Australia Sales Customer Relationship Management

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Sales Customer Relationship Management

Learn how you can use the ServiceNow® Sales Customer Relationship Management (Sales CRM) applications to manage the product sales life cycle in your organization. Your agents can use these applications to generate pre-sales leads and opportunities, provide sales quotes, capture and fulfill orders, work with contracts and entitlements, and manage the customer order workflow for changes.

Explore



Learn how you can use the Sales CRM applications.

Configure



Plan and configure your Sales CRM implementation.

Use



Use the Sales CRM applications as an agent.

Integrate



Extend capabilities in Sales CRM by integrating with other applications.

Reference



Get details about components such as fields, tables, and properties.

Now Assist for SFA



Enhance agent productivity and efficiency for lead-to-opportunity motions through conversation and proactive experiences using Now Assist.

Now Assist for CPQ



Move deals forward faster with AI#powered assistance that helps you review and refine quotes.

Now Assist for Order Management



Improve user experience for customers and agents with AI#powered assistance that streamlines order and invoice operations.

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Additional resources

- Learn more about what's new and changed, see the Sales Customer Relationship Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Sales CRM features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Sales Customer Relationship Management

Whether you're starting or expanding a Sales Customer Relationship Management (Sales CRM) implementation, learn more about its available applications and workflows for pre-sales engagement, order capture and fulfillment, order to cash operations, and post-sales activities in your organization.

Overview of Sales CRM

The Sales CRM applications enable you to manage the product sales life cycle in your organization, including pre-sales leads and opportunities, sales quote generation, order capture, order fulfillment, order and invoice cases, and post-sales order changes and contract renewals.

To support the product sales life cycle, Sales CRM provides the following features and applications.

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Sales CRM high-level workflow

Benefits

With the Sales CRM applications, your organization can improve sales and order processes as well as agent productivity by managing the lead to renewal life cycle on one platform, and by fusing front, middle, and back-office teams with one system of engagement and action. By connecting existing applications and adding ServiceNow workflows, Sales CRM helps increase organizational efficiency, speed order fulfillment, and both accelerate and boost revenue.

Lead and opportunity management

Benefits	Application or key feature	Persona
Create and manage leads for potential customers and product sales.	Lead Management	Sales agent and account executive
Create a series of automated and manual activities that can be set up to engage with leads and customers at every stage of their relationship with your business through various channels.	Customer Engagement Sequences	Sales agent, sales operations team, sequences admin
Unify customer stakeholders across an account by representing all roles involved in a product#family purchase	Buying Group	Sales agents, account executives, sales development representatives, sales managers

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Lead and opportunity management (continued)

Benefits	Application or key feature	Persona
and persisting before, during, and after an opportunity.		
Create pre-sales opportunities that identify and track potential sales based on customer needs.	Opportunity Management	Sales agent and account executive
Project your future sales volumes and revenue based on data from opportunities.	Sales Forecasting	Sales manager and sales representative
Structure and optimize the sales efforts of your organization based on territories by dividing CRM entities, such as accounts, leads, opportunities, and consumers into manageable segments, promoting efficient coverage and accountability.	Sales Territory Management	Sales territory administrator and manager
Streamline customer interactions by enabling teams to plan, execute, capture, and track engagement across channels and key touchpoints throughout the customer lifecycle.	Activity Management	Sales agents, account executives, sales development representatives, sales leadership

Configure, price, quote

Benefits	Application or key feature	Persona
Streamline the process of configuring and pricing customizable products that are added to Sales Customer Relationship Management transactions.	CPQ Configurator	Sales and order agent, admin to set up
Quickly configure and price opportunities, quotes, and orders for simple and complex product offers.	Legacy product configurator	Sales and order agent, admin to set up
Set the pricing for your products through price lists, contextual price controls, and if needed, pricing from external systems.	Pricing Management	Pricing administrator or manager
Create and manage sales quotes, which are formal offers for products or services	Quote Management	Sales agent

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Configure, price, quote (continued)

Benefits	Application or key feature	Persona
that agents propose to customers.		
Define workflows for approving Sales Customer Relationship Management entities, such as customer quotes, in your sales organization.	Advanced Approval Management	Sales or business operation managers, members of sales, finance, and legal teams, sales representatives
Create and manage contracts and entitlements from the initial offer to contract finalization.	Customer Contracts and Entitlements	Agent
Create and manage binding agreements between your sales organization and buyers, with specified items, quantities, prices, terms, and effective periods.	Sales Agreement Management	Sales and order agent

Order management

Benefits	Application or key feature	Persona
Capture and fulfill product and service orders to create a seamless ordering experience for your customers.	Order management	Order agent, fulfillment agent, agent manager, and fulfillment manager

Order operations

Benefits	Application or key feature	Persona
Create and manage cases for customer orders and invoices.	Order Operations Case Management	Order case, invoice case, and customer service agent
Empower sales teams by providing a consolidated view of all critical sales data and activities.	Lead-to-Cash Process Management	Sales manager
Manage return, replacement, or refund cases for installed products.	Return Merchandise Authorization	Agent

Post-sales engagement

Benefits	Application or key feature	Persona
Support change management and commercial workflows	Customer Life Cycle Management Workflows	Agent

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Post-sales engagement (continued)

Benefits	Application or key feature	Persona
(move, add, change, and disconnect) for sold products.		

Partner relationship management

Benefits	Application or key feature	Persona
Hire and engage channel partners to sell your products and services, helping you to grow and improve your business.	Partner Relationship Management	Channel partners

Lead-to-cash foundation

Benefits	Application or key feature	Persona
Create and manage product catalogs for commercial and technical product offerings. Commercial catalogs can be used by your agents to create opportunities, quotes, and orders.	Product Catalog Management	Product catalog administrator or manager
Create the workflows for your organization and configure the metadata for your various Sales Customer Relationship Management entities.	Lead to Cash Core	Agent, admin to configure

Business Portal

Benefits	Application or key feature	Persona
Support your business-to-business customers by enabling self-service capabilities through the Business Portal to create and manage orders, submit order issues, and requests.	Customer self-service for Sales Customer Relationship Management	Customer, admin for set up

Related links

- Configuring Sales Customer Relationship Management applications
- Using lead and opportunity management applications
- Using Order Management

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Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Lead and opportunity management

ServiceNow® lead and opportunity management applications support your sales life cycle from capturing leads to forecasting revenue. Explore each module to streamline engagement, optimize territory coverage, and drive conversion.

Get started

Select a link from the following table to learn about key features and benefits of an application and how it can be used by the user personas in your sales organization.

Lead and opportunity management applications

Application	Description
Lead Management	Capture, qualify, and nurture potential customers.
Customer Engagement Sequences	Automate and personalize outreach strategies.
Buying Group	Create solution-specific buying groups, assign stakeholder roles, and link to opportunities.
Opportunity Management	Track and advance sales opportunities through the pipeline.
Sales Forecasting	Predict revenue and plan resources with confidence.
Sales Territory Management	Define and manage sales regions for better coverage.
Activity Management	Plan, execute, capture, and track customer interactions across multiple channels throughout the customer life cycle.

Related links

Configure the lead and opportunity applications, so your agents can use them in their sales workflows. For more information, see Configuring the lead and opportunity management applications.

Related topics

- Using lead and opportunity management applications
- Lead and opportunity management reference

Lead Management

The Lead Management application enables your sales agents and sales development representatives to create leads and nurture them into opportunities.

In a sales cycle, prospective customers express their interest through various channels, such as website forms, social media, or events. With the information captured through these channels,

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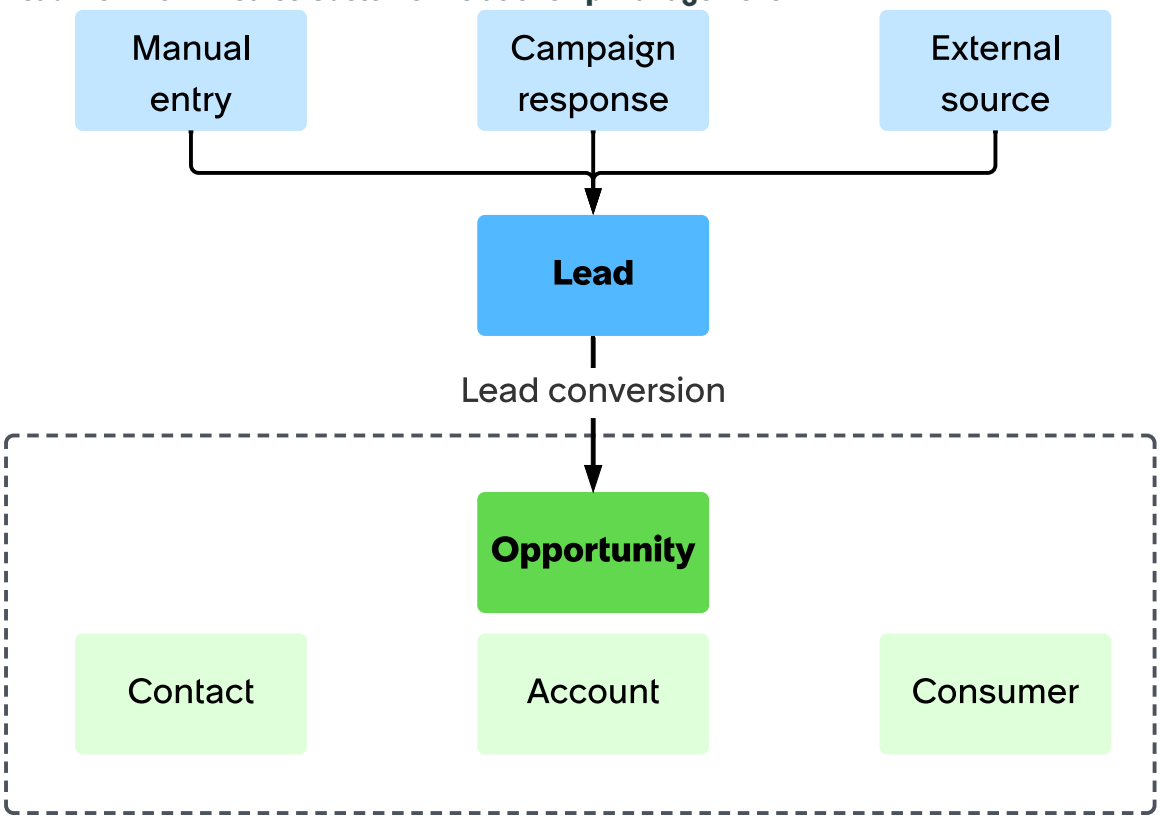
the sales agent creates a lead. After a lead is created, it goes through multiple processes to get converted into an opportunity.

The processes include:

- Lead scoring: Prioritizing leads based on predefined criteria for more focused attention.
- Lead qualification: Determining if a lead meets certain criteria to be considered a sales-qualified lead.
- Lead assignment: Assigning leads to the correct sales development representative to follow up.
- Lead nurturing: Engaging with leads until they become sales-ready.
- Lead segmentation: Categorizing leads based on industry, behavior, or other parameters for targeted marketing.

As sales agents move through the lead workflow and recognize interest from customers in buying products, it becomes essential to qualify or convert the lead. This process includes linking the lead to specific accounts and establishing lead qualification, which ultimately generates product orders.

Lead workflow in Sales Customer Relationship Management



Related links

To learn about setting up Lead Management, see Install and configure Lead Management.

Customer Engagement Sequences

Customer Engagement Sequences is a playbook that consists of a series of automated and manual activities that can be set up to engage with leads and customers at every stage of their relationship with your business through various channels.

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Customer Engagement Sequences overview

Use ServiceNow® Customer Engagement Sequences to provide structured plans to sales representatives for prospects, which helps ensure consistent messaging and effective objection-handling. Standardizing repetitive tasks means representatives can focus on high-value actions.

Customer Engagement Sequences users

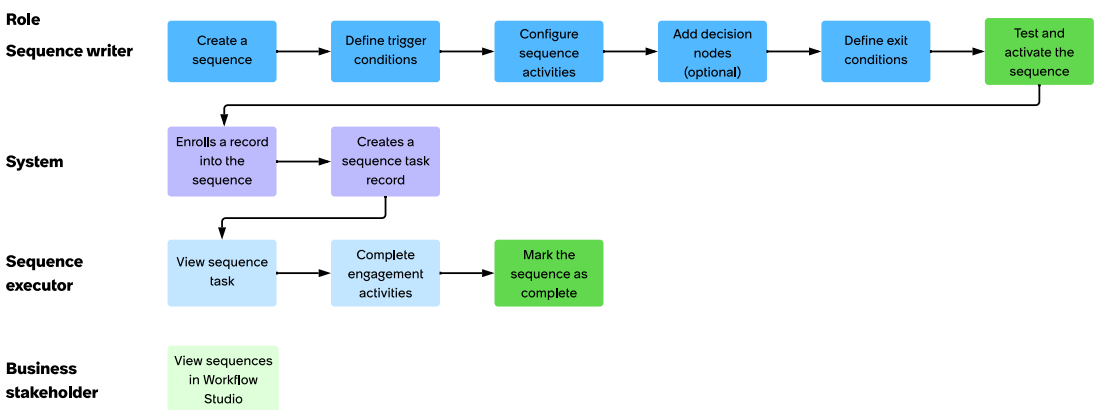
Users

User	Description
Sequence admin, sequence writer (For example, Sales admin, Sales Development Manager (SDM))	Creates multi-step sequences using Workflow Studio and defines triggers (start conditions), activities (for example, call attempts), and exit conditions.
Sequence executor (For example, Sales Development Representative (SDR), account executive, customer success manager, telesales representative)	Views sequence tasks that are assigned to them and executes targeted outreach strategies, often using a combination of emails, phone calls, and social media, to engage prospects and move them through the initial stages of the sales funnel using the predefined sequence steps.
Business stakeholder (For example, sales operations manager)	Views sequences in Workflow Studio to identify and share high-performing workflows across territories, driving process optimization, consistency, and improved sales performance.

Customer Engagement Sequences workflow

The following illustration describes the tasks involved in configuring and using Customer Engagement Sequences.

Creating and using Customer Engagement Sequences



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1. As a sequence writer, create a customer engagement sequence such as a lead-nurturing sequence from the CSM Configurable Workspace.
2. Define the sequence parameters:
   - Single or multi-trigger conditions (for example, when a new lead is created)
   - Sequence steps (for example, call, follow-up, email)
   - Delay between steps (for example, wait three days between two call attempts)
   - Exit conditions (for example, lead conversion or disqualification)
3. Test and activate the sequence.
4. Every record that meets the trigger condition is added to the sequence, and a sequence task associated with the record is created. For example, when a new lead record is created in the system, the sequence is run, and it generates a sequence task.
5. As a sequence executor, view the assigned sequence task and complete the series of predefined activities that are part of it. For example:
   - Day 1: Call the prospect
   - Day 4: Make a follow-up call and use a questionnaire to gather more information
6. The sequence task moves to closed state when all sequence steps have been completed or the predefined exit condition is met.
7. Business stakeholders with sequence reader role can view the sequences in Workflow Studio to suggest process improvements to the SDMs and share high-performing sequences with other sales teams situated in different territories.

Customer Engagement Sequences benefits

Customer Engagement Sequences benefits

Benefit	Feature	Users
• Configure sequences using Workflow Studio to reduce dependency on developers. • Provide a structured, multi-step plan to sales representatives for each prospect so they know exactly when to call, email, or send a social media message. • Personalize outreach by inserting a prospect's name, company, and other details. • Ensure consistent messaging and effective objection handling by providing teams with clearly defined steps that dynamically adapt to customer responses.	No-code interface to build customer engagement sequences	Sequence admin, sequence writer
Reduce duplicating sequence workflows by specifying multiple record-based triggers on various entities that can initiate a sequence.	Define trigger conditions	Sequence admin, sequence writer
Design telesales-oriented sequences using the schedule call activity, and enable	Add a schedule call activity to a telesales workflow sequence	Sequence admin, sequence writer

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Customer Engagement Sequences benefits (continued)

Benefit	Feature	Users
outbound click-to-call capability by integrating with platforms such as Amazon Connect.		
• Boost productivity by minimizing repetitive tasks so sales representatives can focus on high-value activities. • Reduce the chance of missing a follow-up, ensure consistency in outreach, and minimize manual effort by following predefined steps. • Accelerate onboarding by enabling new sales representatives to adopt proven outreach strategies from existing sequences.	Predefined activities that align with business goals and outreach strategy	Sequence executor
Use the click-to-call capability to connect with prospective customers from the sequence task without needing to leave your workspace.	Fulfill a telesales sequence	Sequence executor

Related links

The following topics provide more information about configuring and using Customer Engagement Sequences:

- Configuring Customer Engagement Sequences
- Using Customer Engagement Sequences
- Components installed with Customer Engagement Sequences
- Exploring Workflow Studio

Buying Group

Buying Group represents the customer stakeholders within an account involved in a purchase decision for a product offering family, supporting multiple roles and persisting before, during, and after an opportunity.

Buying Group overview

Buying Groups represent the set of stakeholders involved in a B2B purchase decision. Buying Group captures all contacts who influence the decision, track roles and engagement at both the individual and group level, and identify gaps such as missing roles or inactive participants. This structure helps teams assess stakeholder coverage and manage the buying process more effectively.

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Buying Group users

Users

User	Description
Marketing and sales development representative (SDR) teams	Create and manage Buying Groups early, identify relevant personas, and qualify buying readiness before an opportunity exists.
Account Executives (AEs)/Sales agents	Attach Buying Groups to opportunities, validate roles and stakeholders, identify gaps, and manage engagement during the sales process.
Sales managers and leaders	Review Buying Groups to assess opportunity health, stakeholder coverage, and risk across deals.

Buying Group benefits

Benefits

Benefits	Details
Identification of decision stakeholders	Buying Groups make it explicit which contacts are involved in a purchase decision and what roles they play.
Structured evaluation of stakeholder roles	By tracking roles at the group level, Buying Groups help identify missing roles or stakeholders who are present but not engaged.
Early validation of buying readiness	Buying Groups help teams evaluate decision completeness before or during an opportunity, rather than evaluating contacts in isolation.
Continuity across opportunities	A Buying Group is an account#level construct that can be reused across multiple opportunities, preserving knowledge of the buying committee over time.
Improved coordination between marketing and sales	Buying Groups provide a shared structure that spans pre#sales and sales stages, enabling consistent tracking of stakeholder involvement and engagement.
Better opportunity risk assessment	By showing engagement and participation gaps at the stakeholder level, Buying Groups support more informed evaluation of deal health and potential risks.

Related links

The following topics provide more information about configuring and using Buying Group:

- Configuring Buying Group
- Using Buying Group

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Opportunity Management

The#ServiceNow® Opportunity Management application enables your sales agents and account executives to analyze customer needs and generate product recommendations for potential customers.

An opportunity in Sales Customer Relationship Management provides maximum information about a product or service based on the needs of a customer (called a qualified lead). A lead for a product is the minimal information that a sales agent uses to advance the conversation with a potential customer and create an opportunity.

Opportunity workflow in Sales Customer Relationship Management



Opportunity Management interface

The Opportunity Management application is integrated with the Product Catalog and product configurator to help sales agents access product offerings to build opportunities easily and conveniently. The Opportunity Management interface contains the following tabs:

Opportunity Management tabs

Tab	Description
Details	Add basic information for the opportunity.
Catalog tab	Search for and add product offerings to your opportunity.
Needs	Lists the need templates that provide product recommendations for the opportunity.
Line Items	Add different line items to an opportunity.
Allocations	Distribute sales credit across multiple contributors on a single opportunity.
Competitors	Record competitors information.
Tasks	Create opportunity tasks.
Team	Create opportunity team members.
Contacts	Create opportunity associated contacts.
Emails	Create emails to send to the required stakeholders.
Quotes	Create quotes directly from opportunities.
Related Channel Partners	Add authorized service organizations or partner entities (for example, referral or influencer partners) linked to a customer opportunity.

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Opportunity Management tabs (continued)

Tab	Description
	Related channel partners can be: • Authorized organization: Full permissions to access, view, edit, or modify opportunity details • Listed organization: Only for tracking purpose. No permissions to view, access, edit, or delete opportunity details

Integrating pricing in Opportunity Management

Opportunity Management integrates with the pricing engine to consume the default price list and displays the total price and unit price of product offerings in your opportunity.

Based on the prices of product offerings (POs) that are added to the opportunity, the total price values are auto-calculated. For more information, see Add and view the details of an opportunity and Add line items to an opportunity.

Pricing in Opportunity Management provides the following benefits:

- Revenue forecasting: The pricing engine helps agents evaluate an opportunity's total worth by computing the combined prices of each offering included, which in turn helps teams to strategize resource or budget allocation for deals.
- Deal prioritization: By analyzing the potential revenue of each opportunity, your sales team can focus on the deals based on their financial impact. For example, teams can focus on deals with higher potential revenue and higher margins.
- Negotiation enhancement: The pricing engine gives your sales team real-time pricing insights, which enhances the negotiation process by enabling your sales team to tailor offers that meet customer needs while maintaining profitability.

To learn more about pricing, see Pricing Management.

Related links

To learn about setting up Opportunity Management, see Install and configure Opportunity Management.

Sales Forecasting

Project your future sales and revenue based on data from opportunities, historical performance, and pipeline analysis using Sales Forecasting. With this application, sales managers can allocate resources effectively, receive constructive feedback, and forecast sales with precision to make informed decisions.

Sales representatives are directly involved in communicating with their managers about the sales opportunities that they are handling, offering insights into what they expect to close during the forecast period. Sales Forecasting uses the data from the opinions and insights of your sales representatives on how they feel about the deals in their pipeline. The longer a prospect progresses along the sales pipeline, the better their chances of converting.#For example, a prospect who just signed up for your product’s free trial is 20% more likely to convert into a paying customer. Whereas a prospect who attended the product demo is 80% likely to sign a contract.

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Sales managers own the overall forecast for a group of sales representatives. Sales managers collect data from their team members and adjusting the forecasts based on these insights. They set sales targets and quotas for individual representatives and distribute targets.

Key benefits

- Resource allocation:#Efficiently allocate budget and resources based on projected sales and revenue expectations.
- Budgeting and Financial Planning: Supports financial planning and budget creation by offering insights into anticipated revenue.
- Primary and secondary level hierarchy: Enable forecast owners to configure forecasting with product family as a secondary hierarchy with the primary hierarchy as territory or sales team.
- Base forecast source: Enable forecast owners to submit and adjust forecasts at base forecast source.
- Multi-Period forecast rollups: Achieve better planning and strategy by configuring and managing forecasting for multiple time periods (weekly, monthly, quarterly) within a single forecast model for flexible data reporting.
- Sales Target Setting: Define sales targets and quotas for sales teams, territories, and individual sales representatives.
- Tracking Sales Targets: Track the sales and status of quota target achieved for your agents and team.

Related links

The following topics provide more information about configuring and using Sales Forecasting:

- Configure Sales Forecasting
- Using Sales Forecasting

Sales Forecasting terminology

Use the following list of terms to gain an understanding of Sales Forecasting concepts, components, and configuration.

Forecast Model

The Forecast Model is a framework or method used to predict future sales based on historical data, current sales activities, and other relevant factors. It helps businesses estimate the expected sales figures over a specific period, such as a quarter or year. Only one forecast model, Opportunity Amount Forecast is available to the users. You can forecast the sales for the current opportunities in the system. The **Submission Required** option is enabled by default. From the **Submission Frequency** list, select weekly, monthly, or configure a customized time period to submit your final forecasts. For more info, see Creating business calendars. By default, Sales Team is selected in the Forecast Hierarchy Type list and the Sales Forecasting dashboard displays the forecasts based on sales teams. To view forecasts by regions or territories, select **Territory** from the **Forecast Hierarchy Type** list. To configure a territory see, Configuring the Territory. For more info, see Sales Territory Management.

Forecast Category

The classification of opportunities is based on the level of certainty regarding their closure. The longer a sales prospect progresses along the sales pipeline, the better their chances of converting.#The forecast admin can configure these categories. By default, these six categories are available:

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- Won:#Opportunities that have already been closed and won.
- Commit: Opportunities that sales representatives are confident will close in the forecast period.
- Strong upside:#Opportunities with greatest potential to close but have some minor uncertainty.
- Upside:#Opportunities with potential to close but with lower level of certainty.
- Pipeline: Opportunities in the early stages of the sales process with uncertainty if they will be closed deals.
- Omitted:#Opportunities that are excluded from forecast due to lack of data.

Forecast rollup method

The forecast model defines how opportunities in different categories are aggregated into a forecast. There are two primary types of rollups: single and cumulative.

When you select Single, this rollup method ensures that each forecast category is represented in its own column, with only the opportunities in that category being included.

Single rollup method

Column Name on Forecast page	Opportunities that roll up to it from a forecast category
Pipeline	Pipeline
Upside	Upside
Strong Upside	Strong Upside
Commit	Commit
Won	Won

When you select Cumulative, this rollup method aggregates forecast categories in a cumulative manner, where each subsequent category includes the opportunities from the previous categories. Each cumulative rollup method aggregates opportunities from higher order forecast categories.

Cumulative rollup method

Column Name on Forecast page	Opportunities that roll up to it from a forecast category
Open pipeline	Pipeline + Upside + Strong Upside + Commit + Won
Cumulative Upside	Upside + Strong Upside + Commit + Won
Cumulative Strong Upside	Strong Upside + Commit + Won
Cumulative Commit	Commit + Won
Won	Won

Forecast schedule

The forecast schedule fetches all the opportunities in the system and generates the latest forecast data.

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Sales Quota Management

You can assign sales quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

Related links

- Configure Sales Forecasting
- Using Sales Forecasting

Sales Territory Management

Sales territory management enables you to structure and optimize the sales efforts of your organization based on territories. It focuses on dividing CRM entities, such as accounts, leads, opportunities, and consumers, into manageable segments (geographical, product, or industry-based) to promote efficient coverage and accountability.

Sales Territory Management overview

Sales Territory Management executes and refines the territory plan so that the sales representatives cater to the correct leads and opportunities, optimizing sales efforts. It involves overseeing daily sales activities, adjusting team assignments to complete customer coverage, monitoring sales performance against goals, and updating territory assignments as markets change. Sales Territory Management plugin supports managing and distributing accounts, consumers, leads, and opportunities based on conditions to different sales territories.

Sales Territory Management users

Users

User	Description
Sales Territory Admin	Manage and view sales territory and CRM like Account, Consumer, Lead, and Opportunities.
Sales Territory Viewer	View sales territory.
Sales Territory Manager	Manage members and their roles in the territory hierarchy.

Sales Territory Management benefits

Benefits	Details
Efficient territory allocation	Helps allocate sales regions efficiently to match business complexity and sales team distribution to avoid team overload.
Equitable distribution	Verifies fair distribution of sales among sales representatives. Automating territory assignments reduces manual tasks, enabling sales agents to focus more on selling.
Clear sales accountability	Assigning defined accounts or regions clarifies sales responsibilities and improves team accountability.

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Benefits	Details
Segmentation	Based on the potential of each territory, you can effectively organize sales teams, avoid competing priorities for sales representatives, and set targets accurately.
Data security and compliance	Territory-based data sharing rules promote only authorized users access specific records, maintaining security and compliance.
Enhanced reporting and forecasting	Offers insights on sales team performance, enabling better forecasting and resource allocation decisions.
Adaptability and scalability	Adapts easily to organizational changes for long-term effectiveness.
Systematically rule-based approach	Offers a structured, rule-based method ideal for managing large sales teams efficiently.

Related links

The following topics provide more information about configuring and using Sales Territory Management:

- Configuring Sales Territory Management
- Using Sales Territory Management
- Components installed with Sales Territory Management

Activity Management

Activity Management helps customer-focused teams plan, execute, capture, and track customer interactions across multiple channels throughout the customer life cycle. These interactions include emails, meetings, calls, and key customer touchpoints such as discovery, product demos.

Activity Management benefits

Activity Management benefits

Benefit	Feature	Users
Provide a single, consistent system to plan, capture, track, and act on all sales and service team activities such as discovery calls, demos, and customer business reviews across channels.	CRM Touchpoints	Sales and service teams
Eliminate context switching by accessing CRM data directly from Microsoft Outlook without opening a separate browser or application.	CRM Outlook Add-in	Sales representatives

Related links

To learn more about configuring and using Activity Management, see:

- Configuring Activity Management
- Using Activity Management
- Activity Management reference

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CRM Touchpoints

CRM Touchpoints helps sales and service teams capture, track, and act on customer engagements throughout the customer's association with your organization.

CRM Touchpoints overview

CRM Touchpoints provides sales and service teams a single, consistent system to plan, record, track, and act on customer interactions throughout the customer's association with your business. A touchpoint acts as a single container for all activities related to a specific customer engagement such as discovery preparation, stakeholder alignment, or post-meeting follow-ups so that nothing gets lost across disconnected tools or personal to-do lists. Link touchpoints to accounts, contacts, leads, and opportunities to preserve customer context and enable visibility into interaction history. It enables you to capture activities such as discovery calls, demos, and business reviews across channels, enabling leaders to monitor engagement health and verify whether teams are interacting effectively and productively.

CRM Touchpoints users

Users

User	Description
Touchpoint admin	Configures and manages the CRM Touchpoints application, and manages data retention policies.
Touchpoint users For example, sales development representatives (SDR), account executives (AE), sales representatives, and customer success managers (CSM)	Create touchpoints and capture activities against those touchpoints for the CRM entities they have access to.
Touchpoint viewer For example, managers, stakeholders	Gains visibility into various customer touchpoints without creating or modifying touchpoints.

CRM Touchpoints workflow

The following illustration shows a typical workflow for using CRM Touchpoints to track customer engagements.

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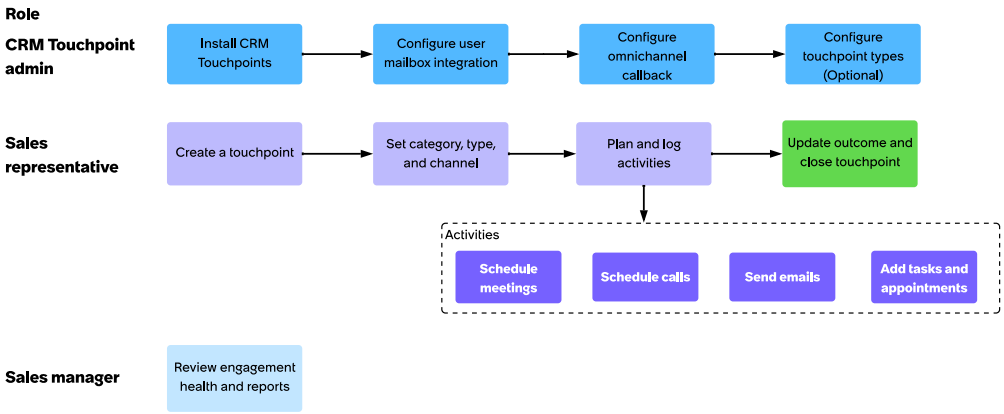
Capturing and tracking customer engagements with CRM Touchpoints



1. As an administrator, install and configure the CRM Touchpoints application on your ServiceNow instance.
2. Set up communication channels such as emails and calls that your organization uses for interacting with customers.
3. If useful, set up custom touchpoint types in addition to the default types of discovery, demo, and customer business review (CBR) to match your organization's specific engagement processes.
4. As a sales or service representative, create a touchpoint record and associate it with a CRM entity such as a lead, opportunity, or account.
5. Set the touchpoint category to Pre-sales, Sales, Post-sales, or Partner, type as Discovery, Demo, CBR, or a custom type, and a primary communication channel.
6. As engagement activities occur, schedule meetings and appointments, send emails, log calls, and create tasks directly from the touchpoint record.
7. When the engagement is complete, update the touchpoint status and record the outcome. The application automatically captures completion timestamps and calculates duration.
8. As a sales or service leader, review touchpoint data to measure engagement health and team productivity.

CRM Touchpoints benefits

CRM Touchpoints benefits

Benefit	Feature	Users
Capture and track all engagement activities in a single system, eliminating the need to switch between multiple tools and reducing data silos.	Create a CRM touchpoint	Sales representative
Classify engagements by category and type to match your organization's specific sales and service processes.	Create custom touchpoint types	CRM Touchpoints admin
Schedule meetings with customers and stakeholders directly from the touchpoint record to align teams and avoid scheduling conflicts.	Schedule a meeting from a touchpoint	Sales representative
Track customer follow-ups by scheduling calls directly from the touchpoint record.	Schedule a call from a touchpoint	Sales representative

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CRM Touchpoints benefits (continued)

Benefit	Feature	Users
Send emails without having to leave the workspace, ensuring all communications are logged and accessible to the entire account team.	Send an email from a touchpoint	Sales representative

Related links

To learn more about configuring and using CRM Touchpoints, see:

- Configuring Activity Management
- Using Activity Management
- Activity Management reference

CRM Outlook Add-in

The CRM Outlook Add-in helps sales teams capture email interactions into ServiceNow CRM directly from Microsoft Outlook.

CRM Outlook Add-in overview

The CRM Outlook Add-in application packages the ServiceNow CRM for Outlook add-in, enabling sales teams to capture and log email interactions into ServiceNow CRM without having to leave Microsoft Outlook. Sales representatives can search for CRM records, associate emails with leads, contacts, opportunities, and accounts, and create new records. For high-volume email capture, administrators can configure redirect rules to route emails automatically to their ServiceNow instance without manual association. This ability eliminates context switching between applications, reduces manual data entry, and promotes consistent CRM data for better pipeline visibility and follow-up tracking.

CRM Outlook Add-in users

Users

User	Description
Sales representative	Searches for CRM records, associates emails to track engagement, and creates leads or contacts directly from Outlook.
Sales manager	Gains visibility into customer engagement and deal progression through consistently logged email interactions.
CRM administrator	Configures the CRM Outlook Add-in plugin, manages user roles, and sets up email redirect rules.

CRM Outlook Add-in workflow

The following workflow illustration shows how a sales representative captures an inbound inquiry using the CRM Outlook Add-in.

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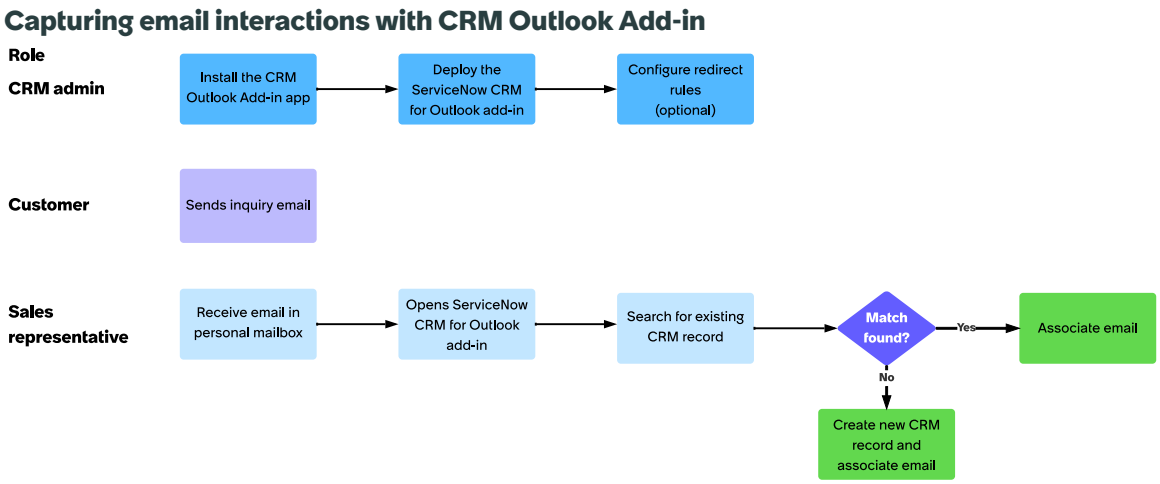

1. As an admin, install the CRM Outlook Add-in.
2. Deploy the ServiceNow CRM for Outlook add-in using the manifest file.
3. If useful, configure email client redirecting rules to enable capturing high volume of sales-related inbound emails automatically.
4. A prospect submits an inquiry through the company website or sends an email directly to a sales representative.
5. The sales representative receives the email in their Outlook inbox and opens the ServiceNow CRM for Outlook add-in.
6. The representative searches for existing CRM records matching the sender's name, email, company, or other identifying information.
   - If a matching record exists, the representative associates the email to the lead, contact, opportunity, or account.
   - If no matching record exists, the representative creates a lead or contact record and associates the email to that record in one action.

CRM Outlook Add-in benefits

Benefits	Feature	Users
Locate CRM records such as leads, opportunities, accounts, or contacts, and link emails without leaving Outlook.	Associate an email with an existing CRM record	Sales representative, Sales manager
Capture new prospects immediately from inbound inquiries with auto-populated sender information and associate emails in a single action.	Create a CRM record from Microsoft Outlook	Sales representative
Audit and troubleshoot email associations from the Staged Email [sys_email_staging] table.	Track emails linked from Microsoft Outlook	CRM administrator
Capture high volumes of emails automatically without manual logging, reducing missed emails and freeing agents to focus on selling.		CRM administrator

Related links

To learn more about configuring and using CRM Outlook Add-in, see:

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- Configuring Activity Management
- Using Activity Management
- Activity Management reference

Configure, price, quote

Explore tools that support the configuration, pricing, and quoting of sales offerings.

Get started

Select a link from the following table to explore CPQ tools that simplify configuration, quoting, and sales agreement management.

CPQ applications

Application	Description
CPQ Configurator	Browse and customize configurable products.
Legacy product configurator	Configure complex products or services dynamically.
Pricing Management	Manage price lists, discounts, and rules to support dynamic and region-specific pricing.
Quote Management	Manage quote creation, approval, and delivery.
Advanced Approval Management	Define workflows for approving sales entities, such as customer quotes, in your sales organization.
Customer Contracts and Entitlements	Standardize, organize, manage, and use contracts and entitlements.
Sales Agreement Management	Create and track contractual sales commitments.

What to do next

Configure the CPQ applications, so your agents can use them in their sales workflows. For more information, see Configuring the configure, price, quote applications.

Related topics

- Using configure, price, quote applications
- Configure, price, quote reference

CPQ Configurator

The CPQ Configurator interface streamlines the process of configuring and pricing customizable products that are added to Sales Customer Relationship Management transactions.

CPQ Configurator overview

The CPQ Configurator is an attribute-based interface embedded in Sales Customer Relationship Management workflows for opportunities, quotes, orders, and product configuration changes involving sold products and contracts. Product catalog admins use the CPQ Configurator

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to manage the product configuration experience, while agents and customers use the CPQ Configurator interface to configure customizable products.

Product catalog admin experience

Product catalog admins create configurable product offerings using Product Catalog Management. After saving a configurable product, they run a synchronization process that generates an associated blueprint for the product. The blueprint contains all the product attribute values (also called fields), product and pricing configuration rules, product relationships, and child products that were defined for the product offering. The blueprint controls the product configuration experience for the product offering and is managed using the CPQ Configurator. When configuration is complete, catalog admins publish the product offering to a product catalog, which also deploys the corresponding blueprint for use.

Agent experience

When agents select a configurable product from the product catalog for a Sales Customer Relationship Management transaction, for example when creating an opportunity or quote, the CPQ Configurator opens. The configurator displays the options and features that can be selected. As agents configure the product, a dynamic list of their selections with associated pricing is also displayed.

Customer experience

When customers use self-service features, such as placing orders, and select a configurable product from the catalog, the CPQ Configurator launches in the Business Portal. The configurator displays the options and features available for the offering. As customers configure the product, a list of their selections and associated pricing updates dynamically, providing a real-time, accurate view of their customizations.

CPQ Configurator users

Users

User	Description
Product catalog admin	Create configurable product offerings and generate the associated blueprints that contain the attributes (fields), product characteristics, product and pricing rules, product relationships, and child products, that guide valid product configuration by agents and customers.
Sales and order agents	Add configurable products to opportunities, quotes, orders, and other transactions such as sold products and contracts that involve configurable products in Sales Customer Relationship Management.
Customers	Add configurable products for self-service transactions in the Business Portal.

CPQ Configurator workflow

The following workflow describes the tasks involved in configuring and using the CPQ Configurator to configure customizable products.

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CPQ Configurator workflow for generating product blueprints and configuring customizable products

1. If upgrading from a release before Zurich, the system admin enables the system property that runs the CPQ Configurator in Sales Customer Relationship Management applications.
2. The product catalog admin creates and saves a configurable product offering in Product Catalog Management.
3. The product catalog admin generates the product offering blueprint.
4. The product catalog admin publishes the configurable product offering so that it's available in the product catalog and also deployed as a blueprint.
5. The agent creates a transaction, such as a quote or order in the CSM Configurable Workspace. Or a customer uses the Business Portal for a self-service transaction, for example, placing an order.
6. The agent or customer selects a configurable product from the product catalog.
7. The agent or customer configures the product using the CPQ Configurator.
8. The agent or customer saves and closes the product offering configuration. The product offering is added as a line item for the transaction, such as a quote line or order line item.

CPQ Configurator benefits

CPQ Configurator benefits

Benefit	Feature	Users
Generate and maintain blueprints that contain configuration logic (rules, attributes, product relationships) for complex products.	Create configurable product offerings and associated blueprints	Product catalog admins
Quickly and accurately configure complex products based on requirements and product attributes, without requiring extensive knowledge of product structure and hierarchies.	Using the CPQ Configurator	Sales and order agents, customers

What to explore next

To learn more about configuring and using the CPQ Configurator, see:

- Configuring CPQ Configurator
- Create configurable product offerings and associated blueprints

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- Using the CPQ Configurator
- Online help (access Logik help topics in the CPQ Configurator interface for product catalog admins)

Legacy product configurator

The legacy product configurator is a user interface that is embedded in various Sales Customer Relationship Management applications, such as the Opportunity, Quote, and Order Management applications, enabling agents to configure complex products or services dynamically according to customer requirements.

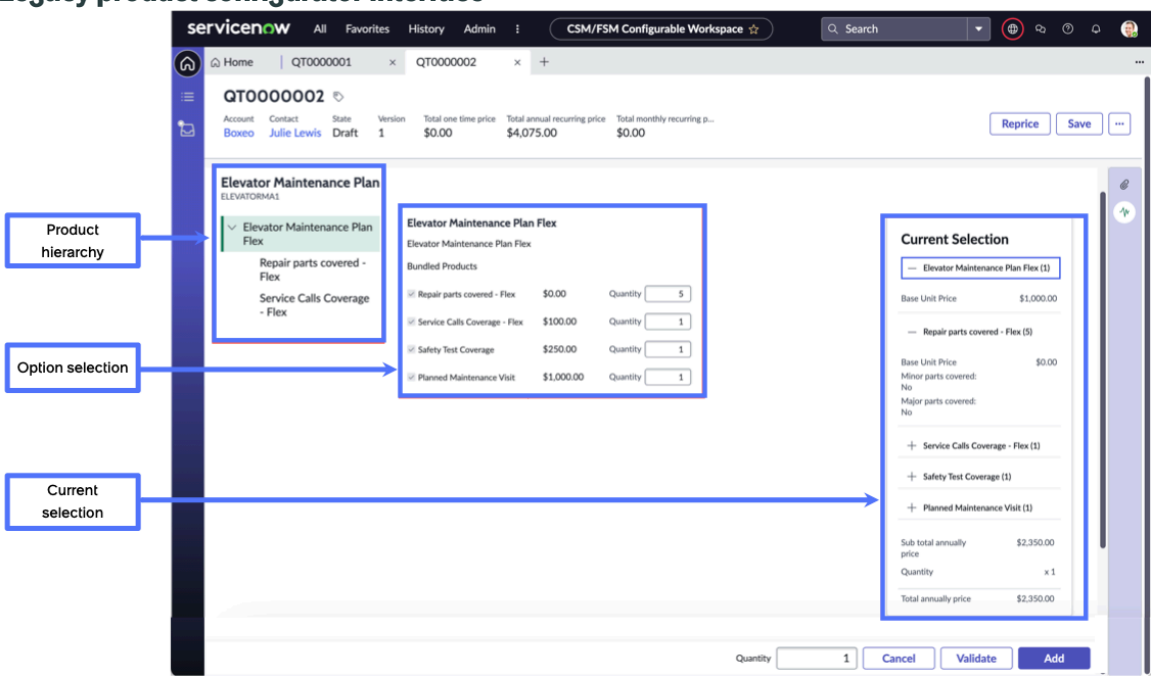
Note: Check your entitlements to determine if you have access to this feature.

The interface consists of three main sections:

- **Product hierarchy**: Lists the parent and child product relationships for configurable products. Product hierarchies are configured using relationships and relationship groups. These hierarchies help agents navigate the product at different nodes or levels in a nested bundle. To learn more about how to configure this section of the product configurator, see Create product offering relationships.
- **Option selection**: Displays the product options or product characteristic options that can be selected. Characteristics and characteristic options are configured as you build your product offerings and appear in the product configurator. As your agents use the interface, visual indicators, alert messages, and contextual information about their entries are also displayed to help agents complete the order. For more information on configuring these options, see Create product characteristics and characteristic options.
- **Current selection**: Shows the pricing for the options that you select, which are calculated automatically and displayed. Pricing for selected options is shown and grouped as bundles as applicable. Also shown are the subtotals and total based on the recurring and one-time pricing methods. See Configuring product pricing for more information.

As an admin, you can use product configurator extension points and methods provided with the Open state management framework to customize the product configurator interface. To learn more about the framework, see Open state management.

Legacy product configurator interface



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Pricing Management

The Pricing Management application enables your organization to set, manage, and optimize pricing strategies for any Sales Customer Relationship Management solution. These pricing strategies enable your sales team to generate opportunities, quotes, and orders with accurate and competitive pricing quickly.

The Pricing Management application is the foundation of any Sales Customer Relationship Management solution. Pricing Management provides various features to implement pricing in your organization.

Note: Check your entitlements to determine if you have access to these features.

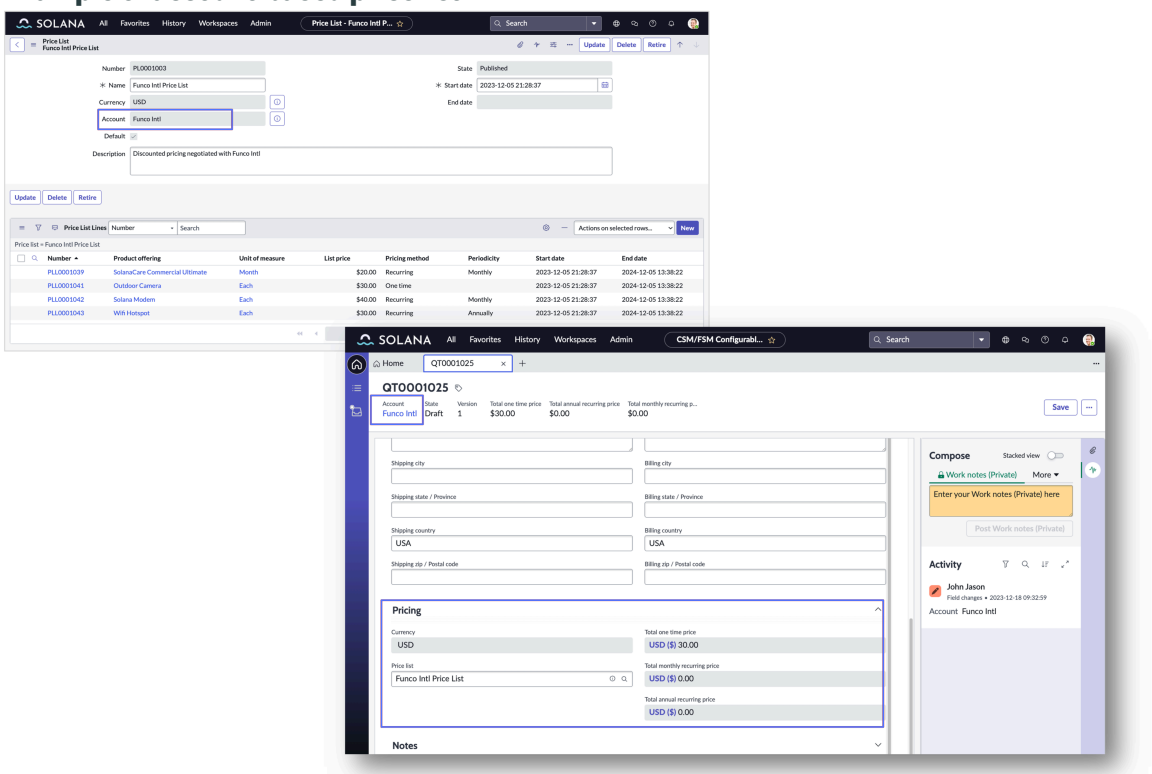
Price lists

Price lists define the prices for products and services offered by your organization. Your agents use price lists to find product pricing quickly when creating quotes and capturing orders. Your pricing admins or managers create price lists and add price list lines that define the list price for each of your product offerings. They can also copy a published price list and its price list lines and use the copy to update the pricing or reuse the price list without having to create a new price list.

Support for multiple price lists

Pricing Management supports multiple price lists, such as price lists based on currency or customer account. The initial, default price list that you create is based on the currency used, but you can change the default price list used by your agents. For example, you can create account-based price lists that are tailored to the needs and preferences of a specific customer or provide pre-negotiated prices for them. You can set an account-based price list as the default, which is then used by your agents when they create quotes or orders for that particular customer.

Example of account-based price list



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Pricing methods

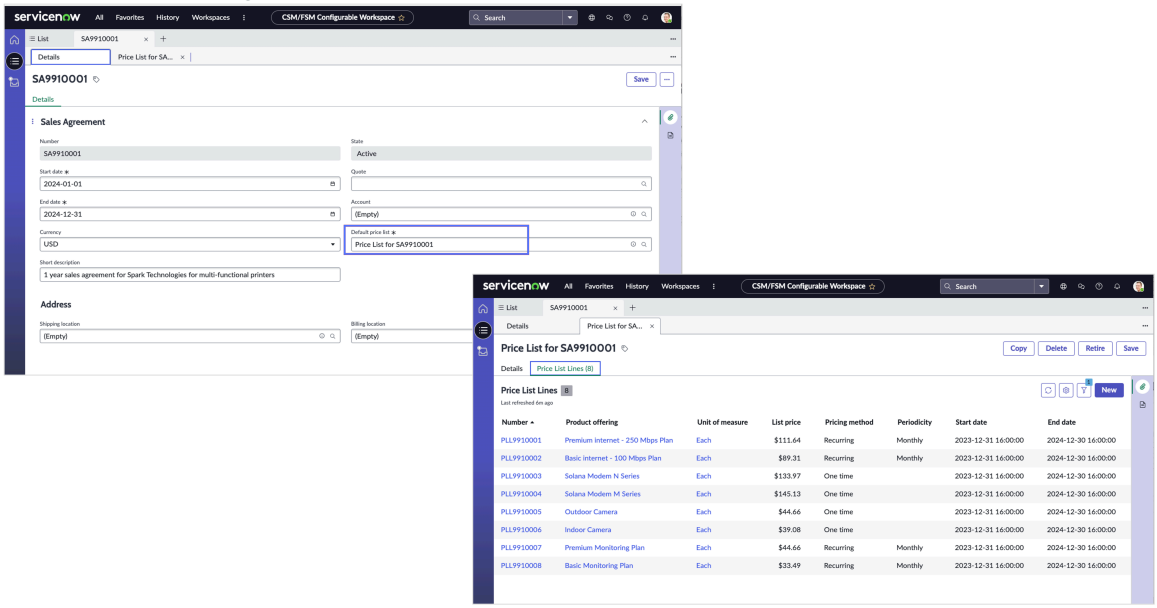
The pricing method is either a one-time fee or a recurring pricing fee with monthly and annual frequencies. The pricing method is set in product offerings and is displayed in price list lines.

For details on setting up and managing price list features, see Configuring product pricing.

Sales Agreement price lists

If you're using the Sales Agreement feature, a published sales agreement price list is generated automatically when a sales agent creates a sales agreement from a completed quote. The sales agreement price list reflects the final unit price for each product that is captured as part of the sales agreement. The sales agreement price list is valid for the start and end dates specified for the agreement. To learn more about sales agreements, see Sales Agreement Management.

Example of sales agreement price list



Cost books

Cost books define the unit cost for product offerings. This information is used in the Quote Management application to provide sales agents with the unit cost, unit margin amount, and unit margin percentage for products in quotes. With this information, your sales agents can perform a simple profitability analysis by subtracting the cost of the product offer from the quoted selling price.

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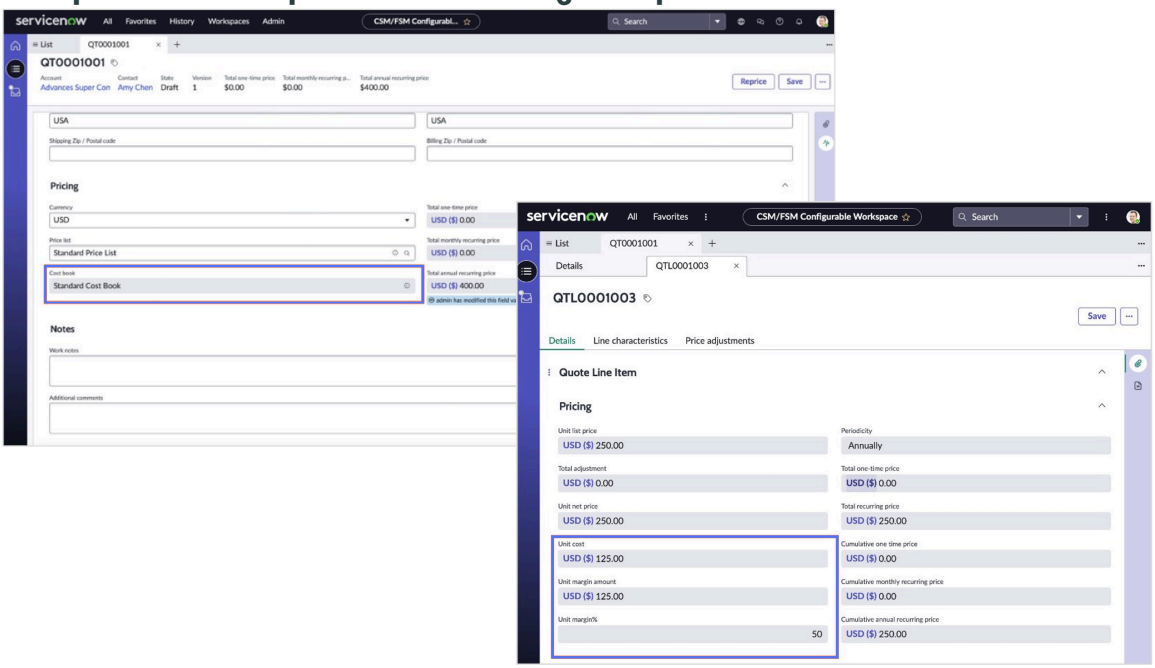
Example cost book in quote details and margins in quote line



Your pricing admins or managers create a cost book and add a cost book line to set the unit cost for each product offering. They can also copy a published cost book and its cost book lines to revise costs in the cost book (update the copy) or reuse a cost book without having to create a new one. For details on setting up cost books and cost book lines, see Create and publish a cost book and Create a cost book line. For information on activating the cost book and cost margin features in Quote Management, see Configuring Quote Management.

Cost-based attribute adjustments

As a pricing admin, you can capture the base cost for a product based on its characteristics, such as model or size, since those attributes can affect the final cost. You can define a cost-based attribute adjustment for a product by specifying a fixed amount or percentage markup or markdown to be applied to all cost books or to selected cost book lines. The base costs are used by the pricing engine to calculate profit margins for products in sales quotes. For more information, see Create and publish a cost-based attribute adjustment.

Price adjustments

In Pricing Management, you can adjust the list price of your products by specifying a markdown or markup fixed amount or percentage, or a price override, based on the following features:

- **Product attributes**: Define a price adjustment based on product characteristics, such as model or color. For more information, see Create a product attribute-based pricing adjustment.
- **Non-product attributes**: Create a price adjustment based on characteristics that aren't related to a product, such as shipping information or sales channel. For example, you can create a pricing adjustment for customers in a particular region. For details, see Create a non-product attribute pricing adjustment.
- **Bundled products**: Create price adjustments for product offerings in a bundled product. For example, you might want to specify a markdown amount for certain product offerings in the bundle, because the bundle provides discounted pricing. For more information, see Create pricing adjustments for bundled products.

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Pricing matrices

Pricing matrices are frameworks for setting conditions in decision rules, which enable you to implement complex pricing adjustments and manage default price list or cost book selection. For instance, if you have multiple price lists, you can use a pricing matrix to specify the conditions that determine the default price list to be applied when agents create a quote or order. Pricing Management offers the following matrices:

- **Price List Defaulting**: Select the default price list to be used, such as the standard price list or an account-specific price list. For more information on configuring this price list matrix, see Control the default price list on transaction header or header line.
- **Cost Book Defaulting**: Select the default cost book to be used, for example the standard cost book or an account-specific cost book. To learn more about configuring this matrix, see Control the default cost book on transaction header or header line.
- **Standard Price Adjustment**: Apply an adjustment based on context variables that represent non-product attributes, such as shipping location or account. Pricing Management provides certain system-defined, non-product context variables that you can use in this matrix, but you can also create your own custom variables, for example, market segment. Your pricing administrator can work with your administrator to develop custom context variables that can be used in pricing matrixes. For details on configuring these adjustments, see Create a non-product attribute pricing adjustment. For more information on configuring custom context variables, see Create a custom context variable and Map a custom context variable to a transaction entity.
- **Configuration Component Price Adjustment**: Adjust the price of a product when it's sold as part of a product bundle. For details, see Create pricing adjustments for bundled products.

Matrix validations

As an admin, you can use system-defined validations or set your own validations to validate rows entered into the decision tables for pricing and product eligibility rule matrices. For more information on these validations, see Configuring matrix validation rules.

Pricing plans

Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices. Adjustments include the pricing changes set in the pricing adjustment matrices. You can use the default plan, or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. To learn more, see Configurable pricing plans.

Pricing extensions

Pricing extensions are integration points that your administrator can use to customize the pricing engine, giving you the flexibility to use pricing information from external sources or control the pricing engine processing logic. Pricing Management provides these extensions:

- Select Price List (DefaultPriceListExtensionPoint): Change the selection logic for using the default price list on a quote or order header.
- Select Cost Book (DefaultCostBookExtensionPoint): Change the selection logic for using the default cost book on a quote header.
- Get Product List Price (ListPriceExtensionPoint): Get pricing directly from another data source or extend the current price list derivation.
- Apply Attribute Adjustments (AttributeAdjustmentExtensionPoint): Get attribute adjustments from another data source, such as product manufacturers, or extend the current adjustment derivation logic.

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- Get Cost (CostExtensionPoint): Get the unit cost for a product offering directly from another data source or extend the current cost book derivation logic.
- Apply Pricing Adjustments (PricingAdjustmentsExtensionPoint): Get pricing adjustments for a product offering from another data source, or extend the pricing engine logic by not relying on the Standard Adjustment and Component Configuration Rule Matrices to get the adjustment values.

To learn more, see Use extension points in Pricing Management.

Quote Management

Quote Management is an application used to create and manage product and service quotes. Quote Management can be a separate application or part of the Sales Customer Relationship Management (Sales CRM) application.

A quote is a formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer or consumer. In the context of Sales Customer Relationship Management, quotes can be created from the Opportunity Management application or quotes can be created separately, depending on your configuration.

Quote Management user interface

The Quote Management application is integrated with the product offering catalog and product configurator to help sales agents build quotes easily and conveniently. The Quote Management interface contains the following tabs:

Quote Management tabs

Quote window tabs or options	Description
Details tab	Add basic information for the quote.
Catalog tab	Search for and add products to your quote using the product configurator. Pricing is also managed through the product offering catalogs.
Line Items tab	Add different line items to a quote. In each quote line item, you can update product characteristics and add pricing adjustments.
Revisions tab	Create multiple versions of a quote.
Customer Orders tab	Turn your quote into a customer order.
Pricing Adjustment tab	View and update pricing adjustments.
Enable a sales agreement in a quote	When the sales agreement is enabled, the quote workflow changes and enables agents to add products and services according to the sales agreement.
Create a quote PDF document	Sales agents can create a PDF document from a quote to send to customers for review and signatures.
Channel Partner Quote management for business organization	Channel partners with multiple locations can create and manage the quote related parties in case of multi-partners sales. They can also view detailed price breakdowns on quote line items.

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Quote Management tabs (continued)

Quote window tabs or options	Description
Quote Related Party Quote management for business organization	Multiple sellers or partners can be added to the quote line item for some business orders. There are two types of quote-related parties: • Authorized organization: This type of organization partners have full permissions to access, view, edit, or modify quote details • Listed organization: This type of organization partners are added solely for tracking purposes and does not have any permissions to view, access, edit, or delete quote details.

Integrate Quote Management with product offering catalogs

Quote Management is integrated with the product catalog and pricing to make adding products to your quote easier and convenient. Agents use the catalog to browse product offerings and the product configurator to add options and pricing to your products. Then they simply add them to the quote. Pricing adjustments that are fetched based on pricing matrices rules are automatically added and presented in the quote.

Use the product configurator

The product configurator lets your agents configure products in the following ways:

- Browse and add configurable product offerings from the catalog to create quote lines.
- Select product options and view product relationships.

The product configurator uses Sales Customer Relationship Management primitives to create and update quote lines and characteristics.

Configure and create quote line items

From the product catalog, browse and add product offers to create quote lines and characteristics.

With the product configurator, characteristics options and relationships can be changed and updated in the Catalog tab for Quote Management. The product configurator uses Quote Management primitives to create and update quote lines and characteristics.

Add pricing adjustments to quotes

Quote Management integrates with the pricing engine to get the list price and price adjustments for the product offers in your quote.

Auto-pricing adjustments are fetched from the pricing engine. Manual pricing adjustments are added by the agent.

Pricing adjustments include markups, markdowns, and price overrides. Total Adjustments are applied to each line item with the cumulative total from each line rolled up to total.

Quote Management lets sales agents add the following types of manual pricing adjustments:

- Markup amount - add a markup amount to a product.
- Markdown amount - add a markdown amount to a product.

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- Markup % - add a markup percentage to a product.
- Markdown % - add a markdown percentage to a product.
- Price override - override a price and set a new price.

Add cost books in Quote Management

A cost book contains the unit costs for product offerings. Cost books provide your agents with the following benefits:

- Profit margin calculation: Ability to calculate the profit margin by subtracting the cost price from the quoted selling price, helping your sales team verify that their pricing strategy aligns with desired profit margins,
- Discount management: Apply discounts to quotes based on cost prices to incentivize bulk purchases or long-term commitments for flexible pricing strategies while maintaining profitability and competitive incentives to your customers.
- Negotiation support: Use cost prices as a reference during negotiations with your customers or suppliers. It provides a transparent basis for discussions, helping you build trust and facilitating fair and mutually beneficial agreements.

To learn more about cost books and their configuration, see Pricing Management, Create and publish a cost book, Create a cost book line, and Configuring Quote Management.

Enable a sales agreement in Quote Management

Enabling a sales agreement in Quote Management changes the quote to a sales agreement workflow that sets the products and services according to the sales agreement. Agents can add simple products or configurable products including product bundles to a sales agreement.

- Configurable bundles with the ability to choose from all available child offers and optional products.
- Category level discounting
- Offer level discounting.

Set a location for product inventories

Use the location feature to set a location for products available in the product catalog.

- Select a location to add products and services to the quote line.
- Copy all products and services from one location to another.

Create PDF documents for a quote

Sales agents can create a PDF document for a quote that can be sent to customers for review and electronic signatures.

- Quote PDF documents can be linked to electronic signature apps like Docusign that enable customers to sign quotes electronically.
- Quote PDF document templates can be created that reflect customer branding and logos.
- Quotes PDF documents that can be sent to customers for review and approvals.

See Configure quote PDF documents and Create a quote PDF document for more information about creating PDF documents for quotes.

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What to do next

To learn about setting up Quote Management, see Configuring Quote Management.

Quote Management integration with Contract Management Pro

The Quote Management integration with Contract Management Pro is known as Contract Management for Sales and Order Management (com.sn_som_clm).

Quote Management integrates with Contract Management Pro to help sales agents create legal sales contracts from a quote. A legal sales contract confirms the sales deal and agreements between your company and customer.

The following roles are required to initiate, view, and manage contract execution:

- Contract fulfiller: This role is assigned with the **Sales agent** role and it enables sales agents to create contracts and execute the contract workflow.
- Contract configurator: This role is assigned with **Sales Ops specialist** role and it enables sales ops specialists to configure data required for contract initiation and its related tasks.

A contract generation process consists of the following steps:

- A sales ops specialist creates a contract type and document template, defines signatory rules, and completes configurations for the contract generation process. To learn more, see Configuring Contract Management Pro.
- A sales agent then initiates the contract creation process through the Initiate contract UI action by filling the required details, such as Type of paper, Contract type, Signature type, and Start and End dates.
  - **Initiate Contract** UI action is visible only when a quote is in Completed state.
  - After you submit the contract creation form, it creates a contract request record.
  - The new contract request triggers the workflow to generate the legal sales contract.

  To learn more, see Initiate a contract request.
- When the contract workflow is complete, the state of the contract request is changed to Closed complete.

What to do next

To learn more, see Integrate with Contract Management Pro.

Advanced Approval Management

The Advanced Approval Management application enables you to define workflows for approving Sales Customer Relationship Management entities, such as customer quotes, in your sales organization.

Advanced Approval Management overview

Sales agents use workflows created by approval admins in Advanced Approval Management to preview and submit approval requests for entities such as quotes. Authorized approvers review approval requests to verify that the items meet legal guidelines and company pricing policies. They can either approve or requests. These workflows provide oversight of the approval process, which helps prevent financial errors and delays in approvals, particularly for high-value or high-risk deals. During the approval process, sales agents and approvers receive notifications informing them of the approval status and approval tasks.

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Advanced Approval Management users

Users in Advanced Approval Management

User	Description
Approval rule admin, approval rule writer (For example, sales or business operation managers)	Creates approval configurations for Sales Customer Relationship Management entities, approval chains, approval trigger conditions, approval rules, approval users, and approval groups.
Approval rule viewer (For example, business stakeholders, operations managers)	Views approval entities, approval chains, approval trigger conditions, approval rules, approval users, and approval groups.
Approval requester (For example, sales representatives)	Creates, previews, and submits approval requests for entities, such as quotes. Tracks status, recalls approval requests if needed, and views approval history.
Approvers (For example, members of Sales, Finance, and Legal teams)	Reviews, approves or rejects, and delegates approval requests. Can act on requests using different notification channels, such as email, CSM Configurable Workspace, and approval centers.
Approval request viewer	Views approval requests and approval steps.

For a complete list of user roles, see Components installed with Advanced Approval Management.

Advanced Approval Management workflow

This section describes the tasks involved in configuring and using Advanced Approval Management.

1. As an approval rule admin or writer, create an approval configuration for a Sales Customer Relationship Management entity, such as quotes.
2. Build approval workflows by creating:
   - Conditions that trigger the rules in the workflow
   - Approval rules that control the steps in the workflow
   - Approval chains for organizing workflow steps and the type of approval work
   - Approval users and groups (approvers and approver groups)
3. As a requester (sales rep), create and preview an approval request, then submit the request. The approval engine routes the approval request to authorized approvers.
4. As a requester, monitor and track the approval process using the advanced approval interface.
5. As an approver, review and either accept or reject an approval request based on conditions and rules.
6. As a requester, update rejected requests and resubmit the requests.
7. As a requester, when the request is approved, proceed with the transaction.

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Advanced Approval Management benefits

Advanced Approval Management benefits

Benefit	Feature	Users
Build and automate workflows that can handle sequential or parallel approvals or a combination of both	Create approval rules and Create approval chains	Approval admins
Enforce financial and legal guidelines particularly for high-value deals to reduce financial and legal risk	Create conditions that trigger approval workflows	Approval admins and approvers
Preview the rules, steps, and approvers before submitting a request	Submitting approval requests	Requesters
Monitor approval workflow and status	Tracking approval status and history	Requesters, approvers, and business stakeholders

What to explore next

To learn more about configuring and using Advanced Approval Management, see:

- Configuring Advanced Approval Management
- Using Advanced Approval Management
- Advanced Approval Management reference

Customer Contracts and Entitlements

The Customer Contracts and Entitlements application for Customer Service Management (CSM) provides solution to standardize, organize, manage, and use customer contracts and entitlements.

Customer Contracts and Entitlements overview

You can use the Customer Contracts and Entitlements application to manage contracts from the initial offer to contract finalization, directly within the CSM Configurable Workspace. You can also manage customer contracts and entitlements life cycle changes, scope modifications, and cancellations. The application enables tracking of entitlements and improves contract compliance.

A customer contract acts as an agreement between the customer and the organization. A contract includes the consumer or account details, the products covered, and the contract term. Contract lines store information related to the product or services purchased as a part of the contract.

Contracts and entitlement workflows help in efficiently managing the complete life cycle of customer contracts and entitlements. The workflows in this application enable you to generate, modify, and renew contracts and entitlements.

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Customer Contracts and Entitlements benefits

Customer Contracts and Entitlements benefits

Benefit	Feature	Users
View and manage contracts and entitlements in the Agent Workspace.	Using Customer Contracts and Entitlements	Customer service manager, order agent
Establish relationships with existing customer data, such as sold products and install base items, by adding the contract and entitlement data to the common data model.	Add a sold product or install base item to a customer contract	Customer service manager
Support customer needs by implementing capabilities ranging from account-based support entitlements to contracts that include service plans with complex entitlement coverage.	Modifying an entitlement	Customer service manager, order agent, sales agent
Customers can create contracts to manage subscription, support, and maintenance contracts. Customers can create these contracts from product inventory records and also manage these contracts by modifying, renewing, or canceling them.	Creating and managing subscription contracts	Customer service manager
Integrates product catalog management, order management, and contract management to deliver a seamless capability to support selling of service contracts and entitlements.	Integration with Customer Service Management modules	Customer service manager
Manage changes in contracts and entitlements. If the customer wants to modify contracts such as changes in coverage or other specific terms, these changes can be managed using order management. You can also suspend, resume, and cancel them based on your requirement.	Modifying Contracts and Entitlements	Customer service manager, order agent, sales agent
Enables the complete end-to-end sales and order management process to generate new customer contracts and entitlements.	Generating new customer contracts and entitlements	Customer service manager, order agent, sales agent
View the Price Ramp details on the contract line, that are applied to quote line items to define incremental price changes for recurring product offerings. This enables customers to scale their purchases during the contract or subscription term by adjusting the pricing.	Using Contracts and Entitlements Workflows	Customer service manager, order agent, sales agent
Enables non-standard renewals of contracts outside of the renewal cycle. This covers three scenarios: an early renewal, a late renewal, and a short-term renewal.	Renew a customer contract line	Customer service manager, order agent, sales agent
Enables consolidation of contracts where customers can merge multiple contracts for the same account into a single contract.	Renew a customer contract line	Customer service manager, order agent, sales agent

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Customer Contracts and Entitlements benefits (continued)

Benefit	Feature	Users
You can add or reduce the quantity to an existing contract during its term.	Upsell or Downsell a customer contract line	Customer service manager, order agent

What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

Sales Agreement Management

Sales Agreement Management is an application that captures the scope and conditions from a quote for future sales transactions, over a specified period between a buyer and a seller.

Sales Agreement Management can be a separate application or part of the Sales Customer Relationship Management application.

A quote is a formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer. Only after a quote is completed or closed, a sales agreement can be generated.

- Details about the buyer and seller involved in the transaction
- Validity period of the agreement
- Details of the products and services to be supplied
- Specific products and services: Quantities and pricing

Sales agreement workflow: Quote-to-sales agreement

Sales agreement and Sales agreement lines are based on quote and quote lines using the same product offerings.

Sales agreement line items

In a sales agreement, a line item refers to any product or service being sold by the seller. These offerings can range from simple items to more complex ones that are configurable or bundled together. Each offering may also have specific features or characteristics. A line item might be a particular version of a product, a combination of different product configurations, or a category of products. A single agreement can include multiple line items.

Sales agreement price list

In a sales agreement, the prices for products and services that are negotiated and finalized are called price lists. These lists specify the agreed-upon prices for various items included in the agreement. When a sales order is placed based on a sales agreement, these price lists are used to determine the pricing of the order. This ensures that the terms negotiated in the sales agreement are consistently applied to all sales transactions under that agreement.

Exploring CPQ

CPQ is a next-generation configuration engine that redefines CPQ by acting as the “C” in Configure, Price, Quote. It uses an attribute-based approach to simplify complex product logic,

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delivering dynamic blueprints, real-time user interfaces, and a powerful Commerce Logic Engine that generates accurate outputs like bills of materials.

Overview of CPQ

With CPQ, organizations gain speed, flexibility, and precision in every sales and configuration experience.

Key features

- Attribute-Based Configurator: Goes beyond traditional add-ons to dynamically manage complex product logic.
- Configuration Management: Handles product line items, BOMs, optional items, and configuration rules.
- Pricing Engine: Supports standard and promotional pricing and enables holistic deal pricing across product bundles.
- Approval Workflows: Offers automated or manual approvals to ensure compliance and manage risk.
- Customer & Fulfilment Details: Manages billing, shipping, staging, and delivery information.
- Sales Enablement: Tracks deal stages, customer details, pricing, discounts, and terms, and generates customer-facing documents like formal quotes, terms & conditions, and warranty documentation.

Key capabilities

1. Fields and Rules: Capture attributes and enforce logic to ensure valid configurations.
2. Layouts: Define the end-user experience with guided flows and visual cues.
3. Flightpath: Analyze rules engine behavior to diagnose performance and accuracy.
4. Cosmo Admin Assist & SmartPredict: Provide AI-driven guidance to administrators for smarter configuration management.
5. Visualization Integrations: Connect with partners like ThreeKit and kBridge to deliver real-time 2D/3D product renderings during configuration.

Key benefits

- Simplified Complexity: Attribute-based rules handle advanced product logic without creating endless bundles or SKU variations.
- Faster Sales Cycles: Guided selling and dynamic blueprints help sales teams configure products and solutions more quickly.
- Operational Efficiency: Centralized administration of rules, fields, and layouts reduces maintenance effort.
- Integration Ready: Works seamlessly with Salesforce CPQ, eCommerce platforms, and visualization tools such as ThreeKit and kBridge.

Key personas

Designed to support a broad set of users, each playing a critical role in configuration and sales processes:

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- Configuration Administrators: Define and manage blueprints, rules, and layouts to enforce consistency across the catalog.
- IT Administrators: Oversee system controls, user access, and integrations to maintain secure and reliable deployments.
- Sales Users: Use CPQ through Salesforce CPQ or eCommerce portals to configure solutions, generate quotes, and guide buyers confidently.

Related topics

Configuring CPQ with basic and advanced features

Integrating CPQ

Using CPQ

CPQ reference

Getting started with CPQ

Start building configurations with CPQ, the configuration engine that powers ServiceNow CPQ. Learn how blueprints, products, fields, rules, and layouts work together to create guided selling experiences.

About CPQ

CPQ delivers a modern, high-performance configuration engine that acts as the “C” in Configure, Price, Quote, enabling organizations to model complex products with clarity, speed, and precision. Built on an attribute-based configuration approach, ServiceNow CPQ simplifies complexity by evaluating product logic through a unified rules framework—allowing sales teams and buyers to configure highly customizable offerings with ease.

At the core of ServiceNow CPQ is a fast, scalable rules processing engine that evaluates configuration inputs in real time. This engine powers dynamic behaviors such as conditional visibility, guided selections, automated calculations, and configuration validation, ensuring every configuration is accurate and actionable.

Configurations are delivered through blueprints—reusable containers that bring together fields, rules, layouts, and configurable products into a cohesive configuration experience. Blueprints make it easy to design, customize, and extend rich UI experiences without code, while providing a consistent structure for managing logic across environments.

Whether used standalone or embedded in eCommerce platforms, Salesforce, or custom applications, ServiceNow CPQ provides a flexible and performant foundation for delivering guided selling experiences, generating bills of materials, and driving downstream processes such as quoting, manufacturing, and fulfillment.

Tip: Involving your CSM in the early phases of your CPQ implementation has a direct impact on the success of your project.

Perspectives

- Market View: Focuses on the environment: target markets, customer segments, and partner strategies. Success is measured by selling to the right customers at profitable margins.
- Organizational View: Focuses on internal operations and systems, such as: Marketing and campaign management, CRM and opportunity management, CPQ, Contract management,

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ERP, fulfillment, billing, and service. Success is measured by operational efficiency, profitability, and repeatability.

- Sales Rep View: Focuses on day-to-day selling tasks, such as: identifying targets, analyzing product needs, configuring solutions, agreeing on pricing and terms, and packaging deals and closing sales. Success is measured by closing deals efficiently and meeting customer needs.

Key concepts

Before you start building, familiarize yourself with the foundational terms used in ServiceNow CPQ:

1. Configurable Products — product records that launch a configuration when added to a quote.
2. Blueprints — the containers for configuration logic and UX (fields, rules, and layouts).
3. Fields — variables that collect and store data during configuration (at the header or line level).
4. Rules — logic that validates input, sets values, filters options, or computes outputs (for example, to produce a BOM).
5. Set up layouts — the structure and navigation of the buyside UI. Layouts define the end user interface, how fields are arranged on the page, and how the user travels through the configuration experience.
6. BOM — bill of materials output used for quoting and/or downstream manufacturing/ERP.

Build your first configuration

Build your first configuration.

- Upload a sample blueprint using the Matrix Loader. See the Configure the Matrix Loader.
- Create a configurable product in Salesforce CPQ (SFDC) and associate it with your blueprint. See The CPQ Configurator.
- Launch the configuration experience by adding the product to a quote and verifying that the blueprint-driven UI is working as expected. See Set up blueprints.

Related topics

The CPQ Configurator

Buyside user interface

The configurator buyside user interface is a modern, intuitive platform designed to simplify the configuration of complex products and services. Integrated with Salesforce CPQ and other enterprise systems, it enables users to create, manage, and visualize detailed product configurations, ensuring accuracy and efficiency throughout the sales and fulfillment process.

- The buyside user interface (UI) in CPQ is where sales reps or customers configure products in Salesforce CPQ.
- Provides guided, attribute-based product configuration with rules, enrichments, and integrations.
- Ensures accurate Bills of Materials (BOMs) are generated for quoting, manufacturing, or service operations.

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Key capabilities

- Multi-BOM displays: Organize and visualize different types of line items (sales, installation, service, support) in separate, easily navigable sections.
- Dynamic field grids: Collect and manage structured data (like sales figures or configuration attributes) in intuitive, tabular formats.
- Guided configuration: Use sections, subsections, and nested tiers to break down complex product lists, making selection and customization effortless.
- Rule-based automation: Automate calculations, field updates, and validation, ensuring accuracy and compliance with business logic.
- Enrichment scripts: Apply advanced logic—such as surcharges or custom fields—at the end of the configuration process, before passing data to downstream systems.
- No-code/low-code administration: Empower business admins to manage and update configurations without deep technical skills, using point-and-click tools

Key personas

- Sales Representative: Configure and quote tailored solutions for customers, using guided workflows and automated rules to ensure compliance and accuracy.
- System Administrator: Manages platform setup, integrations, and ongoing maintenance, ensuring the configurator aligns with enterprise needs. Maintain and update configuration logic, manage integrations, and ensure the platform aligns with evolving business needs.
- Solution Architect: Design scalable configuration models and validate technical feasibility for complex deals.
- Business Process Owner: Oversee adoption, gather feedback, and drive continuous improvement.
- End User (Customer or Partner): Interact with the configurator via self-service portals, customizing products and services to their requirements.

Key benefits

- Accelerated sales cycles: Guided, rule-based configuration reduces errors and rework, speeding up time-to-quote.
- Enhanced user experience: Intuitive UI, dynamic filtering, and real-time feedback make even complex configurations simple.
- Operational efficiency: No-code administration empowers business users, reducing IT dependency and admin costs.
- Scalability and flexibility: Adapts to any industry, product complexity, or channel—supporting sales teams, partners, and self-service customers.
- Governance and compliance: Automated rules and AI-driven governance ensure configurations meet business and regulatory requirements.

Workflow

1. Access the CPQ configurator: Users launch the configurator from Salesforce CPQ or a ServiceNow portal.
2. Configure products and services:

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- Use multi-BOM displays to separate sales, installation, and support items.
- Filter and select products using sections, subsections, and nested tiers.
- Enter and organize data in field grids for structured input.

3. Apply rules and automation:
   - Automated rules calculate prices, apply surcharges, and validate configurations.
   - Enrichment scripts add advanced logic, such as tax exemptions or shipping fees.
4. Collaborate and finalize:
   - Stakeholders review and approve configurations as needed.
   - Generate and share quotes, ensuring all business and compliance requirements are met.

Example

Jack, a sales representative, receives a request from a SaaS customer for a tailored network solution.

- Jack opens the opportunity in Salesforce CPQ and launches the configurator buyside user interface.
- He uses multi-BOM displays to separate hardware, installation, and support items.
- Jack filters router models by business size using nested tiers, ensuring the customer only sees relevant options.
- The system automatically calculates surcharges and applies tax exemptions, thanks to built-in enrichment scripts as Jack adds installation services.
- The solution architect reviews and approves the configuration.
- Jack generates a quote, confident that all business rules, pricing, and compliance requirements have been met.
- The customer receives a clear, tailored proposal, ready for approval.

Related topics

The CPQ Configurator

The CPQ Configurator

The CPQ Configurator is an advanced commerce logic solution that allows businesses to configure and sell products more effectively. Unlike traditional product-based systems, CPQ uses an attribute-based configuration model. This ensures that users are guided through selections, rules are enforced automatically, and only valid outcomes are generated.

The configurator connects customers to products faster and easier by enabling:

- Attribute-based user inputs that drive the commerce logic engine.
- Guided product and solution recommendations.
- Headless eCommerce experiences integrated with existing channels.
- No-code/low-code tools for simplified maintenance and administration.

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Key benefits

- Faster sales cycles: Guided Selling and Solution Selling that reduces errors. Customers and sales reps can configure products quickly and confidently.
- Next-Generation Performance: High-performance architecture supports large product models. Flexible UI built with Salesforce Lightning for seamless user experience.
- Accelerated Product Launches: Introduce products faster with fewer SKUs to manage. Quickly deploy and update rules across channels.
- Lower Administration Costs: A no-code/low-code Admin interface consolidates multiple systems. Reduces integration complexity and ongoing maintenance overhead.

Key capabilities

- Attribute-Based Configuration: Prompts users with guided questions. Applies configuration rules to ensure valid results. Eliminates human error found in product-based systems.
- Guided Selling and Headless eCommerce: Self-service buyers receive automated recommendations. Sales reps follow consistent workflows.
- Dynamic Bills of Materials (BOMs): Sales BOMs integrate with Salesforce CPQ Quote Line Editor. Manufacturing/custom BOMs support ERP and Order Management flows.
- No-Code/Low-Code Administration: Intuitive UI for creating, updating, and deploying rules. Removes dependency on IT or development teams.
- High-Performance Architecture: Handles complex configurations at scale. Maintains speed without compromising accuracy.

Product-based and attribute-based configuration

Product-Based Configuration

- Requires sales reps to manually select products.
- High risk of error due to changing lists and rules.

Attribute-Based Configuration

- Prompts users with questions about desired features.
- Applies configuration rules to automatically generate valid outputs.
- Results can be quoted in Salesforce CPQ or purchased directly online.

Examples of commerce logic in action

- Sales Enablement
  - Sales rep enters requirements (e.g., “number of users”).
  - CPQ applies rules and generates a valid configuration instantly.
  - Results flow into Salesforce CPQ quotes.
- Headless eCommerce
  - Customer answers guided questions in a web storefront.
  - CPQ delivers a tailored recommendation.
  - Customer purchases without sales intervention.
- Manufacturing Integration

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- Complex product configuration produces both a Sales BOM and Manufacturing BOM.
- Sales BOM passes to Salesforce CPQ.
- Manufacturing BOM flows to ERP for production planning.

Key components

The Commerce Logic Engine is built from modular components that define how products are configured and presented.

Key components of the configurator

Component	Description
Configured Products	Salesforce objects that require configuration in CPQ before being added to QLE.
Blueprints	Containers for all components needed to render the UI.
Fields	Attributes that capture user inputs.
Layouts	Define how the configuration UI is displayed.
Rules	Ensure products are configured correctly.
Sets	Dynamic arrays that adapt to user selections.
Product Pickers	Menus for selecting products without running the rules engine.
Picklist extensions	Extend the capabilities of picklists.
Product Lists	Display the configuration BOM to the user.
Tables and Table Queries	Store and retrieve supporting data during configuration.
Set Repeaters	Combine set functionality with flexible layouts.
Associated Picklist Sets	Dynamically sized sets based on menu choices.
Field grids	Tabular field groups for structured data entry.
Advanced Product Actions	Scripts to define which line items are sent to the Config BOM.
Twinning	Copies Salesforce Quote data into CPQ fields.
Enrichments	Scripts that run outside the rules engine during configuration.
External Connections	Connect to third-party data sources to retrieve configuration data.

Configurable products

Learn how configurable products connect blueprints to end-user configuration experiences in CPQ, supporting both headless and Salesforce-integrated use cases.

Configurable products act as the bridge between a CPQ blueprint and the configuration experience that end users interact with. They define how a specific product launches and behaves during configuration—whether accessed through a headless application or integrated with Salesforce CPQ.

Each configurable product ties together the technical definition of a product (its blueprint) with the business object that represents it (the Salesforce Product2 record or headless configuration

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record). This association allows users to configure products dynamically, ensuring that all logic, pricing, and visualization rules from the blueprint are applied in real time.

Key benefits

Configurable products simplify the connection between your product definitions and customer-facing configuration workflows. They provide:

Key benefits

Benefit	Description
Unified Configuration Launch	Connects each product directly to a CPQ blueprint so the correct configuration UI opens automatically for the end user.
Cross-Platform Flexibility	Supports both headless and Salesforce CPQ environments with consistent configuration experiences.
Reduced Maintenance	Allows multiple Salesforce Product2 records to link to a single blueprint, simplifying updates across similar products.
Faster Go-to-Market	Eliminates the need for custom integration scripts to launch configuration sessions.

Configurable product architecture

At a conceptual level, configurable products establish the relationship between your CPQ blueprints and the user-facing configuration layer. This relationship varies slightly depending on whether your environment is headless or Salesforce-integrated:

- Headless: The configurable product is defined directly in CPQ, and end users access the configuration experience through a front-end application or API connection.
- Salesforce Integrated: The configurable product acts as the “front door” to the configuration experience in Salesforce CPQ. When users select a CPQ - enabled product, the corresponding configuration UI launches automatically.

In both cases, the configurable product ensures a seamless connection between the product’s logic and its visual configuration experience.

Salesforce setup

In Salesforce-integrated environments, configurable products link CPQ blueprints to Salesforce Product2 records. This association ensures that selecting a Salesforce product automatically launches the correct CPQ configuration experience.

Only one blueprint can be associated with each configurable product, but multiple Product2 records may link to the same blueprint—simplifying management for similar product variations.

The setup process depends on your Managed Package version used for CPQ: Once configured, selecting the product in Salesforce CPQ automatically opens the CPQ configuration experience for the user.

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General guidelines

- Maintain consistent blueprint naming conventions to simplify identification and mapping.
- Use CSV uploads for bulk creation of configurable products in headless environments.
- Verify that Product2 records in Salesforce are CPQ enabled before associating blueprints.
- Use sandbox environments to validate blueprint mappings before deployment to production.
- Regularly review configurable product associations when blueprints or product structures change.

Related topics

Setting up configurable products

Blueprints

Learn how blueprints define the structure of configuration experiences in CPQ and act as containers for fields, rules, layouts, and configurable products.

Blueprints are the foundation of every configuration experience in CPQ. They define the structure, behavior, and visual layout of configurations by linking together all key elements —Fields, Rules, Layouts, and Configurable Products—into a single, manageable container. A blueprint represents the complete configuration logic for one product or experience and ensures consistent behavior across environments.

By using blueprints, administrators can design, deploy, and manage configuration workflows without duplicating content or logic. Each blueprint provides a modular, versioned space to build and refine configuration experiences safely before deploying them to production.

Blueprint components

A blueprint brings together several key elements that define how a configuration behaves and appears to end users.

- Fields: Capture data and user input. Blueprints associate only the subset of global fields relevant to that configuration experience.
- Rules: Define the business logic that governs visibility, validation, product inclusion, and dynamic behaviors. Rules automatically connect to blueprints when their referenced fields are associated.
- Layouts: Determine how fields and pickers appear in the UI. Each Layout is unique to a single blueprint, though a blueprint can contain multiple Layouts.
- Configurable Products: Act as the entry point that launches the configuration defined by a blueprint. Multiple products can reference a single blueprint, but each product can only belong to one blueprint.
- Enrichments: Extend logic beyond the rules engine to handle advanced scripting, external connections, or pricing enrichments.

Blueprint life cycle

Blueprints are version-controlled entities that progress through a simple life cycle: creation, association, deployment, and migration.

- Create: Define a new blueprint record and assign a name.
- Associate: Link fields, rules, layouts, and configurable products to the blueprint.

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- Deploy: Make the blueprint available for end-user configurations in your environment.
- Export/Import: Move blueprints between development, test, and production environments for versioning and reuse.

Blueprint administration interface

Each blueprint record includes multiple tabs that provide visibility into its structure and related components:

- Associated Fields: View all fields and subfields linked to the blueprint, organized by type (Standard, Sets, product pickers, System).
- Related Rules: Review active and inactive rules automatically linked through field references.
- Layouts: View or modify layouts associated with the blueprint. The most recently saved layout is used by default during runtime.
- Configurable Products: View all products that launch the configuration experience defined by the blueprint.
- Deployments: Track the most recent deployments, including date, user, and status.
- Enrichments: Manage enrichment scripts that run outside the rules engine (for example, initialization or pricing scripts).

Deployment and environments

Deployments make a blueprint visible to end users. All associated changes—fields, rules, layouts, and configurable products—become active upon deployment. Deployment notifications appear in the lower-left corner of the Admin interface, showing status updates such as “In Progress” or “Completed”.

Deployment behavior varies by environment type:

- Production: Deployed blueprints remain active indefinitely.
- Test: Automatically undeployed after 30 days of inactivity (reset upon redeployment).
- Demo: Automatically undeployed every weekend for maintenance.

Migration and version control

Blueprints can be exported and imported across environments to support development life cycles and version control. The exported package includes all related elements such as fields, rules, and layouts, allowing you to migrate configurations without manually recreating components.

When importing, administrators can update Product IDs, rule mappings, and environment-specific references to ensure compatibility in the target org. CPQ maintains unique IDs for each Configurable Product to preserve data integrity across environments.

General guidelines

- Create modular blueprints for each major product or configuration flow.
- Use descriptive names and variable names for clarity and maintainability.
- Review inactive rules regularly to prevent outdated logic from re-entering deployments.

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- Deploy changes in a controlled environment before promoting to production.
- Document the enrichment scripts and custom external connections that are used by each blueprint.

Related topics

Set up blueprints

Fields

Learn how fields provide the foundational data model for CPQ configurations—what they are, how they relate to blueprints, rules, and layouts, and how to choose the right type and display for reliable, reusable experiences.

Fields are the smallest unit of the CPQ configuration model and represent a single piece of data (for example, a quantity, a choice, or a note). They power the user experience (what the user sees and edits), the logical model (what rules read and act on), and downstream outputs (what is written to the bill of materials or passed to external systems). Because fields are global in an environment, the same field can be reused across blueprints, rules, and layouts to ensure consistency and reduce duplication.

Fields become part of a specific configuration only when they are associated with a blueprint. When all fields referenced by a rule are associated to a blueprint, the rule is intrinsically related to the blueprint—no extra linking step is required.

How fields fit into the configuration model

- Blueprints: Declare which global fields participate in a configuration. Association enables reuse without cloning.
- Rules: Read field values as inputs and perform actions on fields (determine values, show/hide, validate, filter options, add products).
- Layouts: Place fields visually and select a Component display type to control how the user interacts with each field.
- BOM/product list: field values can be mapped to product attribution or extended properties for downstream processing.

Field scope and life cycle

Fields are created once and available globally. Their life cycle is lightweight and designed for reuse:

1. Create: Define the field type, name, and unique variable name (global identifier).
2. Associate: Add the field to one or more blueprints to make it available in those configurations.
3. Place Display: Choose the appropriate Component display type in a layout (for example, grid, visual picker, slider, read-only).
4. Orchestrate: Apply rules to read or set field values, control visibility, present messages, and drive product actions.

Choosing the right field type

Selecting the correct type ensures valid data and simpler rules:

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- Text: Free-form string input (up to 2000 characters), with optional length constraints and default.
- Number: Numeric input with optional min/max; layout-level options can enforce step or precision and formatting (currency/percent/read-only currency).
- Boolean: True/False with customizable labels and default state.
- Picklist (single or multi-select): Constrained choices with definable options, defaults, and picklist extensions for rich, columnar option data and implicit filtering.
- Product Picker: A picker specialized for products that can add items to the BOM and map additional data to Product List fields—often removing the need for separate rules.
- Sets: Tabular collections where each row's subfields interact row-locally (ideal for calendar-like or line-item scenarios).

Note: Prefer constrained types (number, picklist, product picker) when possible. Clear constraints reduce validation logic and improve end-user guidance.

Data model vs. display model

The field type defines the data model and specifies what values are valid. The Component display type defines how users interact with the field in a layout (for example, radio, menu, or grid). A single field can be rendered differently across layouts while preserving a consistent data model.

Examples:

- Number: shown as number input, number-with-submit, slider, read-only text/currency, or formatted number.
- Picklist: shown as traditional menu, vertical radio buttons or check boxes, visual tiles, or grid (with picklist extension columns).
- Product Picker: shown as a grid or visual tile experience with subfields and aggregates.

Association and reuse

Because fields are global, reuse is the default. Associate a field with any blueprint that needs it; the field is then available to the blueprint's layouts and rules. If all referenced fields in a rule are associated with the blueprint, the rule is automatically considered related to the blueprint.

This model avoids cloning, reduces drift, and simplifies maintenance across products and experiences.

Governance and naming

- Variable names: Use clear, stable, names (with words separated by underscores, as in shipping_method) to make rule scripts expressive and durable.
- Descriptions: Document intent and valid ranges (minimum and maximum, semantic meaning) to aid future reuse.
- Defaults: Set only when the business logic expects a starting state; otherwise, let rules determine values contextually.

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Accessibility and internationalization

- Prefer display types that make choices obvious (radios/tiles) when option sets are small.
- Provide human-readable labels and help text; use read-only text with Markdown for structured guidance.
- Use layout-level formatting for numbers and currency to respect locale conventions.

Performance and reliability tips

- Choose the simplest field type that satisfies the requirement. Fewer rules and validations mean faster run times.
- Use picklist extensions or product pickers to encapsulate rich option data and reduce rule count.
- Reserve “always-on” determination rules for true system defaults; prefer contextual conditions elsewhere.

When to use bulk operations

For larger changes or environment migrations, use Matrix Loader to bulk-create and edit fields and field options. The spreadsheet artifact doubles as documentation and accelerates flow from dev to test to production.

Related topics

Configure fields

Matrix Loader

Learn how the Matrix Loader accelerates configuration management by simplifying large-scale data creation, updates, and migrations across your CPQ environments.

The Matrix Loader is a bulk data management utility that enables administrators to efficiently add, edit, and migrate configuration elements such as fields, field options, rules, layouts, product pickers, and tables. Instead of creating elements one by one in the Admin interface, the Matrix Loader lets you define configurations in CSV files—making it ideal for scaling complex implementations, backing up configurations, and moving data between test and production environments.

The Matrix Loader ensures data integrity and consistency by automatically validating dependencies (for example, between fields and field options) and uploading elements in the correct order. Administrators can also use the Matrix Loader to export CSV templates and sample files, providing a quick reference for valid column structures, accepted values, and upload formats.

Key concepts

- CSV structure: Each configuration type has a specific column schema. Administrators can rearrange columns as long as headers remain correct.
- Import order: The loader auto-sorts uploads logically (for example, fields → field options → rules).
- Validation and error handling: Errors during upload usually result from missing required columns, invalid references, or mismatched names. The Matrix Loader displays error messages to help correct them quickly.

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- Export and backup: All configuration entities can be exported from the Admin interface to create reusable CSV backups.
- No redeployment for tables: Updates to managed tables take effect immediately. However, rules referencing those tables require redeployment if modified.

Key benefits

The Matrix Loader eliminates the repetitive and time-consuming steps involved in large-scale setup or updates. It provides several key advantages:

Benefits of the Matrix Loader

Benefit	Description
Efficiency	Upload hundreds of fields, rules, or tables in one batch instead of creating them manually.
Consistency	Maintain consistent configurations across environments with reusable CSV definitions.
Traceability	Use exported CSV files as a versioned record of environment data for audits or rollback.
Migration support	Seamlessly migrate configurations from sandbox to production environments.
Error handling	Validate and confirm successful uploads before committing changes.
No-code automation	Modify configurations and relationships without scripting.

Matrix Loader configuration types

The Matrix Loader supports multiple configuration types, each designed to streamline a specific aspect of the CPQ setup:

Matrix loader configuration types

Upload Type	Purpose	Example Use Case
Fields and field options	Create and manage fields, picklists, and product pickers.	Add 200 product options to a field at once.
Rules	Define business logic, calculations, and conditional visibility.	Upload all visibility and determination rules for a blueprint.
Layouts	Design user experiences by defining field placement and grouping.	Update layout structure across multiple blueprints.
Tables	Manage data sets used for lookups and dynamic logic.	Import pricing data or reference mappings.
Product pickers	Define product selection fields and their behaviors.	Bulk upload accessory or component data.

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How the Matrix Loader works

The Matrix Loader performs uploads in a controlled sequence to maintain relational accuracy between configuration elements. Here's how the process works:

1. Prepare data files: Define configuration elements in spreadsheet tools such as Google Sheets or Microsoft Excel, and export each sheet as a CSV file.
2. Access the Matrix Loader: in the left Admin navigation pane, click **Matrix Loader**.
3. Export sample templates (optional): Download sample CSVs for fields, field options, rules, or tables to use as reference templates.
4. Upload files: Drag and drop one or more CSV files. The Matrix Loader automatically detects file types based on filename keywords.
5. Validate mappings: Confirm that the Matrix Loader correctly identified each upload type (for example, fields vs. rules).
6. Import and verify: Click **Import**. The Matrix Loader runs each upload in the correct sequence. Review success or error notifications in the Notification Center.
7. Confirm configuration: Verify new and updated items on the relevant Admin pages (such as fields or rules).

Note: The Matrix Loader automatically performs dependency resolution—for example, ensuring that fields upload before field options or that rule dependencies are validated.

Example use cases

- Bulk onboarding: Create hundreds of picklists, rules, and layout mappings for a new product line in minutes.
- Environment migration: Move configuration data from sandbox to production using standardized CSV exports.
- Mass update: Change field types, rule actions, or default values across multiple blueprints simultaneously.
- Backup and restore: Export CSVs regularly to maintain a recoverable version of your configuration.

Related topics

Configure the Matrix Loader

Matrix Loader CSV fields and field options upload and export

Matrix Loader: CSV rules upload

Matrix Loader: CSV table upload

Sets

Learn how sets organize repeatable field groups, simplify complex configurations, and enable data aggregation across repeated elements in CPQ.

A set is a reusable, repeatable collection of fields that lets administrators define multiple instances of similar configuration data—such as multiple products, components, or options—in a single blueprint.

Each row in a set represents one instance of a repeated group of fields, and each field in that row behaves independently. sets streamline configuration design, reduce duplication, and support advanced use cases that require tabular or list-based inputs.

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Administrators use sets to present configuration options in structured, table-like layouts that customers can easily edit in the end-user interface.

Sets are designed to:

- Simplify repeatable configurations. Instead of creating multiple fields and rules for each repetition, define once and reuse many times.
- Provide intuitive, tabular data entry. End users can add, remove, or edit multiple product instances in a structured grid.
- Support dynamic rules. Rules can reference values in the same row or aggregate data across all rows.
- Enable advanced reporting and summaries. Aggregates summarize field values across rows (for example, total quantity or total rack units).

How sets work

A set groups several configuration fields together and repeats that group for each item in the list.

Each set row is fully independent:

- Fields in the same row can affect other fields in that row.
- Fields in one row cannot directly affect fields in another row.
- Fields outside a set can influence fields inside it, but not vice versa.

To affect fields outside a set, use:

- Aggregates: Sum, count, average, maximum, or minimum values across all rows.
- Product rules: Define logic that sets external field values based on set data.

A set can contain up to 2,000 rows.

Display options

Sets can appear in the UI in several formats, depending on user experience requirements:

Display options for sets

Display type	Description	Example use case
Table	Rows, columns, and cells with headers; ideal for detailed comparisons.	Configure multiple network devices.
List	Each row shown as a card; can support single-select or multi-select.	Select delivery slots or service packages.
Repeater	Displays one record at a time with navigation controls.	Edit configurations one-by-one in smaller layouts.

Administrators control layout, alignment, and scrolling in the layout editor.

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Field relationships

Relationship	Behavior
Inside → Inside	Fields in the same row can trigger each other through rules.
Inside → Outside	Not allowed directly; use Aggregates or Product Rules.
Outside → Inside	Allowed. Rules or field actions outside a set can change set field values.

Key properties

Sets include several configuration categories that shape how users interact with the table or list:

- General settings: Orientation, maximum height, alignment, index labels.
- Display type: Choose between Table and List views.
- Inline settings: Show “Add Row” indicators, drop-down controls, or hover actions.
- Size settings: Manage how users increase or decrease set rows (numeric or slider field).
- Selection settings: Add single or multiple row selection with a Boolean selection field.
- Search settings: Allow users to search values in a set (for example, filter by available date).
- Message settings: Display validation messages or indicators in specific cells.

Managing set data

Sets support importing and exporting data in CSV format.

- Download set data: Exports only visible columns based on filters applied in the UI.
- Upload set data: Adds or updates rows in the set using a structured CSV file.
  - Rules run automatically on upload.
  - New rows are appended; matching rows are updated.
  - System-enforced limits apply (25 visible columns recommended).

Enable uploads/downloads by adding JSON properties in the set’s raw value:

```
{
  "uploadDetails": {
    "uploadButton": { "label": "Upload CSV", "visible": true },
    "downloadButton": { "label": "Download CSV", "visible":
 true }
  }
}
```

Scripting with sets

To reference sets in rules or scripts, use the following syntax:

Use case	Example syntax
Access the set	`set.<setVarName>`
Access an aggregate field	`set.<setVarName>.<aggregateVarName>`

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For example:

```
if (set.networkDevices.totalRackUnits > 50) {
   field.requiresAdditionalCooling = true;
}
```

Related topics

Configure sets

Layouts

Layouts define how the configuration experience looks and feels for your users. They control where fields appear, how steps are grouped, and how the product list (shopping cart) is presented—turning a blueprint's logic and data into an intuitive, guided UI in CPQ.

A layout is the presentation layer of a configuration experience. Where a blueprint brings together fields, rules, layouts, and configurable products, the layout focuses on how those elements are displayed:

- Which fields appear on each page or tab
- How sections are grouped and labeled
- How sets, product pickers, and messages are arranged
- How the product list is rendered alongside the configuration

Layouts are defined per blueprint. A single blueprint can have one or more layouts, giving you flexibility to support different personas, channels, or demo experiences without duplicating configuration logic.

When a blueprint has multiple layouts, end users can rotate through them using the alternate layout control in the upper-right corner of the configurator UI.

How layouts fit into the configuration model

Layouts are placed at the presentation layer of the CPQ configuration stack:

- Fields collect and display data.
- Rules control behavior (visibility, messaging, calculations, product inclusion, and more).
- Blueprints tie fields, rules, layouts, and configurable products into a single configuration experience.
- Layouts define the buyside interface—pages, tabs, sections, and product list—without changing the underlying logic.

Because layouts reference field variable names and product list parameters, you can safely iterate in the layout (for example, reorganizing tiers or changing display types) without modifying rules or data structures.

Layout building blocks

Layouts are composed of reusable structural and visual elements that you define in a layout CSV file and refine in the Layout Wizard or the layout editor.

Tiers: pages, tabs, and sections: Tiers define the major structural areas of the configuration experience. Each tier has a tierDef that describes how it behaves:

- Pages (PagesWithLabels): Break the configuration into discrete steps with progress navigation.
- Tabs (VerticalTab): Group related content horizontally or vertically for quick switching.

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- Accordion (AccordionWithNavigation): Show one expanded section at a time for long or complex content.
- ExpandableSection: Allow users to expand or collapse content as needed.
- BasicContainer: Provide an unstyled container for simple grouping.

You can nest tiers to build multilevel layouts—for example, pages that contain tabs, or tabs that contain expandable sections.

Layout definition and tools

Layouts are authored and maintained using a combination of CSV files and in-product tools:

- CSV layout upload
  - Primary definition format for layouts
  - Built in a spreadsheet tool and exported to a CSV file
  - Supports full control over tiers, column sets, fields, product list, and component properties
- Layout Wizard
  - Helps you quickly generate an initial layout from a blueprint's fields
  - Provides a visual preview of tiers and major groupings
  - Acts as a starting point; fine-tuning is done via CSV file or the layout editor
- Layout editor
  - Allows you to edit an existing layout directly in the Admin UI
  - Supports arranging tiers and column sets, editing labels, adjusting display types, and updating extended properties
  - Provides keyboard shortcuts and visual cues for missing or partially supported elements

Regardless of which tool you use, the layout is ultimately stored as a structured definition that can be exported, versioned, and replaced as your configuration experience evolves.

Sets and repeatable content

Layouts also control how sets are presented:

- As tables (rows and columns with headers)
- As lists (card-style rows with optional selection and search behavior)
- In repeaters that focus the user on one set index at a time

Set-specific layout properties—such as expand direction, size controls, message indicators, inline add/remove controls, and upload/download behavior—are configured in the layout via extended properties and raw value JSON.

The product list section of a layout defines how the shopping cart is displayed:

- Which product list parameters appear as columns (for example, name, quantity, price, extended attributes)
- How columns are labeled and aligned
- Whether the product list is inline or in a window

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Product list columns are driven by the layout CSV file using the `productlist` and `productlistcolumn` types and by referencing `ProductList.<param>` values defined in the product rules and underlying tables.

Related topics

- Set up layouts
- Layout Wizard
- Layout: a deeper dive

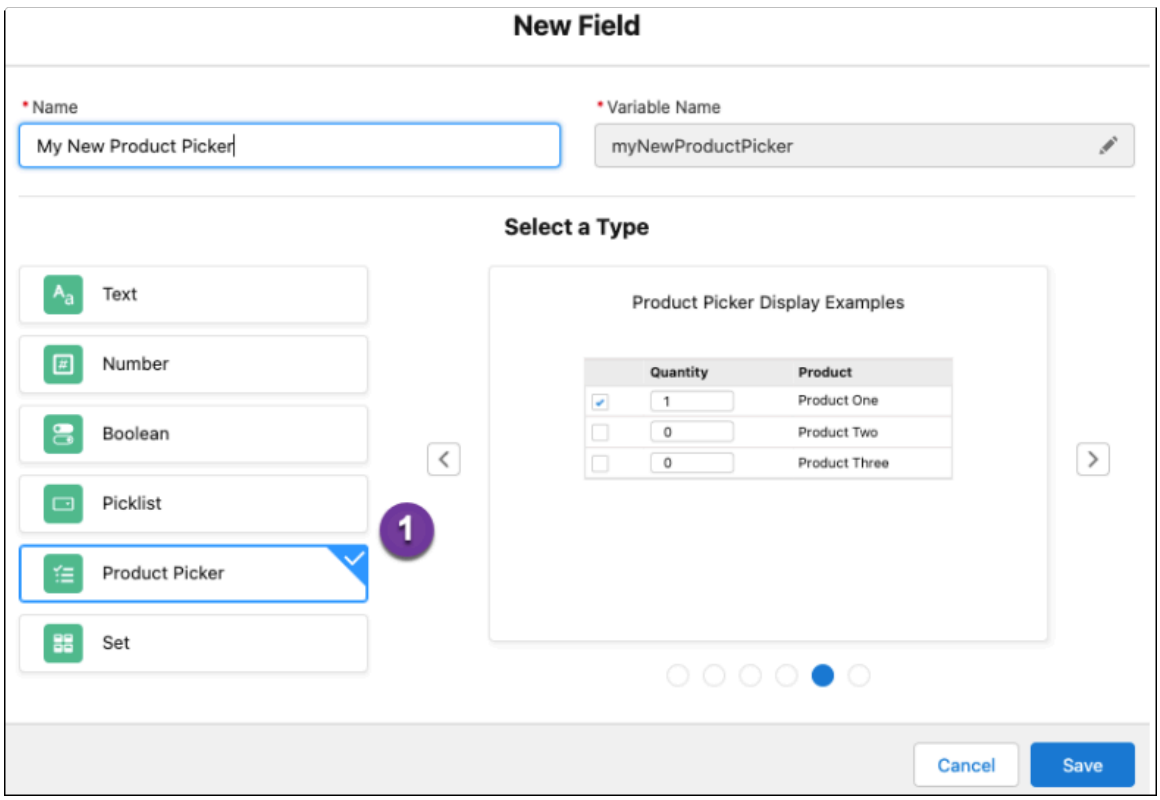
Product pickers

Learn how to create and configure product pickers to add products to a bill of materials (BOM) without writing rules. Define product options, subfields, aggregates, and display settings to enhance user interactions, automate data mapping, and present product information directly in layouts.

A product picker is similar to a picklist with extended data. product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules. Bulk actions provide additional, table based rules that can be used with the product picker Field.

Creating a new product picker

Product Pickers can be created in the fields tab of the Logik Admin. To make a new product picker functional, all you need to do is add some options, then place it on a Layout. Select product picker as the new field type.



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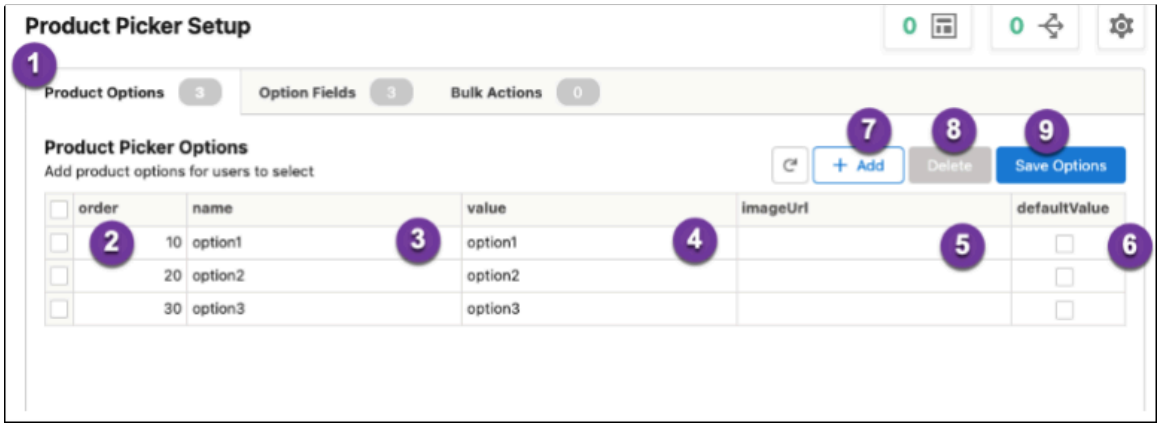
Options



Just like picklists, product pickers have a list of options. Each option represents a product, which is added to the BOM when selected by the user.

(1) The Product Options tab is the starting point for adding options to the product picker. Options are displayed below in table format.

Product Picker Option Fields:

- (2) Order: display order of options in the product picker
- (3) Name: name to use for the product picker option (required)
- (4) Value: value to use for the product picker option (required, defaults to name)
- (5) imageUrl: URL of an image to use for this product picker option
- (6) defaultValue: Controls if this option is selected by default

Actions:

- (7) Add Row: Add product picker
- (8) Delete: Delete the selected options of the product picker options table
- (9) Save options

Option import

Product Picker options can be imported directly into the Picker by uploading a CSV file, much like picklist options.

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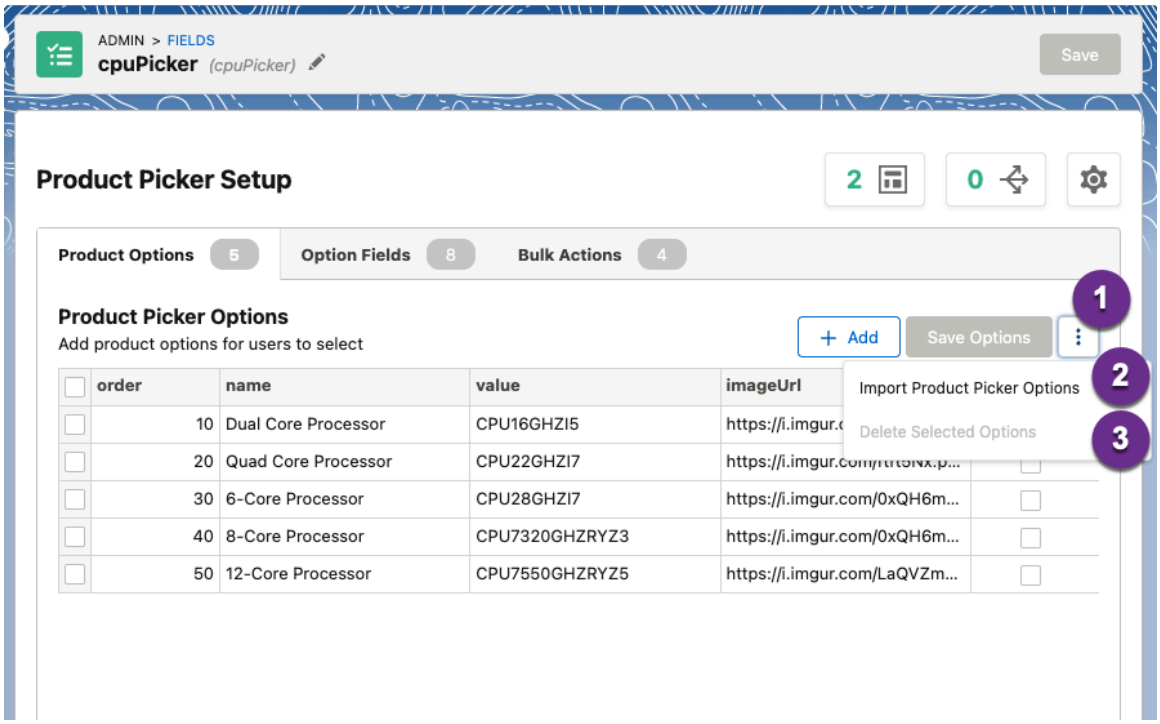
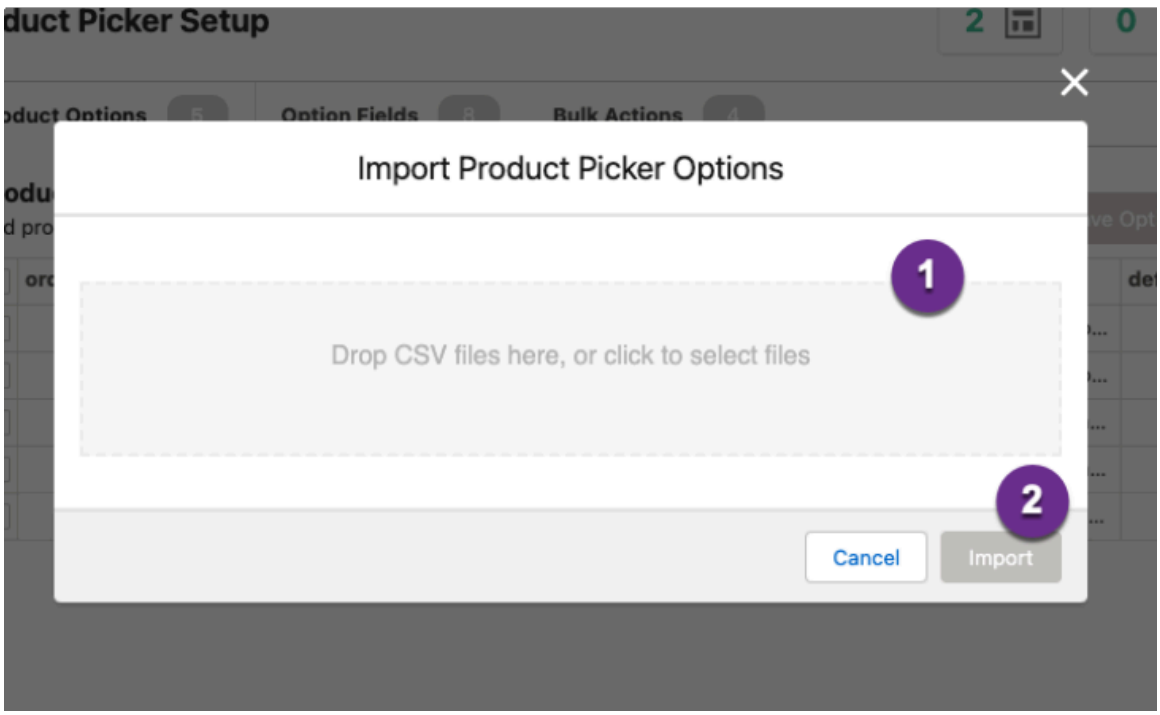


- (1) Menu: Click the 3 vertical dot icon to open the menu
- (2) Import product picker options: launch the import dialog for product picker options
- (3) Delete Selected options: If any product picker options are selected, delete them

Import dialog:



(1) CSV import: Click or drag and drop the CSV file containing the product picker options that you want to import.

(2) Import: Once a file is selected, click import to load the options into the product picker.

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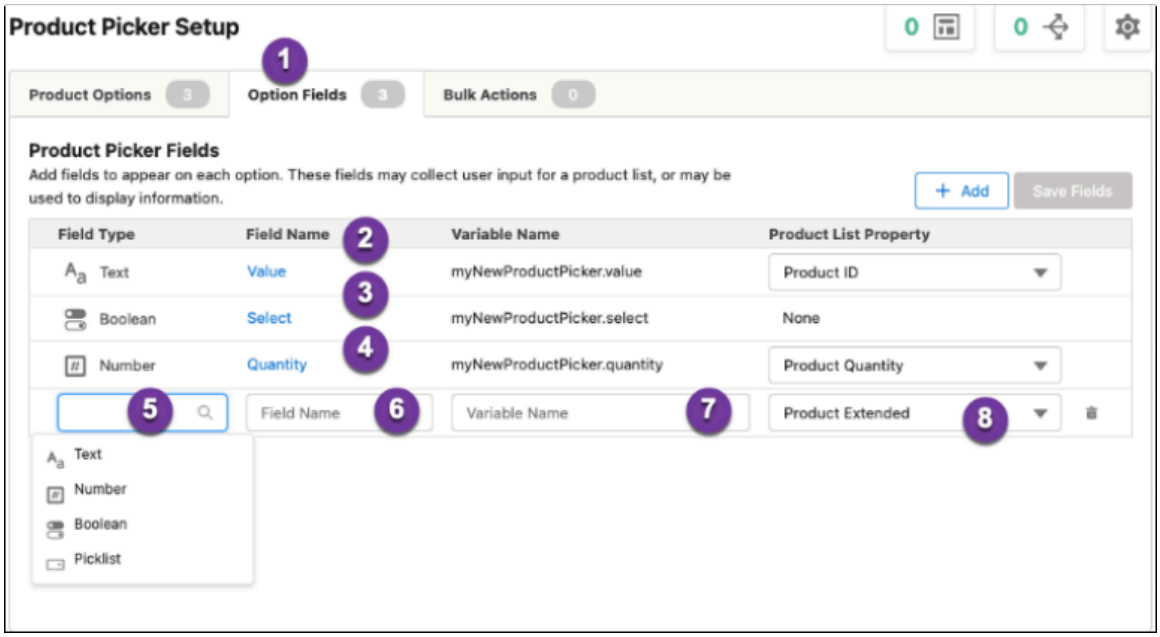
Product Picker fields

Fields can be created in the product picker and used to collect user input, interact with rules, display information and optionally set data in the product list. These fields are children of the current product picker and are found in the Option Fields tab. They are also referred to as subfields.



(1) Option Fields tab: Additional subfields can be created and added to the product picker to display and optionally pass additional data into the ProductList. Subfields are displayed in a table format below.

Three fields are automatically included in each product picker:

- (2) Value: the value of the option, by default maps to Product Id when selected
- (3) Select: Boolean field that controls if the product option is added to the product list (BOM)
- (4) Quantity: quantity of the product to add when option is selected, by default maps to Product Quantity

Additional subfields can be created and optionally configured to pass additional data into the ProductList or display in the UI.

- (5) Field Type: Can be Text, Number, Boolean or Picklist
- (6) Field Name
- (7) Variable Name: Variable name of new subfield, including the product picker variable name as the prefix
- (8) ProductList property: Optionally, you can configure the newly created field to pass data into the ProductList. Select the field in the ProductList to map the subfield's value to, or choose None to not pass the data

Aggregates

Aggregates can be created on product pickers, similar to how set aggregates work. For information about set aggregates, see Creating set aggregates.

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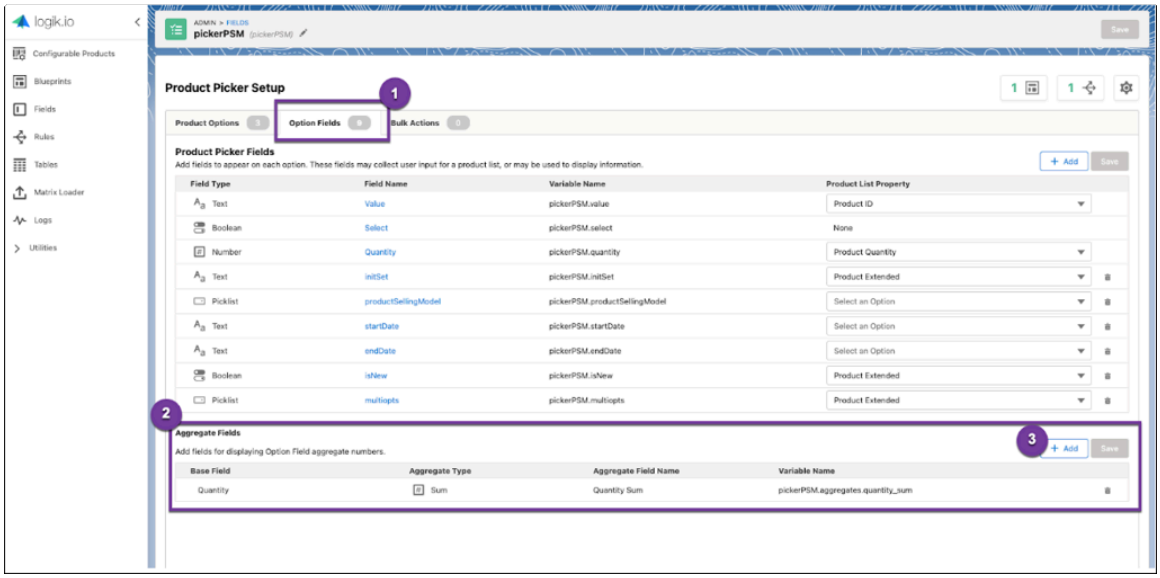
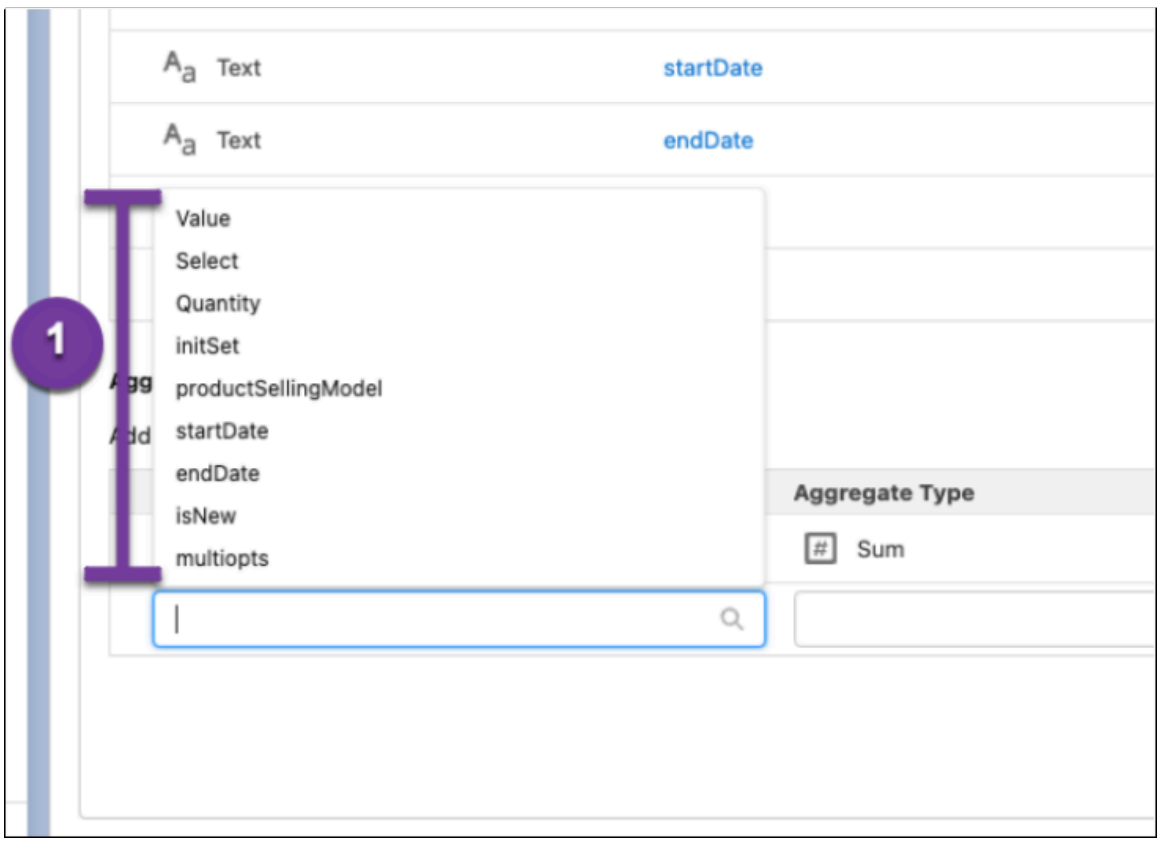
Setup



Navigate to a product picker field.

- (1) Open the Option Fields tab in the product picker
- (2) New section for aggregate fields
- (3) Add button to create a new aggregate field



When you create a new aggregate field, you can select any of the subfields in a product picker to aggregate on.

A list of available sub fields are displayed. Select the field to create a new aggregate.

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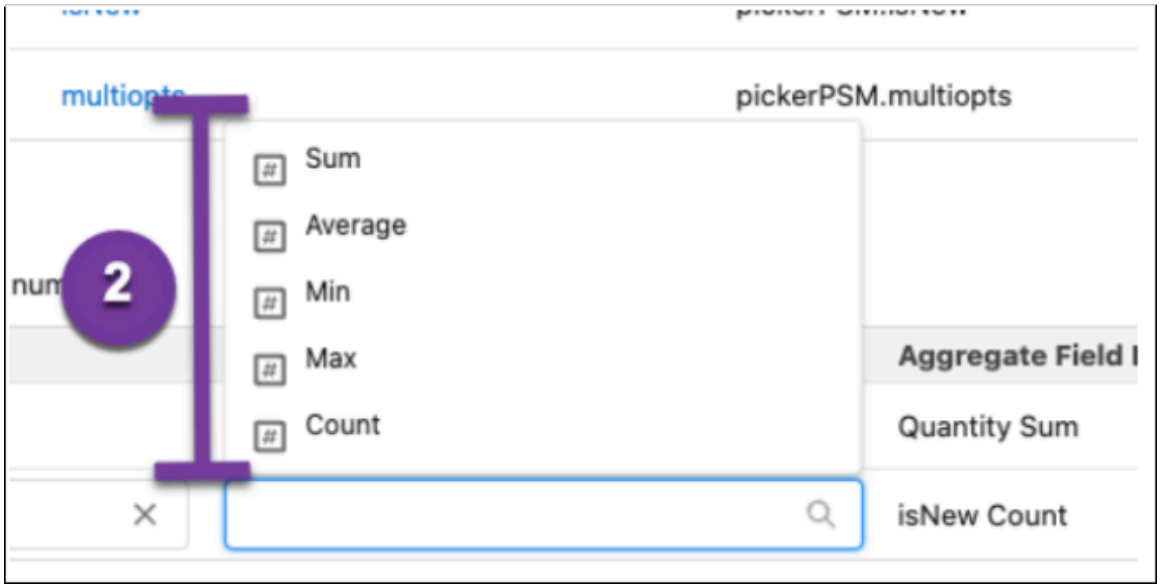
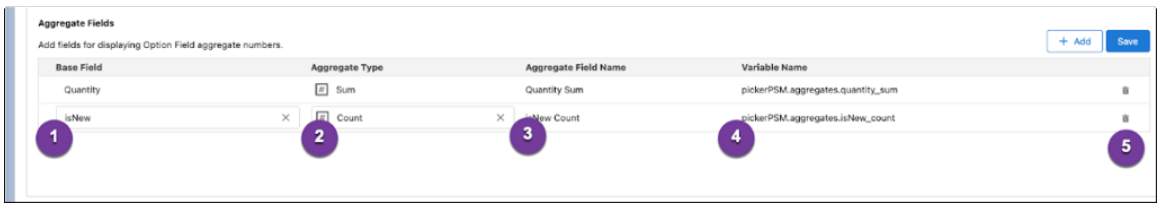


1. Five types of aggregates can be created:

- Sum
- Average
- Min
- Max
- Count

Select the aggregate type to use for the subfield. Each aggregate type can only be used once per subfield.



Final Aggregate Field:

- (1) Subfield to aggregate on
- (2) Aggregate Type
- (3) Field Name (automatically generated)
- (4) Variable Name (automatically generated)
- (5) Delete

Example

Aggregate fields can be added to the layout and will automatically be calculated on change of a field.

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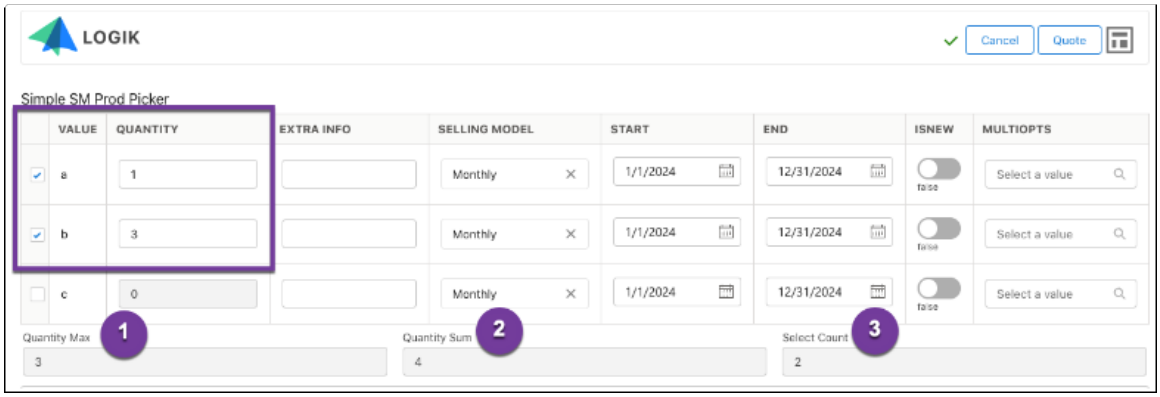
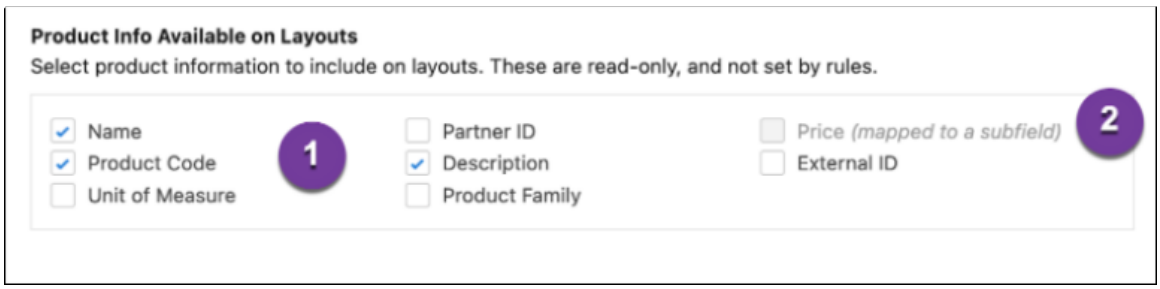


- (1) Quantity Max = 3, product b has qty 3
- (2) Quantity Sum = 4, one product with qty 1, one with qty 3
- (3) Select Count = 2, 2 products are selected

Product Info fields

Product Pickers can optionally display some read-only information about a product. The values are pulled from the product template that is cached in Logik. These fields can then be added to the layout.

Note: These values are read-only and cannot be set by rules.



- (1) Available fields: Any available fields will be editable, to include a field and make it available in the layout, check the box next to the field name
- (2) Unavailable fields: Fields that are mapped to a subfield will be grayed out and unavailable to be included. To make a field available again, change the mapping of the subfield in the product picker Fields section

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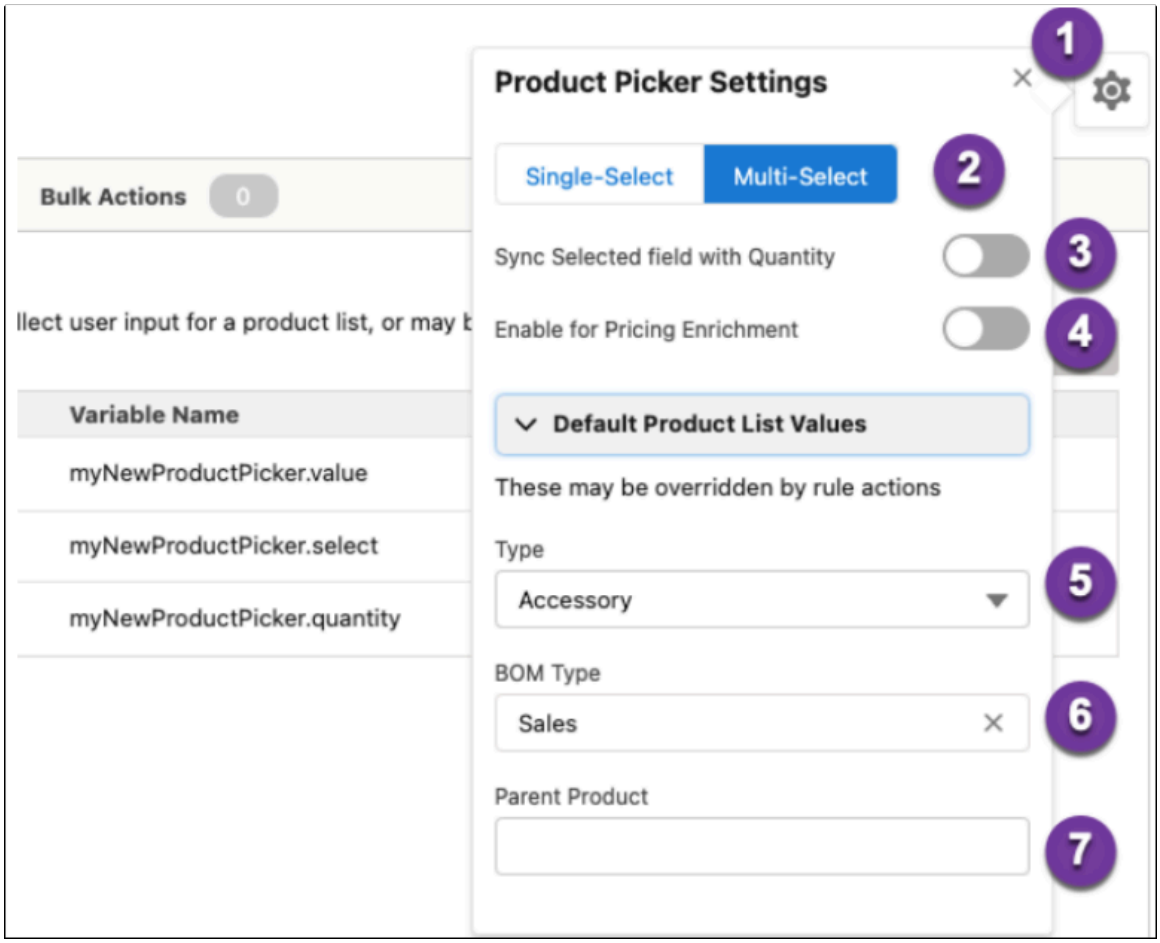
Product Picker settings



Product pickers have additional properties that can be set, both to control the product picker behavior itself and to set additional default values for the product list.

- (1) product picker Settings: Click the gear icon to open the product picker Settings menu
- (2) Type: Single-select or multiselect product picker, behaves same as picklist
- (3) Sync Selected field with Quantity: Boolean toggle field that controls whether the Quantity and Select fields in the Product picker are kept in sync. If enabled, these values are set based on whether the user has made changes. See the scenarios listed in the table below.
- (4) Enable for Pricing Enrichment: enable the product picker for Pricing Enrichments
- (5) Type: Type to use for product options, Accessory or Component
- (6) BOM Type: Which BOM to set by default for the product options
- (7) Parent Product: Name of the parent product to use by default for the product options

This table shows scenarios where the user changes Quantity and Logik changes Select, or vice versa. In all other cases, the value is not changed.

Changes to the Quantity and Select fields

Change	Status of Quantity field	Status of Select field	Result
User changes Select to false	Set to non-zero by rule		Quantity set to 0

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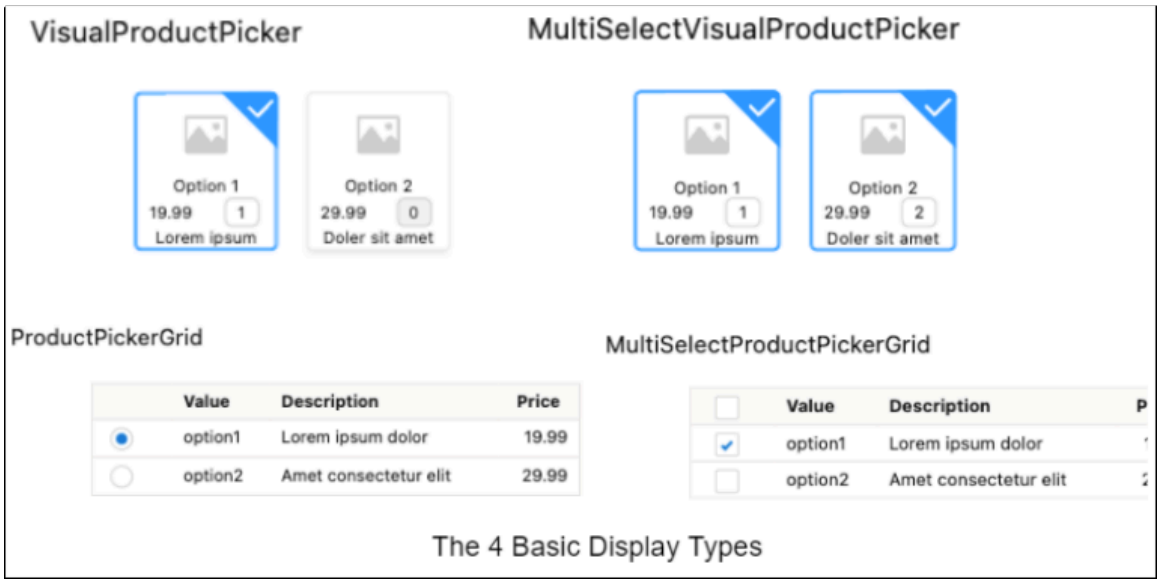
Changes to the Quantity and Select fields (continued)

Change	Status of Quantity field	Status of Select field	Result
User changes Select to true	Set to 0 by user		Quantity set to 1 (or its min value)
User changes Select to true	Set to 0 by rule		Quantity set to 1 (or its min value)
User changes Quantity to non- zero		Set to false by user	Select set to true
User changes Quantity to non- zero		Set to false by rule	Select set to true
User changes Quantity to 0		Set to true by user	Select set to false
User changes Quantity to 0		Set to true by rule	Select set to false

Product Pickers in layouts

Product Pickers can be added and edited in Layouts both through the Layout Wizard and through the Layout CSV. Four basic display types are supported:

- VisualProductPicker: Tile based display, Single-select
- MultiSelectVisualProductPicker: Tile based display, multiselect
- ProductPickerGrid: Table based display, Single-select
- MultiSelectProductPickerGrid: Table based display, multiselect



The 4 Basic Display Types

Product Picker imports and exports

If a product picker Field is associated with a blueprint, it will be included in the exports of that blueprint.

From the Fields page in the CPQ Admin, select a product picker to export and a ZIP file will be generated containing the following:

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- Product Picker fields
- Product Picker field options
- Product Picker definition and bulk actions
- Bulk Action data, each in a CSV file

A ZIP file containing a product picker can be imported through the Matrix Loader.

Related topics

Product picker bulk actions

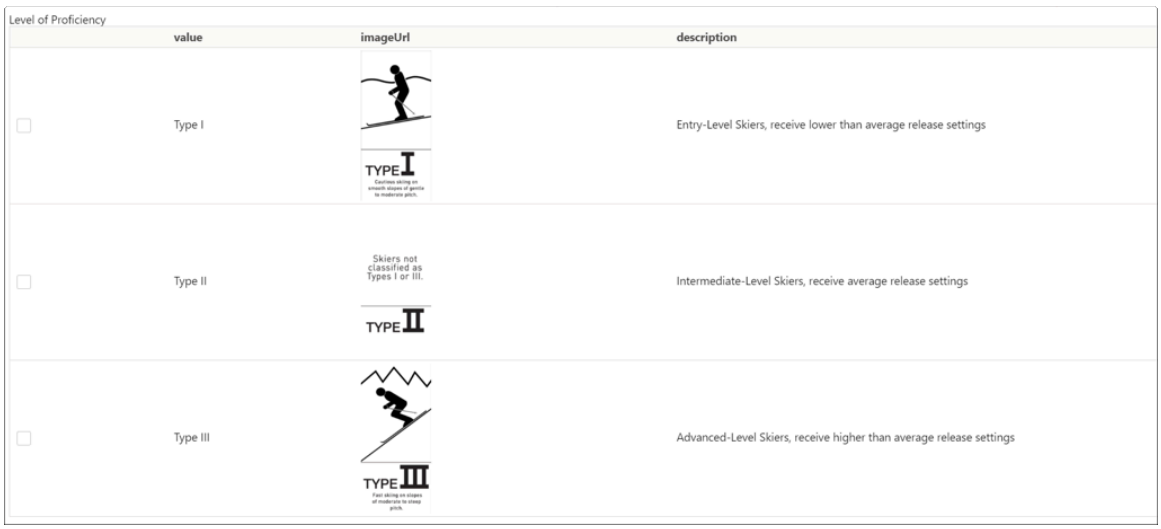
Referencing a product picker

Picklist extensions

Picklist extensions enhance standard picklists by displaying additional option details, enabling automatic filtering, and supporting implicit product rules. Use them to simplify configuration logic and present richer, more informative option selections to users.

Picklist extensions provide three benefits:

- Display: Picklist extensions display the option data that resides in a picklist field, along with additional information that corresponds to each picklist. The graphic below is a single-select picklist in the form of a grid check box with three options, displayed as a picklist extension. Values of picklist options are in the leftmost column (value). All other columns are extended information.



- Optional implicit filtering (include/exclude rules): When tied to another field, options are filtered without having to write additional rules.
- Optional implicit product rules: The Admin can define a product and quantity for each selectable option.

Related topics

Configure picklist extensions

Rules

Learn how to create and manage rules to deliver dynamic configuration experiences. Define conditions and actions to show or hide fields, display messages, calculate values, and generate

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bills of material (BOMs). Explore rule types, including visibility, message, inclusion, exclusion, determination, and product actions, to efficiently build intelligent, responsive configurations.

As the end user navigates through the configuration experience and populates information, rules provide its dynamic elements: hiding and showing content, calculating values, delivering recommendations and messages, and building the bill of materials (BOM).

With a focus on administering rules in the administration user interface, this article discusses the two components of rules, conditions and actions, and the six action types available in CPQ. Much like other elements in the application, the UI is a good place to add or edit small numbers of rules. When many rules need manipulation, we recommend using the Matrix Loader. For more information, see Matrix Loader: CSV rules upload.

In the administration UI, rules are accessible in two ways:

- Global rules: In the navigation pane, click **Rules**. The rule list administration page displays all rules defined in the environment. If your task is to add new rules, this is the only place in the Admin UI where you can initiate a new rule.
- Rules associated with a single blueprint: Click **Blueprints**, and then click a blueprint. Click the Rules tab to view the rules. Click a rule to open it.

Conditions

CPQ rule conditions consist of a logical expression. At runtime, the rules engine executes the rule if the expression evaluates true.

The administrator can define several kinds of conditions:

- Any Condition Is Met: ORs the defined logical expressions.
- All Conditions Are Met: ANDs the defined logical expressions.
- Always (Action Input Change): Runs the rule whenever the end user alters a relevant input.
- Custom Logic is Met: Allows the administrator to define custom logic, including ANDs and ORs, among expressions.
- Advanced Function: Enables the administrator to write a script to define the rule condition.

Actions

The actions section of a rule defines the tasks the rule accomplishes when it runs (when its condition evaluates true). CPQ, unlike other engines, allows multiple actions and action types under one condition. This is a handy organizational feature that consolidates all tasks that need to be performed in the same scenario in one rule. The consolidation of multiple tasks with one condition also increases the efficiency with which the rules engine evaluates and accomplishes tasks. Increased efficiency translates to performance that the end user can see.

On the rule administration page, review the Actions section located below the summary and conditions area.

- List of actions: actions defined in this rule. Filter input allows you to find action(s) quickly, particularly when many actions are defined.
- Action editor pane: Allows Admin to review and edit the action selected in the list of actions.
- Add New Action button: define a new action for this rule. Six available action types are displayed in the action editor pane.

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Hiding actions

Hiding actions hide an entire field from view to the end user. Use hiding actions to focus the end user's attention, presenting only those fields that are relevant to the solution being configured. A hidden field retains its value.

Message actions

Message actions provide contextual information as the end user works through the configuration. The message is located relative to a designated field in the layout. Four message types are available.

Message actions

Message type	Example	Notes
Info	X6000 doesn't require additional setup for the slot	No effect on configuration experience beyond message
Warning	Temperature specified is below freezing. Please evaluate heavy-duty options.	No effect on configuration experience beyond message
Error	Model 'P' power supply required.	Disables the Quote button so the user cannot move forward until the error state is alleviated.
Custom	Look is determined by user	The user can control whether this has no effect on configuration experience beyond message of if it disables the Quote button so the user cannot move forward until the error state is alleviated.

Inclusion/exclusion actions

Control picklist field options using inclusion and exclusion actions. The two action types allow the administrator to define the set of field options in the most convenient manner possible. Both inclusion and exclusion rules may operate on the same picklist field. For a picklist, the displayed options are determined as follows:

1. Inclusion rules are applied to the set of options defined in the picklist field. If no inclusion rules are defined for the field, all of the picklist options continue past this step. The result of this step is the included set of picklist options.
2. The included set is then evaluated against any exclusion rules that apply. The result is the 'displayed set' of options.

Picklist options that are eliminated as a result of inclusion/exclusion actions can either be removed or disabled from the picklist menu of options visible to the end user.

During runtime, if a picklist option is selected (either by an end user or via determination action), but inclusion/exclusion rules later determine that it is an invalid option, users can specify what happens if currently selected options become excluded. The user may choose to leave the

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selections unchanged, deselect the selections, or to deselect the selections and then select the first valid option instead. The Quote button is disabled until the end user corrects this error state.

Determination actions

A determination action programmatically sets the value of a field. The administrator can choose whether the determined value is soft-set or read-only (forceset).

If an end user changes the value of a field that had been soft-set by a determination rule, CPQ displays a message to the user reminding them of the recommended value. The message does not limit the user from quoting the configuration; it is informational only. If the user reverts the value of the field to the determination-recommended value, the message goes away. The Admin can choose not to display this message.

Product actions

Product actions result in additions to the bill-of-material (BOM). When the BOM Type is set to Sales, a simple product action displays the product to the user as a line in the shopping cart. These sales BOM items are transferred to the Salesforce Quote Line Editor (SFDC QLE) when the configuration is quoted. If the BOM Type is set to Manufacturing, administrators usually do not show these lines to end users in the shopping cart. Manufacturing BOM items, however, are recorded and transferred to the SFDC Configuration Line Item object for communication with ERP and provisioning applications downstream.

Inputs

Input	Notes
Product	When BOM Type = Sales, the value in Product can be a 15-18 digit <SFDC Product2 Id> with format, 01t5f0000001tEIAAI. CPQ pulls product code, description, and price from the SFDC Product2 record, or <SFDC Product2 Product Code>, or External ID depending on environment Product Id field settings. When BOM Type = Manufacturing, four options are available: • <SFDC Product2 Id> • <SFDC Product2 Product Code> • External ID • A valid string composed of letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " !
Quantity	<positive integer>
BOM Type	Sales: display in shopping cart. Quote pushes the item to the SFDC QLE and Configuration Line Items objects. Manufacturing: usually not shown to the end user. Quote pushes the item to the SFDC Configuration Line Items object.

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Inputs (continued)

Input	Notes
	All: All BOM types display in shopping cart. Quote pushes the Sales and Manufacturing items to the Configuration Line Items object and Sales to the SFDC QLE object.
Mandatory	TRUE: end user is unable to delete the item from the shopping cart. FALSE: end user is allowed to delete the item from the shopping cart.

Advanced product actions

If your use case requires multilevel bills of material (BOMs), setting a dynamic quantity, or product attribution beyond that available in simple product actions, an advanced product action is necessary. The advanced product action allows you to write a script that outputs records to the ProductList object.

The following matrix describes available ProductList attributions.

ProductList attributions

ProductList.<param>	ReqOpt	Valid Values	Notes
bomType	R	Sales, Manufacturing, All	In Salesforce-integrated use cases, Manufacturing items are only written to LGK__ConfigurationLineItem__c; Sales items are written to the QLE and LGK__ConfigurationLineItem__c
description	O	<text>	
extended	O	<JSON object> consisting of key : value pairs (see note 1)	If populated, this information transfers to LGK_Extended_Information__c on the Configuration Line Item object in Salesforce, after the user clicks the Quote button
id	R	When SF-integrated use case AND bomType = Sales…	
		Product2.Id, Product2.ProductCode, or External Id	See note 2

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ProductList attributions (continued)

ProductList.<param>	ReqOpt	Valid Values	Notes
		When Headless/eCommerce AND bomType = Sales...	
		ProductId or ProductCode	See note 2
		When SF-integrated AND bomType = Manufacturing...	
		<text>, Product2.Id, Product2.ProductCode, or External Id	Administrators may add items not stored in Product2. If referencing records stored in Product2, note 2 applies
		When Headless/eCommerce AND bomType = Manufacturing...	
		<text>, ProductId or ProductCode	Admins may add items not stored in the Product object. If referencing records stored in Product, note 2 applies
level	O	<integer>	Optional; for Admin reference; does not drive app logic
notes	O	<text>	
orderNumber	O	<integer>	Populate this parameter with numerical values that determine the sequence number of lines. Note: the ProductList object is filled by all product actions that trigger in the the blueprint. Limited to 28 digits.
parentProduct	O	<text>	If populated, must match uniqueIdentifier of parent line. In SF- integrated use cases, the top-most parentProduct is the Configurable Product. Set this value to the Product2.Id or

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ProductList attributions (continued)

ProductList.<param>	ReqOpt	Valid Values	Notes
			Product2.ProductCode of the Configurable Product.
price	O	<float>	Negative and zero allowed. If unassigned, CPQ retrieves the base price from the product master.
qty	O	<float>	Negative and zero allowed. If unassigned, defaults to 1.
selectionType	O	Required, Optional	If left unpopulated, defaults to Required
uniqueIdentifier	R	<unique text>	String that uniquely identifies this line from others in this configuration session (see Unique Identifier attribute section below)
uom	O	<text>	Unit of measure

Note:

1. The ProductList.extended parameter can take a shallow JSON object. Example: `{ "key1": "val1", "key2": "val2" }` Also, the Admin can define the extended key : value pairs for a ProductList record using JavaScript. Examples:`ProductList.extended["key"] = "val";` `ProductList.extended.key = "val";`
2. To simplify the migration of product data between test and production environments, particularly in SF-integrated environments, administrators can request product actions to reference a ProductCode or External Id rather than ProductId. In the CPQ Admin, go to the Utilities menu in the navigation pane, and then click **Settings**. You can then set the Product Id field to Product Code, Partner Id, or External Id. If considering migrating from ProductId to ProductCode after go-live, you must coordinate the setting change with the values referenced in your Product actions and the implicit product actions in any picklist extension data you have defined.

Unique Identifier attribute

CPQ passes the unique identifier of a product in CPQ to the Unique Line Id field on the quote line in Salesforce, allowing users to assign unique IDs to specific Salesforce quote lines.

When using the parentProduct and uniqueIdentifier attributes for product hierarchy, if two child products have the same parent product and Product ID but need to be displayed separately in the BOM, each requires a unique "uniqueIdentifier". This ensures that the UI treats them as unique products when listing them.

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See the following sample script to observe how item hierarchy, differentiating parent items via uniqueIdentifier, bomTypes, and iterating through ProductList records can work: Adv Product Action: Sample Hierarchical BOM.

Related topics

Quote line unique IDs

Transaction Converse

With Transaction Converse, you can use natural language to manage line items in transactions and quotes. Add, update, and delete items quickly and intuitively with conversational commands, even in complex transactions with many line items.

The new Transaction Converse feature in Transaction Manager simplifies and accelerates the way users manage line items in transactions and quotes. Using natural language to interact add, delete, and update line items makes dealing with complex transactions with numerous line items easier.

Key features

- Conversational line item management

  Transaction Converse lets users perform actions such as adding, updating, or deleting line items by typing or speaking their requests. For example, when a user tells the system to "discount laptop by 25%" or "add rear camera to the quote," the feature identifies the relevant items and columns, previews the intended changes, and asks for confirmation before the changes are applied.

- Bulk and targeted actions

  The feature excels at handling bulk changes across many line items, making it particularly valuable for transactions or quotes with hundreds of line items. Instead of manually searching and editing each line, users can issue a single command, and Transaction Converse efficiently processes the request.

- Controls that keep users informed and involved

  Transaction Converse is designed with robust feedback mechanisms. Before any changes are finalized, users can preview which line items and columns are affected, ensuring transparency and control.

- Intelligent prompt handling and clarification

  If a user's request is vague or ambiguous (for example, "take care of the expired licenses"), the feature intelligently prompts for clarification or offers possible interpretations. For example, Transaction Converse might suggest which items would be updated or deleted based on context and fuzzy matching. Transaction Converse uses reinforcement learning with human feedback to adapt to the particular language and needs of each organization. Over time, the model becomes more attuned to the way users phrase requests and to the unique characteristics of their product catalogs, personalizing the feature for each customer and making it increasingly effective.

- Bulk update via file upload

  Users can upload files to quickly add products and update price and quantity.

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- If the uploaded file includes non-configurable products that are not currently in the transaction, the products are added to the transaction with their corresponding prices and quantities. (Configurable products cannot be added at this time.)
- If the uploaded file includes products that are already in the transaction, their prices and quantities are updated to match the file. Both configurable and non-configurable products can be updated in this way.
- Products that are in the transaction but not in the uploaded file are not updated and remain unchanged.

Transaction Converse supports comma-separated value (.csv) files and Excel format (.xlsx) files for upload.

- Easy activation

  Transaction Converse can be enabled on request for customers using Transaction Manager. Interested customers can file a support ticket, and the team will assist with activation and collect feedback to guide future enhancements.

Takeaways

- Transaction Converse enables users to manage line items using natural language, which streamlines add, update, and delete actions.
- The feature is particularly beneficial for large, complex transactions, reducing effort and improving efficiency.
- Built-in preview and feedback mechanisms give users control over changes before they are applied.
- The system adapts and improves over time, learning from user interactions and organizational language.
- Customers can request activation and contribute to the ongoing development of Transaction Converse.

Using Transaction Converse, Transaction Manager customers can transform how they manage transaction data, making the process faster, more intuitive, and increasingly tailored to their needs.

Config Converse

With Config Converse, you can use natural language to create simple or complex configurations.

The new Config Converse feature can make creating new configurations easier and faster by using natural language to leverage artificial intelligence.

Enable Config Converse

To enable Config Converse, follow these steps:

1. Submit a support request to enable AI features for CPQ.

   You'll receive a message confirming that the features have been enabled. When the features are enabled, continue to step 2.

2. In CPQ Admin, click **Utilities**.
3. On the Utilities page, open the settings.

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4. Click to set **Enable Smart Predict**.
5. Click to set **Enable Config Converse**.

When Config Converse has been enabled, follow these steps to enable the feature on a layout that's part of a blueprint:

1. In CPQ Admin, click to open a blueprint.
2. Click to open a layout for editing, and then access the layout properties by clicking the gear icon.
3. In the Layout Properties window, scroll down to the Config Converse section and click to set **Enable Config Converse**.
4. If you want to create a default landing page for Config Converse in this layout, click **Use Landing Layout**.

   When the landing page is enabled, users see a window where they can enter a configuration request using natural language. Depending on the landing page settings, they may also be presented with other options, such as the ability to choose from a menu of configuration scenarios. Users can choose to skip using Config Converse and go to the regular configuration page by clicking **Skip**.

Use Config Converse

To use Config Converse, type a configuration request into the prompt box, and then click **Generate configuration**. Use natural language. For example, you might enter a request like the following:

```
I need to config a workload type of AI/ML using unstructured
data types. Data will be accessed moderately frequently, with a
data size of 20 TB, a growth rate of 20%, and 99.99% uptime. Data
should be retained for two years. Setup will be handled in house.
```

Config Converse searches for relevant fields based on the information in the prompt and updates the fields to generate a configuration that meets the requirements you provide. Depending on the configuration, a bill of materials (BOM) is also created.

As the configuration is generated, a **Configuration AI** pane appears that shows the details of the new configuration. When the initial configuration is complete, the user is prompted to specify any changes to be made. These changes can also be specified using natural language. Users can also modify the configuration without using Config Converse.

Scripts

Learn how scripting extends CPQ beyond simple rules—understand where scripts run, what they return, and how to use them to model advanced configuration logic safely and efficiently.

Scripting enhances CPQ when configuration logic requires more flexibility than simple rules. Administrators can use scripts to calculate complex values, evaluate conditions, or manipulate product data dynamically. Scripts are available in rule conditions, actions, and in blueprint enrichments for initialization, validation, or pricing.

Scripting complements, but does not replace, declarative options. Use standard rules, picklist extensions, and product pickers first. Reserve scripting for specialized scenarios.

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Where can you use scripts

- Rule conditions: Return `true` or `false` to determine whether actions run.
- Rule actions: Set field values, hide or display elements, or build product lists dynamically.
- Blueprint enrichments: Initialize data, call external systems, or enrich configurations during "On Configure" or "Reconfigure" events.

Each script type requires a specific return value to ensure predictable results.

Expected return values

Expected return values

Script Type	Return Format	Example
Advanced condition	Boolean	`true` or `false`
Advanced hiding	String	`"field_to_hide"`
Field determination	Depends on field type	Number → `5`; Text → `"Red"`; Multi-select → `["Option1", "Option2"]`
Inclusion and exclusion	Array	`["OptionA", "OptionB"]`
Product action	ProductList object	`ProductList.add({id:"123", qty:2})`
Enrichment	Updated configuration object	`return cfgRequest;`

Configuration objects

Scripts interact with the following configuration objects:

- `cfg`: A read-only snapshot of current field values used by rules.
- `cfgRequest`: A writable object available in Enrichments; use `.set("value", x)` to modify fields.
- `ProductList`: Used to add or modify items in the bill of materials (BOM).

You can reference properties using either dot or bracket notation (`cfgRequest.fieldName` or `cfgRequest["fieldName"]`).

Working with external data

Use external data to enhance configurations dynamically:

- Managed tables: Query data with `lookup()` to map results into fields or products.
- External connections: Make approved calls (for example, SOQL queries to Salesforce) to populate sets or field values in Enrichments.

These techniques reduce hard-coded logic and centralize data management.

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Debugging and testing

The scripting interface includes built-in tools:

- Code suggestions: Autocomplete for functions, variables, and fields.
- Help panel: Lists all supported functions and parameters with examples.
- Debugger: Accepts JSON input and displays output and `console.log()` results. Save common test inputs as comments for reuse.

General guidelines

- Prefer declarative rules when possible.
- Keep scripts concise and focused on a single task.
- Always return the expected data type.
- Use clear variable names and comments.
- Avoid nested or long conditional logic—use tables or external connections instead.

Related topics

Create scripts

IP allow-listing update

To better support our growing needs and increase capacity, we have expanded the pool of outbound addresses used for requests from CPQ.

Important: This change is relevant only if you use allow-listing to control which external systems can communicate with your integration servers. If you rely on allow-listing, it is important to update your configuration to include the new addresses listed below. This will help ensure that your integration calls from CPQ continue to function smoothly and without interruption.

Inbound production (prod01.logik.io)

- 35.224.151.71
- 34.83.141.224

Outbound production (prod01.logik.io)

- 34.72.98.104
- 104.198.22.182
- 35.238.218.128
- 35.233.220.207
- 35.222.102.215(new)

Inbound non-production (test.logik.io)

Inbound:34.135.130.9

Oubound non-production (test.logik.io)

- 34.68.236.64
- 34.30.162.13

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- 35.226.98.108
- 34.121.127.94(new)
- 34.29.158.138(new)

Aug 1, 2025 Test Sector Update

While performing testing for a large data migration, we had a large increase in outbound IPs. These are dynamically assigned currently, but on Friday, Aug 22, 2025, we changed to a much smaller static list in Test.

The following are the new additions:

- 34.10.0.135
- 34.10.242.143
- 34.122.88.68
- 34.123.63.250
- 34.134.181.254
- 34.135.82.144
- 34.136.119.129
- 34.171.226.19
- 34.173.198.250
- 34.28.193.204
- 34.28.74.81
- 34.29.158.138
- 34.44.124.55
- 34.44.76.215
- 34.46.254.151
- 34.55.149.73
- 34.55.173.230
- 34.55.91.85
- 34.56.58.123
- 34.58.152.142
- 34.58.72.106
- 34.60.204.253
- 34.63.178.255
- 34.63.29.27
- 34.66.102.79
- 34.66.181.238
- 34.66.55.102
- 34.67.116.134
- 34.72.83.158
- 34.9.93.234

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- 35.188.84.55
- 35.223.33.177
- 35.226.103.168
- 35.232.208.89
- 35.238.247.112
- 35.239.113.70

The following are the IPs recently introduced:

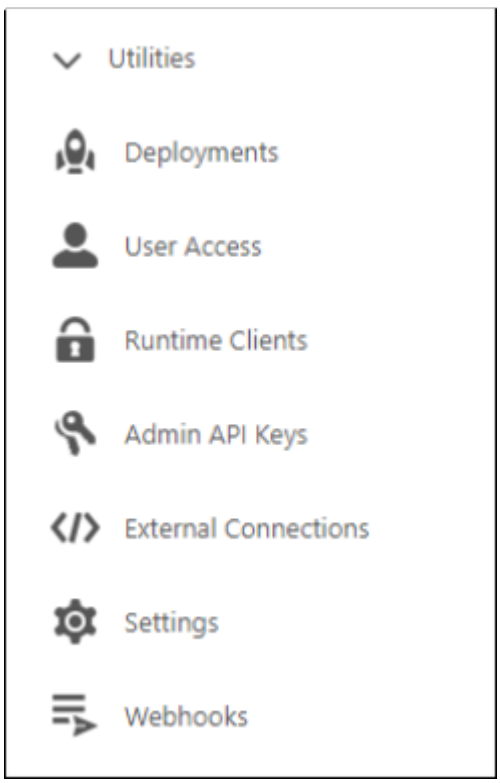
- 35.226.81.113
- 35.238.9.191
- 34.27.254.59
- 35.222.207.50
- 34.29.115.14

Utilities

Access utilities including deployments, user access, and admin API keys to manage and customize CPQ.

CPQ has many features and settings outside the standard Admin pages of Fields, Blueprints, Rules, etc.

Any features that are not necessarily in common use when creating and editing a configuration can be found in the “Utilities” menu.



More information about the items in the menu can be found in the following topics:

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- Viewing blueprint deployments
- Using CPQ user access management
- Set up a runtime client
- Intro to admin API keys
- Using external connections with OAuth support
- Setting up configurable products
- CPQ: User Access Control
- Webhooks

Cosmo Admin Assist

Cosmo Admin Assist delivers conversational, AI-powered guidance to help admins quickly find answers and general guidelines. Using Retrieval-Augmented Generation (RAG) and ServiceNow knowledge articles, it provides context-aware, actionable support directly in the CPQ Admin interface.

Admin Assist significantly reduces the time it takes for product administrators (admins) to find answers about features and general guidelines. Admin Assist is especially useful for scenario-based questions, providing guidance you can immediately act upon and pointing to the most relevant articles for more information.

Admin Assist helps admins find answers and get guidance by using a Retrieval-Augmented Generation (RAG) approach. By leveraging ServiceNow's support and knowledge articles, Admin Assist lets admins ask both specific and scenario-based questions directly in the CPQ Admin interface. This feature streamlines the processes of learning about CPQ's capabilities and troubleshooting issues, reducing the time needed to find relevant information.

Key features

- Conversational support: Admin Assist lets you ask questions in natural language, whether you're seeking information about a feature or exploring scenario-based use cases.
- Context-aware guidance: Admin Assist uses the context of your conversation to provide more detailed and relevant answers, tailoring suggestions to your specific needs.
- Knowledge article integration: Answers are drawn directly from ServiceNow's support and knowledge articles, ensuring that you receive accurate and up-to-date information.
- Decision support: To help you decide between complex alternatives, such as deciding between managed tables and external connections, Admin Assist outlines key considerations such as performance, data volatility, and source limitations.
- Direct support links: If Admin Assist can't fully resolve your query, you can reach out to ServiceNow's support team by following direct links in the interface.

User feedback

Admin Assist continues to improve based on user feedback on its responses. Your input is essential for making the tool even more effective. Your insights help us enhance the feature and improve our models to serve you better.

Related topics

Cosmo SmartPredict

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Cosmo SmartPredict

Cosmo SmartPredict delivers AI-powered, in-context recommendations during configuration, helping users make informed decisions. It learns from live or uploaded data to generate accurate suggestions, improving configuration speed and consistency across blueprints. For clarity, suggestions are labeled Good, Better, or Best.

Cosmo SmartPredict provides users with fast, in-context, predictive recommendations as they complete their configurations. SmartPredict can be trained either on existing configurations that are stored in the CPQ environment or on data that is uploaded via a CSV file.

Cosmo SmartPredict leverages a strong underlying AI model, but depends on the quantity and the quality of the data that it is provided for training.

Setting up Cosmo SmartPredict

Access to Cosmo SmartPredict is restricted. To have SmartPredict provisioned in your CPQ environment, contact support. Once provisioned, SmartPredict can be enabled on individual blueprints selectively. To enable SmartPredict on a blueprint, navigate to the blueprint, click the new Smart Predict tile in the blueprint, and click the toggle button on the SmartPredict screen.

To create a SmartPredict model, click **Create** to start defining the model parameters. At a minimum, a model must have a name and a variable name. Several additional model settings determine what data the model should use for training.

- Training with live data

  If you choose to use live data to train your model, existing and future configurations in CPQ that use this blueprint will serve as inputs to refine the model for the fields in the blueprint. You can further refine the training data by defining a start date and by specifying inclusion or exclusion of fields. You can create additional filters based on field values. Any filtering of the training data is optional. If all other parameters are left blank, the model will be trained on all existing configurations of the blueprint. Once finished setting parameters, click **Save & Train** to begin training the model.

  Optional filtering parameters include:

  - Start date: Choose a start date (inclusive) of configurations to train on. If blank, configurations will not be filtered by created date.
  - Fields: Individual fields on the blueprint can be selected to be either included or excluded.
  - Additional filters: To filter the training configuration data down to only those that match the filter criteria, you can select individual fields and enter equals criteria.

- Training with data from a CSV file

  Models can also be trained with data from external sources by formatting and uploading the data as a CSV file. In CSV data, the first row must be the variable names of the fields. You can download a sample CSV file with all the fields on the blueprint from the CSV upload page.

  When formatting the CSV file, you can choose to provide only a subset of the available fields on the blueprint.

  - Fields: The column header should be the variable name of the field that the values are provided for. Only fields that are of a type that can be predicted are used in training: Boolean, number, picklist, sets, and product pickers. Text fields are not predicted and are not used in training.
  - Multiselect picklists: Provide multiple values of a picklist using commas with no spaces.

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- Sets and product pickers: The formatting for set and product picker fields is `SetVariableName_index_fieldVariableName` or `ProductPickerVariableName_index_fieldVariableName`, using: 0, 1, or 2 for indexes, and the variable name for the fields, sets, or product pickers.

Once a model has been saved, it is queued for training based on the uploaded data or the filtered live data. Training is variable based on the amount of data that is supplied, but typically takes a few hours, or at most, a day. Once the model has completed training, it can be activated and deployed.

Models are retrained if the filters, fields, or start date are changed when the model is using live data. If new CSV data is uploaded, the model is retrained. Models using live data continue to be trained on live data periodically. When the model is being automatically trained with new live data, there is no need to redeploy the blueprint to have it use the updated model.

Using Cosmo SmartPredict

Once a model has been trained for a blueprint, it can be activated. Multiple SmartPredict models can be trained, but only one model can be active on a blueprint at any time. If a model is changed or activated for a blueprint, the blueprint must be redeployed to use the new model.

For an end user to trigger the recommendations from Cosmo SmartPredict, approximately 5% of the fields must be filled in with a value.

Predicted field types include numbers, picklists, Boolean values, sets (including number, picklist, and Boolean fields), product pickers, and subfields of all these types. Text fields are not predicted.

Three types of recommendations are provided to the user: Good, Better, and Best. These recommendations correspond to the model predictions based on the training data. As always, the quality of the data heavily influences the quality of the predictions.

Recommendations can change based on the fields that are filled out. Fields that are user-edited will not have a prediction.

If sets or product pickers are included in the predictions, all the fields in a set or product picker row have a predicted value.

SmartPredict V1 and V2

Two models of SmartPredict are available: V1 and V2. While the V1 model remains available, V2 has superior capabilities.

The V2 model introduces several key enhancements and changes compared to its predecessor:

- Enhanced prediction confidence: V2 is engineered to provide higher-confidence predictions, typically offering a single, highly probable recommendation to guide your decisions.
- Broader field support: Prediction capabilities now extend to include sets and product picker fields, significantly widening its applicability across your configurations.
- Expanded prediction options: Unlike V1, V2 is not restricted to predicting three indexes or options for sets and product pickers, allowing for more comprehensive and flexible suggestions.
- Training data accessibility: Administrators can download the CSV training data used for any scenario from in the platform, offering greater transparency and control.

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However, V2 model training times are significantly longer. For data sets of a few thousand rows, training typically ranges from 30 to 60 minutes. Furthermore, the model requires activation via the scenario list page. Activation consistently takes from 20 to 40 minutes, regardless of the training data size.

The V1 model remains operational, providing a smooth transition period as you consider whether to adopt V2.

Your input on the accuracy, performance, and overall experience with the V2 model is crucial for our continuous improvement. We are eager to hear about your experiences and celebrate the successes of customers leveraging AI in configuration. Please share your feedback with our support or product teams.

Notes and recommendations

Our AI model infrastructure requires substantial resources. To effectively manage capacity, models that have not been accessed for a prolonged period or exhibit very low usage may be automatically deactivated. Should your model be deactivated, you can easily reactivate it from the scenario list page. Allow approximately 20-40 minutes for the reactivation process to complete before predictions become available again.

In general, about 400 configurations are required to have a robust data set on which to train the model.

As with any AI model, the quality of the training data is the main factor in the quality of the predictions.

Transaction Manager

Set up, govern, and troubleshoot Transaction Manager so sales teams can capture non-configuration commercial data—such as contacts, addresses, quotes, discounts, and presentation options—alongside CPQ configuration outcomes.

As a transaction administrator, you can

- Access stages, associated fields, related rules, rule groups, events, layouts, views, and personas.
- Decide the sales workflow stages you need and what must be true to enter each stage (entry criteria).
- Identify transaction-level (header) fields and transaction-line fields you'll capture.
- Enable these optional pilots:
  - Transaction Converse for natural-language line-item operations
  - Cosmo SmartPredict for in-context predictive recommendations

How Transaction Manager is organized

In Admin, choose the transaction context in the top navigation. The left menu exposes Transaction Manager admin areas (stages, associated fields, related rules, rule groups, events, layouts, views, and personas). The main work area changes based on the entity you're editing.

Core building blocks and relationships include:

- Stages that structure the sales process. Each stage may have entry criteria and can invoke rule groups and events. A transaction is in one stage at a time.
- Fields that store data. Use transaction-level (header) fields for deal metadata and line-level fields for the grid of items and pricing.

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- Rules that evaluate conditions and perform actions such as hiding, messages, including or excluding picklist values, and setting or clearing values. Use rule groups to bundle rules and attach them to stages and events.
- Events such as buttons and API triggers that can run rule groups and drive stage transitions.
- Layouts and UI effects that define the buyside experience.
- Views and personas that tailor the layouts and fields that appear for a particular audience or stage.

> **Note:** Favor many simple, non-scripted rules; the rules engine can evaluate tens of thousands quickly and automatically optimizes their order. To keep the UI responsive, avoid scripting where you can.

Related topics

Installing the Salesforce Transaction Manager Integration Package extension

Blueprints, fields, rules, layouts, and BOMs

Learn how the core building blocks of ServiceNow CPQ—blueprints, fields, rules, layouts, and bills of material (BOMs)—work together to power configuration and transaction experiences.

Blueprints

Blueprints define the configuration model for a product or offering. They include all the attributes, rules, and user experiences required to guide users through selection and configuration.

- Each blueprint represents a distinct configurator.
- Blueprints connect directly to transaction workflows through Transaction Manager.
- A blueprint includes fields, rules, layouts, and optional BOM definitions.

Fields

Fields are attributes that capture data during configuration and transaction workflows.

- Transaction-level fields capture header data such as customer details, dates, or totals.
- Line-level fields appear in the transaction grid for products, pricing, and discounts.
- Field types include text, number, Boolean, picklist, and date/time.
- Some fields are system-provided. You can also create custom fields for your sales process.

Rules

Rules automate logic and calculations. Each rule includes:

- Conditions that define when the rule should run.
- Actions that define what happens when conditions are met (set values, hide fields, filter picklist options, display messages).
- Rules that can run at transaction level or line level.

You can group rules into rule groups and assign them to stages or events.

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Layouts

Layouts define the user interface for the buyside experience. Layouts let you streamline the UI for different audiences while maintaining consistent logic. They specify:

- How transaction and line-level fields appear on the page
- Which fields or sections are visible for each stage or persona
- UI effects, such as messages or highlights triggered by rules

BOMs

Bills of material (BOMs) translate configured data into structured outputs that integrate with downstream systems.

- Sales BOMs: Line items that pass into Salesforce for quoting.
- Manufacturing or custom BOMs: Detailed component structures exported to ERP or fulfillment systems.
- BOMs ensure that attribute-based configuration outputs map correctly into orderable and manufacturable items.

How components interact

- Blueprints bring together fields, rules, layouts, and BOM definitions into a complete model.
- Fields collect the data users provide.
- Rules validate input, enforce logic, and calculate outputs.
- Layouts deliver the tailored UI experience to users.
- BOMs package the result into line items for quoting and manufacturing.

Installing the Salesforce Transaction Manager Integration Package extension

To use Transaction Manager with Salesforce, you must first follow these steps to install and configure the Salesforce Transaction Manager Integration Package Extension.

Prerequisites

This guide assumes that your CPQ environment is integrated with a Salesforce org, and that Transaction Manager is enabled. If your Salesforce org has no CPQ packages installed, install version 2.7 or later of the CPQ Managed Package. For instructions, see Installation and setup guide for environments linked to Salesforce orgs.

Note: CPQ Transaction Manager has no dependencies on Salesforce CPQ. You can ignore any steps or references specific to Salesforce CPQ.

Submit a support ticket requesting Transaction Manager be turned on in your CPQ environment.

About the CPQ Transaction Manager extension

The CPQ Transaction Manager Extension is a package of components that Salesforce administrators install on their Salesforce environment to facilitate the integration between Salesforce and CPQ Transaction Manager.

Contact ServiceNow customer support for information on the latest version and how to access the managed package for installation.

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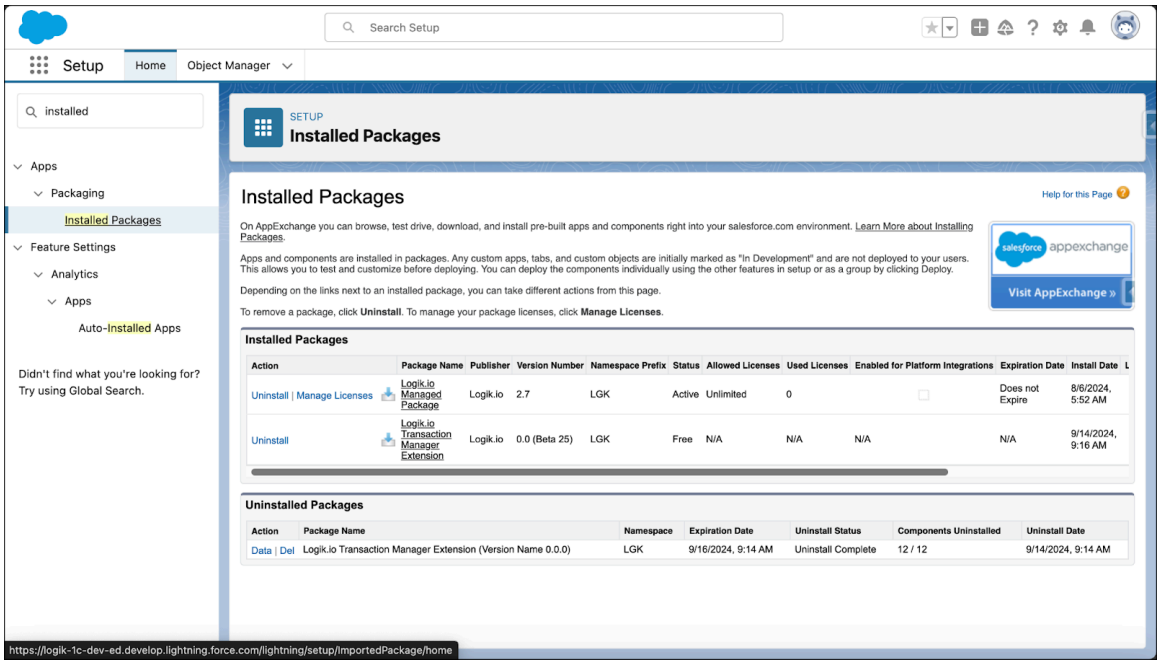
Admins can install the package for admins only, for all users, or for specific profiles. The package includes permission sets for Transaction Manager that can be assigned to individuals or replicated on profiles. To view the permissions sets, in Setup, go to **Users**, and then see the **Logik.ai Full Access** option in **Permission Sets**.

After it is installed, you can view the version of the package in the **Installed Packages** section of Salesforce Setup.



Salesforce: Enable custom address fields

The Salesforce environment must have Custom Address Fields enabled. If this feature is not enabled, see this article for more information: Enable Custom Address Fields

Salesforce: Allow security exceptions for CPQ

Add trusted URLs:

1. From Salesforce Setup Home, go to **Settings** > **Security** > **Trusted URLs**. Create a new trusted URL.
2. Provide an API name.
3. Enter the URL of the CPQ environment, as shown below.

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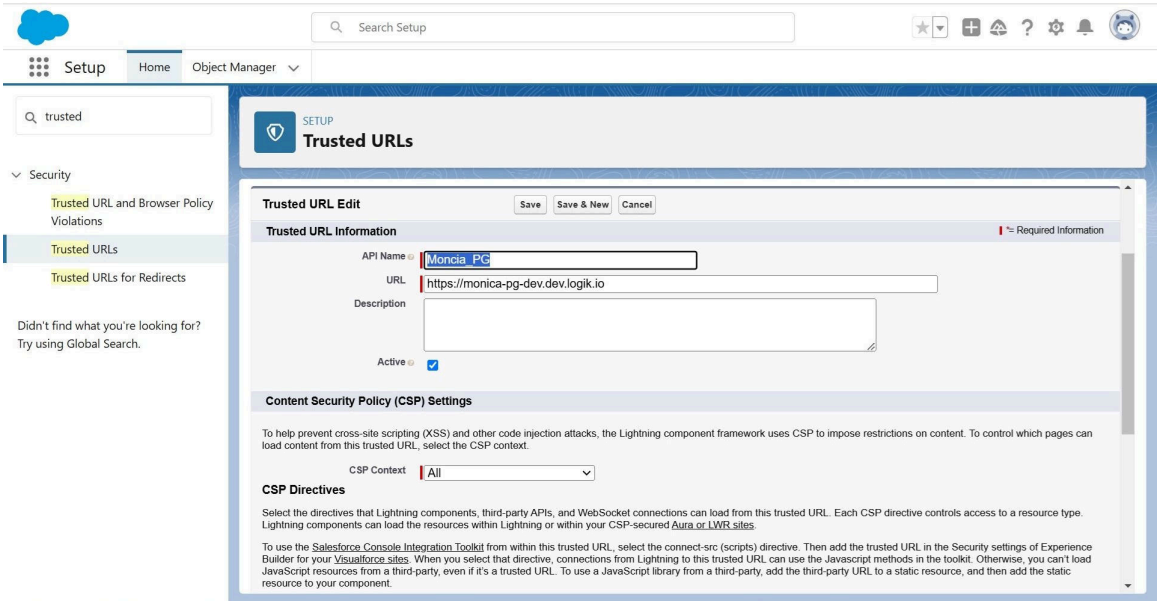
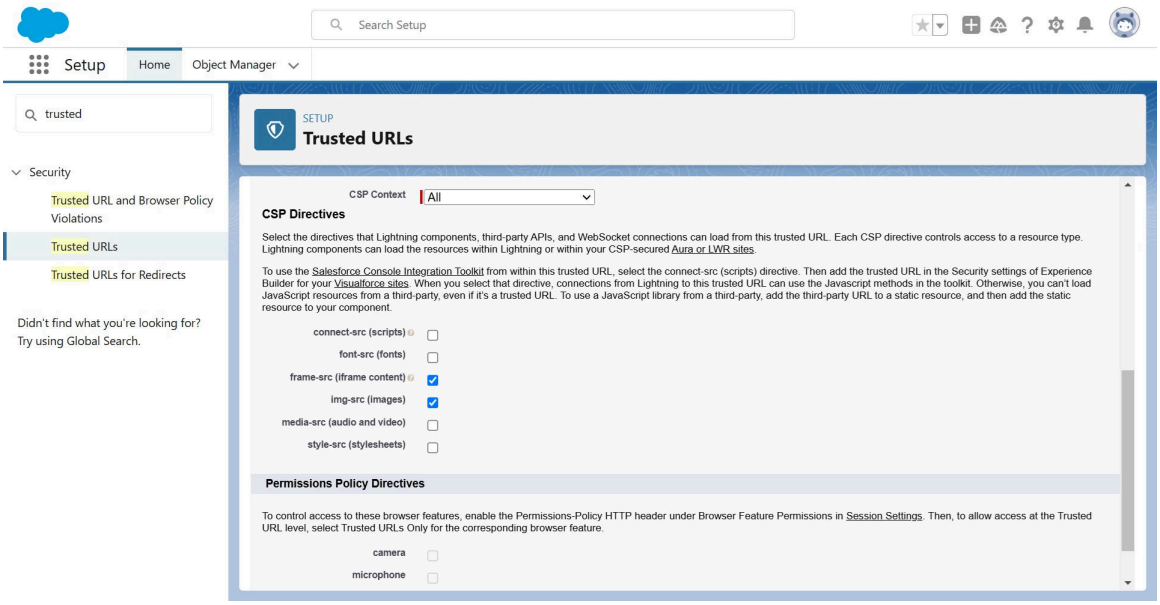


4. Under CSP Directives, make sure that at least **frame-src (iframe content)** is enabled, and click **Save**.



Configure remote site settings:

1. From Salesforce Setup Home, go to **Settings** > **Security** > **Remote Site Settings**. Create a new remote site.
2. Provide a name.

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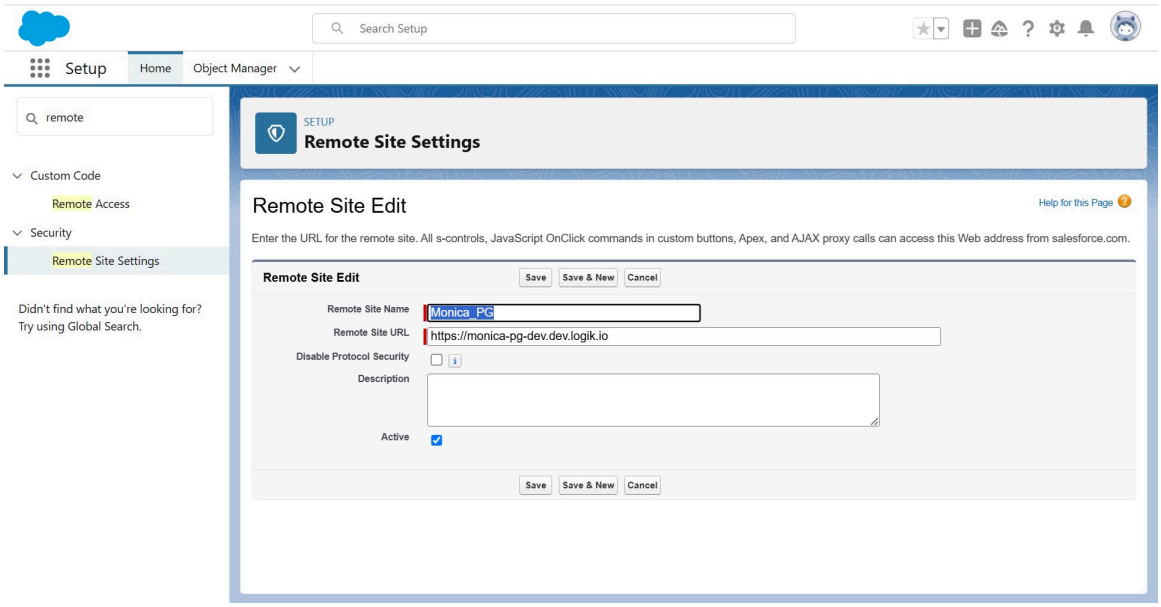
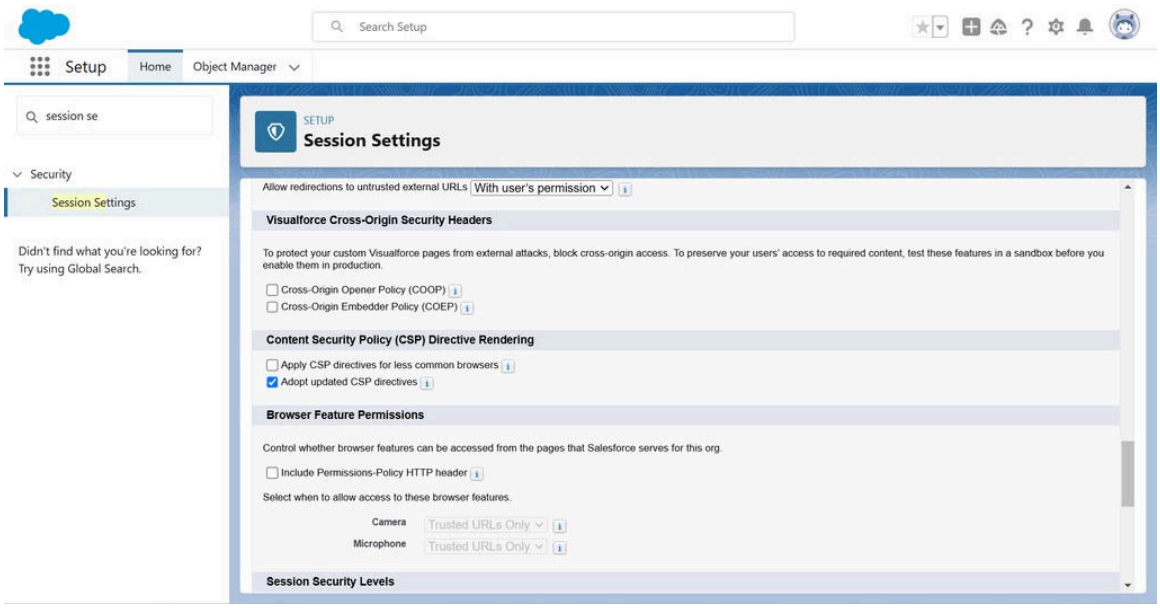
3. Enter the URL of the CPQ environment as shown in image below, and click **Save**.



Optionally, allow microphone access for Cosmo Converse (currently in beta). Cosmo Converse allows the user to communicate via voice with Transaction Manager. By default, this feature is not enabled. To use Cosmo Converse, submit a support ticket that describes your use case. To prepare for Cosmo Converse, update Salesforce settings to allow microphone access.

1. From Setup Home, go to **Settings** > **Security** > **Session Settings**.
2. Under **Browser Feature Permissions**, make sure that the check box for **Include Permissions-Policy HTTP header** is disabled.
3. If necessary, click **Save**.



CPQ: Set up the runtime client token

The CPQ runtime client token facilitates authentication for communications from Salesforce to CPQ. For steps to create a runtime client token in CPQ, see Set up a runtime client. For this Transaction Manager use case, please be sure to enable permissions on this runtime client for

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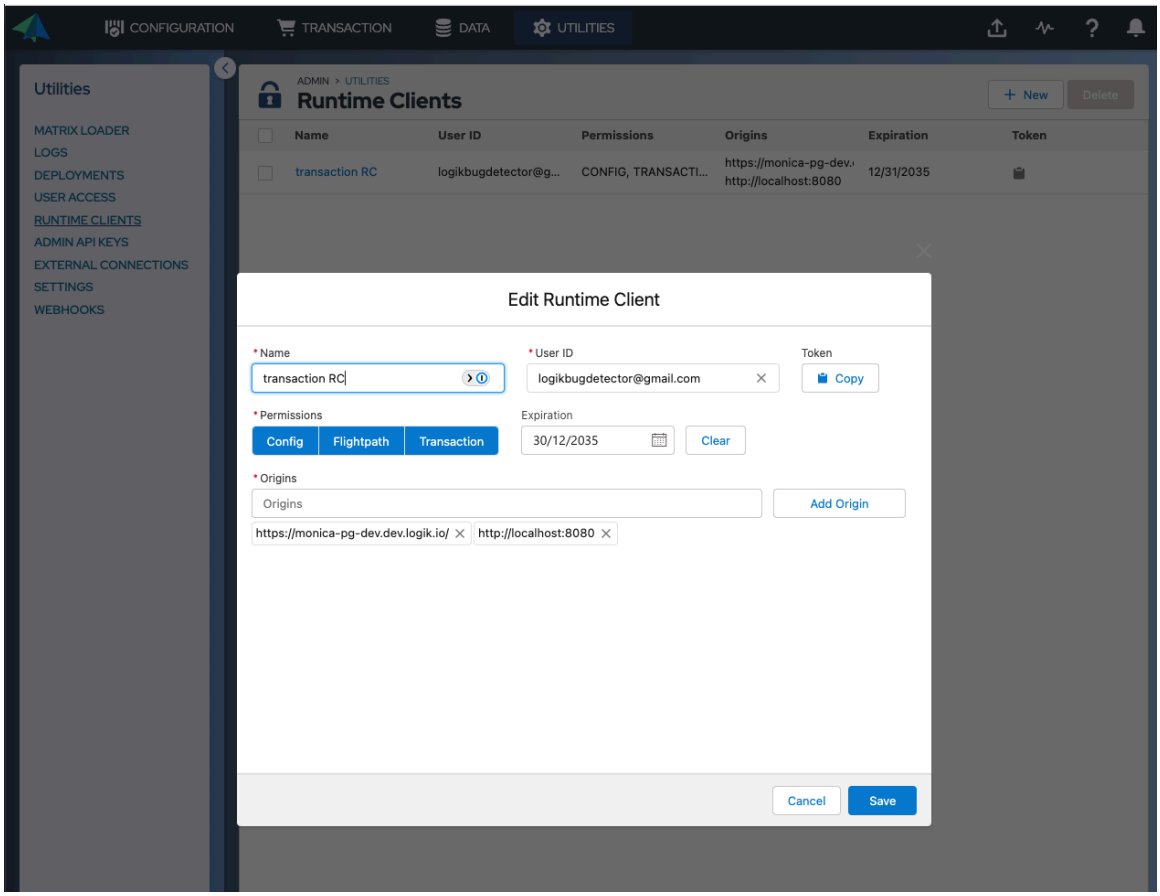
TRANSACTION, and add a valid User ID that is recognized by the corresponding Salesforce environment.

Note that in CPQ Admin, the runtime client token must be updated to include TRANSACTION in its permissions and itself as an origin. (For example, the runtime client token for `https://test-txn.test02.logik.io` must have an origin of `https://test-txn.test02.logik.io`.) Also, when a runtime client token includes TRANSACTION, a user must be included. Make sure that the user has permission to perform the Create Transaction event.



When you have set up the runtime client token, copy it to your local clipboard for use in the next procedure.

Install the CPQ Transaction Runtime Token in Salesforce

1. From the Salesforce App Launcher, search for and open **Logik.io Admin Custom Settings**.
2. Press the **Set** button next to the **Runtime Client Token** field to enable it.
3. Paste the token from CPQ into the editable field, and click **Save**.

Note: The runtime client token isn't displayed on the Admin Custom Settings page after it's been saved.

Salesforce: Update the Opportunity layout to Open Transaction Manager

1. In Salesforce, click the gear icon in the top right corner.
2. Navigate to **Setup** > **Object Manager** > **Opportunity** > **Page Layouts**.
3. Select the page layout to edit. (If you have multiple layouts, choose the one associated with the relevant record type or user profiles.)

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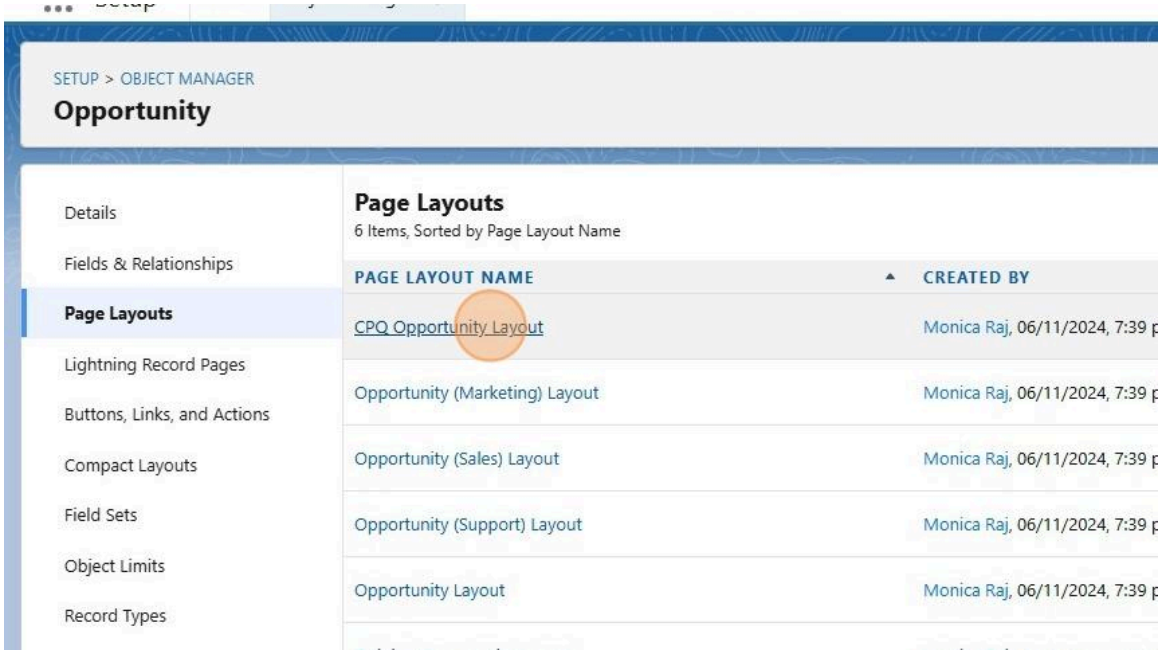
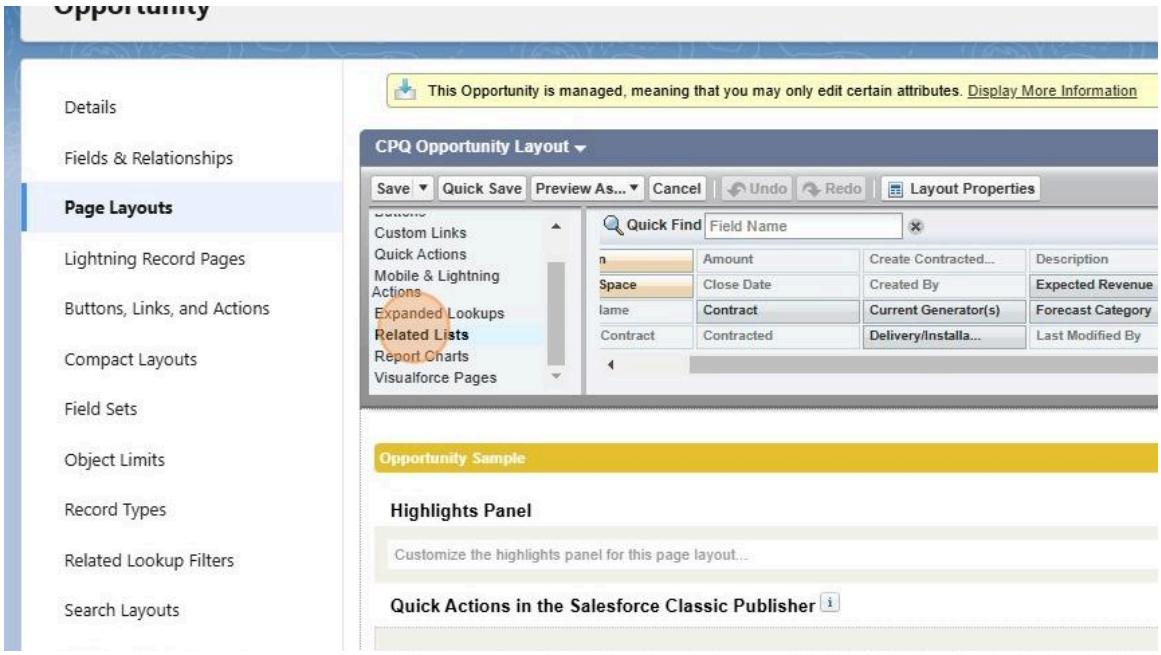


4. Scroll down in the layout editor until you see the **Related Lists** section.



5. Drag the Transactions object from the list of available related lists on the top palette to the desired position in the **Related Lists** section.

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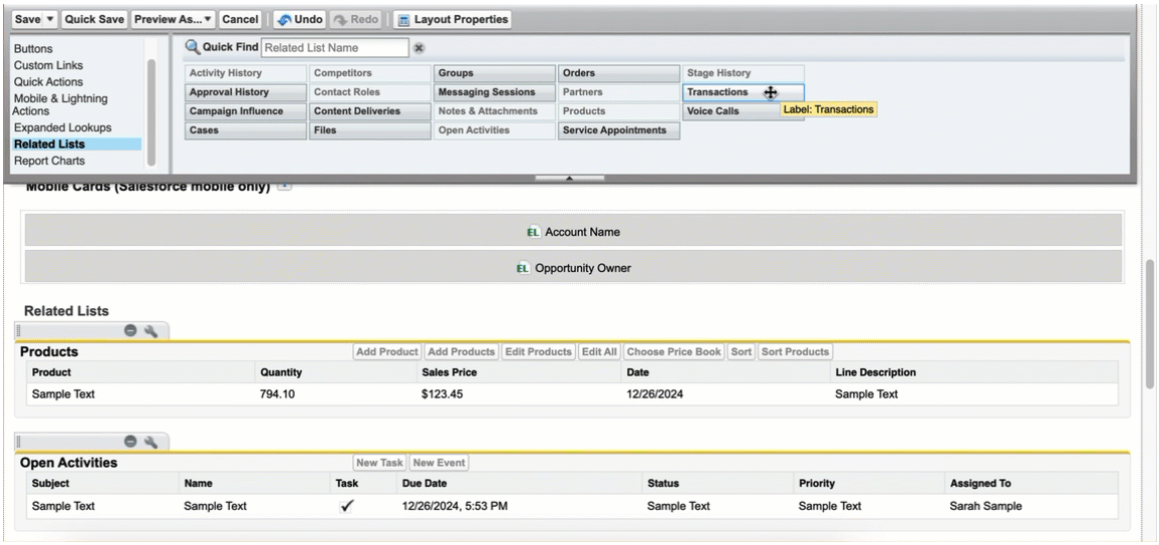
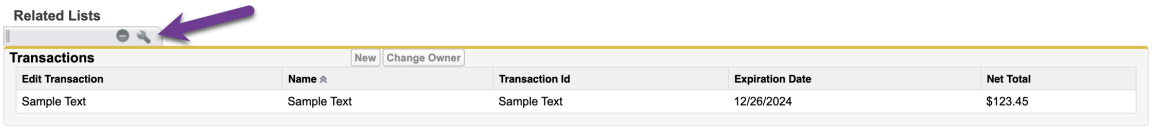
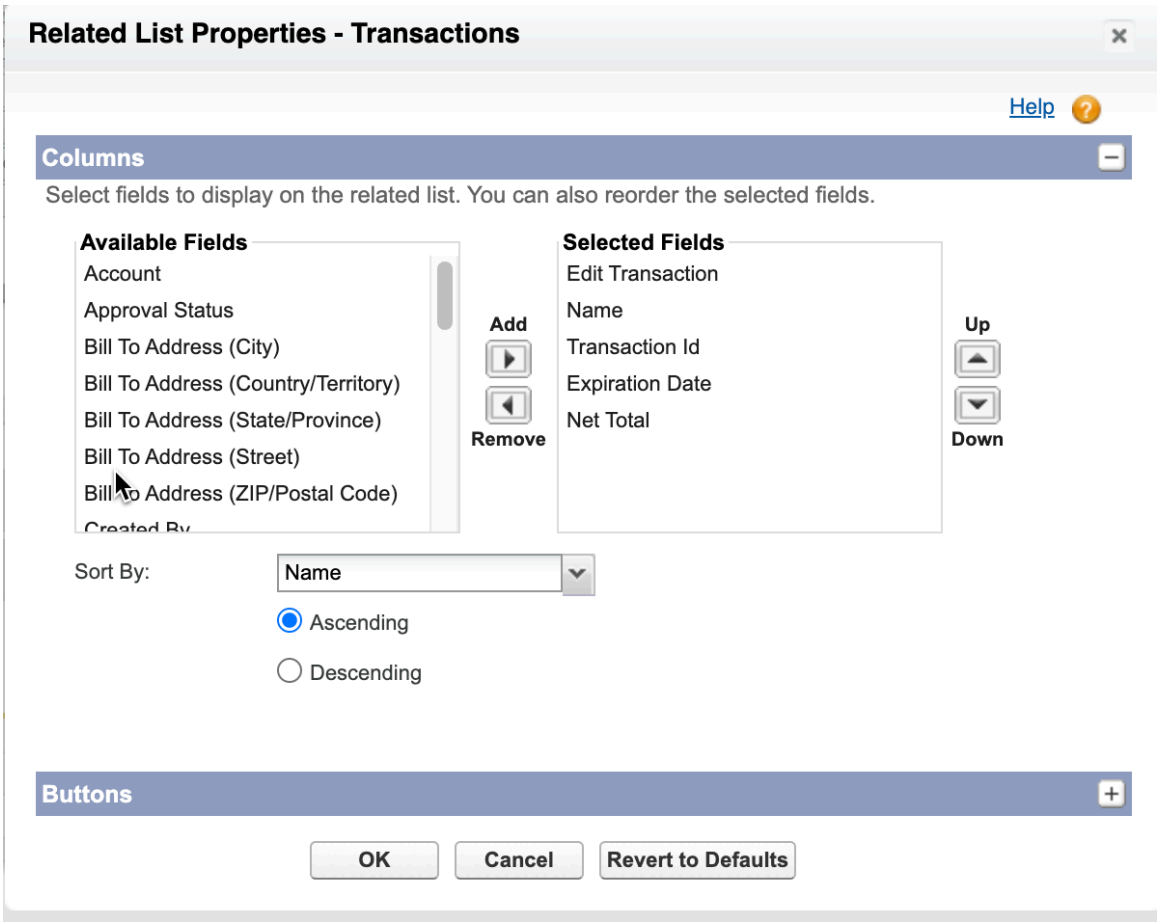


6. Click the wrench icon for the Transaction object to open the properties for the related list.



7. In the **Selected Fields** section, select the **Edit Transaction** field from the **Available Fields** column. Click **Add** to move it to the **Selected Fields** column. Rearrange the fields as needed, and click **OK** to save the changes. After making the changes, click **Save** in the top left corner.



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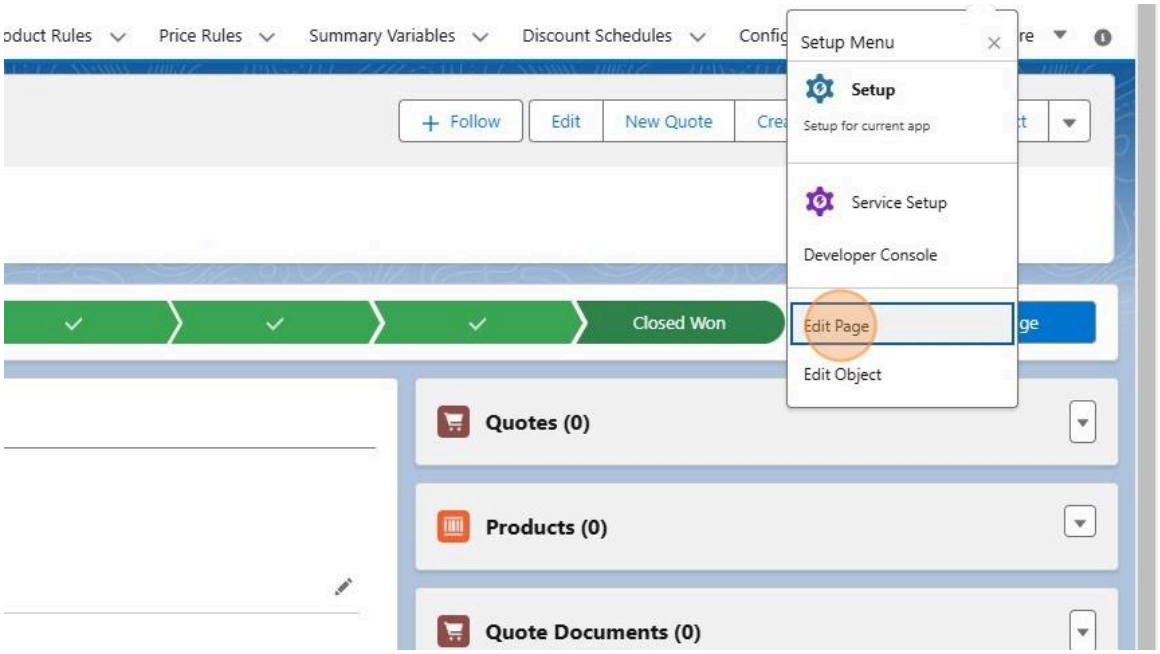
8. Test the updated layout.
    - As an end user (on the buyside of Salesforce), navigate to an Opportunity record.
    - Ensure that the transaction related list appears on the page and that the **Edit Transaction** link is visible and functional.

Troubleshooting: If the Transaction button is missing

If the transaction button is missing from the buyside opportunity detail page, follow these steps.

1. In the top right corner of the page, click the gear icon, and then click **Edit Page**. This opens the Lightning App Builder for the Opportunity record page.



2. Select the Related Lists component of the page. In the **Assign Page Layouts** section, find the name of the page layout currently assigned. (In the image, the correct layout is indicated with the word "(previewed).")

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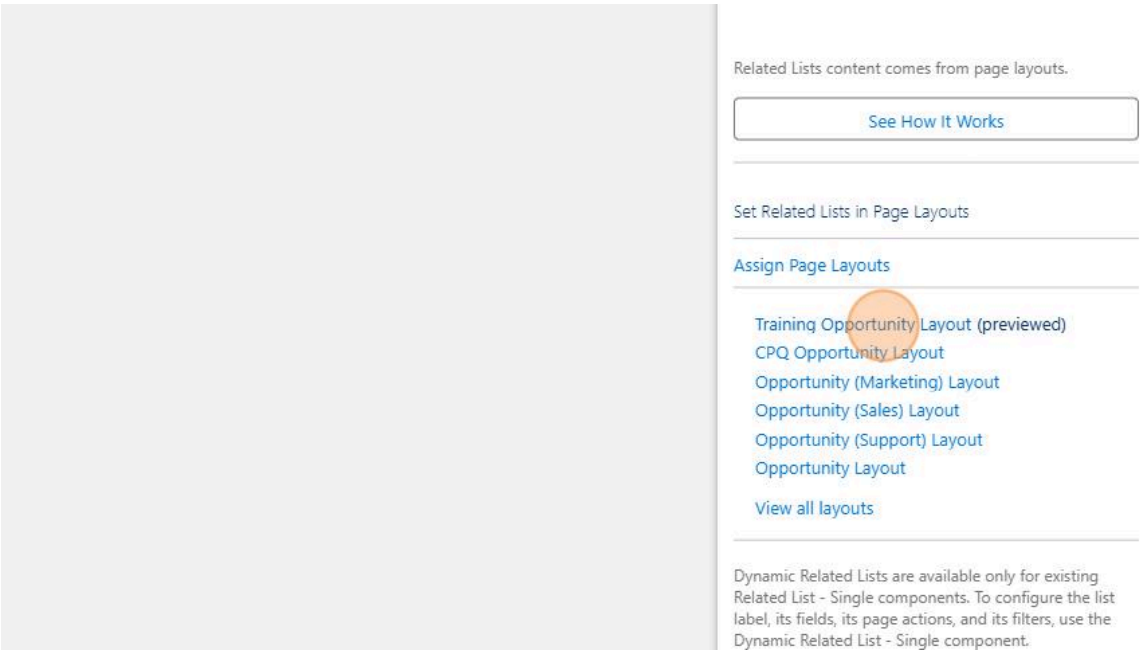

3. Click the previewed layout and repeat steps 4 through 7 in the "Salesforce: Update the Opportunity layout to Open Transaction Manager" section (above). Next, on the buyside, navigate to an opportunity record. Check the **Related Lists** section to confirm that the transaction object appears. Click the arrow, and create a new transaction to validate that the **Edit Transaction (EditLink__c)** field is available.

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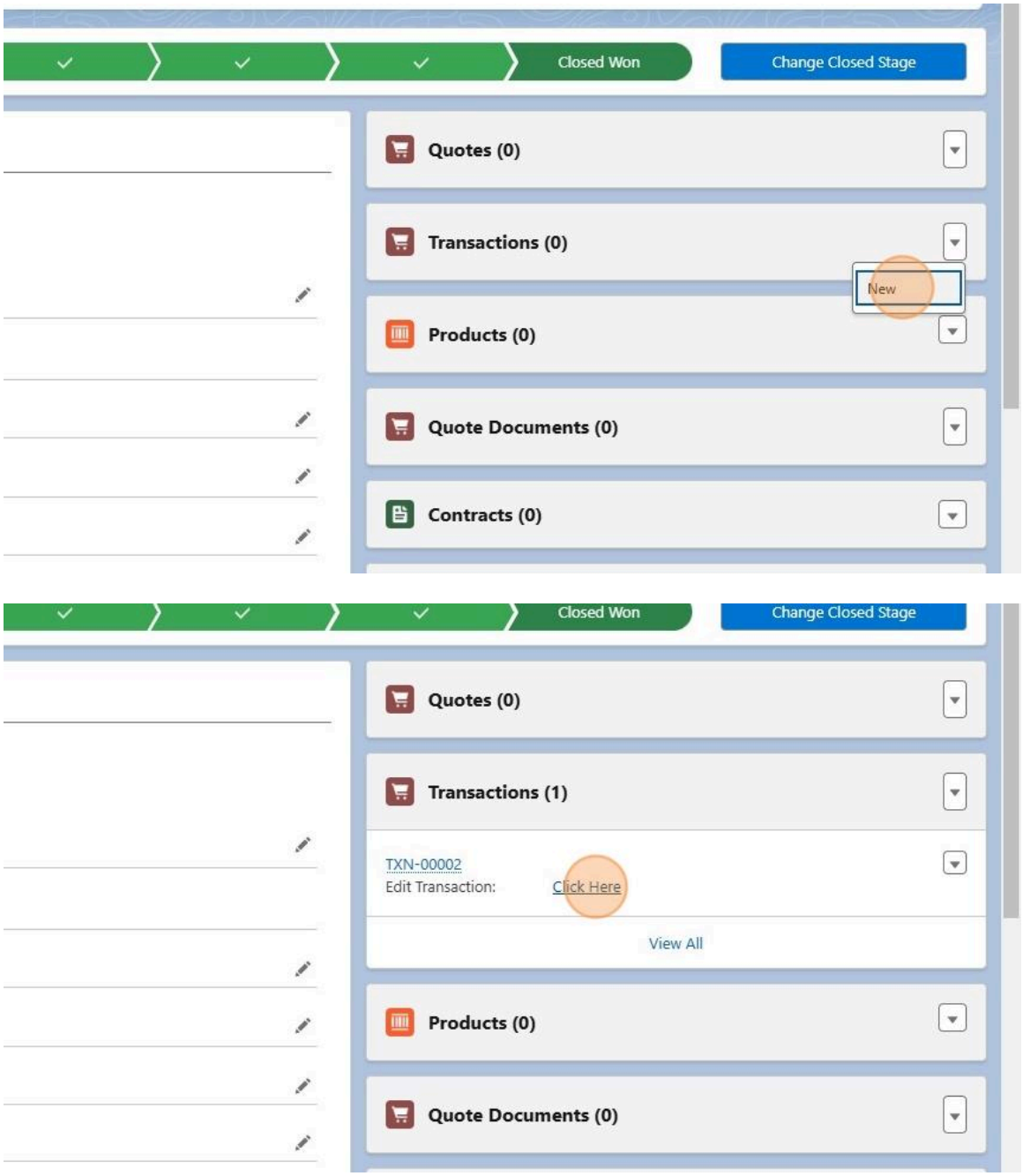

Salesforce: Set up custom field mappings

When a new CPQ transaction record is initiated in CPQ, it can be helpful to transfer essential data from the Salesforce transaction record. This section sets up field mappings that copy (or "twin") information from a field in Salesforce to a field in CPQ, or visa versa, during the transaction creation flow. As an example, it is common for the administrator to twin the value held in *`LGK__OpportunityId__c`* to the corresponding CPQ transaction field, *`txn.opportunity.id`*.

1. In Salesforce, go to Setup.
2. In the Quick Find bar, search for `Custom Metadata Types`.
3. In the search results, under Custom Code, click **Custom Metadata**.

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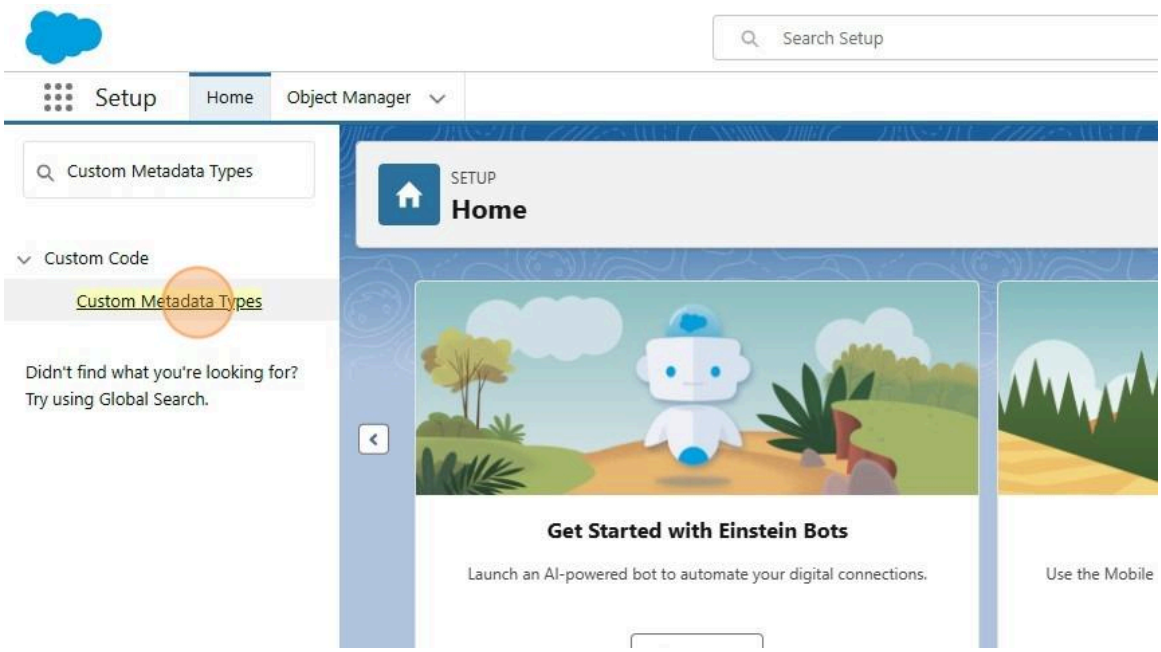
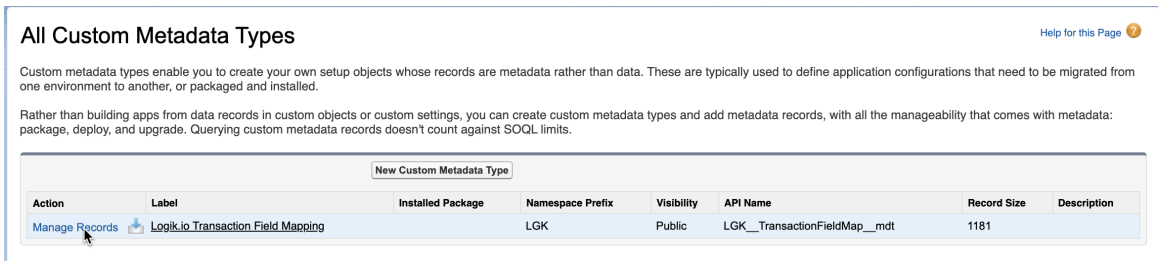


4. To access the existing field mappings, locate **Logik.io Transaction Field Mapping** in the list of custom metadata types, and click the **Manage Records** link next to it.



5. Click **New**, fill out the required details, and then click **Save**.

   Source fields:

   - Environment: Choose the source of the field value:
     - Select **Salesforce** for fields originating in Salesforce.
     - Select **Logik** for fields originating in CPQ.
   - Object: Enter `Transaction`.
   - Field: Specify the field name.

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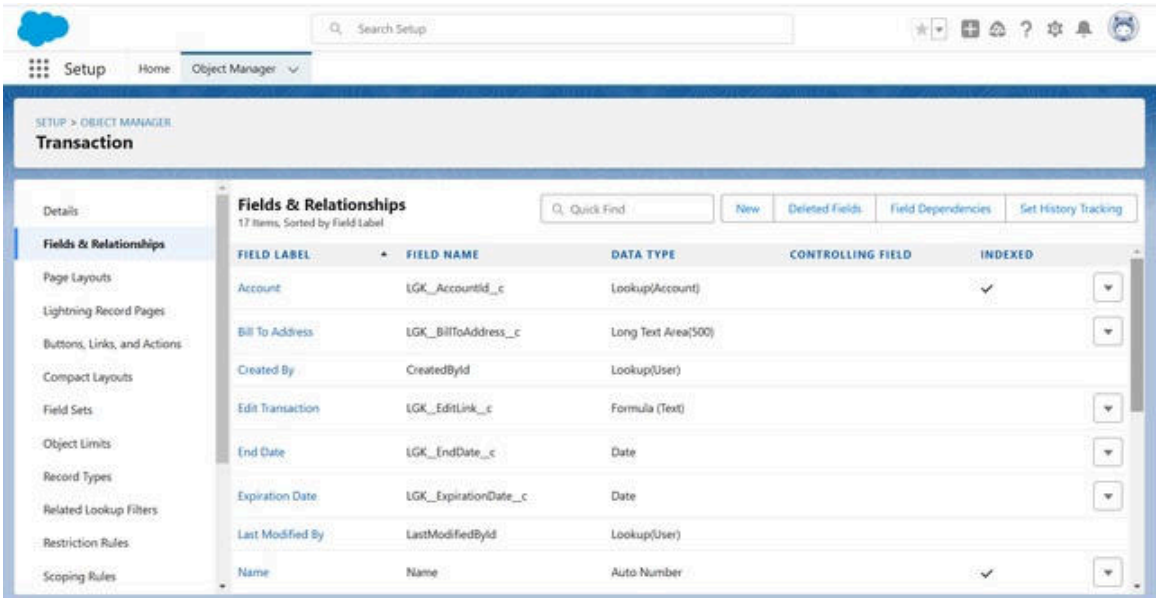
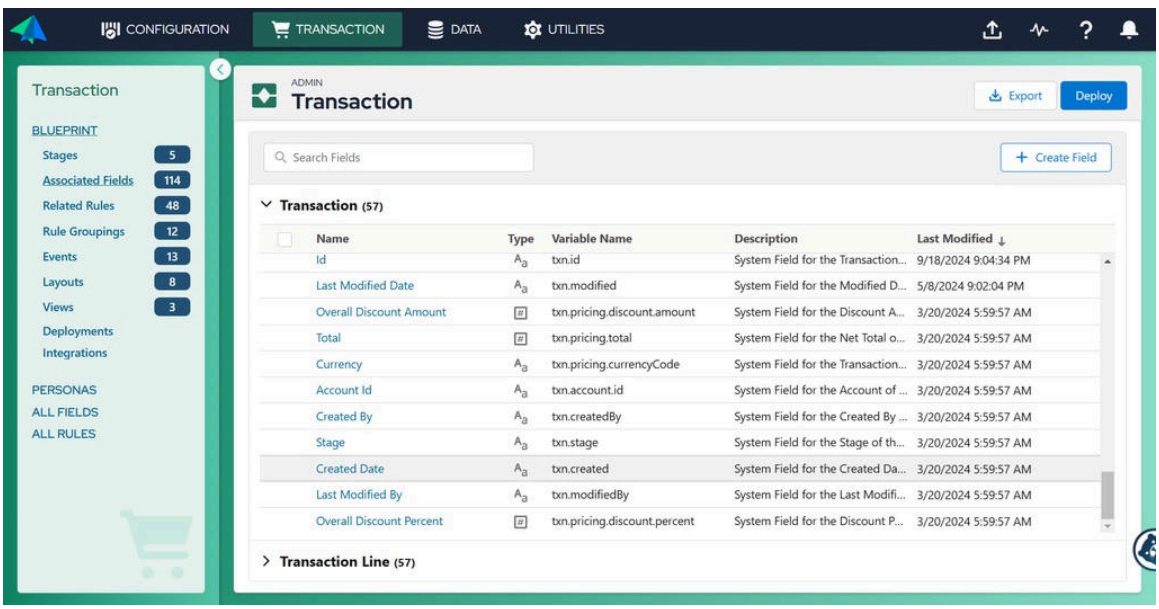
- For Salesforce fields, include the `__c` suffix (for example, `CustomField__c`). Review the exact field names from **Salesforce** > **Setup** > **Object Manager** > **Transaction** > **Fields** and relationships.



- For CPQ fields, include prefixes such as `txn.` or `txn.line.` to denote the field (for example, `txn.TotalAmount`). Be sure to use the exact field variable names from **Admin** > **Transaction** > **Associated Fields**.



Target fields:

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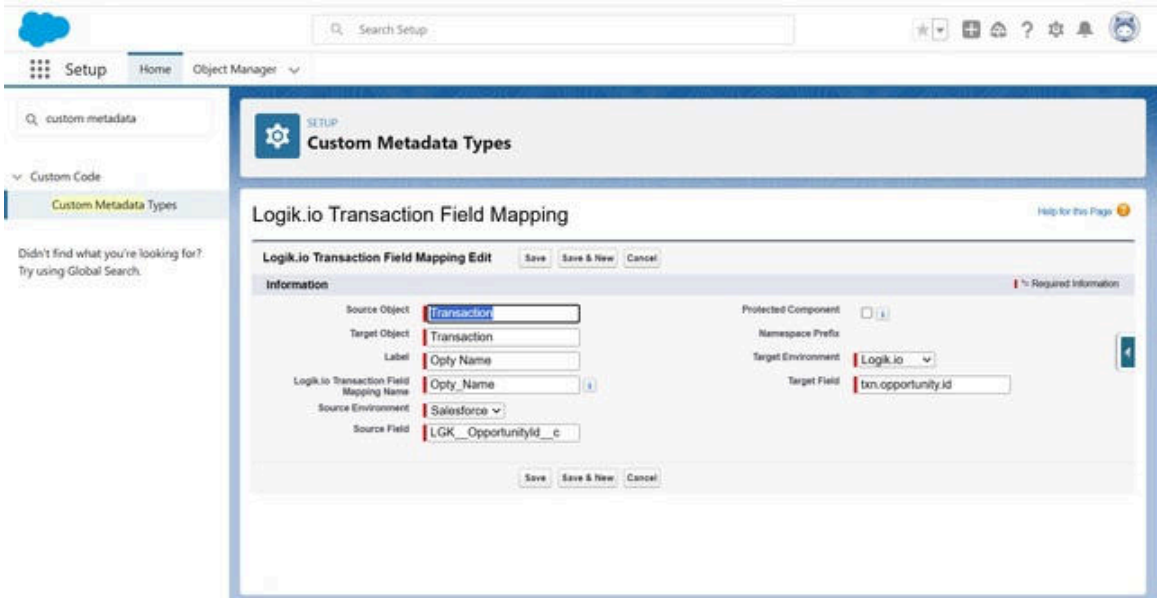
- Environment: Indicate where the field value should be updated (Salesforce or CPQ).
- Field: Enter the field name of the target in the same format (for example, Salesforce fields with `__c` or CPQ fields with `txn.` prefixes).



Note:

- A field mapping record is included as a reference. This cannot be deleted, but its source and target details can be edited. Verify that your custom added field record matches it.
- If you are uninstalling the managed package, any created records for new custom fields must be deleted first.

Salesforce: Activate Transaction Line to Opportunity Line syncing and asset flows

Note: By default, the following flows are active:

- Logik.ai Copy Transaction
- Logik.ai Create Transaction (Record Trigger)
- Logik.ai Create Transaction (Screen)

1. From Salesforce Setup Home, search for "Flows". Click **Process Automation** > **Flows**.
2. Search for the following. You will perform step 3 for each:
   - Logik.io Opportunity Line Sync (Upsert)
   - Logik.io Opportunity Line Sync (Delete)
   - Logik.io Primary Transaction Change
3. For each of the three flows identified in step 2, activate one of the following options:

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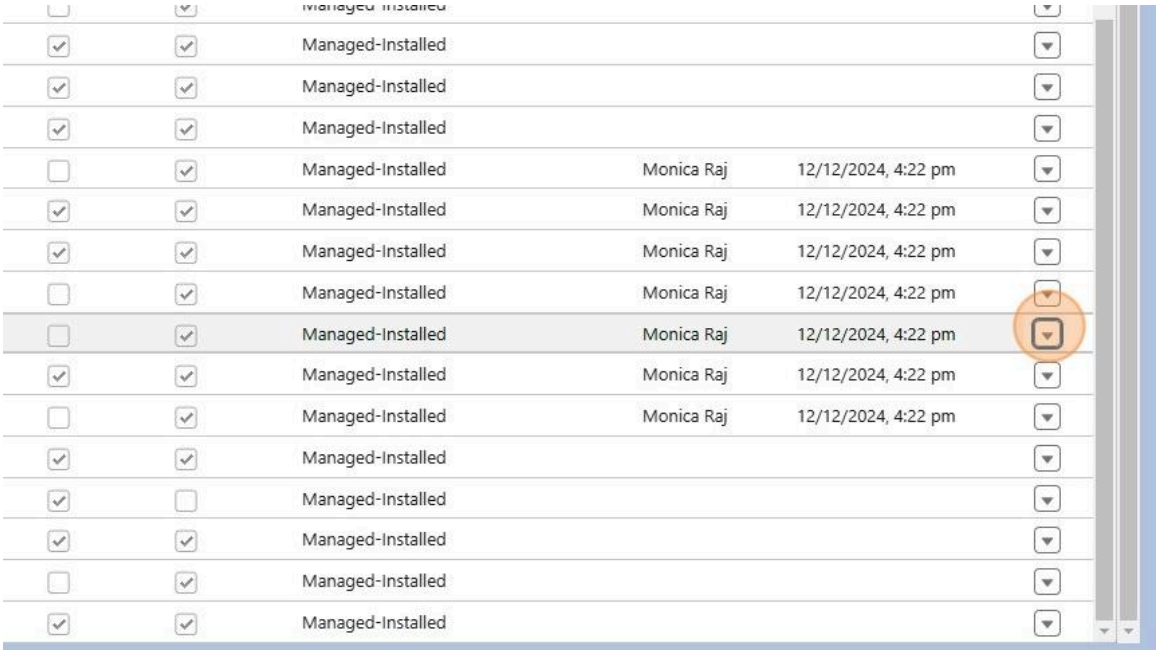
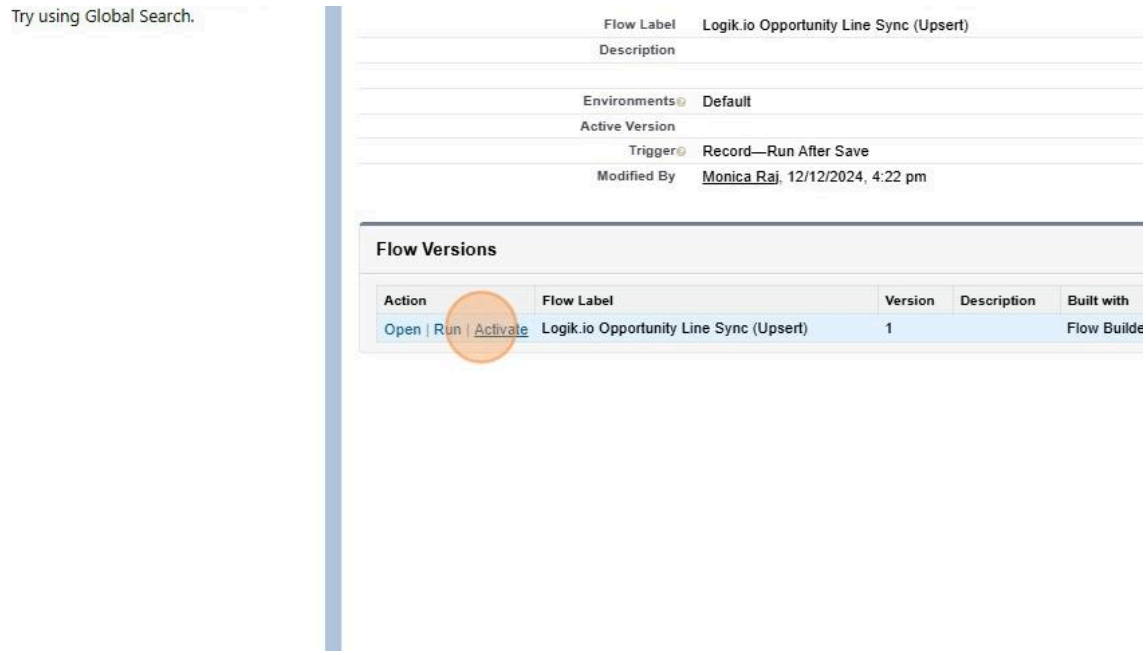
- Option 1: Using the drop-down menu:
  - Click the arrow to the right of the flow name.



  - Select **View Details and Versions**.
  - Click **Activate** for the most recent version of the flow.



- Option 2: Open the flow:

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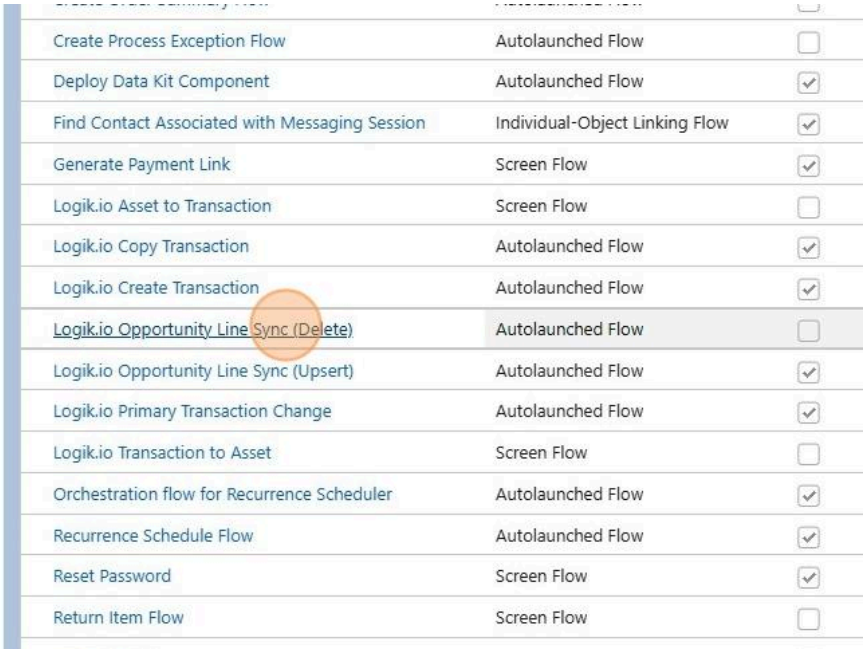
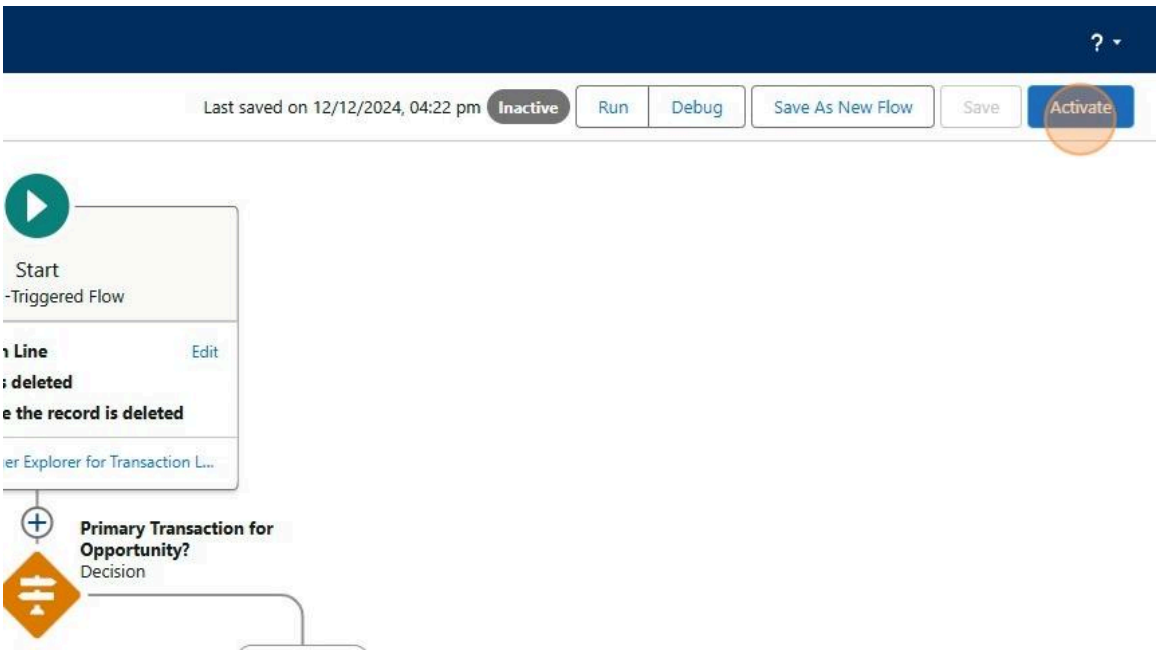
- Click the flow name to open it in the Flow Builder.



- Click **Activate** at the top right of the Flow Builder.



Make sure all the flows are in active status.

Note: Opportunity line syncing is applied only to the transaction assigned to the Primary Transaction opportunity field.

End-user flow: Launching a CPQ transaction from Salesforce

- Create a transaction record in Salesforce

  There are several ways for the end user to initiate a CPQ transaction in Salesforce. The most common flow starts on the Opportunity record.

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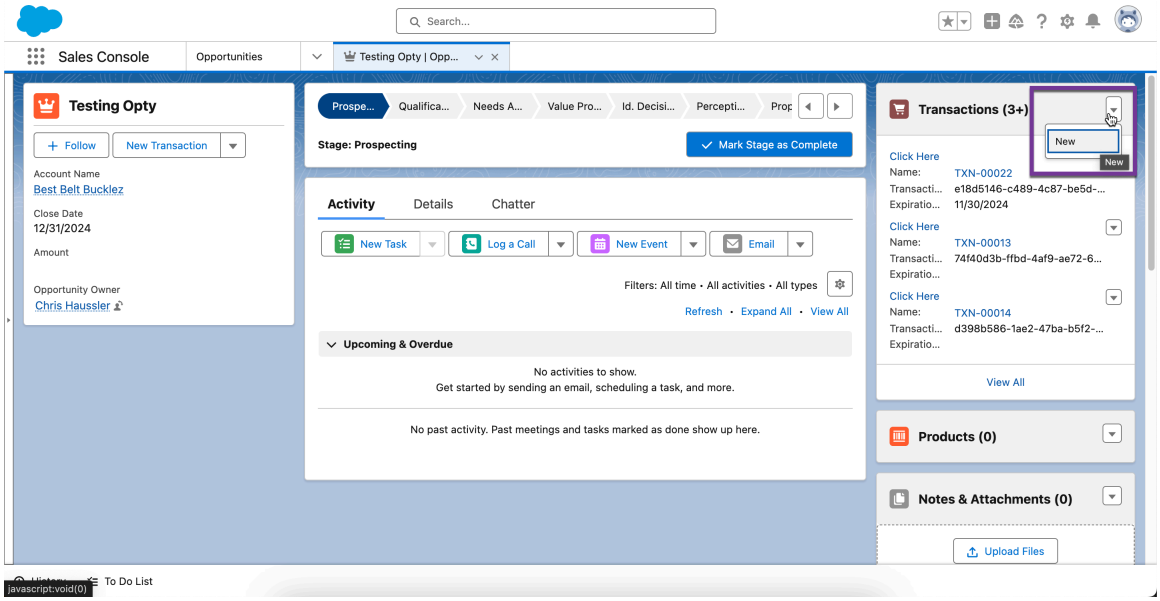
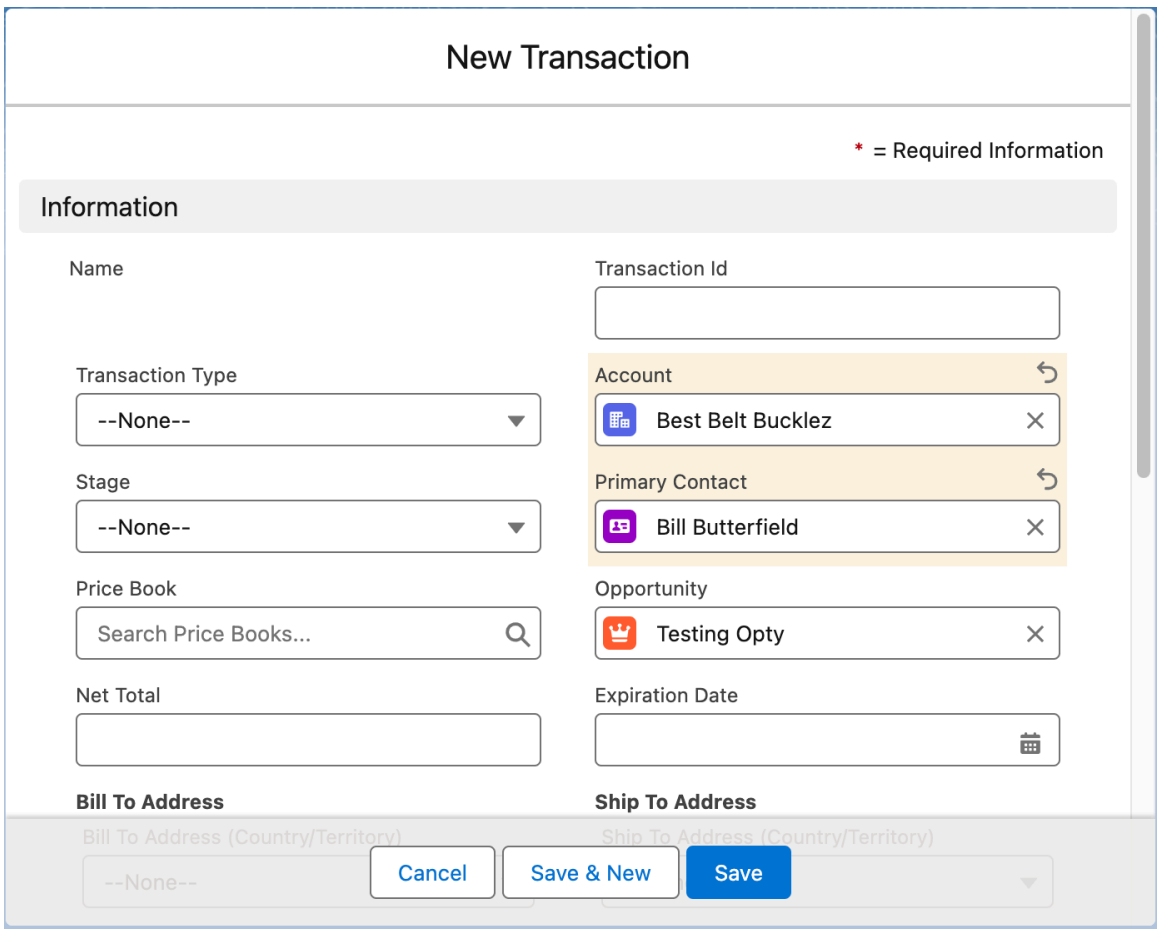
1. From an Opportunity record, click the arrow in the transaction's related list, and then click **New**.



2. A new transaction opens with the **Opportunity** field populated. Fill in **Account**, **Primary Contact**, and any optional fields. Click **Save**.



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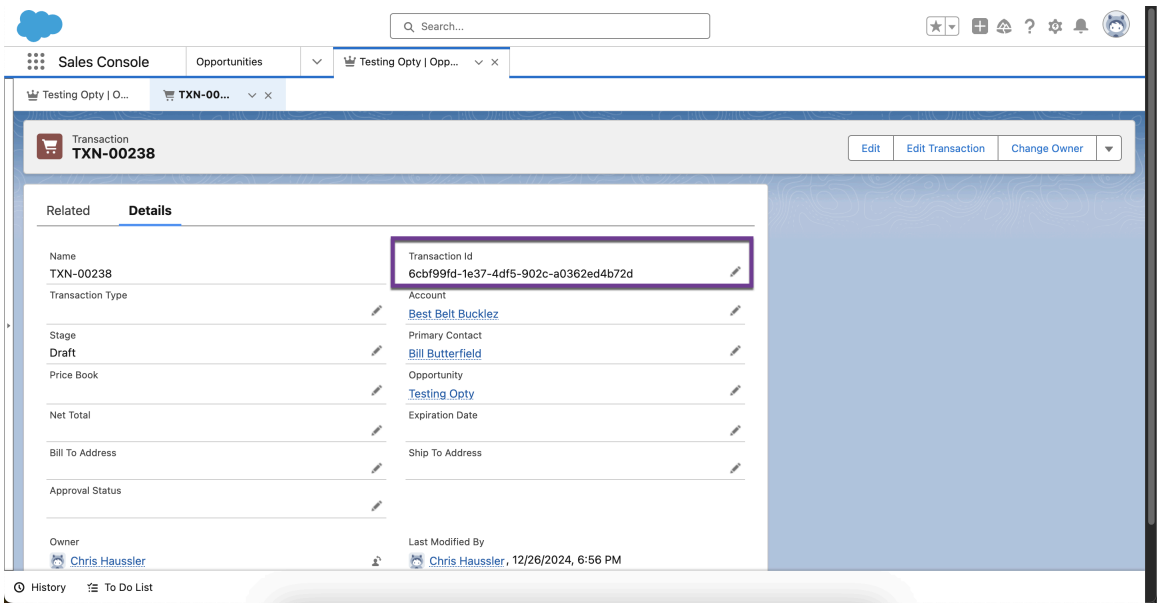
3. A record-triggered flow in the managed package creates a new transaction in CPQ. The UUID of the new CPQ transaction record updates in Salesforce (*LGK__TransactionUUID__c*). If the transaction ID does not appear immediately, refreshing the browser usually corrects the anomaly.



If the **Transaction Id** field remains unpopulated after a browser refresh, see the Troubleshooting section below.

- Edit a transaction

  From a Salesforce transaction (or a transaction related list), Transaction Manager can be launched using either the **Edit Transaction** button on the transaction detail page or the link available via the **Edit Transaction** field. This loads a CPQ transaction based on the **Transaction Id** field in the Salesforce record.

  Transaction Manager loads in an iFrame, replacing the current subtab in Salesforce.

  Note: Salesforce's classic UI is not supported.

- Copy Transaction

  By clicking the **Clone** button on the Salesforce transaction record, users can call a CPQ Copy event to recreate the transaction and lines in Transaction Manager. This action is based on the transaction ID on the header record in Salesforce and results in a cloned transaction record.

  Note: Cloning a transaction from Salesforce does not automatically make copies of the affiliated line records to the new transactions. To clone the lines to the new transaction, launch the new (cloned) transaction record in Transaction Manager, and initiate a Salesforce sync.

Troubleshooting: CPQ fails to launch with a "Transaction with id 'null' could not be found" error



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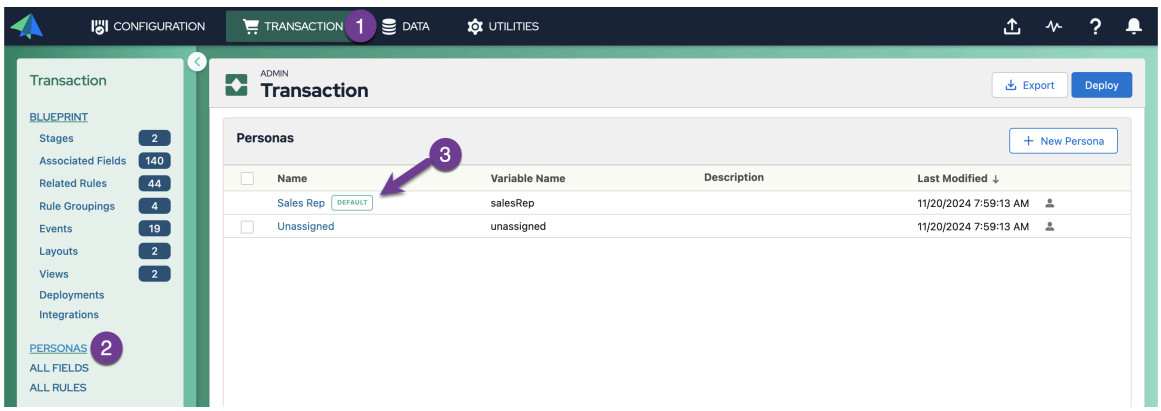
This error occurs when the creation of a new CPQ transaction record is initiated via API call from Salesforce and fails. This failure usually occurs due to one of two reasons:

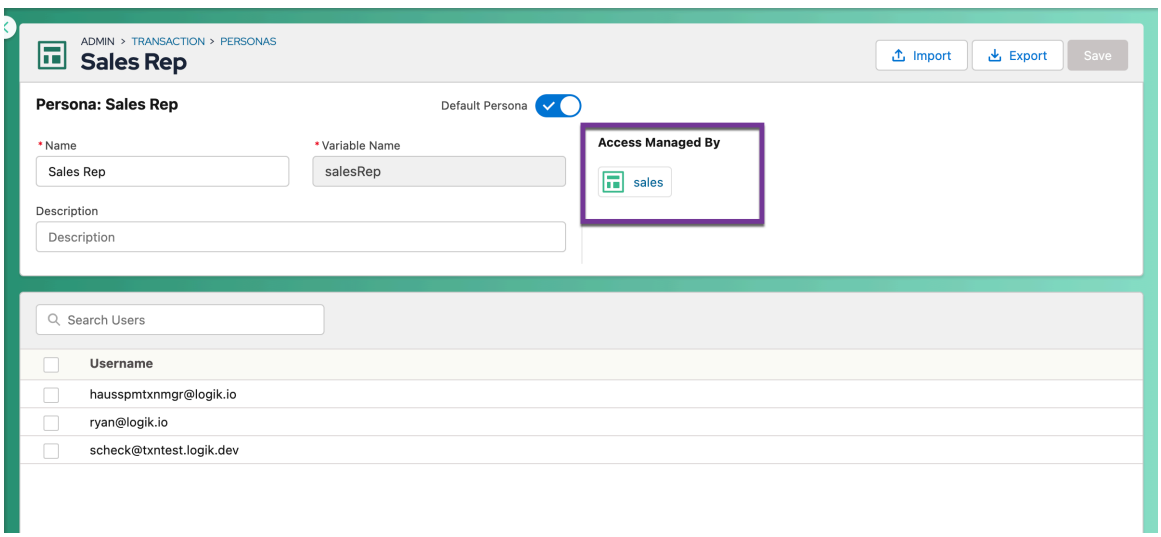
- The Transaction runtime token is incorrectly set up or has expired. Review the steps in the "CPQ: Set Up the runtime client token" section above.
- The user creating the CPQ transaction record from the Salesforce UI does not have permission to do so.

To troubleshoot permissions errors, follow these steps.

1. In Transaction Administration, click **Personas**.
2. In the list of personas, observe which persona is labeled DEFAULT. The screenshot below shows that "Sales Rep" is the default persona. By default, all new users are assigned this persona.



3. Open each persona record. Find your user name. The user you are debugging should only be visible in one persona. Once you find the appropriate persona, note the view that manages this persona's access. In the example, the user is among the listed user names in the Sales Rep persona. This persona's access is managed by the "sales" view.



4. Open the view that manages the persona's access. In our example, the view is named "sales". To open the view, in CPQ Transaction Admin Home, go to Views, and then click the managing view.

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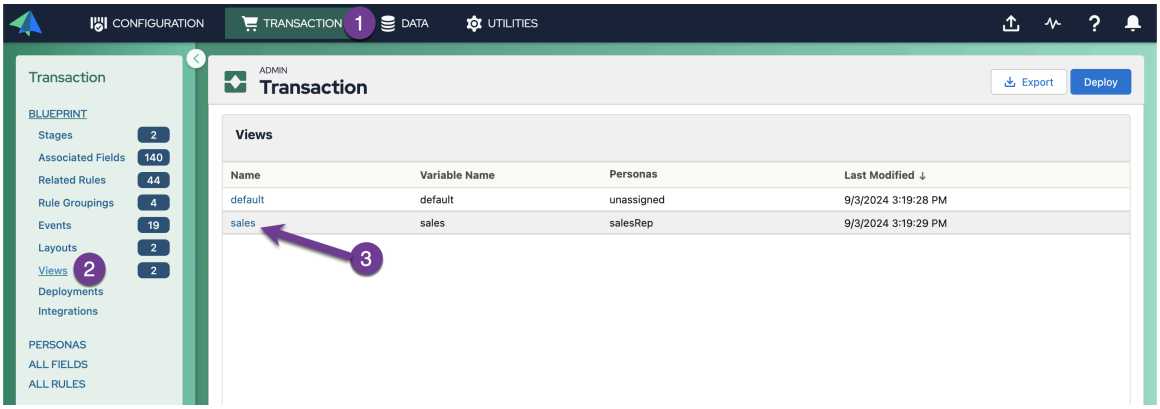
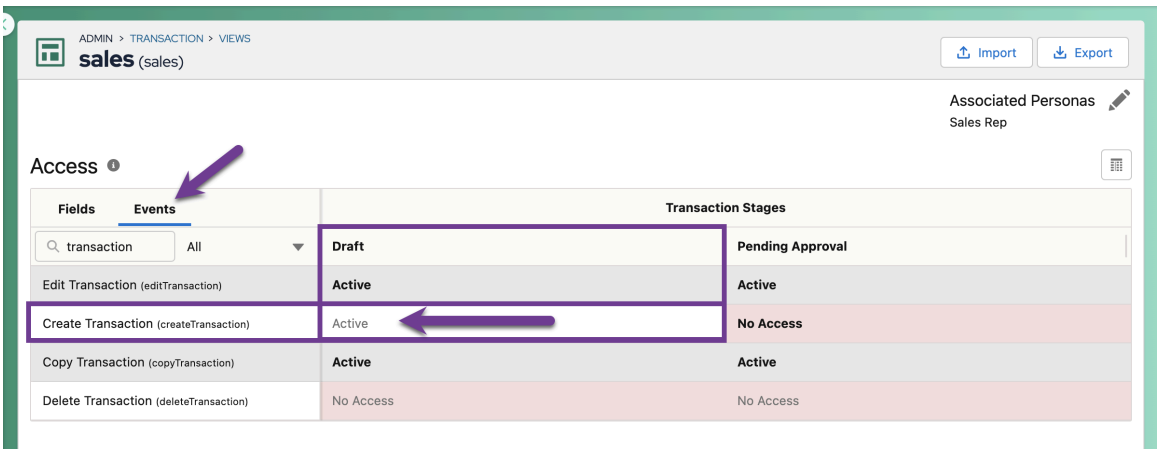


5. On the view detail page, click **Access**, click **Events**, and search for `createTransaction`. In the initial stage, the create transaction event (varname: createTransaction) must be set to **Active**.



To sum up: for any given user, the administrator must manage the items in the following table.

Issue	Correctio
User persona assignment	Navigate to **Personas** in CPQ Transaction Admin, and select a persona record. • To add a user to a persona, click **+ Associate Users**. • To remove a user from a persona, select a user name, and then click **Remove Selected**.
Persona view assignment	In CPQ Transaction Admin, go to **Views**, select a view record, and then click **Associated Personas**.
View: access to each event, per stage	For information about how to perform fine-grained access administration (recommended), see the Events CSV File section in Transaction Manager: Views. To administer access in a less precise way, go to Events in CPQ Transaction Admin, click the **Create Transaction** event, click **Edit Event Access**, and set the event access to Active. By default, the event is active across all stages and views.

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Transaction Manager: Integrations

Use integrations to exchange data with third-party sources, including Salesforce.

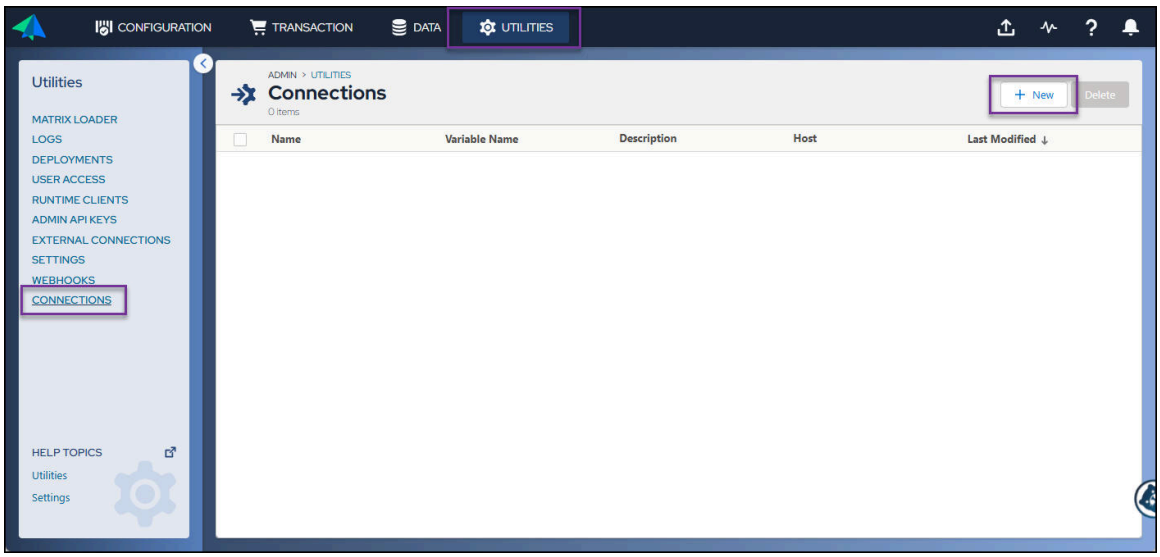
To gather information from external data sources such as Salesforce in Transaction Manager, the admin creates integrations. Transaction Manager integrations define the information necessary to connect to a data source, extract information, and map the data into Transaction Manager. Integrations can also be used to extract information from Transaction Manager and send it to be mapped in a third-party environment.

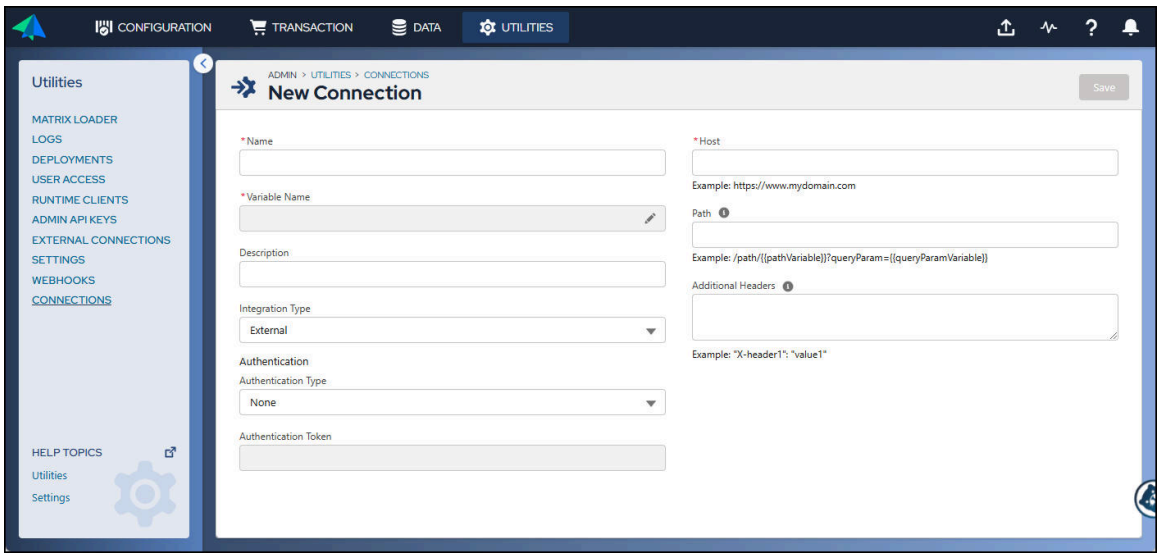
Before an integration can be defined for Transaction Manager, the admin must first create a connection to the third-party environment, much like an external connection in the configuration environment. Connections are defined in the Utilities section of the Admin UI.

Creating a connection

Before an integration is defined, the admin must define a connection to the third-party source for the data the integration uses.

To create a new connection, in the Utilities area of the Admin UI, click **Connections**. Then click **+ New** to display the New Connection page.





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On the New Connection page, name the new connection and assign a variable name. Next, choose the integration type: Salesforce or External.

If you are creating a connection to Salesforce, none of the other fields are required. CPQ knows how to authenticate and knows the required endpoints to use when communicating with Salesforce.

If you are creating an external integration, choose the authentication type. Supported authentication methods are None, Bearer Token, and OAuth. If you choose Bearer Token, use the Authentication Token field to provide the bearer token for the site with which you are communicating. If you choose OAuth, use the Client ID, Client Secret, and Token URL fields to provide the required OAuth information.

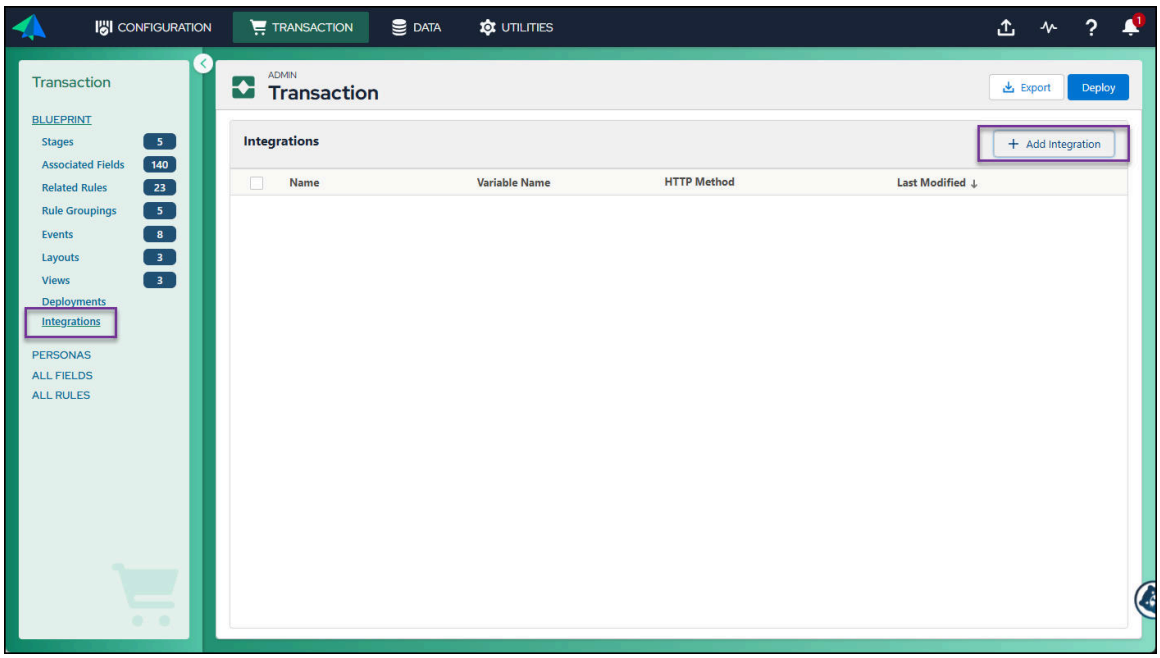
In the Host field, enter the URL to the third-party site with which you will be communicating.

In the Path field, enter the path to the endpoint that you are trying to access on the third-party site.

Use the Additional Headers field to add any additional header information that is required by the third-party site in order to execute the desired endpoint.

Creating an integration

To create a new integration, click **+ Add Integration**. The New Integration window appears. Give the new Integration a name and a variable name, and click **Save**.



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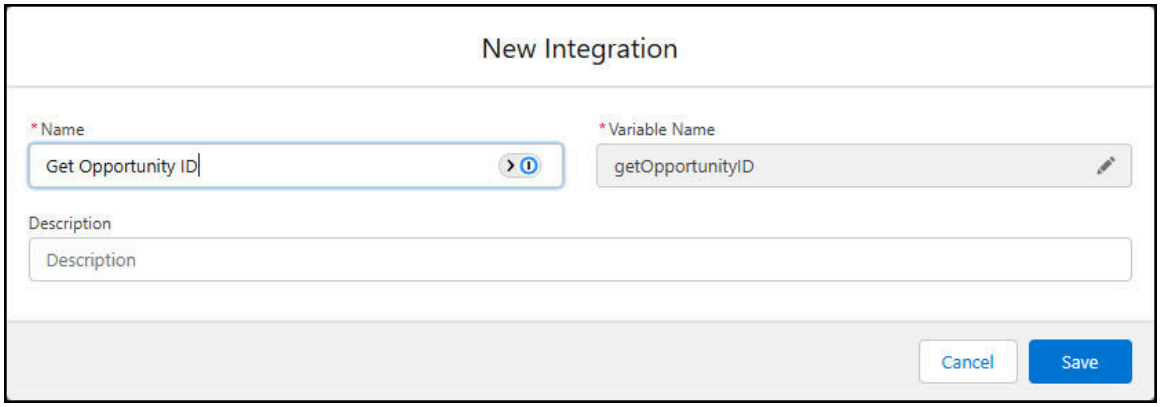
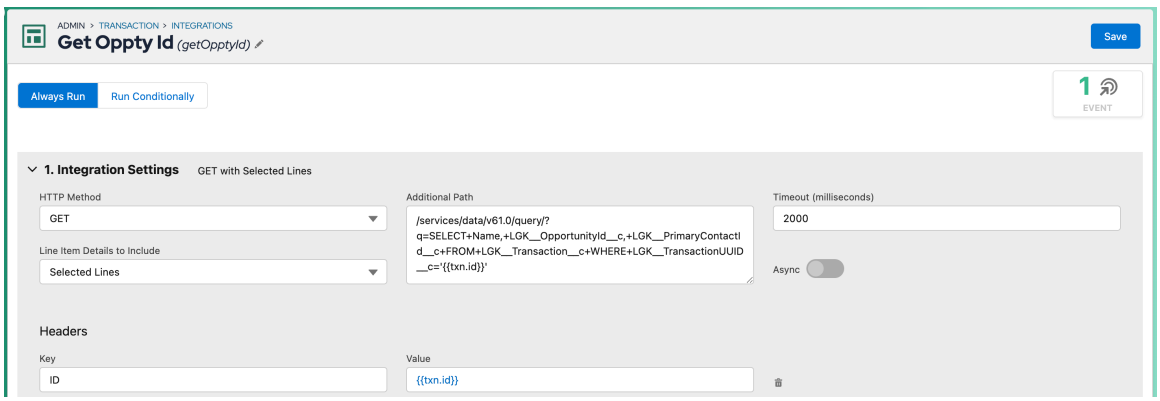


The Integration Editor page opens. Continue defining the new integration by configuring the following settings:

- **HTTP Method**: You can perform either a GET, POST, PATCH, PUT, or DELETE operation, depending on the endpoint that you are using on the third-party site.
- **Line Item Details to Include**: Define which type of line items you will work with in the integration. Options are Selected Lines, Modified Lines, and Deleted Lines.
- **Additional Path**: Enter the query command to execute on the third-party site. If you are connecting to Salesforce, this will probably be a SOQL query. On other platforms, it may be a standard SQL query.
- **Timeout**: Defines the amount of time (in milliseconds) that the request will wait for a response before declaring an error.
- **Async**: This toggle allows you to run the query asynchronously in the background so that the user can continue working.
- **Headers**: You can use static text in header-level Transaction Manager fields by using simple handlebar syntax, you can set key-value pairs for headers, or you can combine both these methods. `{{txn.fieldname}}`



Next, you need to define the connection to the endpoint. Here you choose from a list of the connections that you previously created in the Utilities area to define which third-party site to connect to for this integration.

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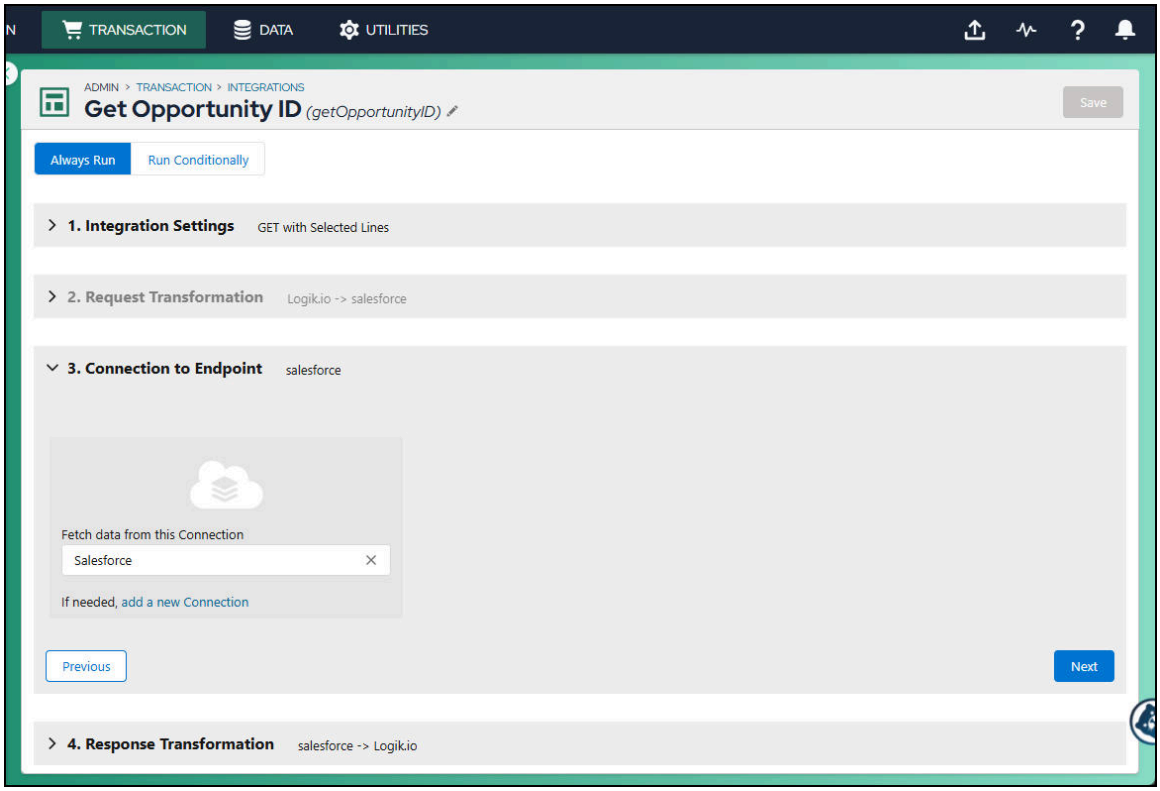

Finally, you need to define the transformation template, which lets you map third-party data to CPQ fields or map CPQ data to third-party data source fields.

JSON is used to define the mapping, as in the following example.

```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#eachrecords}}{{LGK__OpportunityId__c}}
 {{/each}}"
    },
    {
      "variableName": "txn.custom.primaryContact",
      "value": "{{#eachrecords}}{{Contact.FirstName}}{{/each}}"
    }
  ]
}
```

This example uses Mustache syntax for the Salesforce data that was extracted from the Salesforce site. Each field mapping includes the variable name of the CPQ field that receives the extracted data, followed by the value that identifies the Salesforce field where the data was extracted. The `#eachredords` and `/each` nomenclature denote that each record in the query response is searched for each of the three field values in the template.

You can use the Sample Return Data area and the Transformation Result area to troubleshoot an Integration that is not working. If you perform the query in a tool like Postman, where you can see and copy the query response, you can paste the query response in the Sample Response Data area and then click **Run Transformation** below the Transformation Template area. The

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query response data runs through the defined transformation template, and the results of the Transformation is displayed in the Transformation Result area.

Transaction Manager: Integration - POST

Learn how to write data to a third-party application such as Salesforce by using the POST integration.

Prerequisites

This article assumes that you have a CPQ environment that is integrated to a corresponding Salesforce environment. Before you continue, see Installing the Salesforce Transaction Manager Integration Package extension to complete the necessary integrations.

When the end user initiates a function that writes CPQ data back to the corresponding Salesforce transaction record, CPQ must have the Salesforce transaction's record identifier on hand. To understand how to retrieve the Salesforce transaction ID and save it into CPQ for future use, see Transaction Manager: Integration - GET.

Salesforce setup

In this example, we write LGK data to the Salesforce fields listed below. Review the Salesforce Transaction and TransactionLine objects to ensure these fields are present.

Header fields (Salesforce object: *LGK__Transaction__c*)

- *LGK__Stage__c* holds the stage of the CPQ transaction.
- *LGK__PricingExtendedNet__c* is the transaction (header-level) net total.
- *LGK__Id__c* is mapped to the *id* of the parent transaction.

Line Fields (Salesforce object: *LGK__TransactionLine__c*)

- *LGK__Quantity__c*: the line-level quantity.
- *LGK__PricingList__c*: the line-level list price.
- *LGK__PricingNet__c*: the line net price, or discounted piece price.
- *LGK__PricingExtendedNet__c*: the line net total, or extended net price (includes quantity).
- *LGK__ParentTransactionLineId__c* checks whether *txn.line.custom.parentLineReferenceId* exists. If it does, it assigns the corresponding line's *id*; otherwise, it sets the value to *null*.
- *LGK__Product2Id__c* is mapped to the *partnerId* of the product associated with the current transaction line.

POST integration using Composite Graph

The LGK POST integration uses the Salesforce Composite Graph API to update multiple Salesforce objects simultaneously in a single API call, allowing both header-level and line-level fields to be updated in the same request.

The Salesforce Composite Graph API enables bundling multiple operations into a single request, making it highly efficient for integrations. It allows writing to multiple Salesforce objects in a single POST call, reducing API usage, ensuring data consistency, and enabling atomic transactions—where either all operations succeed or none are applied. This simplifies integration processes and improves error handling. For more details on the Composite Graph construct, see Composite Graph | REST API Developer Guide | Salesforce Developers.

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Because the Composite Graph API is a core Salesforce capability, no setup is necessary. However, we introduce the concept here, before we populate a Composite Graph in the LGK POST call, described below. In the example below for POST, the integration uses the previously mentioned header-level and line-level fields in the Salesforce Setup section above, with the option for users to add or remove fields as per their requirements.

Transaction Manager setup

The transaction ID mappings mentioned in the Salesforce Setup section help CPQ send the right line IDs to Salesforce and manage updates, deletions, and additions effectively. By mapping LGK__TransactionId__c to the parent transaction ID, Salesforce can link all line-level changes to the correct transaction, ensuring proper association. The LGK__ParentTransactionLineId__c checks for a parent line reference; if present, it assigns the corresponding line ID, ensuring that only valid lines are updated or deleted. If no reference exists, it sets the value to null. The LGK__Product2Id__c maps to the product's partner ID, ensuring the correct product is linked to the line for accurate pricing and discount application. These dynamic mappings ensure that Salesforce can accurately update quantities, delete lines, and add new ones while preserving user's line-level discounts by maintaining proper associations with transaction and product data.

This integration transform requires the use of two custom line fields, *`lineReferenceId`* and *`parentLineReferenceId`*. These fields must be set up to store a variation of the *`txn.line.id`* and (potentially) *`txn.line.parent.id`* system fields.

Rules

The Salesforce Composite Graph API does not support hyphens in certain identifiers, which can cause issues when sending data that includes hyphenated IDs, such as the LGK line IDs. To make the integration work, the system removes any hyphens present in the LGK line IDs before sending them to Salesforce. This ensures that the IDs comply with Salesforce's format requirements and that the integration functions correctly without errors related to invalid characters. By removing the hyphens, the system ensures that all identifiers are accepted by Salesforce, allowing the integration to process updates and other operations smoothly.

To remove hyphens by using a rule, create a determination rule action to make line-level reference Id fields Salesforce-compatible. You can add both the lineReferenceId determination action and parentLineReferenceId determination action in a single rule.

Below are two determination scripts (transaction line level) for how the fields should be defined.

```
// lineReferenceId Determination Action

var original = txn.line.id;
var result = "";
for (var i = 0; i < original.length; i++) {
  if (original.charAt(i) !== "-") {
     result += original.charAt(i);
   }
}
return result;
```

```
// parentLineReferenceId Determination Action

var original = txn.line.parent.id;
var result = "";
if (txn.line.parent.id != txn.id) {
  for (var i = 0; i < original.length; i++) {
    if (original.charAt(i) !== "-") {
        result += original.charAt(i);
```

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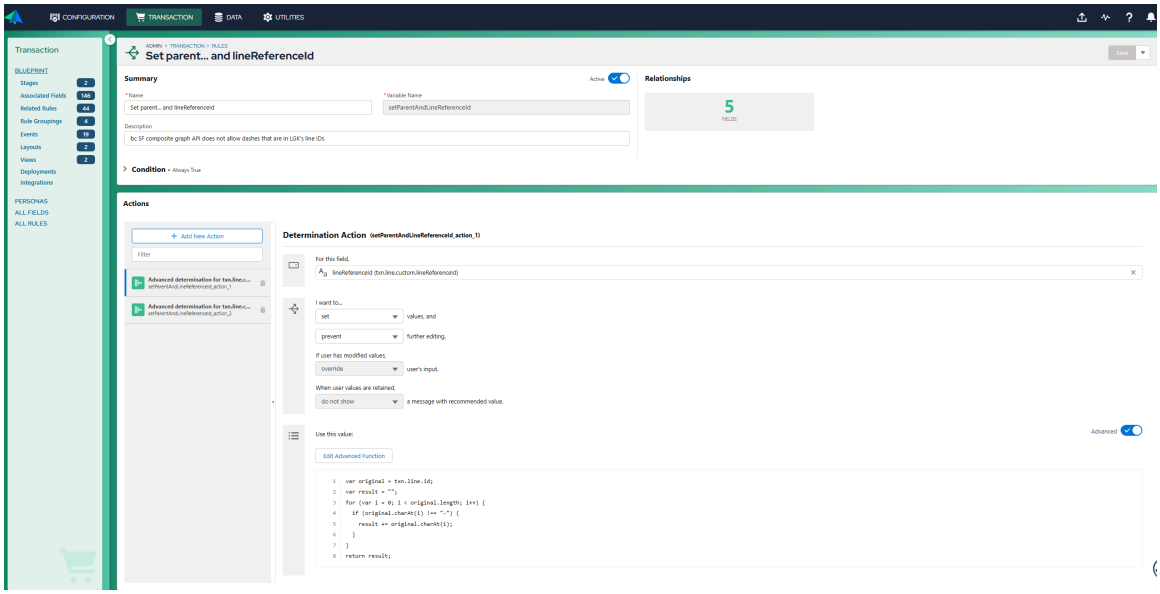
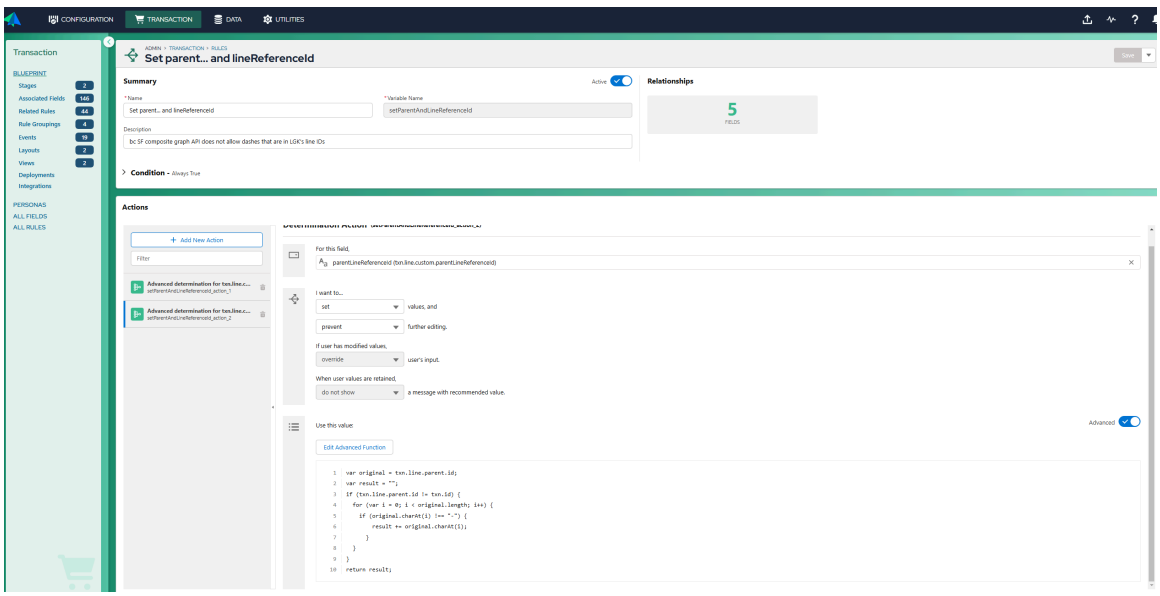
```
        }
    }
}
return result;
```

The rule should be configured as follows, with two determination actions to handle *txn.line.custom.lineReferenceId* and *txn.line.custom.parentLineReferenceId*:





Add Connection

The screenshot below shows the external connection as “Salesforce” in the POST integration.

If you want to create a new connection, see the "Creating a Connection" section in Transaction Manager: Integrations.

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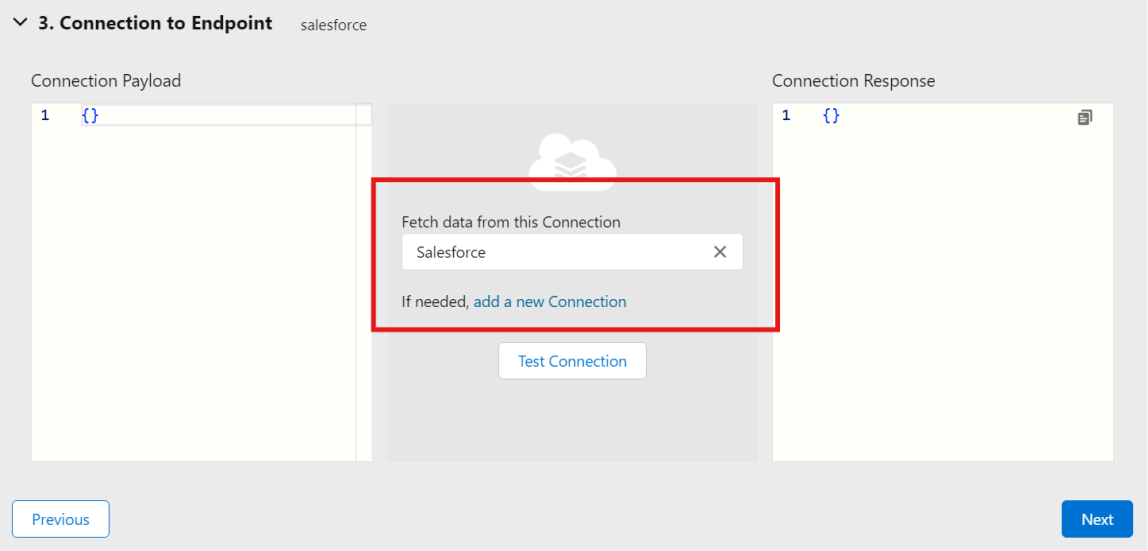
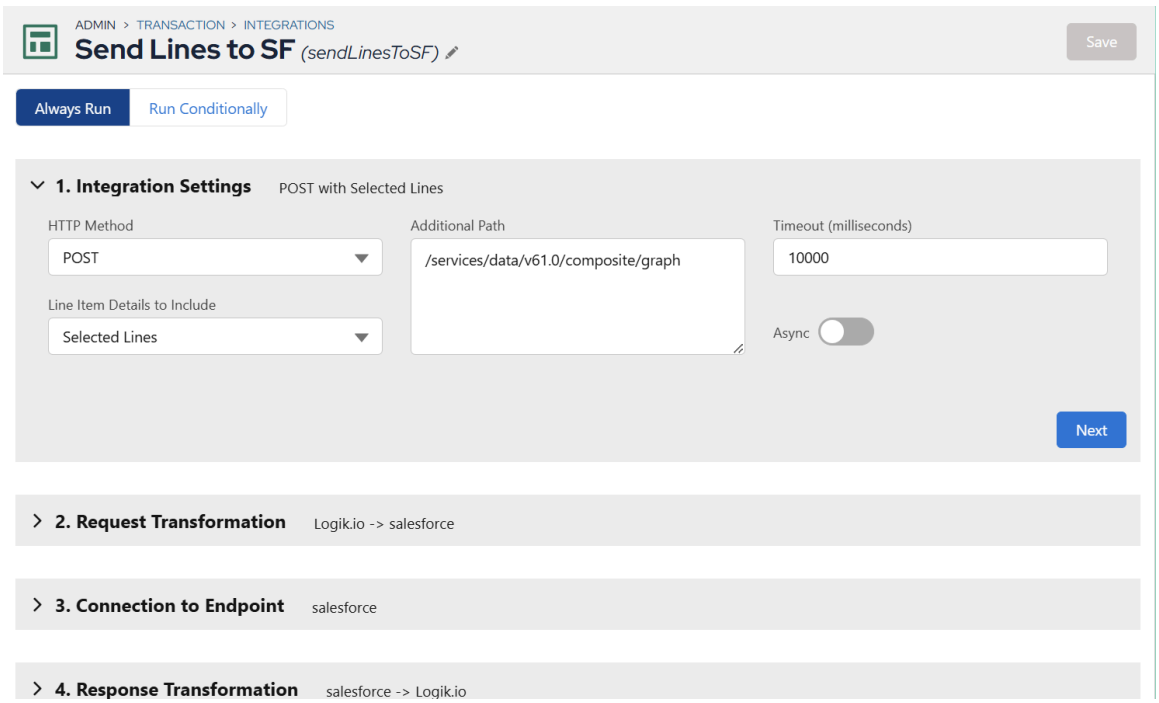


To POST data back to Salesforce, you need the Salesforce transaction record ID. If you have not yet set up the GET integration to fetch the transaction ID, see Transaction Manager: Integration - GET.

Add integration

1. Navigate to the Integrations section and create a new integration.

- HTTP Method: POST
- Additional Path: `/services/data/vXX.X/composite/graph`, where `vXX.X` is the latest composite graph version. You can check for the latest version here.
- Line Item Details to Include: Selected Lines
- Connection: Salesforce



2. In the Request Transformation section, add this sample transaction JSON (header and line-level fields may vary according to your preference):

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```
{
  "graphs": [
    {
      "graphId": "graph0",
      "compositeRequest": [
        {
          "method": "PATCH",
          "url" :
 "/services/data/v61.0/sobjects/LGK__Transaction__c/LGK__Transac
tionUUID__c/{{txn.id}}",
          "referenceId": "parentTransaction",
          "body": {
            "LGK__Stage__c": "{{txn.stage}}",
            "LGK__NetTotal__c": "{{txn.pricing.total}}"
          }
        }
        {{#if lines}}
    {{~#each lines~}}
    {{#if txn.line.product.partnerId}}
    ,
        {
          "method": "PATCH",
          "url":
 "/services/data/v61.0/sobjects/LGK__TransactionLine__c/LGK__Tra
nsactionLineId__c/{{txn.line.id}}",
          "referenceId":
 "line_{{txn.line.custom.lineReferenceId}}",
          "body": {
            "LGK__TransactionId__c": "@{parentTransaction.id}",
            "LGK__ParentTransactionLineId__c": {{#if
 txn.line.custom.parentLineReferenceId}}"@{line_{{txn.line.custo
m.parentLineReferenceId}}.id}"{{else}}null{{/if}},
            "LGK__Product2Id__c":
 "{{txn.line.product.partnerId}}",
            "LGK__Quantity__c": "{{txn.line.quantity}}",
            "LGK__ListPrice__c": "{{txn.line.pricing.list}}",
            "LGK__NetPrice__c": "{{txn.line.pricing.net}}",
            "LGK__NetTotal__c":
 "{{txn.line.pricing.extendedNet}}"
          }
        }
        {{/if}}
  {{/each}}
  {{/if}}
      ]
    }
  ]
}
```

This transformation template is added to the Transformation Template area of the Request Transformation section as follows:

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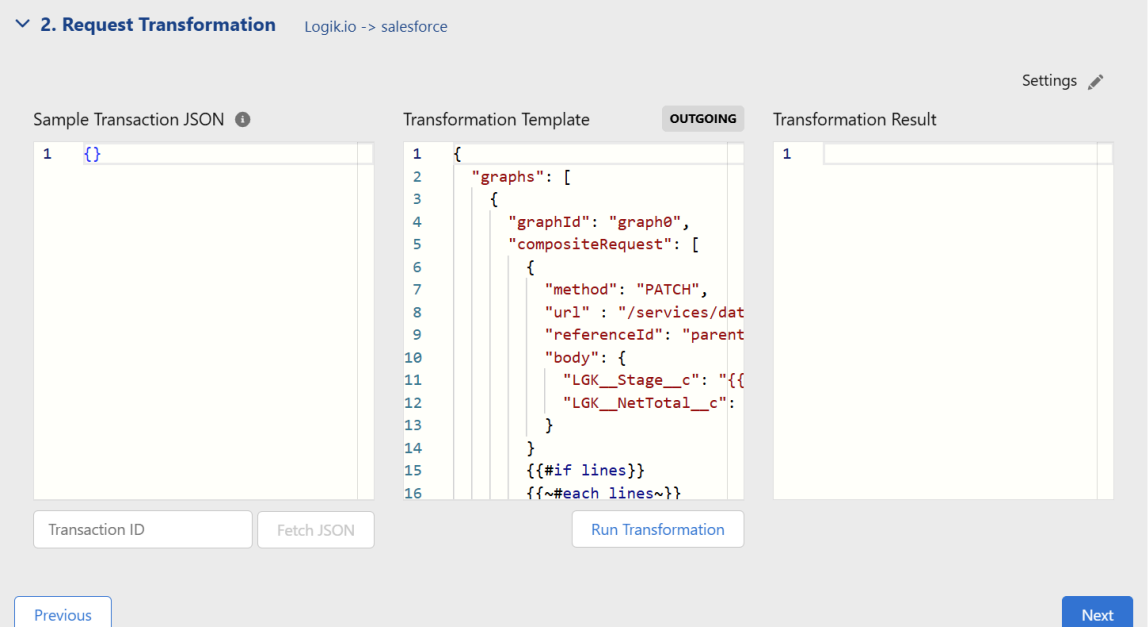
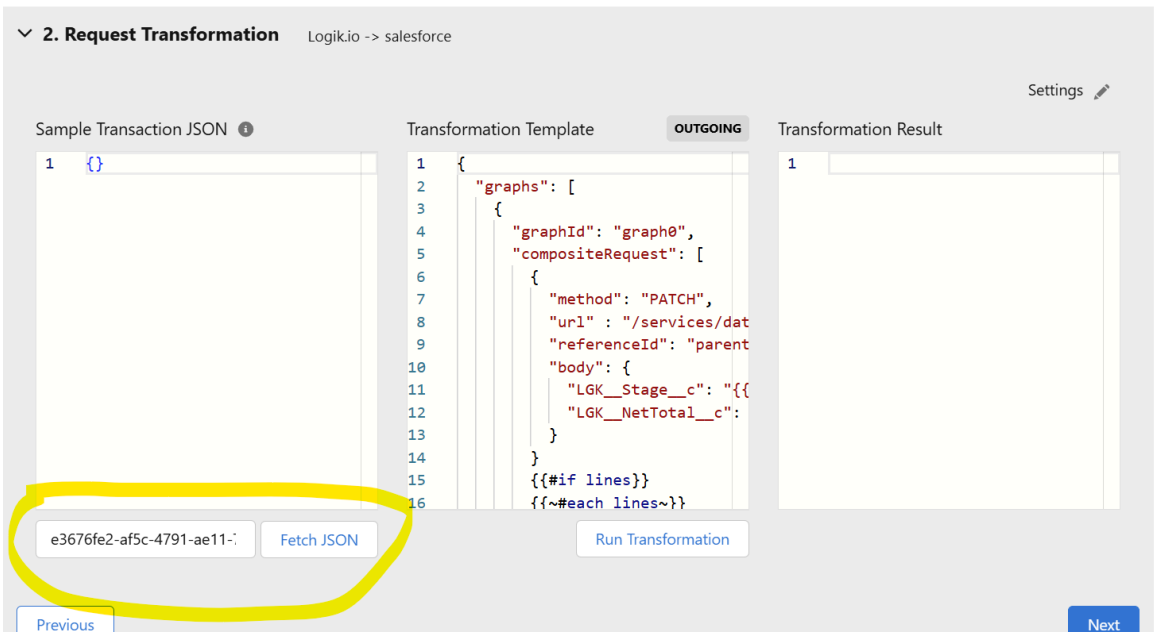


For more information about Handlebar syntax, see Transaction Manager: Integrations - Handlebars syntax.

Debugging the POST call

To use the Integration Admin interface to debug a POST call that is not working as expected, follow these steps:

1. Copy the transaction ID for which the integration is not working, paste it in the small Transaction ID box, and then click **Fetch JSON**.



The application populates the Sample Transaction JSON box.

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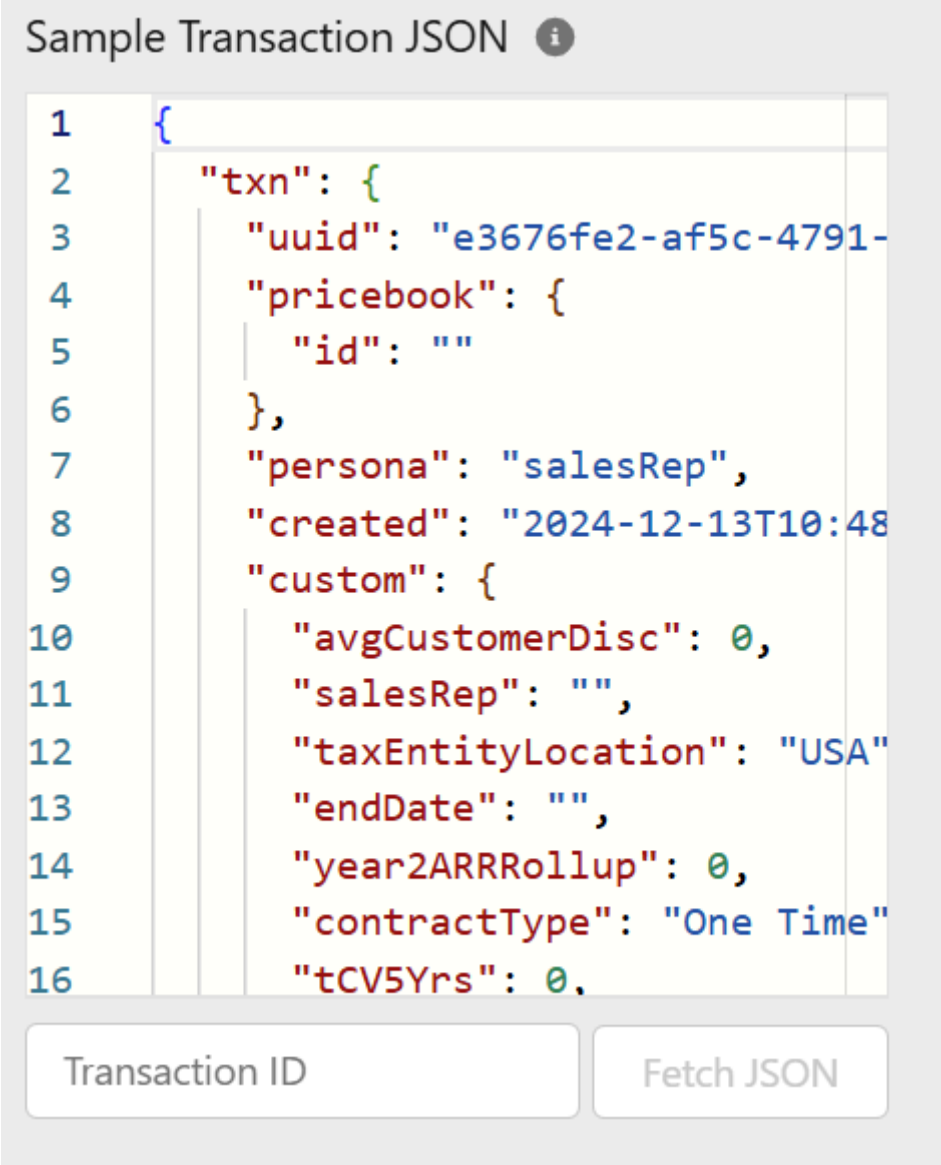

2. Click **Run Transformation**. This processes the transaction information contained in the Sample Transaction JSON input through the transformation logic and generates a result that you can test using Postman.

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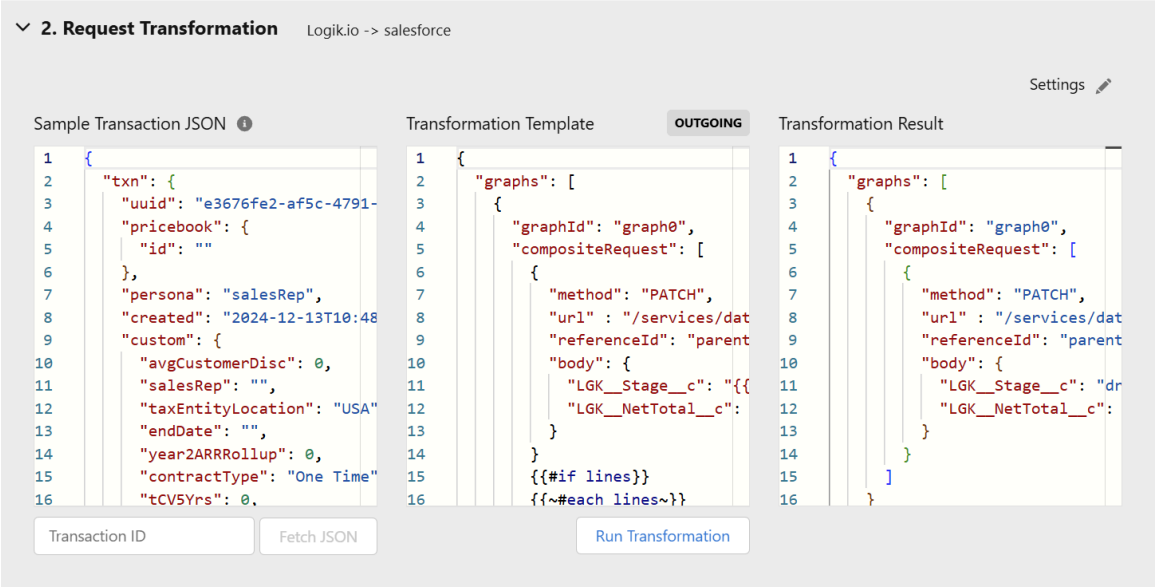
For more information about setting up Postman to interface with your Salesforce org, see Connect Postman to Salesforce.



Related topics

Transaction Manager: Integration - GET

Transaction Manager: Integration - GET

Learn how to access data from a third-party application such as Salesforce by using the GET integration.

This article describes how to retrieve the Salesforce opportunity ID, together with transaction details including the account name, opportunity name, shipping address, and billing address, and write them into CPQ transaction fields. This pattern is relevant to any integration that requires CPQ to request data from a third party.

Goal: End-user (buyside) flow

We begin by opening a Transaction Manager transaction in Salesforce. Then, by clicking **Get SF Data** in the buyside UI, we trigger the Get SF Data event. This event initiates several integrations that connect to Salesforce, extracting the relevant transaction data (opportunity ID, opportunity name, shipping address, billing address, account ID, and account name) and populating the corresponding fields in the buyside UI.

In the buyside transaction UI, click **Get SF Data**.

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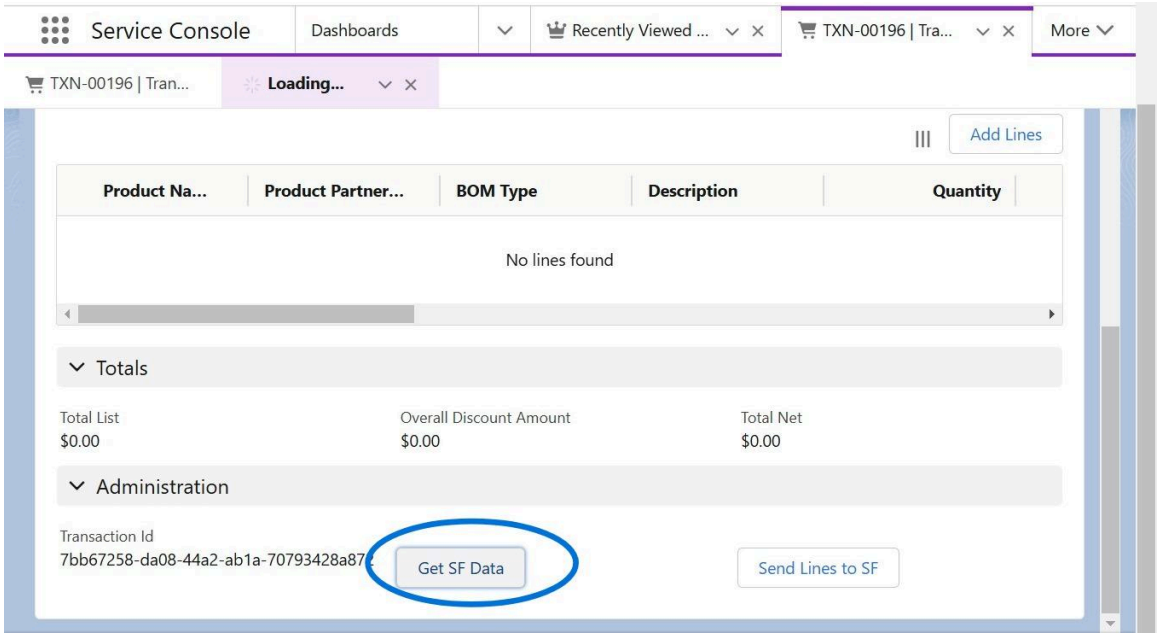
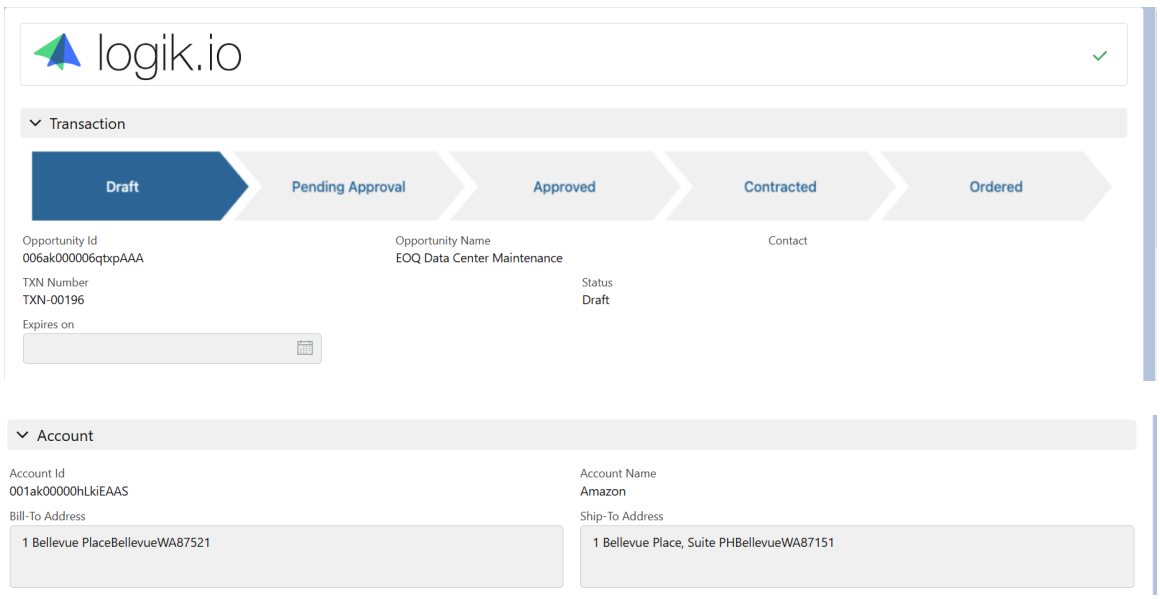


Notice that the details are all populated.



The rest of this article lists the steps in CPQ to create the integrations that get the data from Salesforce.

Administration setup: Prerequisites

This guide assumes a CPQ environment with Transaction Manager features enabled, as well as installation of the Logik Transaction Manager Integration Extension on a corresponding Salesforce environment. To view the installation instructions, see Installing the Salesforce Transaction Manager Integration Package extension.

CPQ: Add a connection

A connection record contains the data required to initiate a Transaction Manager Integration. This includes authentication details, host URL, path, and headers. To view a connection record, in CPQ Admin, go to **Utilities**, and then click **Connections**.

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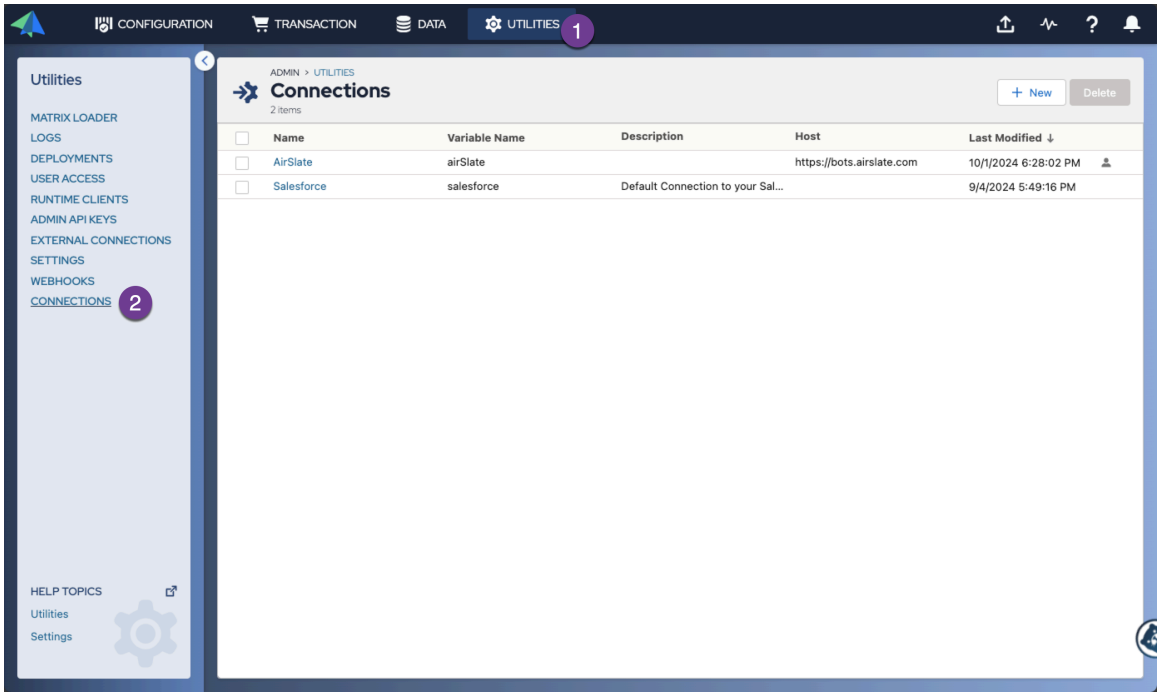
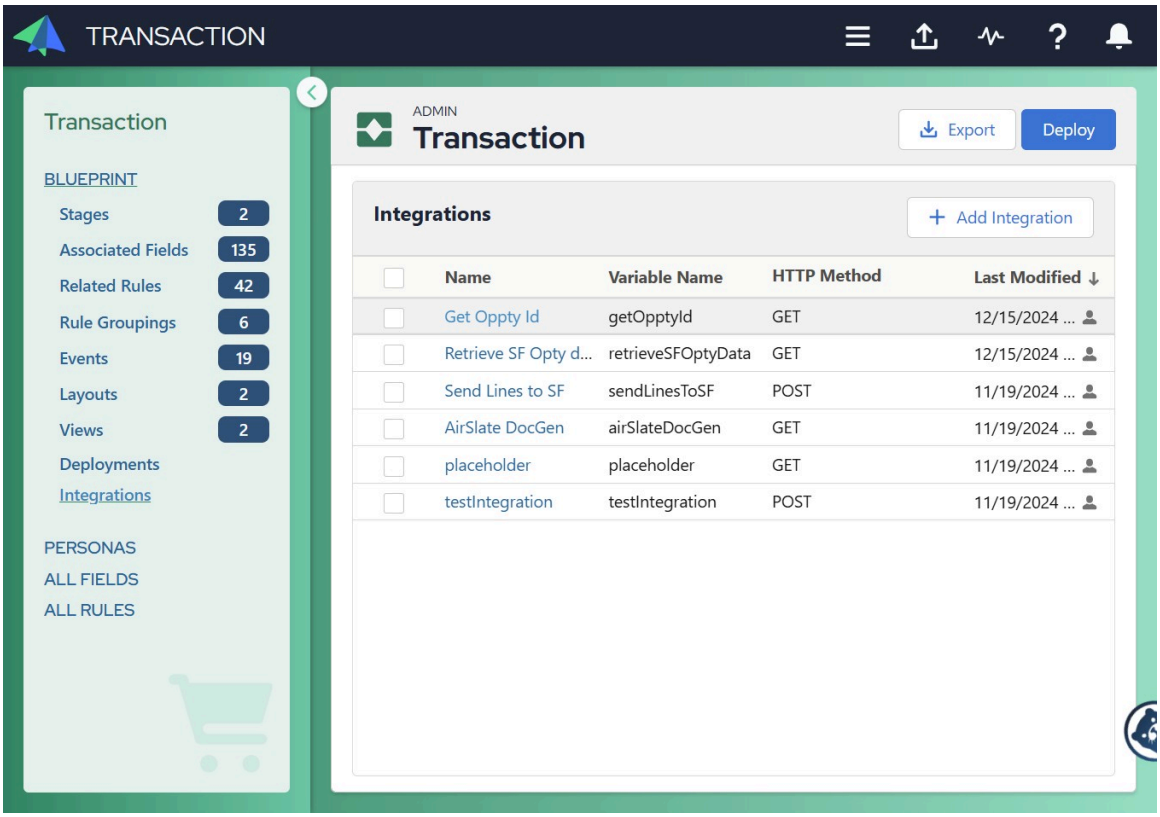


For information about adding a connection, see the "Creating a Connection" section in Transaction Manager: Integrations. For the purposes of this article, we use a connection to a Salesforce environment.

CPQ: Add the integration

1. Open CPQ Admin and go to the Integrations section.
2. Click **Add Integration**. Create a new integration using any suitable name. In this example, we use the name "Get Oppty Id".



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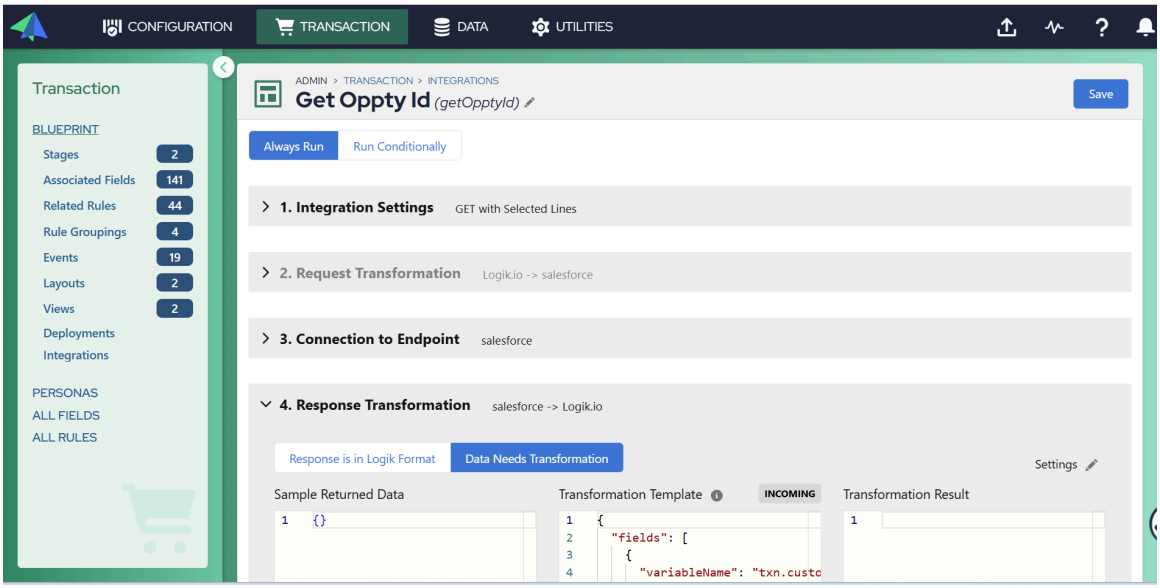

The integration details page shown above includes the following sections:

- Integration settings
- Request Transformation
- Connection to Endpoint
- Response Transformation

Details about these sections follow.

- Integration settings:
  - HTTP method: GET
  - Path: `/services/data/vXX.X/query/?q=SELECT+Name,+LGK__OpportunityId__c FROM+LGK__Transaction__c+WHERE +LGK__ID__c='{{txn.id}}'`

    The GET request retrieves the *Name* and *LGK__OpportunityId__c* fields from the *LGK__Transaction__c* object in Salesforce, filtering by the transaction ID “txn.id” in the *LGK__ID__c* field.

    In the path, <vXX.X> is the latest composite graph version. You can check for the latest version here.
  - Line Item Details to Include: Selected Lines
  - Timeout: 2000 ms

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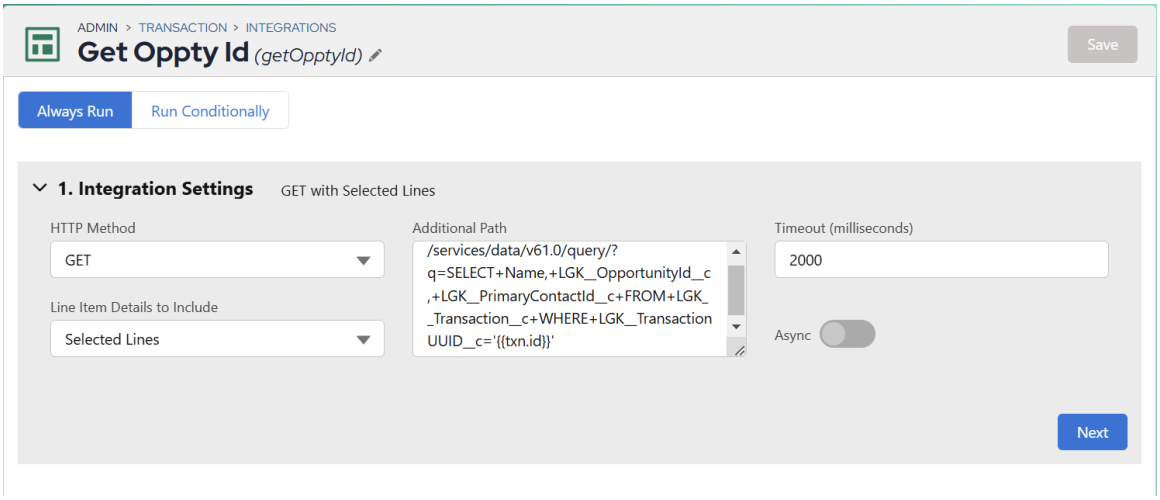
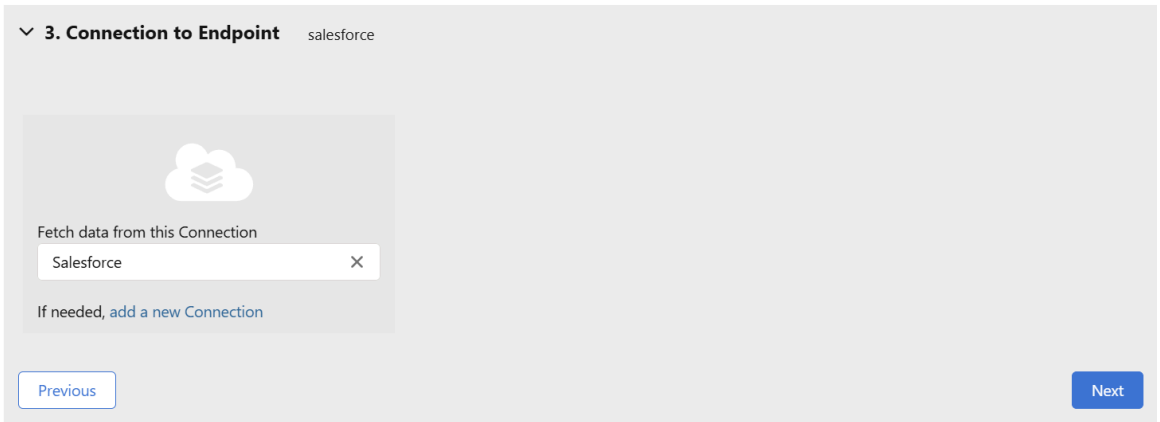


Click **Next**.

- Request Transformation: Not required when we are building a GET Integration.
- Connection to Endpoint: For this example, we are querying **Salesforce**. If you are setting up an integration with another system, select the appropriate connection.



Click **Next**.

- Response Transformation: See this sample response transformation template.

```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#each
 records}}{{LGK__OpportunityId__c}}{{/each}}"
    }
  ]
}
```

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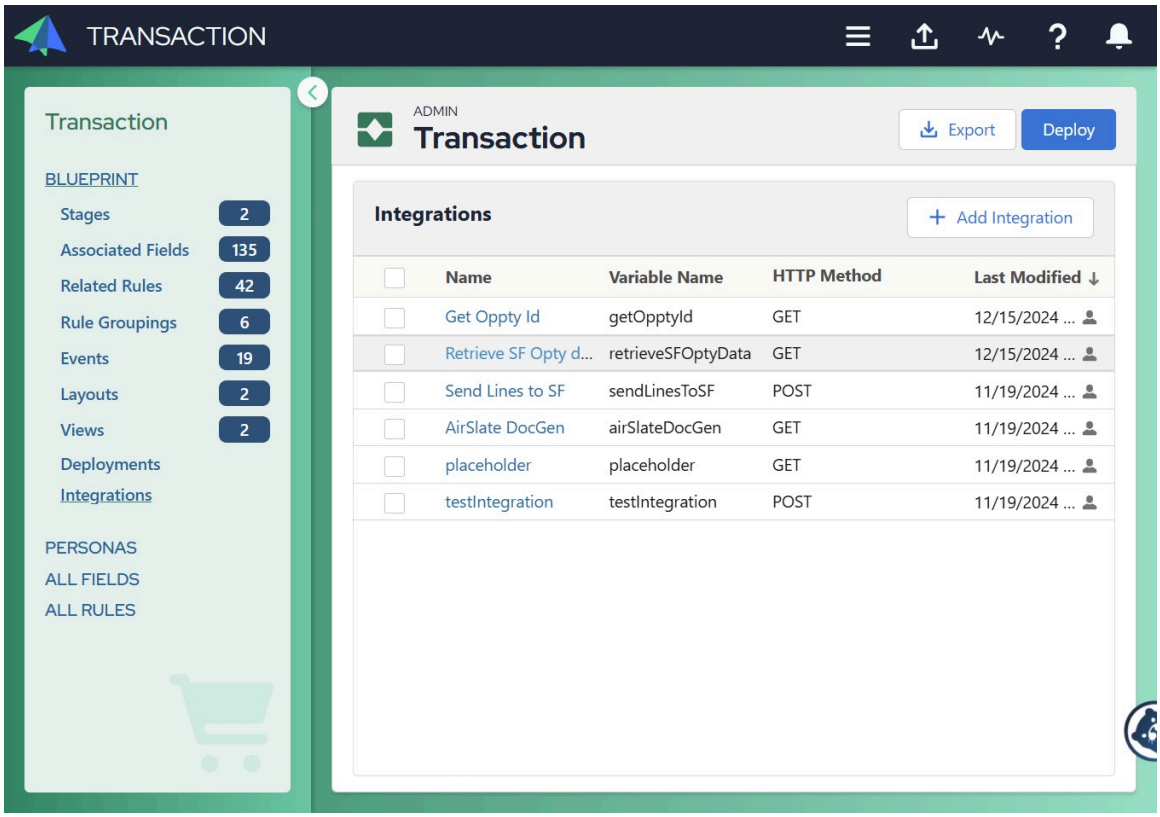
New integration: Retrieve opportunity details

Create another integration to get additional details through *txn.opportunity.id*.

Now that we have the opportunity ID, the next step in the integration involves using it as a reference to retrieve additional details from the opportunity and to populate the relevant LGK transaction fields.



- Integration settings:
  - HTTP method: GET
  - Path: `GET /services/data/vXX.X/query?q=SELECT Id,Name,Owner.Username,AccountId,Account.Name,Account.BillingAddress,Accou FROM Opportunity WHERE Id='{{txn.opportunity.id}}'`

    This query retrieves fields from an Opportunity record in Salesforce, based on the unique ID of the opportunity. It also retrieves related account details, such as the account's name, billing address, and shipping address. The query returns data for a specific opportunity identified by *{{txn.opportunity.id}}*.

    To get the field details from Salesforce, click **Setup** > **Object Manager** > **Opportunity** > **Fields & Relationships**.

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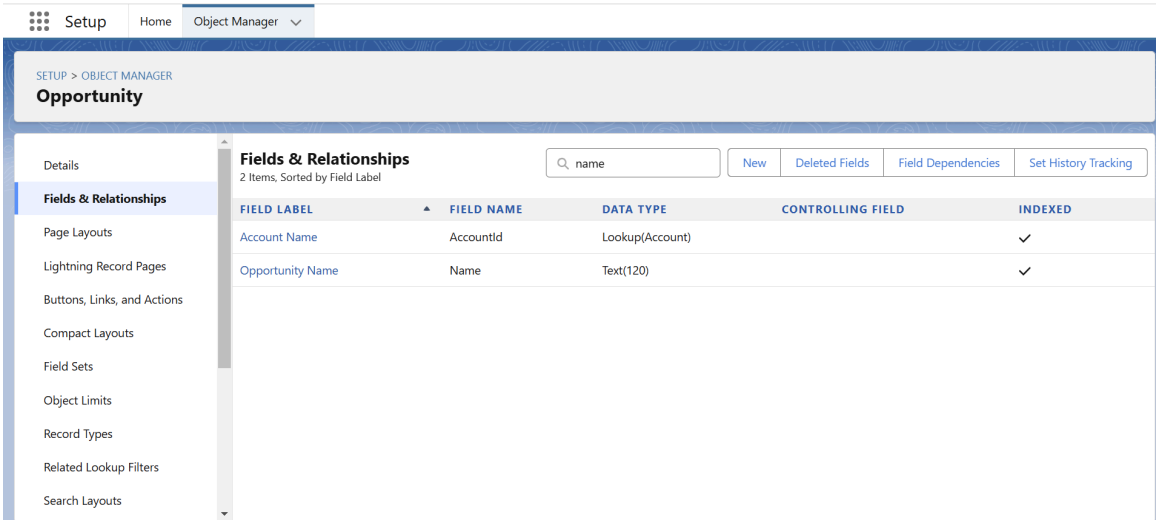
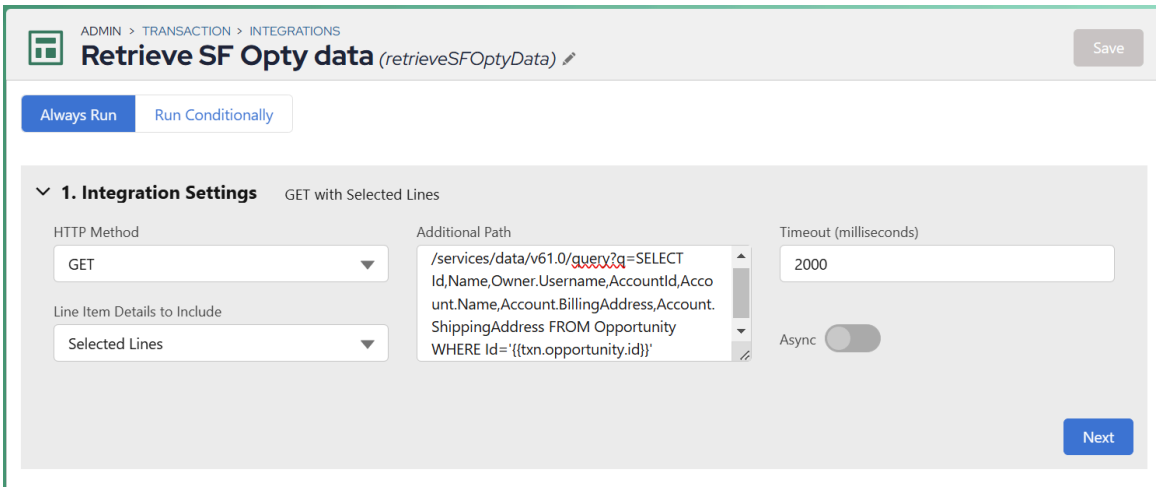


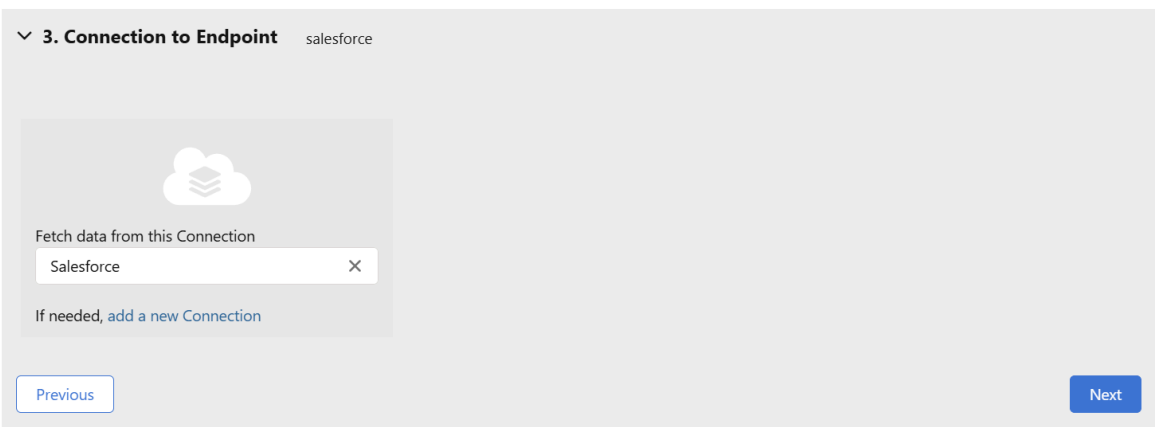
- Line Item Details to Include: Selected Lines
- Timeout: 2000 ms



Click **Next**.

- Request Transformation: not required when building a GET integration.
- Connection to Endpoint:

  Select **Connection to Endpoint**. For this example, we are querying Salesforce. If you are setting up an integration with another system, select the appropriate connection.



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Click **Next**.

- Response Transformation: The following JSON snippet defines how to populate variables defined in additional path by iterating over a collection of `records`.

  For *`txn.custom.opportunity`*, it extracts the *`Name`* field from each record, while for *`txn.custom.billToAddress`*, it extracts and concatenates the *`Account.BillingAddress.street,Account.BillingAddress.city,Account.BillingAd`* field. The Handlebars *`{{#each}}`* loop is used to process each record, and the resulting values depend on the system's handling, either as concatenated strings or arrays of values.

```
{
  "fields": [
    {
      "variableName": "txn.custom.opportunity",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.account.id",
      "value": "{{#each records}}{{AccountId}}{{/each}}"
    },
    {
      "variableName": "txn.custom.accountName",
      "value": "{{#each records}}{{Account.Name}}{{/each}}"
    },
    {
      "variableName": "txn.custom.quoteNumber",
      "value": "{{#each records}}{{QuoteNumber}}{{/each}}"
    },
    {
      "variableName": "txn.custom.billToAddress",
      "value":
 "{{records.[0].Account.BillingAddress.street}}{{records.[0].Ac
count.BillingAddress.city}}{{records.[0].Account.BillingAddress
.state}}{{records.[0].Account.BillingAddress.postalCode}}"
    },
    {
      "variableName": "txn.custom.shipToAddress",
      "value":
 "{{records.[0].Account.ShippingAddress.street}}{{records.[0].A
ccount.ShippingAddress.city}}{{records.[0].Account.ShippingAddr
ess.state}}{{records.[0].Account.ShippingAddress.postalCode}}"
    }
  ]
}
```

Trigger the integration when the end user clicks a button. You can now click **Events** to create a new event or to select an existing one. In this case, we use the Get SF Data event (a button in the UI) to connect to the integrations we previously created.

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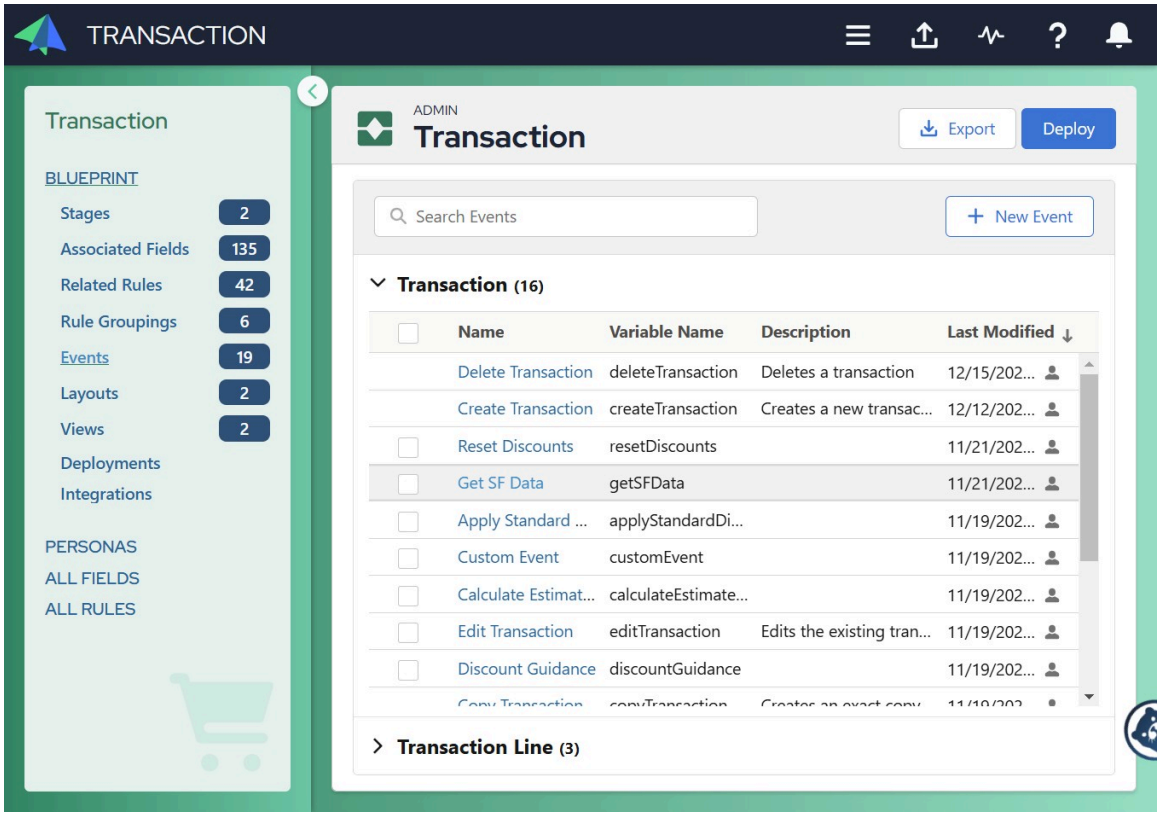
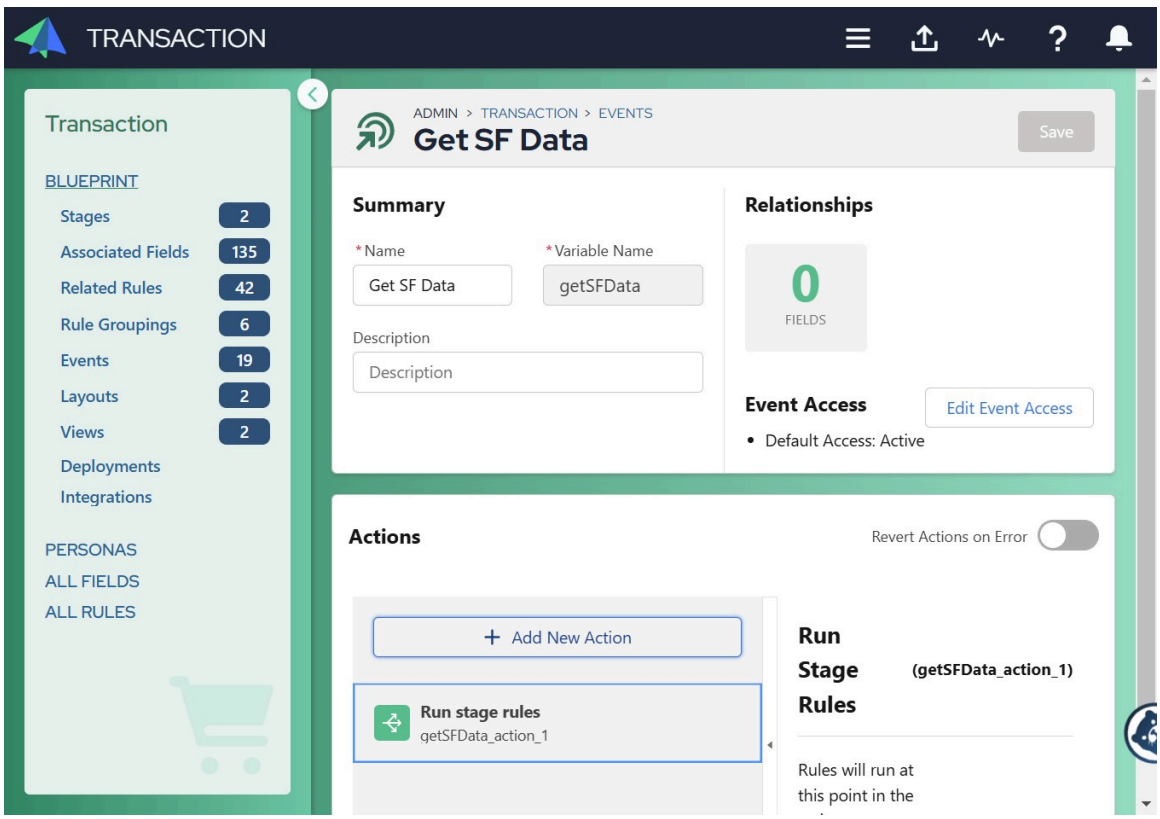


Click **Add New Action**.



Click **Integrations**.

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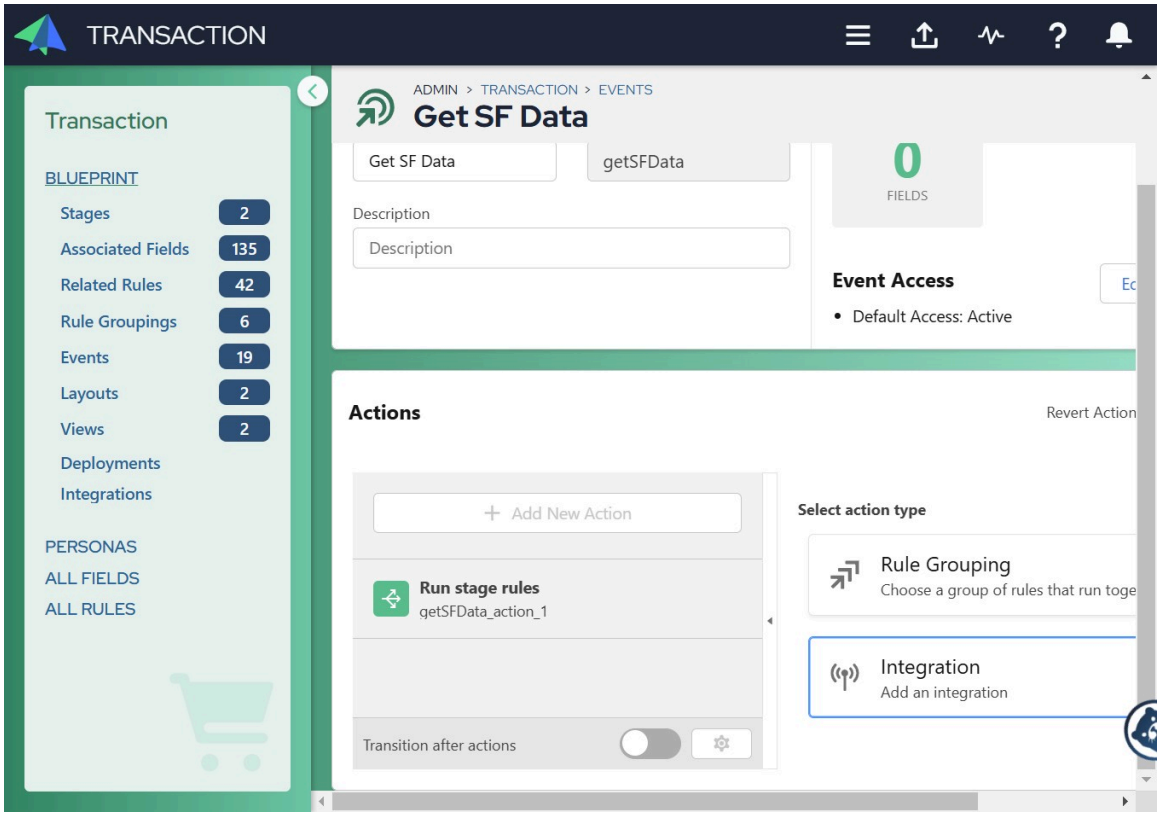
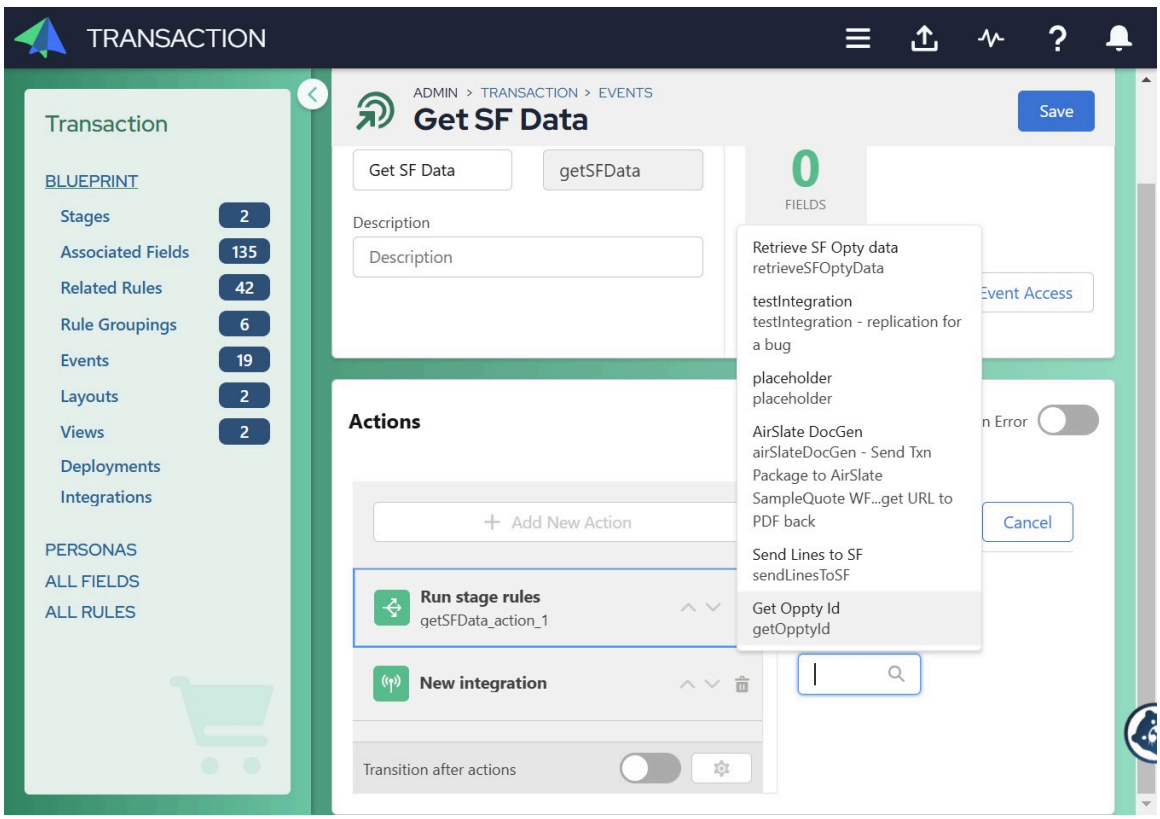


Search for and add the "Get Oppty Id" integration.



Click **Save**. Then, click **Add New Action** and add "retrieveSFOptyData".

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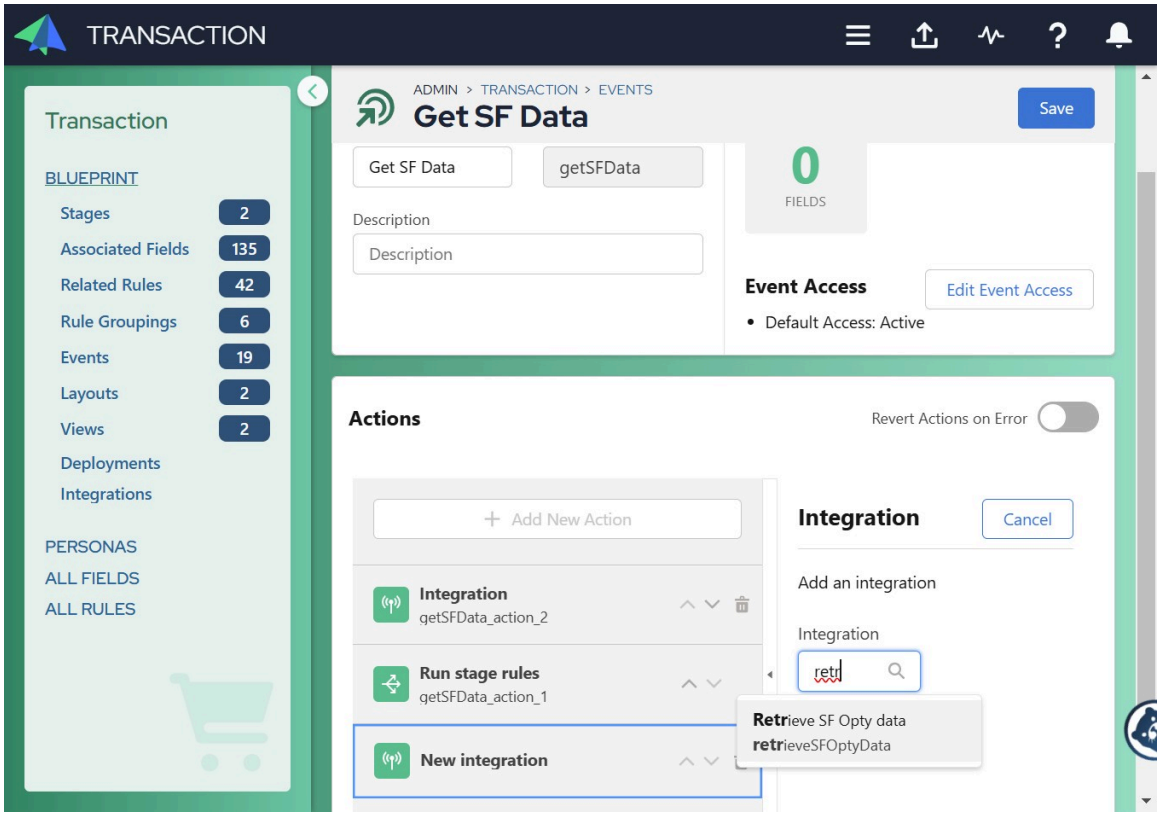
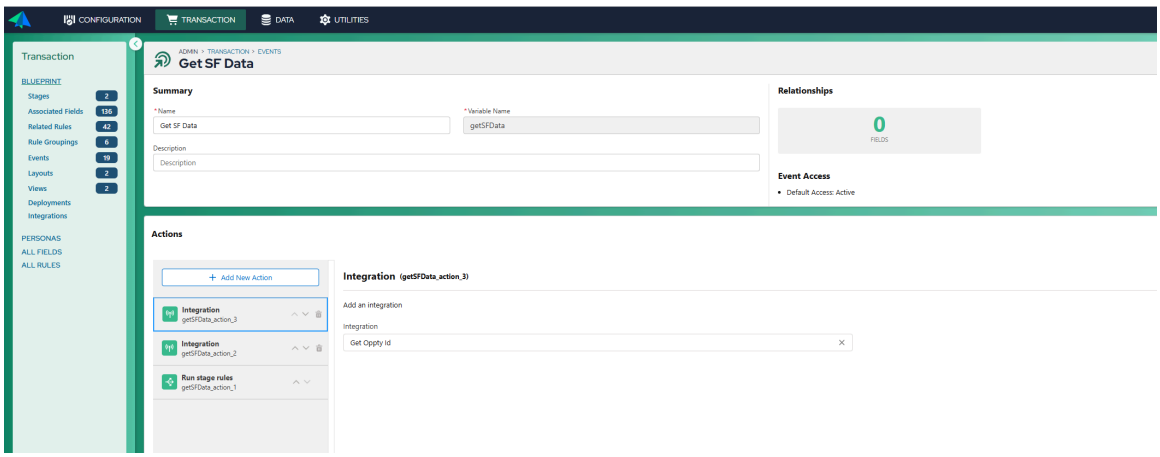


Click the up and down arrows next to the action items to arrange them in the desired order. (Here, we are selecting "Get Oppty Id", followed by "Retrieve SF Opty Data", to fetch the opportunity ID and retrieve relevant data.)



Click **Save**, and deploy the changes.

We have discussed how integrations can be added with events. Integrations can also be configured at the stage level. To do so, navigate to **Stages** > **Edit Settings** > **Add New Action** > **Integration**.

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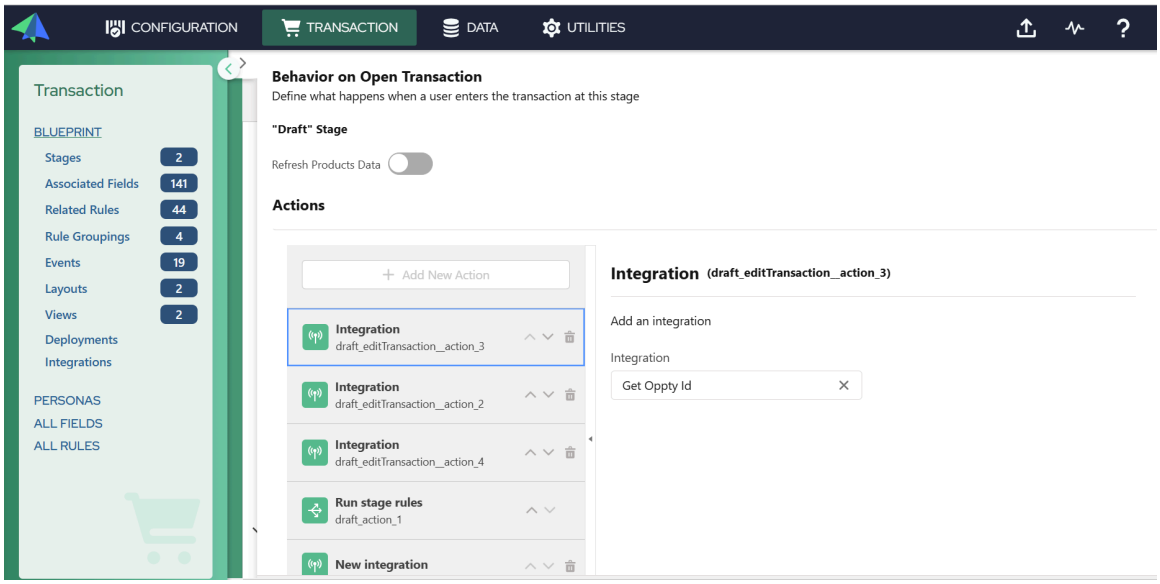

Troubleshooting

When configuring integrations, it is crucial to ensure that the sequence of integrations is set up correctly to retrieve accurate details. The order of execution plays a significant role in maintaining data consistency and alignment.

To achieve this, follow these steps:

1. Fetch the opportunity ID: The opportunity ID serves as the key reference for linking related data. This step is essential because the transaction details you retrieve later are directly associated with a specific opportunity.
2. Fetch the transaction ID through opportunity details: Use the opportunity ID to fetch the transaction ID. Because each transaction is linked to a particular opportunity, this approach ensures that you accurately associate the correct transaction with its corresponding opportunity.

By following this order, you can maintain the integrity of the integration and ensure that the data flow remains seamless and reliable.

Related topics

Transaction Manager: Integration - POST

Transaction Manager: Integrations - Handlebars syntax

You can use the Handlebars templating language when you build an integration transformation template.

Handlebars is a lightweight templating language used to generate dynamic content. Administrators building integration transformation templates use the following key elements of Handlebars syntax, together with enhancements specific to CPQ:

- Handlebars expressions: Enclosed in double curly braces `{{ }}`, expressions enable administrators to insert variables, functions, or properties into the template. For example, `{{user.name}}` renders the value of the name property of the user object.
- Built-in helpers include conditional helpers and iteration helpers.

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- Conditional helpers enable you to render content conditionally based on a value. For example:
  - *#if* renders content if the condition is true.

    ```
    {{#if user.isActive}}
      Active
    {{/if}}
    ```

    This snippet renders "Active" only if `user.isActive` is true.

  - *#unless* – The opposite of #if, it renders content if the condition is false.

    ```
    {{#unless user.isActive}}
      Inactive
    {{/unless}}
    ```

    This snippet renders "Inactive" if `user.isActive` is false.

- Iteration helpers let you loop through lists or modify scope.
  - *#each* loops through an array and renders content for each item.

    ```
    {{#each users}}
      <li>{{this.name}}</li>
    {{/each}}
    ```

    This snippet iterates through users and displays each user's name as a list item.

  - *#with* changes the scope to a specific object.

    ```
    {{#with user}}
      <p>{{name}}</p>
    {{/with}}
    ```

    This snippet simplifies access to properties of `user` in the block.

Advanced Handlebars syntax for integrations

Here's an explanation of each syntactical element used in the Integration Template, which leverages the Handlebars templating language.

- *{{#if lines}} {{/if}}*

  {{#if}} checks whether something is true.

  The following snippet checks whether there is something in `lines`. If `lines` has a value (like a list of items or some data), it will do something inside the block. If `lines` is empty or doesn't exist, it skips the block.

  ```
  {{#if lines}}
    We have lines to process!
  {{else}}
    No lines available.
  {{/if}}
  ```

  If `lines` exists, it shows "We have lines to process!". If not, it shows "No lines available."

- *{{~#each lines~}} {{/each}}*

  {{#each}} repeats something for each item in a list.

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The following snippet iterates over each item in the `lines` list and renders the content inside the block for every item. The ~ symbols are whitespace control characters in Handlebars. They help remove any extra spaces or line breaks before and after the block, ensuring cleaner and more compact output. (See below.)

```
{{~#each lines~}}
  <p>{{this}}</p>
{{/each}}
```

The snippet goes through each item in `lines` and puts each item in a paragraph tag.

- *{{#if <logik line-level field varname>}} {{/if}}*

  {{#if <logik ...}} checks whether a specific piece of data is true or exists. It checks whether a specific field or value (like varname) in your data exists or is true. It's a way to check for specific information in a more complex structure (like in a dataset).

```
{{#if logik.lineLevelField.isActive}}
  The field is active!
{{else}}
  The field is not active.
{{/if}}
```

  This snippet checks whether `logik.lineLevelField.isActive` is true (like checking if something is "active"). If it is, it shows "The field is active!" If not, it shows "The field is not active."

The tilde (~)

The tilde (~), a control character, hides whitespace and line breaks, helping keep the output clean. It makes HTML more compact and prevents spacing issues in output.

In some of the examples above, a leading tilde before *#each* removes whitespace before the block starts. The trailing tilde after #each removes whitespace after the block starts.

The zeroIfMissing custom helper

The zeroIfMissing helper prevents errors due to missing values and ensures numerical fields always have a valid default value.

```
Custom Helper 'zeroIfMissing'
"price": {{zeroIfMissing txn.price}}, would become -> "price": 0
 (or "price": 9.99, if txn.price is present)
```

The lgkFilter custom helper

The lgkFilter helper iterates through a collection and includes only items that meet a specified condition.

```
{
  "numericFiltered": [
    {{#lgkFilter lines "txn.line.custom.someNumber > 10"}}
      {
      "id": "{{txn.line.product.id}}",
      "someNumber": "{{txn.line.custom.someNumber}}"
    }
    {{else}}
      {
```

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```
      "error": "Item could not be added (numeric condition)"
    }
    {{/lgkFilter}}
  ],
  "textFiltered": [
    {{#lgkFilter lines "txn.line.custom.status == Active"}}
      {
      "id": "{{txn.line.product.id}}",
      "status": "{{txn.line.custom.status}}"
    }
    {{else}}
      {
      "error": "Item could not be added (text condition)"
    }
    {{/lgkFilter}}
  ]
}
```

This helper replaces *#each* and *#unless* blocks.

- Simple syntax: *{{#lgkFilter lines "<predicate_field>"}}*
- Conditional syntax: *{{#lgkFilter lines "<predicate_field> <comparator> <literal_value>"}}*
- Supported comparators: *<*, *>*, *<=*, *>=*, *!=*, *==*
- Complex conditions such as && are not supported

The `else` block is supported within the helper.

The helper throws an error when its syntax is incorrect and when fields cannot be parsed.

The helper performs comma joins internally for valid JSON output.

The @ symbol

The @ ensures that you're pulling the value from the outer or parent context and not from the current context. It's often used when the data you need is at a higher level in the structure, and you want to avoid confusing it with the local data of the current scope.

In the expression *"LGK__TransactionId__c": "@{parentTransaction.id}"*, the *@* symbol is used to reference a value from a parent context or object in templating systems, such as Handlebars or other similar systems.

The *@{}* syntax tells the system to look at the parent context (the object or data outside the current scope) and retrieve the value of `parentTransaction.id`.

For example, suppose you have an object like this:

```
{
  "parentTransaction": {
    "id": "12345"
  }
}
```

When you use *"LGK__TransactionId__c": "@{parentTransaction.id}"*, the `id` from `parentTransaction` (which is `12345`) will be used as the value for *"LGK__TransactionId__c"*.

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Conditional assignment example

The line *"LGK__ParentTransactionLineId__c": {{#if txn.line.custom.parentLineReferenceId}} "@{line_{{txn.line.custom.parentReferenceId}}.id}" {{else}} null {{/if}}* is part of a Handlebars template and conditionally sets the value of the field `LGK__ParentTransactionLineId__c`.

- `LGK__ParentTransactionLineId__c` is the key where the resulting value will be placed.
- *{{#if txn.line.custom.parentLineReferenceId}}* checks whether `txn.line.custom.parentLineReferenceId` exists and has a value.
- *@{line_{{txn.line.custom.parentReferenceId}}.id}* creates a dynamic reference to the `id` of a specific line based on `parentReferenceId`.
- *{{else}} null {{/if}}* sets the value to null if the condition is false.

Concatenating Salesforce fields with conditional punctuation

In Handlebars, concatenating multiple fields together with punctuation (like commas, spaces, and conditional checks) can be done by combining variables in the template and using {{#if}} blocks to handle conditional logic.

For example, you can use the following approach to concatenate fields such as street address, street address2, city, state, and zip code for an address while ensuring that a comma and space after street address2 are only included if street address2 is populated:

```
{{#if streetAddress}}
  {{streetAddress}}
  {{#if streetAddress2}}, {{streetAddress2}}{{/if}}
  {{#if city}}, {{city}}{{/if}}
  {{#if state}}, {{state}}{{/if}}
  {{#if zipcode}}, {{zipcode}}{{/if}}
{{else}}
  No address available
{{/if}}
```

This concatenates fields like streetAddress, streetAddress2, and city, ensuring that commas are only included when the corresponding fields are populated.

Example output with `streetAddress2`: *"123 Main St, Apt 4, San Francisco, CA, 94105"*

Example output without `streetAddress2`: *"123 Main St, San Francisco, CA, 94105"*

Conclusion

By using these key elements, administrators can create dynamic, flexible, and maintainable integration transformation templates. Understanding and leveraging expressions, helpers, blocks, conditionals, and parent context references enables handling complex data and logic with ease.

For more information on Handlebars syntax, see the Handlebars documentation.

Note: Handlebars syntax does not support all the features described in this external document.

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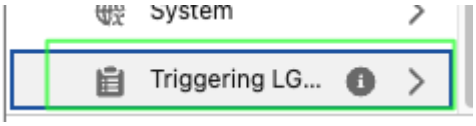
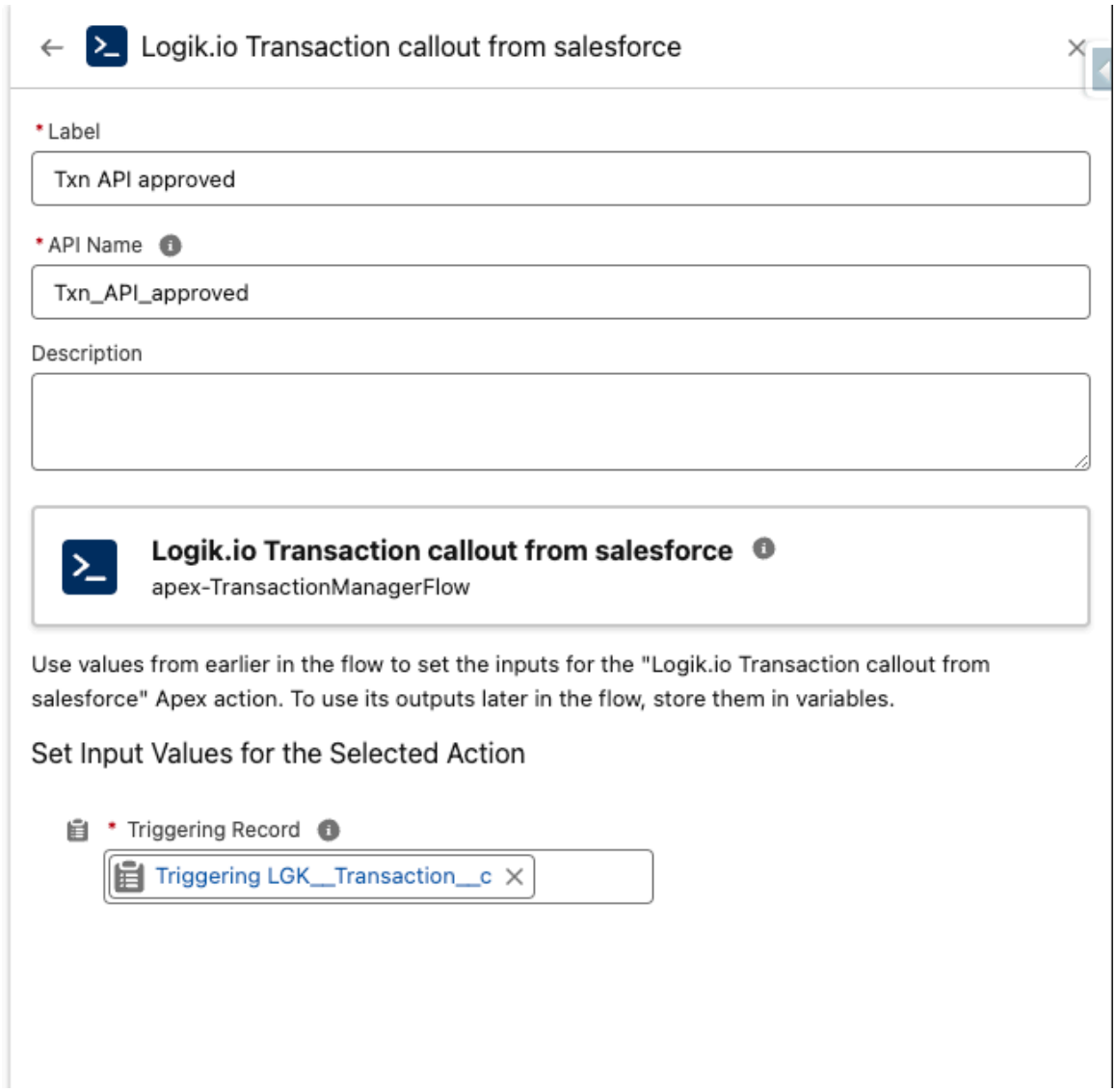
Transaction Manager: Integrate Salesforce approvals

Integrate Salesforce approvals into Transaction Manager.





Salesforce setup

Refer to these Salesforce Trailheads modules and documentation:

- Postman: Quick Start: Connect Postman to Salesforce
- Submit for Approval: Salesforce Developers: Submit a Record for Approval

An approval process in Salesforce automates record approval workflows in an organization. It defines:

- Approval Steps: The sequence of steps and approvers for a record, for example, sending a time-off request to an employee's manager for approval.
- Actions: Automated actions based on the approval outcome, such as updating records if approved or sending notifications if rejected.

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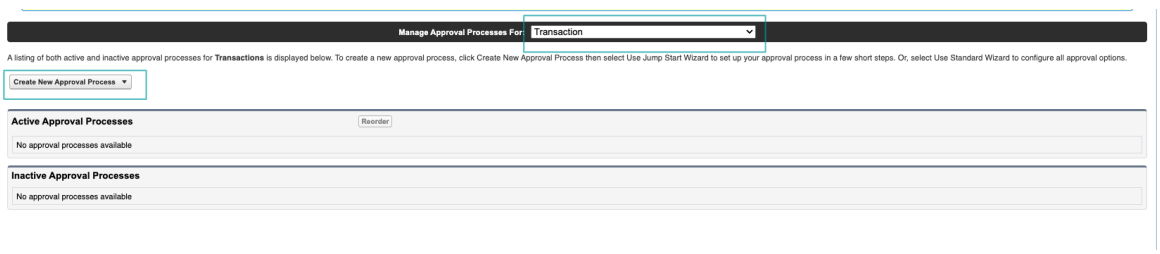
This streamlines the approval process and ensures consistency.



1. Go to Setup, click **Approval Processes**, and select the transaction record.
2. In **Manage Approval Processes For**, select **Opportunity**.
3. Click **Create New Approval Process**.



4. Ensure that the **Add the Submit for Approval and Approval History** option is checked.

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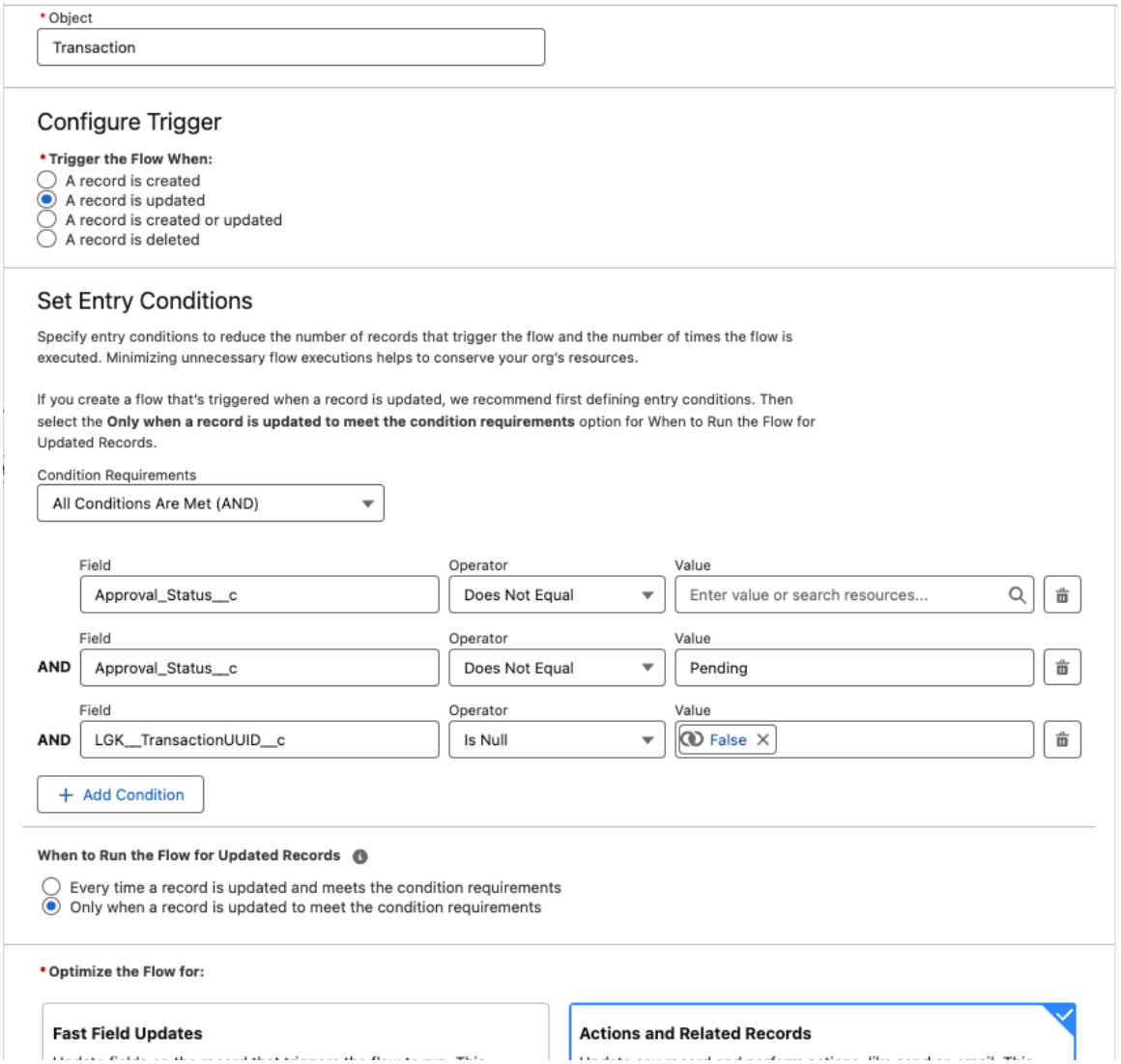
You can specify conditions, if applicable, in the Entry-Specific Criteria section.

5. Choose **Automatically assign approvers** and set it to anyone with the SysAdmin role.



6. Create a custom picklist field in the transaction record by navigating to Setup, clicking **Object Manager**, and then clicking **Transaction**. Ensure that the field is not set as a multi-select picklist.

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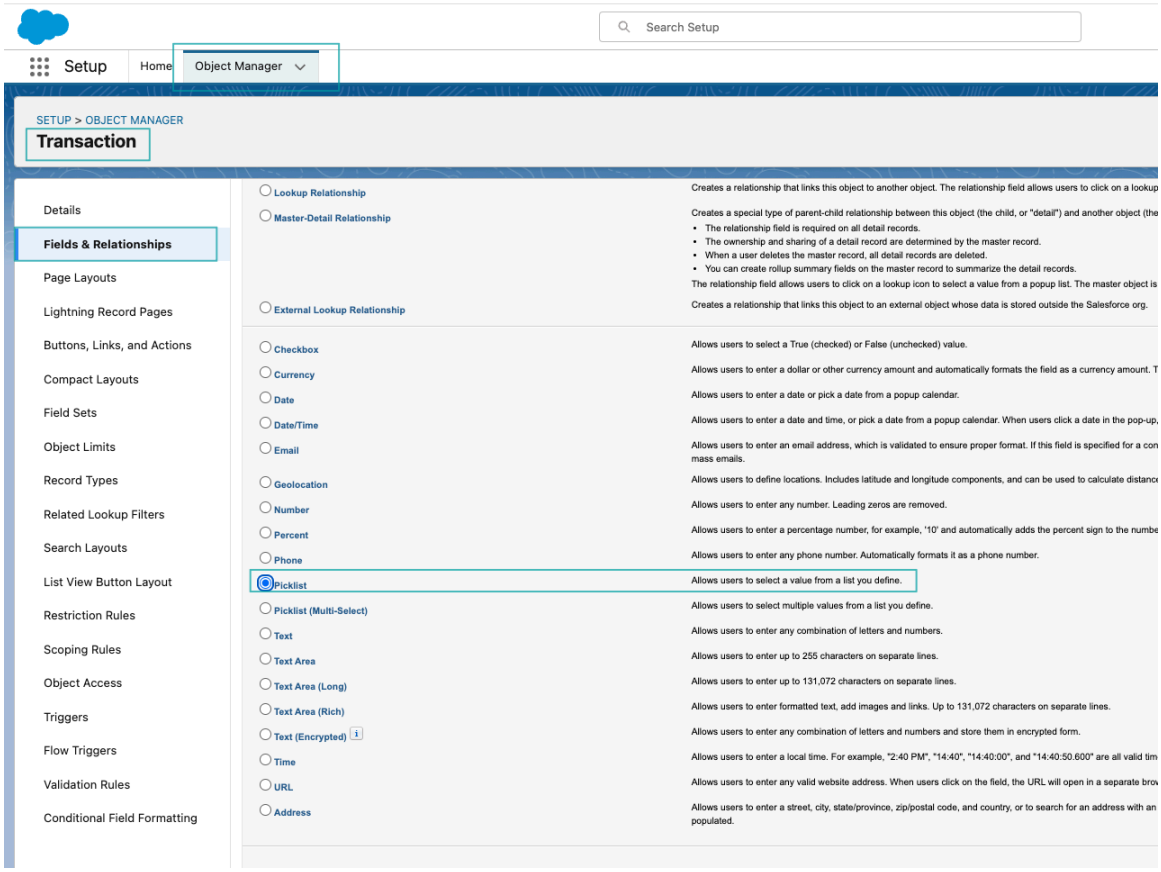

7. Give the picklist field three values to distinguish between Pending Approval, Approved, and Rejected.

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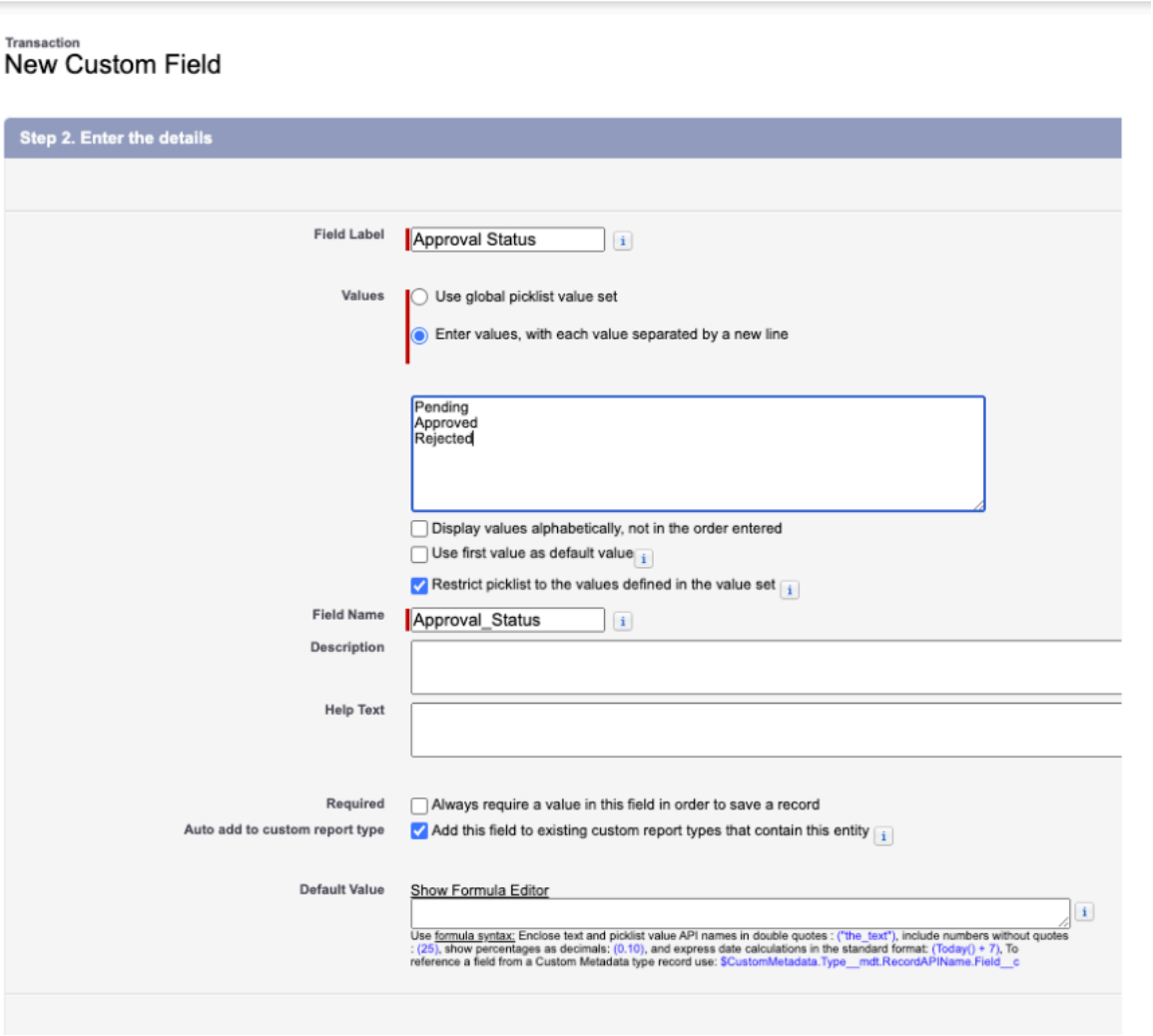
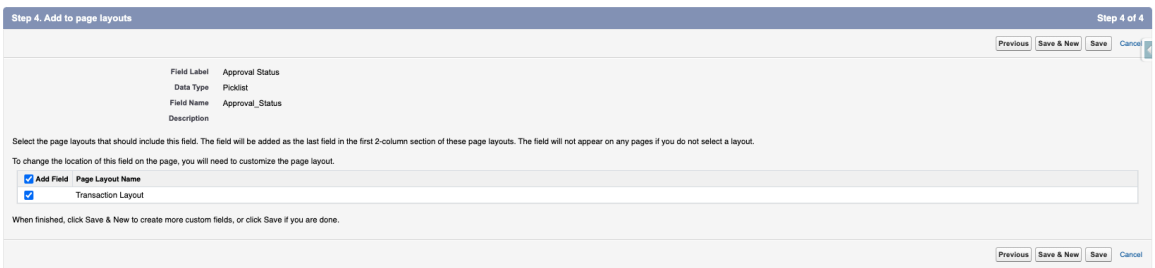


8. Add the custom field to the Transaction Layout.



If you skipped the previous step, you can add the field to the Transaction Layout like so:

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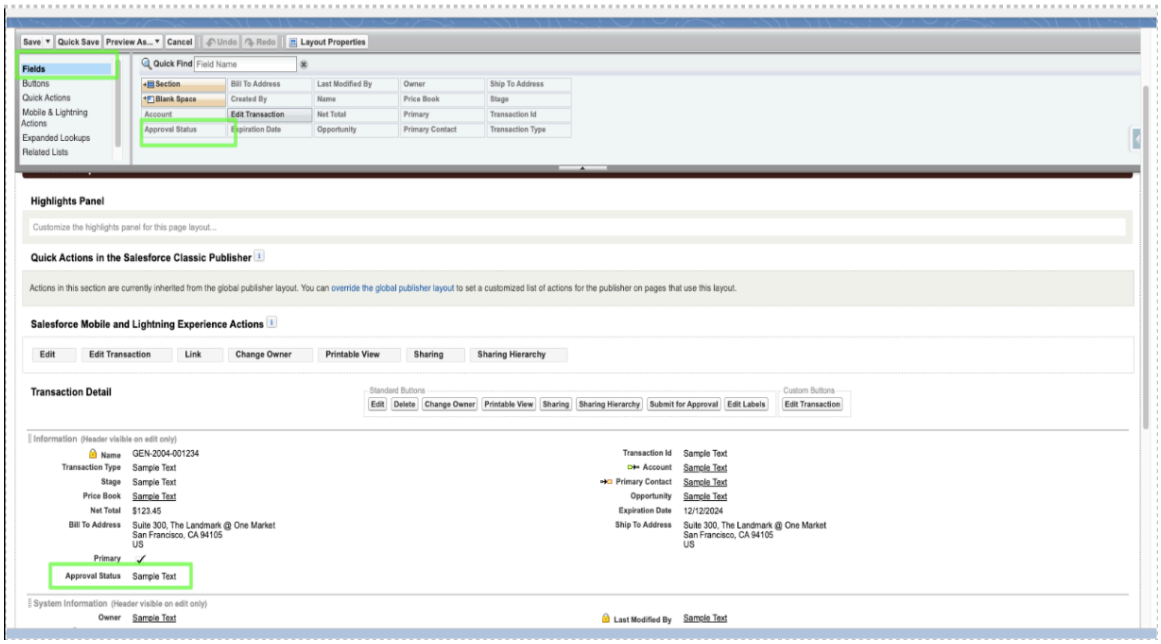
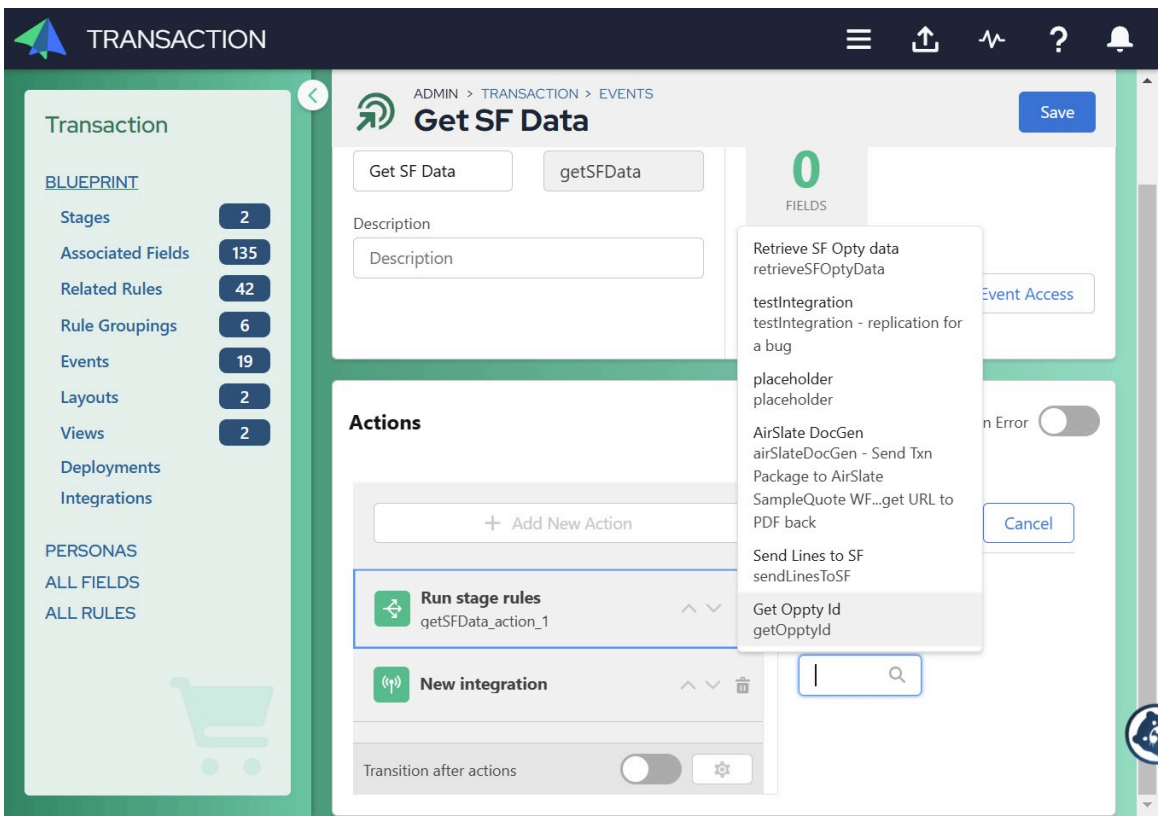


9. Go back to the approval process, click **Initial Submission Actions**, click **Add New**, and then select **Field Update**. Configure it with the required values.
10. To ensure that the relevant fields are updated based on the outcome of the approval process, repeat step 9 for the Approval Actions and Rejection Actions sections. The following screenshot shows the final rejection option.



If you included email alerts along with field updates, the approval process should resemble the following:

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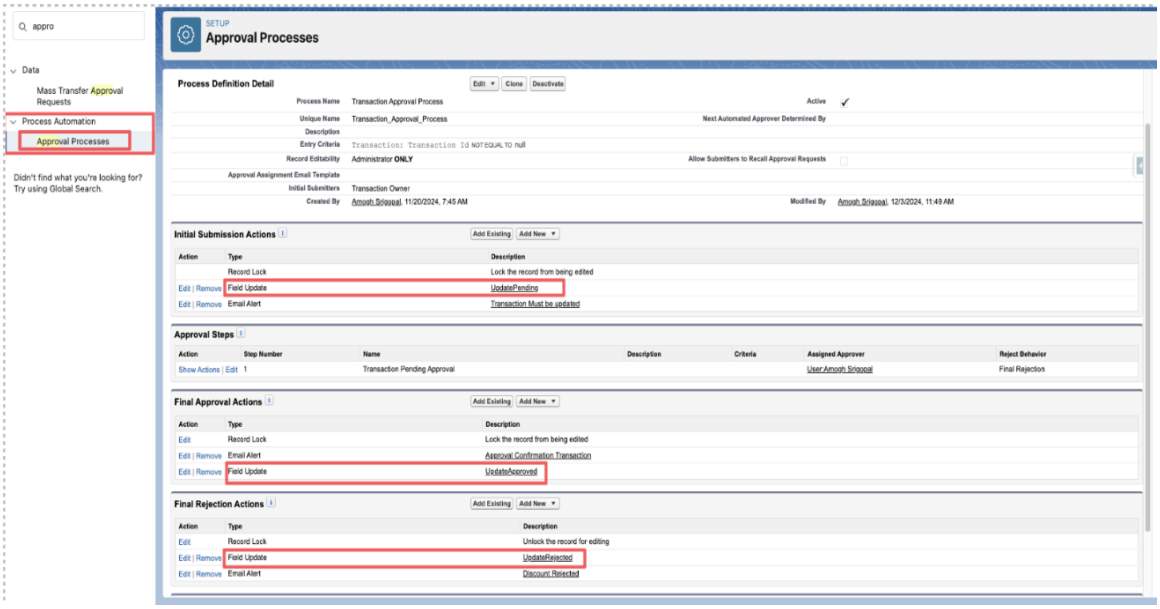
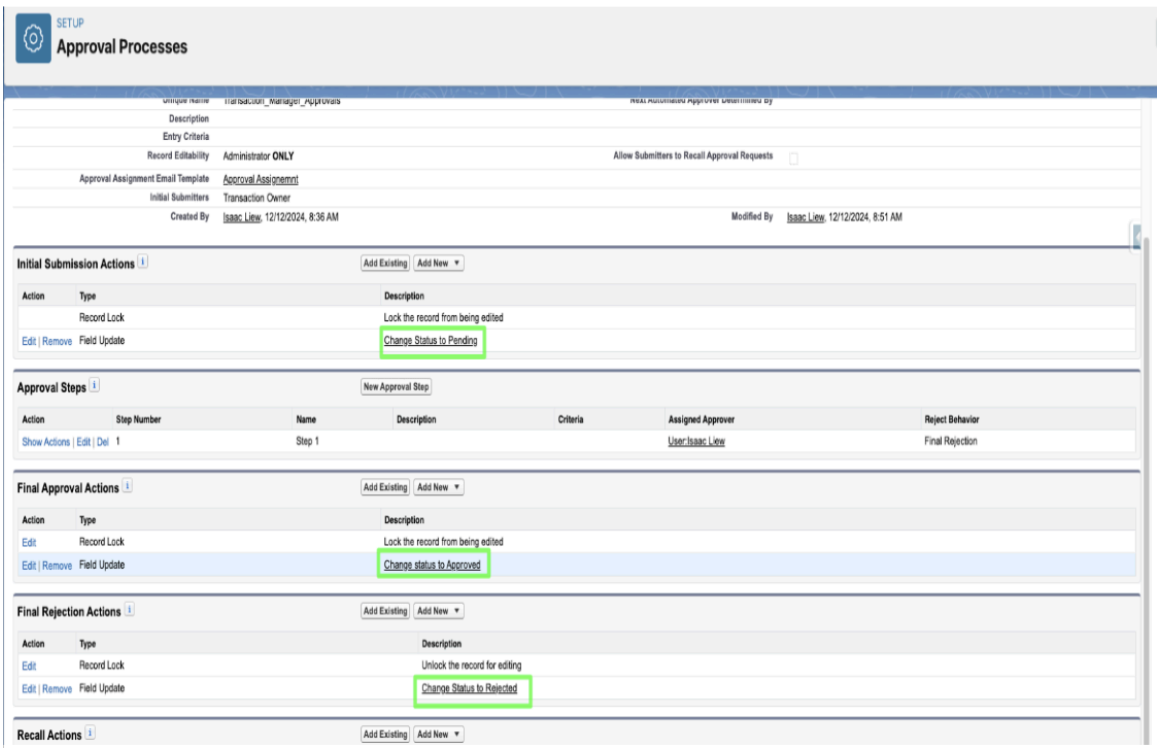


If the final approval process has only field updates, it should resemble the following:



11. Click **Activate**.

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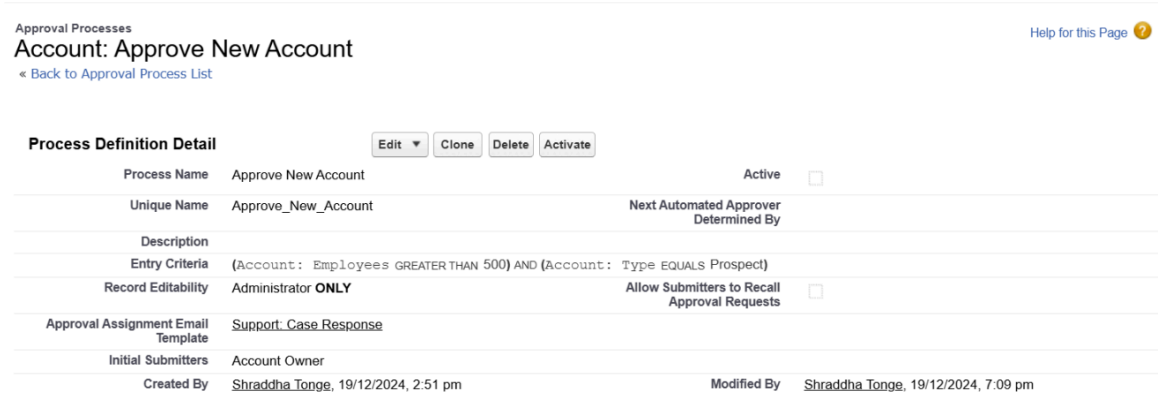
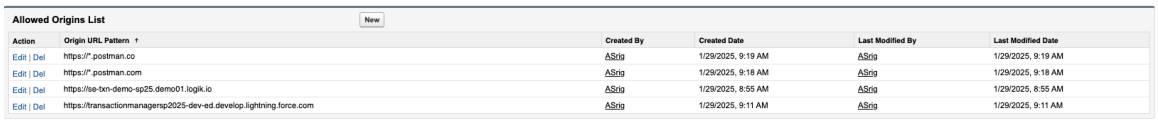


12. To ensure that CORS includes the URL, in the Setup search bar, search for CORS, or go to Setup, click **Security**, and then click **CORS**. Verify that these are included in the CORS:



Transaction Manager setup: integrations

Create two integrations for an event that will be used to submit the record for approval through Transaction Manager.

Note: If you want to test these calls in Postman, the endpoint is the my Salesforce URL: `<https://logik-1e-dev-ed.develop.my.salesforce.com/>`.

1. Receive the Salesforce record ID: Fetch the right Salesforce record ID using the UUID. This integration is used for filling in the custom field for the integration above.
   - Connection: Salesforce
   - GET

     Additional path: `/services/data/v62.0/query/?q=SELECT Id, CreatedDate, LGK__TransactionUUID__c FROM LGK__Transaction__c WHERE LGK__TransactionUUID__c = '{{http://txn.id/}}'ORDER BY CreatedDate DESC`

     Response Transformation:

```
{
  "fields": [
    {
      "variableName": "txn.custom.sfRecordID",
      "value": {{#each records}}{{#if
@first}}"{{this.Id}}"{{/if}}{{/each}}
    },
    {
      "variableName": "txn.custom.opportunityName",
      "value": {{#each records}}{{#if
@first}}"{{this.LGK__OpportunityId__r.Name}}"{{/if}}{{/each}}
    },
    {
      "variableName": "txn.custom.accountName",
```

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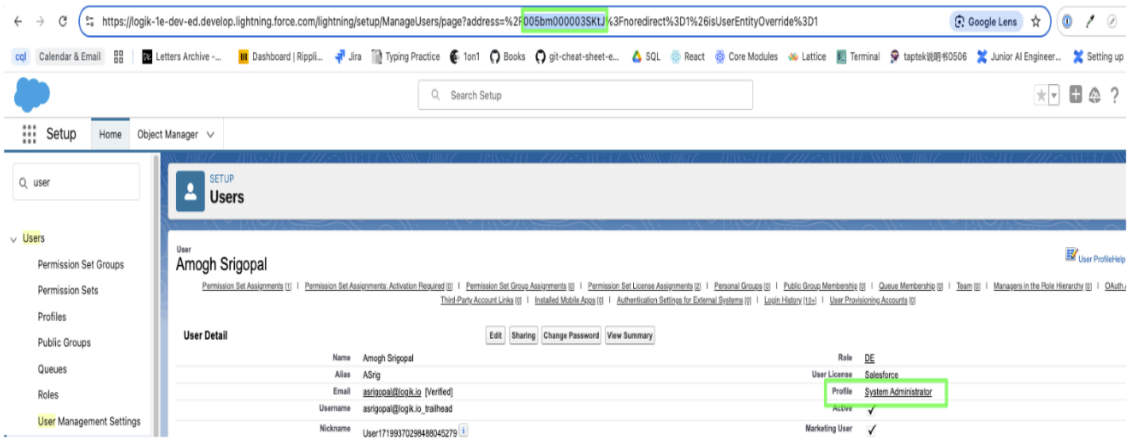
```
      "value": {{#each records}}{{#if
 @first}}"{{this.LGK__AccountId__r.Name}}"{{/if}}{{/each}}
    }
  ]
}
```

UPDATED QUERY USE THIS:

```
/services/data/v62.0/query/?q=SELECT Id,
 CreatedDate,LGK__OpportunityId__c,LGK__OpportunityId__r.Name,
 LGK__AccountId__r.Name,
 LGK__AccountId__c,LGK__TransactionUUID__c FROM
 LGK__Transaction__c WHERE LGK__TransactionUUID__c
 ='{{txn.id}}'ORDER BY CreatedDate DESC
```

contextActorId refers to the system Admin Record ID in Salesforce. It can be obtained by navigating to Setup and clicking **Users**, and then copying the ID from the URL of the user page.



2. Submit for approval.
   - Connection: Salesforce
   - POST

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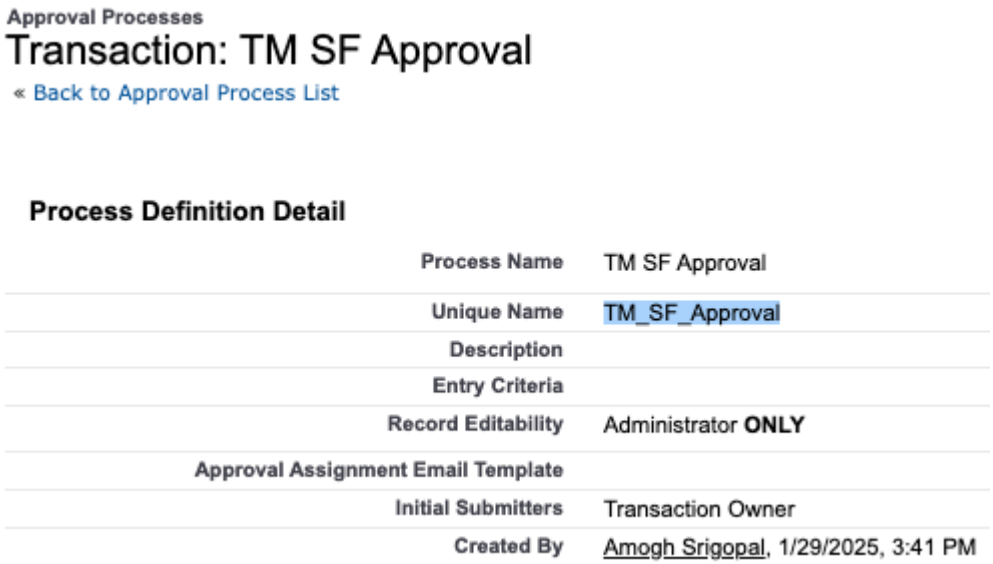
Additional path: `/services/data/v62.0/process/approvals`



Request Transformation:

```
{
  "requests" : [{
  "actionType": "Submit",
  "contextId": "{{txn.custom.sfRecordID}}",
  "nextApproverIds": [],
  "comments":"The line item has a discount percentage of
 {{txn.custom.overallDealDiscount}}%",
  "contextActorId": "005bm000003SKtJ", -- SF Record ID of user
 highlighted above
  "processDefinitionNameOrId" : "TM_SF_Approval", --should be
 the unique name fro process definition detail highlighted above
  "skipEntryCriteria": "true"}]
}
```

Make sure that the transform template has these values correctly:

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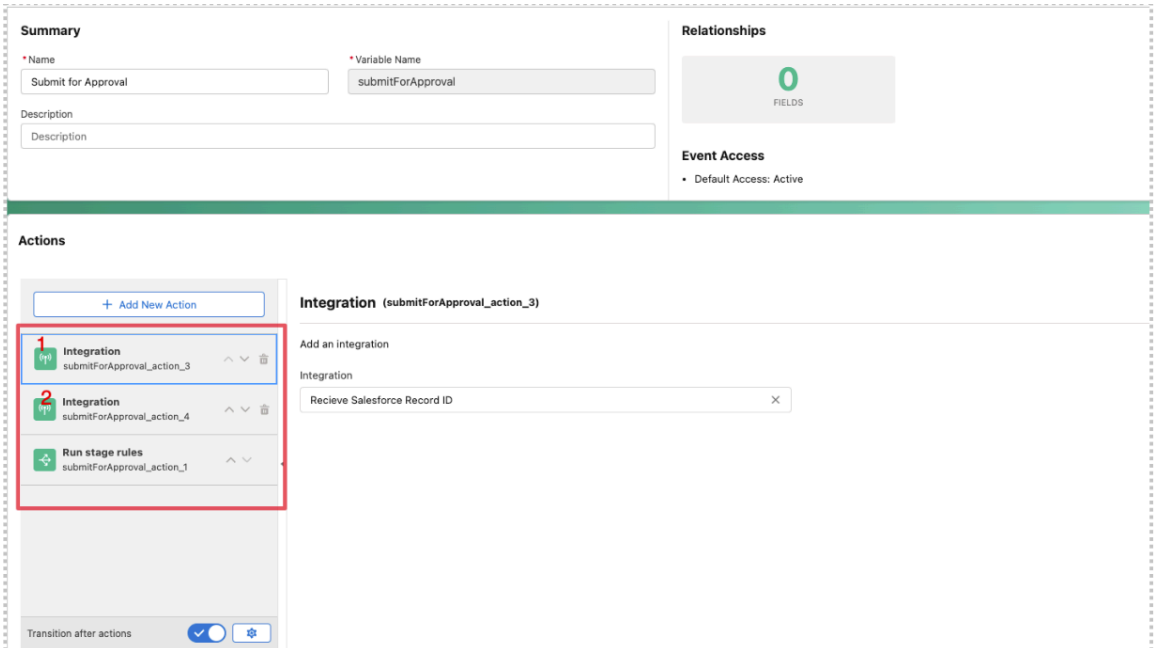
```
equests" : [{
ctionType": "Submit",
ontextId": "{{txn.custom.sfRecordID}}",
extApproverIds": [],
omments":"The line item has a discount percentage of {{
ontextActorId": "005bm000005XhMf",
rocessDefinitionNameOrId" : "Transaction_Manager_Approv
kipEntryCriteria": "true"}]
```

Transaction Manager setup: creating events

Slack Approvals Integration is implemented through headless event API calls. In this approach, we'll use these headless API calls in a record-triggered flow and perform the callout through Apex actions.



Note that the two integrations created in the previous step are designed to work in sequence. The first integration receives the Salesforce record ID, and the second integration submits it for approval. Alternatively, the process of receiving the Salesforce ID can occur on the Open Transaction action by adding the necessary configuration at that stage.

Create two additional events that will move the stage either forward for approval or backward for revision. Be sure to note their respective variable names for use in the API callout configuration.

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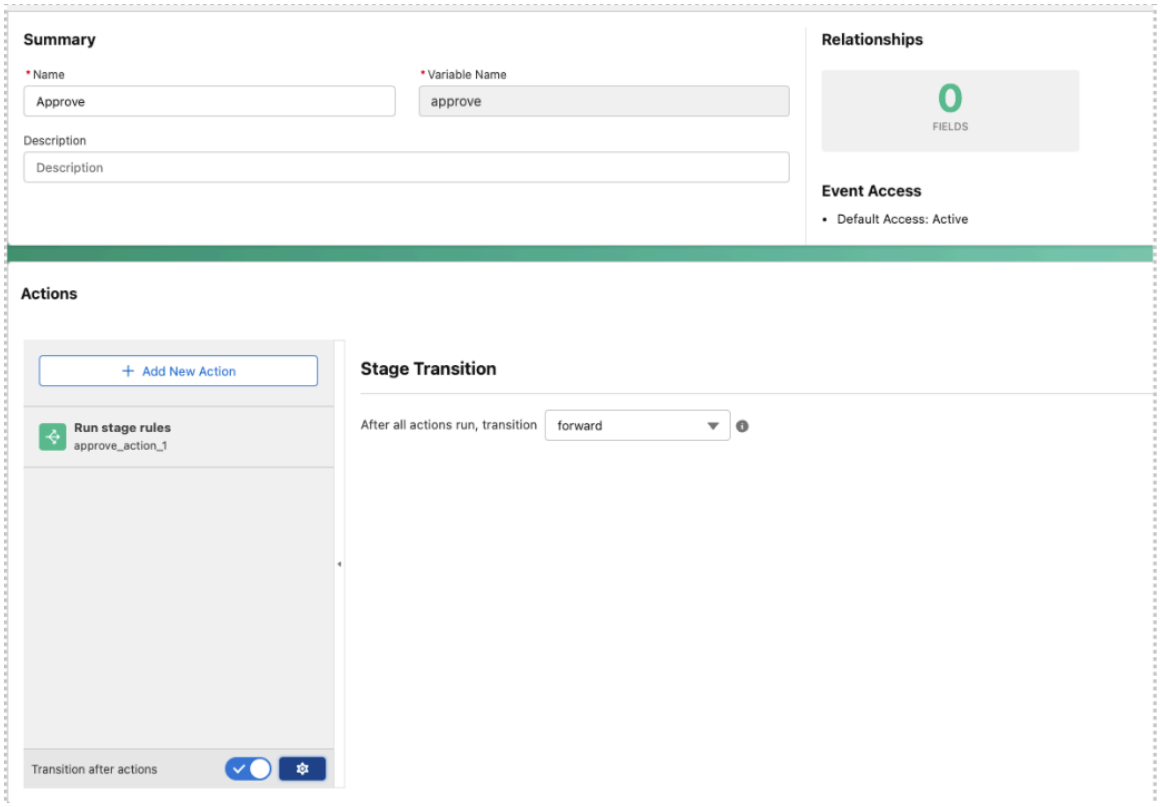

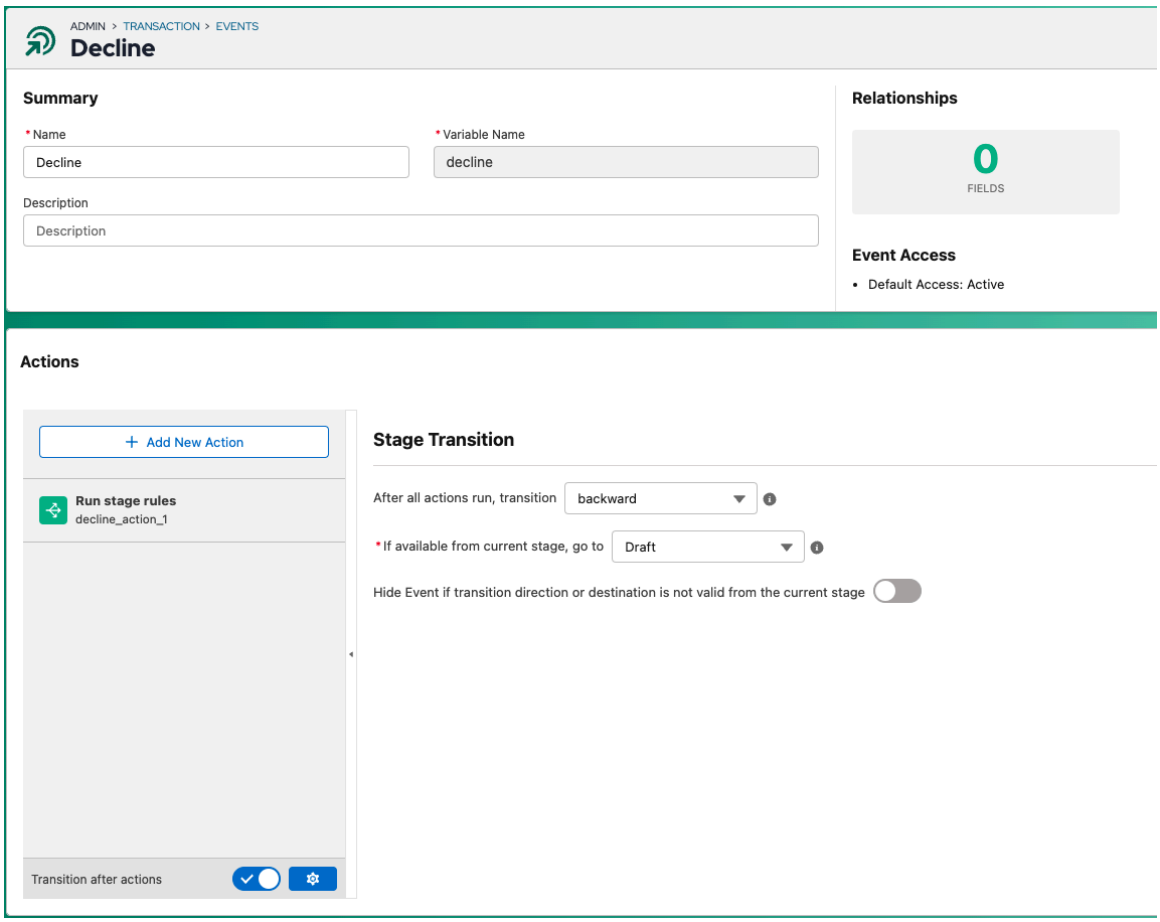

Transaction Manager setup: adding the Submit for Approval button to the layout

The button events can be added to the default_draft layout using the following JSON format:

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```
{
  "type": "button",
  "event": "submitForApproval",
  "label": "Revise",
  "columnOrder": 2,
  "variableName": "revise"
},
```

Make sure to add the custom field to the `draft fields: []` section; it's not necessary to include it in the layout.

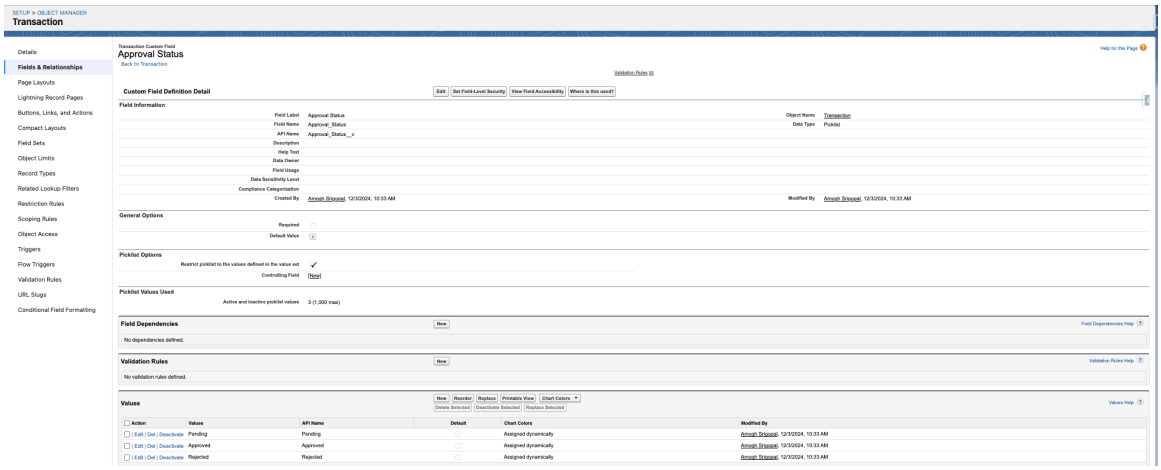
```
{
  "type": "ReadOnlyText",
  "label": "SF Record ID",
  "variableName": "txn.custom.sfRecordID"
},
```

Record-triggered flow

To set up the VS code environment, install the VS Code extensions from this document: Sales Engineering Team Member Setup

1. Following the Trailheads approval process, create a picklist record on the *LGK__Transaction__C* object that has the current approval state of the transaction, and ensure the process updates the record based on approval, rejection, and pending approval.

   The following image shows a custom field that triggers the record-triggered field: the *Approval_Status__C* field that you made when you created the approval process.



   The following image shows what the flow will look like when it's complete.

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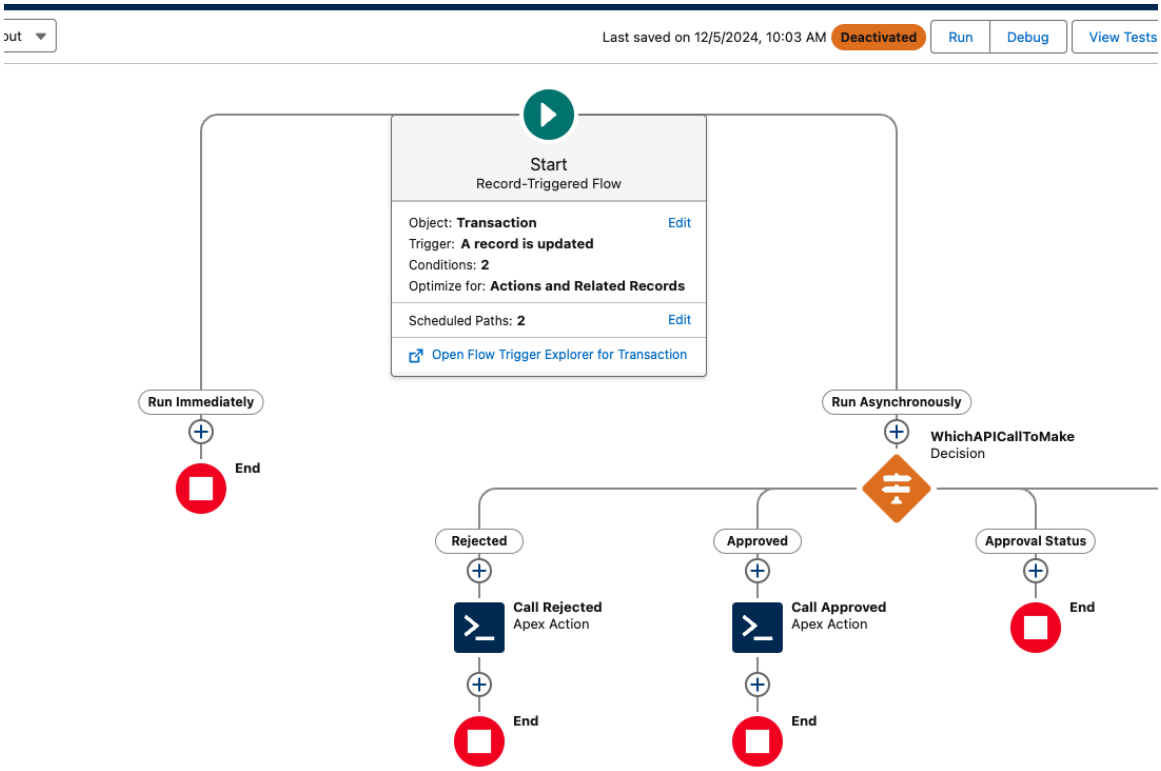

2. In the Start block, click **Edit**.

Trigger on the *LGK__Transaction__C* object based on the custom field, ensuring that a UUID is not null. Also make sure to click **Run Asynchronously** and **Only when a record is updated to meet**.

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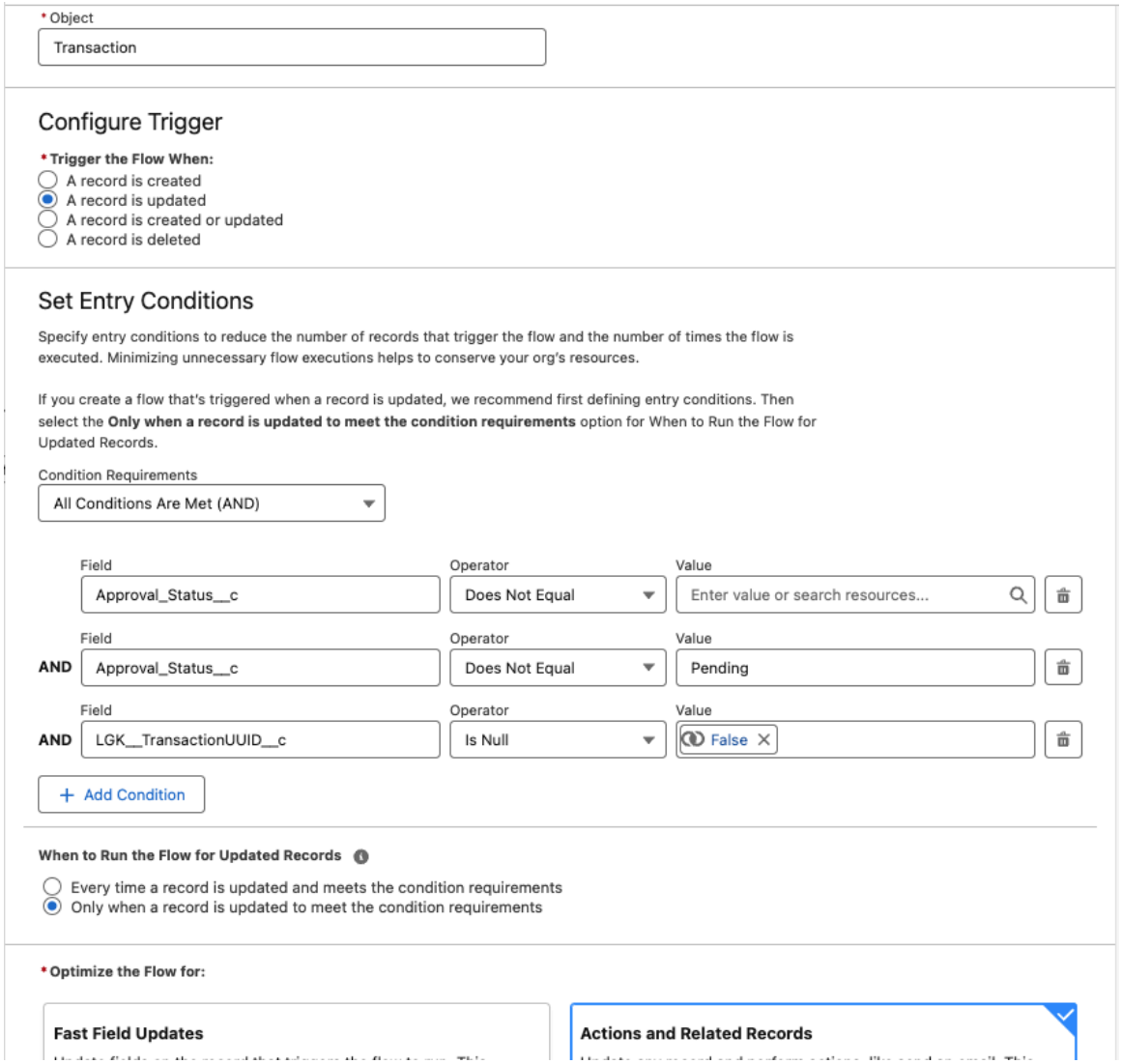

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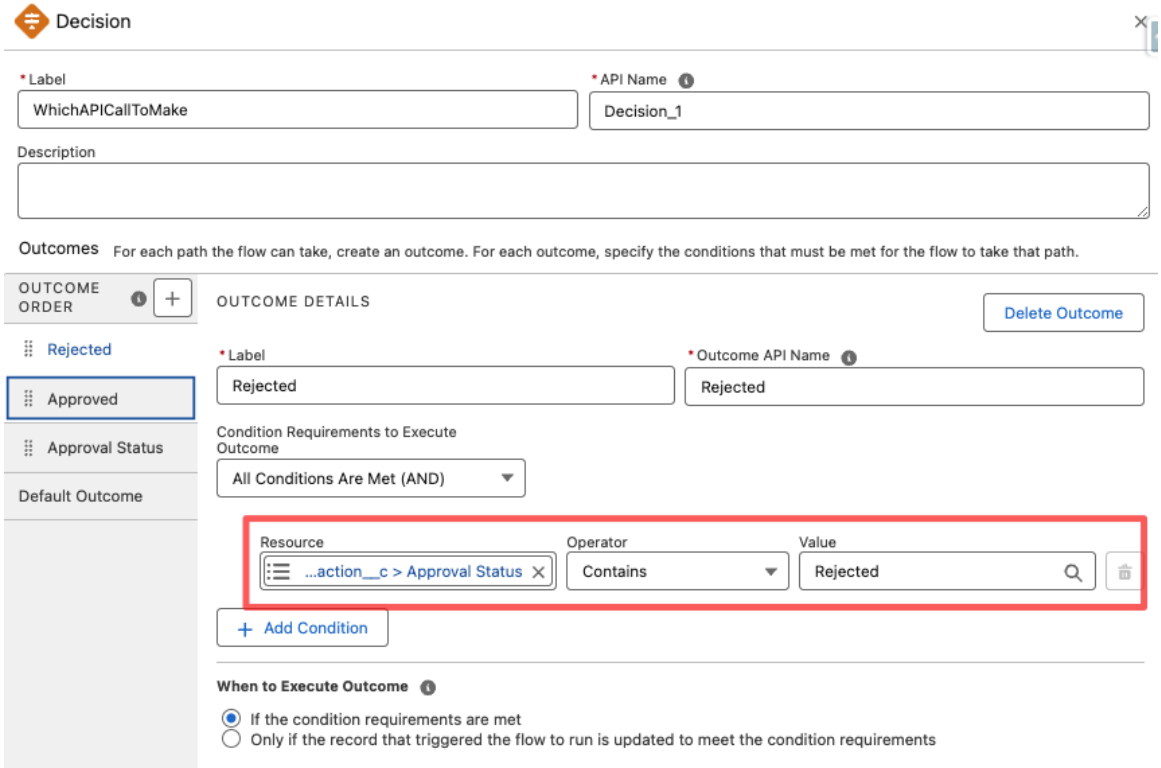
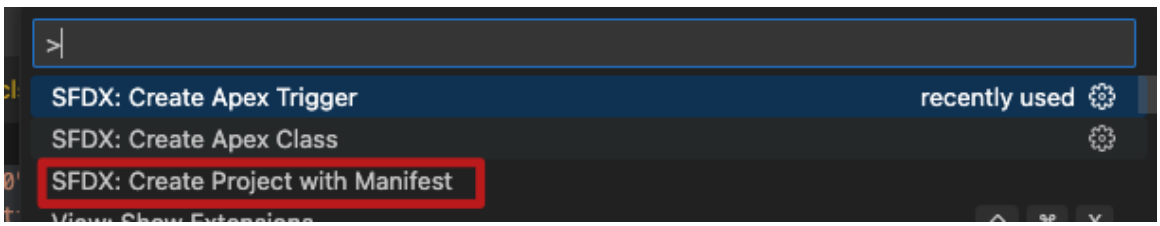
3. Add a decision block, and create outcomes for when the custom field you created is approved or rejected.



Apex Code

Although this Apex Class was deployed through VS code, it could also be deployed in Salesforce. The first step is the create a new Project with manifest.



Next, create an Apex class (in the blue box) as well as a manifest.xml file (in the green box) to go into the respective files in the project directory.

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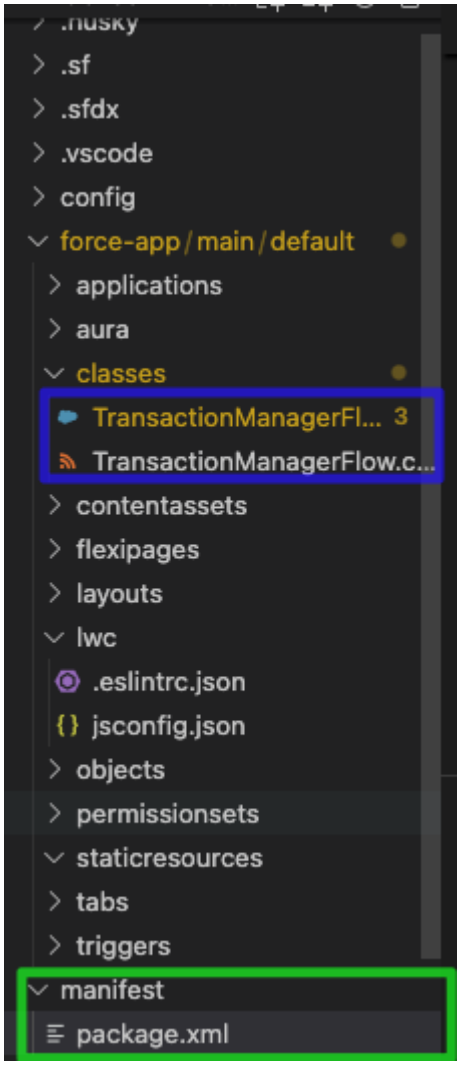

Apex code:

```
global with sharing class TransactionManagerFlow {
    global class FlowInput {
        @InvocableVariable(label='Triggering Record'
 required=true)
        global LGK__Transaction__c triggeringRecord;
    }
    // Handle logic for Rejected status
    @InvocableMethod(label='Logik.io Transaction callout from
 Salesforce' description='Makes callout to transition Logik.io
 transaction stage.')
    global static void handleApprovalStatus(FlowInput[]
 requestInputs) {
        System.debug('Handling Rejected status for Record: ' +
 requestInputs[0].triggeringRecord.Id);
        LGK__ConfigurationTenant__c customSettings =
 LGK__ConfigurationTenant__c.getInstance();
        String updatedRuntimeToken =
 '_gdyiOwOoGu1bNk3PO5exhUGqDFcZQVLIw';
        System.debug(updatedRuntimeToken);
        String endpoint =
 'https://se-txn-sandbox.test02.logik.io';
        for (FlowInput eachTxn : requestInputs) {
```

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```
            // Make the API request to transfer a transaction
from 'new' stage to 'rejected' stage
            // (compare with snippet from
ApprovalProcessHandler.makeApiCall)
            String uuid =
eachTxn.triggeringRecord.LGK__TransactionUUID__c;
            Http http = new Http();
            HttpRequest request = new HttpRequest();
            request.setHeader('Origin', endpoint);
            if (eachTxn.triggeringRecord.Approval_Status__c ==
'Rejected') {
                request.setEndpoint(endpoint + '/api/t/' +
String.valueOf(uuid) + '/events/revise'); // Example endpoint
                System.debug('Endpoint set for rejection' +
request.getEndpoint());
            } else if
(eachTxn.triggeringRecord.Approval_Status__c == 'Approved') {
                request.setEndpoint(endpoint + '/api/t/' +
String.valueOf(uuid) + '/events/proceedToApproved'); // Example
endpoint
                System.debug('Endpoint set for approval' +
request.getEndpoint());
            }
            request.setMethod('POST');
            request.setHeader('Authorization', 'Bearer ' +
updatedRuntimeToken);
            request.setHeader('Content-Type',
'application/json');
            request.setBody('{}');  // Convert to JSON if inputs
are needed
            System.debug(request);
            if (!Test.isRunningTest()) {
                HttpResponse response = http.send(request);
                if (response.getStatusCode() != 200) {
                    System.debug(LoggingLevel.ERROR, 'Error
transitioning transaction: ' + response.getStatusCode());
                    System.debug(LoggingLevel.ERROR,
response.getBody());
                } else {
                    System.debug('Rejected API Call Failed: ' +
response.getStatusCode() + ' - ' + response.getBody());
                }
            } else {
                eachTxn.triggeringRecord.LGK__TransactionUUID__c
= 'testUUID';
            }
        }
    }
}
```

XML:

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>TransactionManagerFlow</members>
        <name>ApexClass</name>
```

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```
    </types>
    <version>61.0</version>
</Package>
```

Next, if you're not logged into the org you want to deploy to, do so with the `sf org login web` command, which takes you to login.salesforce.com.

When you've authorized CLI, the result should resemble the following:

```
asrigopal : ~/Salesforce Apex/ProcessApproval  sf org login web

 ›   Warning: @salesforce/cli update available from 2.67.7 to 2.68.6.
Successfully authorized iliew@dftxnmgr.demo with org ID 00Dbm000009BIe1EAG
asrigopal : ~/Salesforce Apex/ProcessApproval
```

Note: If you're logged into multiple orgs through CLI, use this command to switch:

```
sf config set target-org=<username>
```

When you're logged in, execute this command:

```
sf project deploy start --manifest manifest/package.xml
```

```
──────────── Deploying Metadata ────────────

Deploying v61.0 metadata to iliew@dftxnmgr.demo using the v62.0 SOAP API.

✔ Preparing 199ms
○ Waiting for the org to respond — Skipped
✔ Deploying Metadata 3.24s
  ▸ Components: 1/1 (100%)
○ Running Tests — Skipped
○ Updating Source Tracking — Skipped
✔ Done 0ms

Status: Succeeded
Deploy ID: 0Afbm00000DcjBCCAZ
Target Org: iliew@dftxnmgr.demo
Elapsed Time: 3.48s

Deployed Source
```

State	Name	Type	Path
Created	TransactionManagerFlow	ApexClass	force-app/main/default/classes/TransactionManagerFlow.cls
Created	TransactionManagerFlow	ApexClass	force-app/main/default/classes/TransactionManagerFlow.cls-meta.xml

Add the Apex actions after the decision blocks, and make sure your flow looks similar to the one provided in the screenshot. (Look for a name that matches the label parameter in the invocable method.)

Finally, activate the flow and test.

Testing

After the record-triggered flow and the Transaction Manager blueprint are created, you may find this SOQL query helpful for debugging your approvals process in Salesforce.

Receiving Salesforce Approval Status (getting the state of most recent process)

- Connection: Salesforce
- GET

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- Additional Path: {_endpoint}/services/data/v61.0/query/? q=SELECT +Id,Status,TargetObjectId+FROM+ProcessInstance+WHERE +TargetObjectId={{sfRecordId}}+ORDER+BY+CreatedDate+DESC
- SOQL Query

```
SELECT Id, Status, TargetObjectId
FROM ProcessInstance
WHERE TargetObjectId-'006bm000002IUI4AAO' -- This is the sf
 oppy/transaction object  id
ORDER BY CreatedDate DESC
```

Transaction Manager: Fields

Understand the five major field type options: text, number, Boolean, picklist, and date/time. Learn how to create new fields using the Admin UI.

In Transaction Manager, administrators are able to create text, number, Boolean, picklist, and date/time fields. Admins also have the choice of creating fields at the transaction level or at the transaction line level.

Fields created at the transaction level sit outside the transaction line grid. These fields commonly contain information about the account, addresses, list price total, total discount, and net total for all line items.

Fields created at the transaction line level sit in the transaction line grid. These can appear as column fields or as fields in the Line Details, Model, and Slide Out UI effects.

The selected level will ultimately impact the field's availability for rules, which also have a transaction and transaction line level.

In the buyside screenshot below, the sections marked 1 are transaction-level fields; the fields in the section marked 2 are transaction line-level fields.

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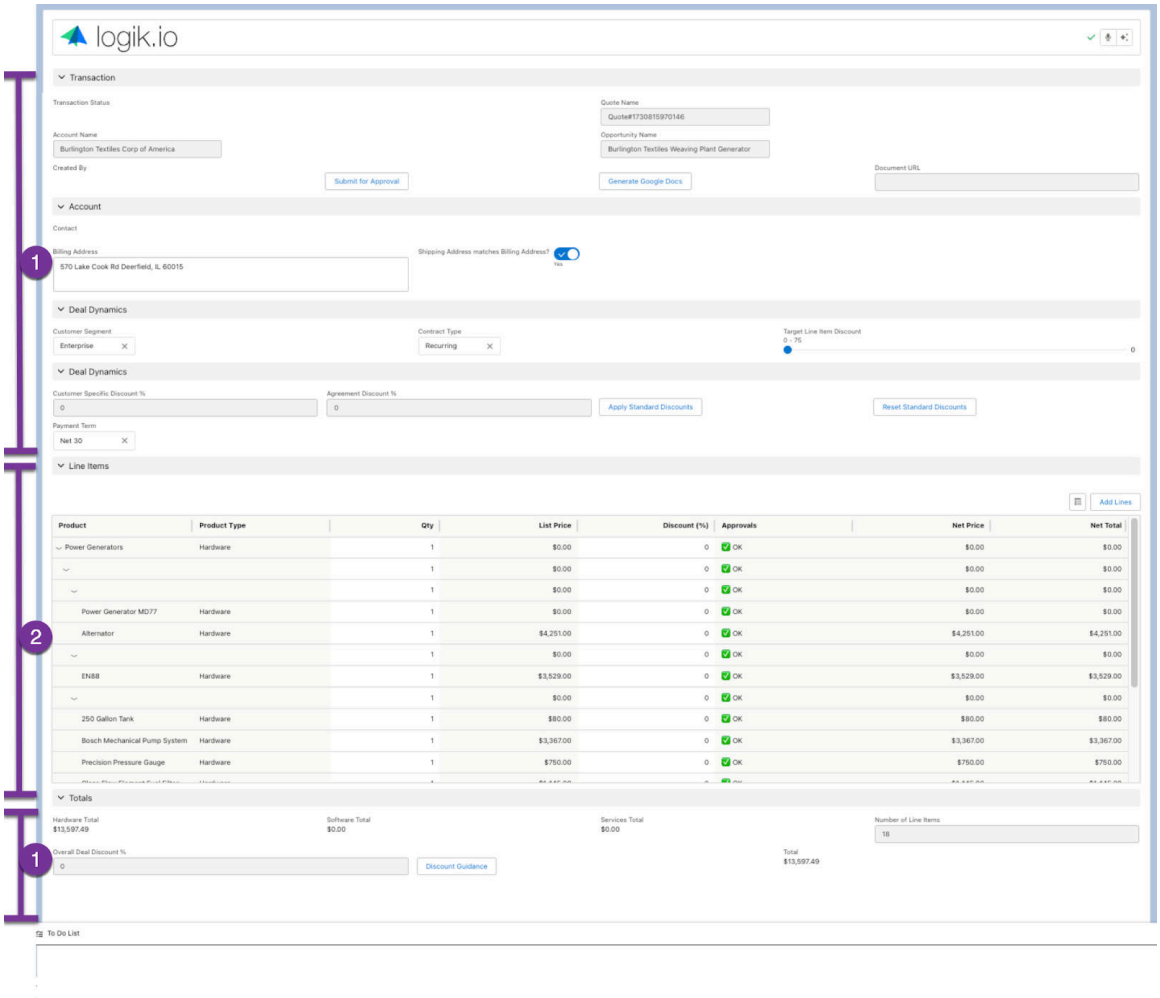

Field types

Transaction Manager provides the following field types.

- Text
- Number
- Boolean
- Picklist
- Date/Time

Options for these types are described in the sections that follow.

System-provided fields

Transaction Manager provides the administrator with a set of system-provided fields that are often used in transaction processing. There are system-provided fields at both the transaction level and the transaction line level.

The system-provided fields provide fields in the following categories:

Transaction level:

- Pricing information
- Opportunity information

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- Transaction information
- Account information

For a complete list of transaction-level fields, see Transaction Manager: Transaction-level system fields.

Transaction line level:

- Pricing information
- Transaction line information
- Configuration information
- Product information
- Order information

For a complete list of line-level fields, see Transaction Manager: Line-level system fields.

You can also add custom fields to a blueprint in Transaction Manager. Custom fields added via the Transaction Manager Admin UI are automatically associated with the blueprint. However, custom fields uploaded by using the Matrix Loader must be associated with the blueprint by means of the blueprint.yaml file. To do so, add a list to the blueprint.yaml file that details the field variable names to be associated with the blueprint.

The following sample blueprint.yaml file shows the field associations in the relatedFields section:

```
---
blueprints:
- variableName: default
  relatedFields:
  - txn.custom.transactionNumber
  - txn.custom.quoteName
  - txn.custom.quoteValidUntil
  - txn.custom.paymentTerm
  - txn.custom.accountSpecificDiscount
  - txn.custom.agreementDiscount
  - txn.line.custom.agreementLineDiscount
  - txn.line.custom.customerLineDiscount
 lastModifiedBy: mark@logik.io.sfdcdev
  name: Transaction Manager Default
  stages: /blueprints/default/stages/stage.yaml
  description: Transaction Manager Default blueprint
  layouts: null
  events: /blueprints/default/events/events.csv
  views: /blueprints/default/views/views.yaml
fieldOptions: /fields/fieldOptions.csv
rules: null
fields: /fields/fields.csv
```

Creating a new field using the Admin UI

To add a new field to the Transaction Manager blueprint, follow these steps:

1. Navigate to the Transaction Manager Admin UI.
2. Click **Associated Fields**.

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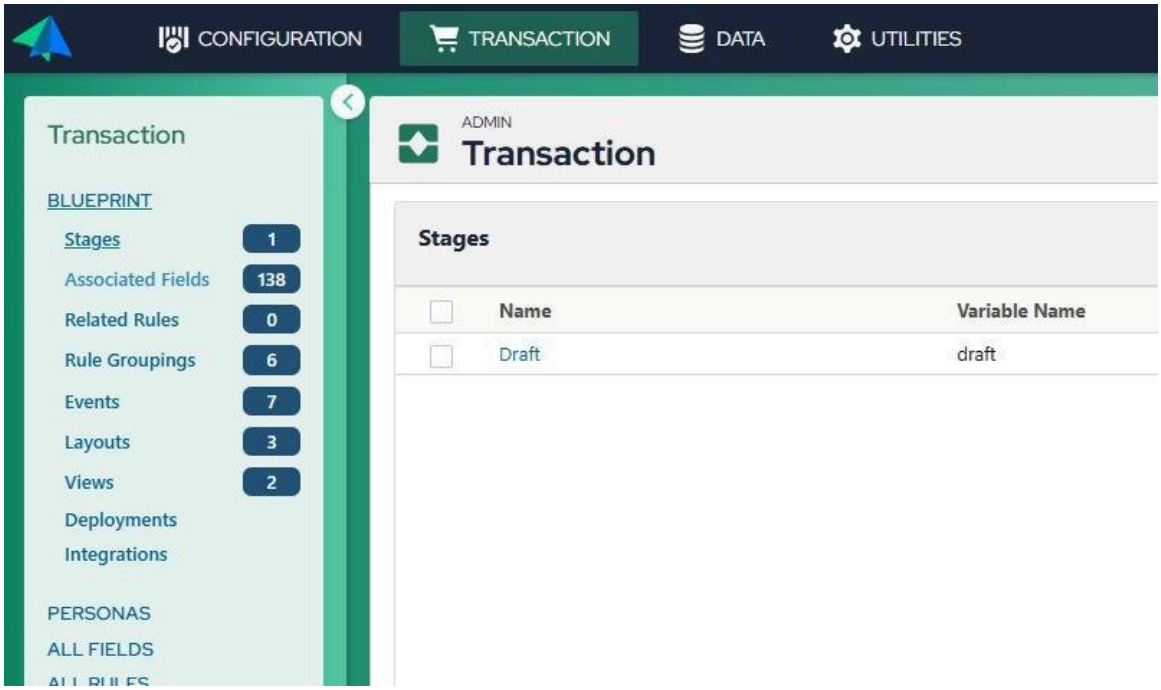
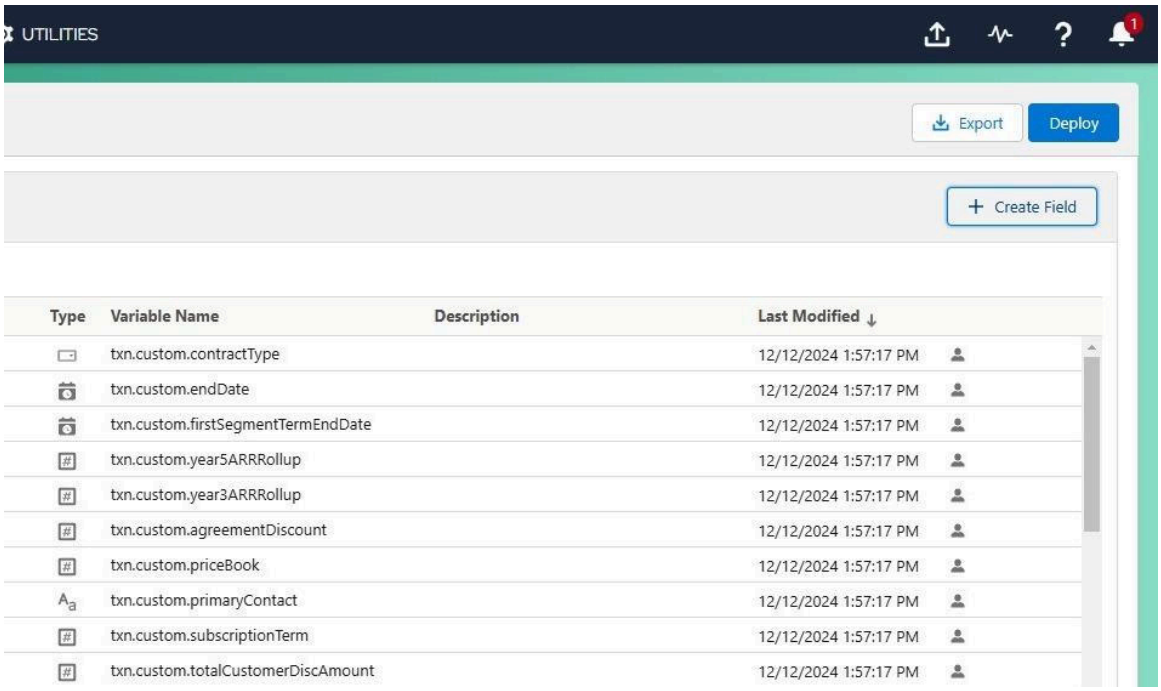


3. Click **Create Field** to create a new field.



The **New Field** dialog box opens.

4. Enter a name in the **Name** field.

As the name is entered, it is mirrored in the **Variable Name** field. By default, the variable name is the same as the entered name, but in camel case with all spaces and special characters removed. For example, if you enter the name Customer Billing Address, the automatically entered variable name is customerBillingAddress. To create a custom variable name, click the pencil icon to the right of the variable name field and enter your own value.

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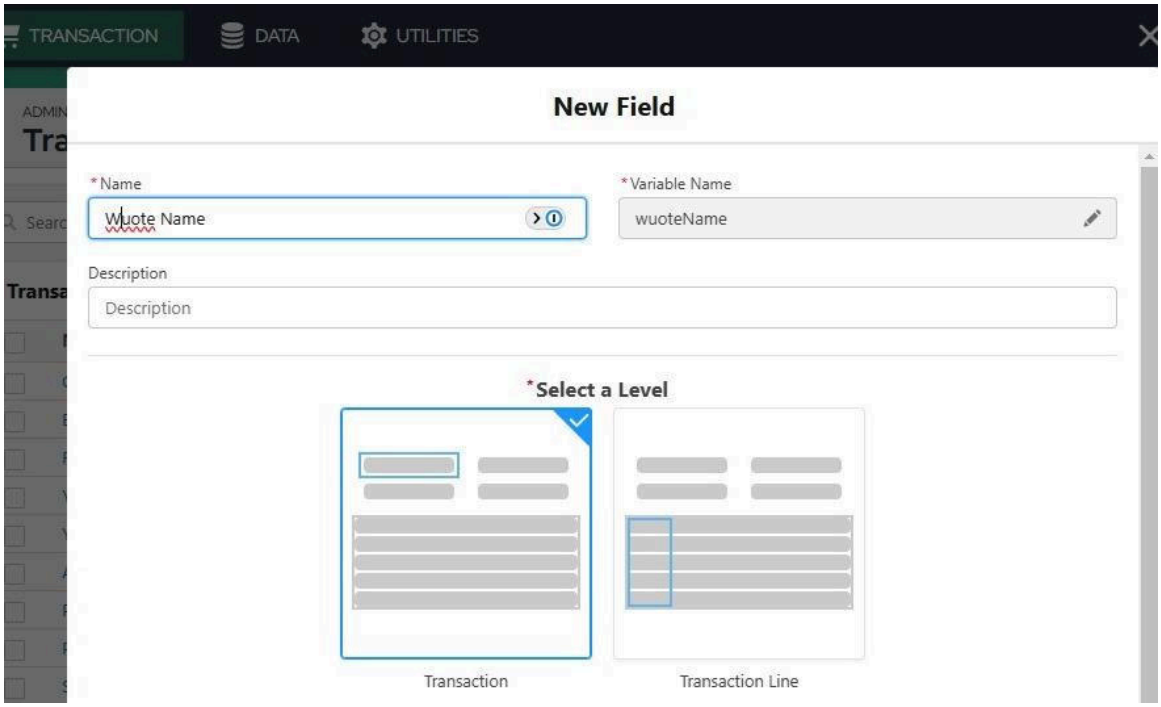
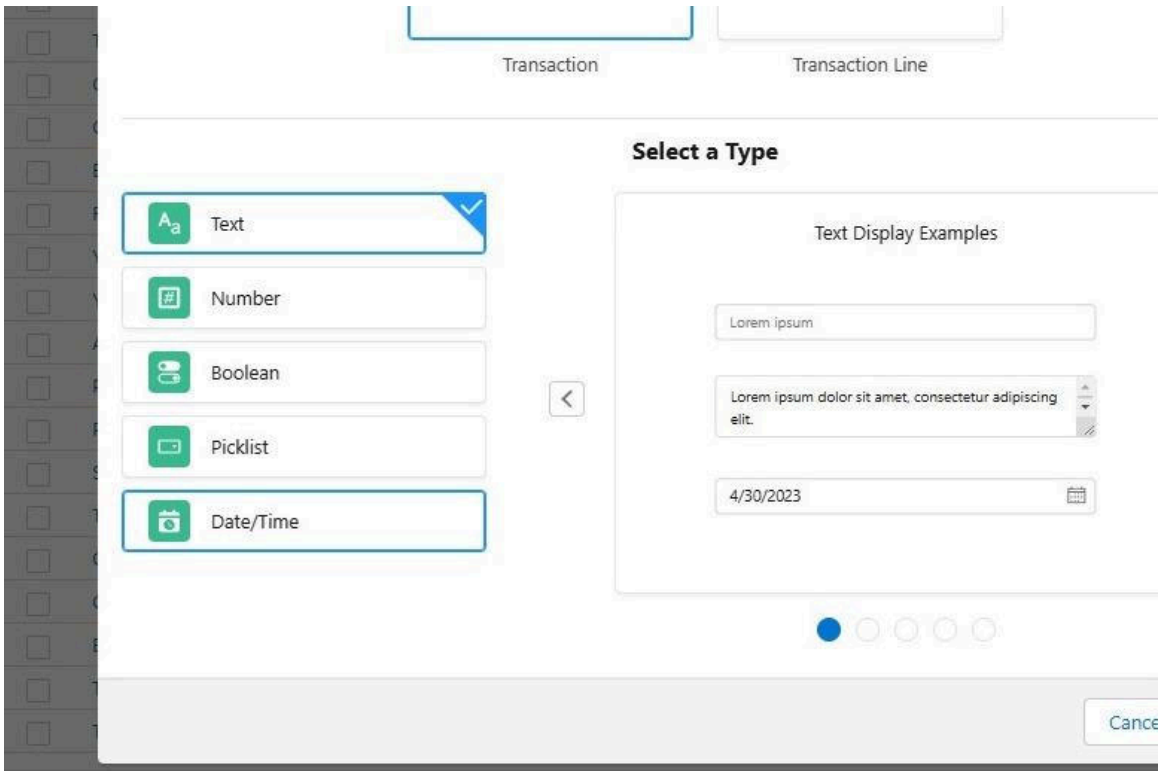


5. Select a level to choose whether the field is a transaction level field or a transaction line level field.
6. Choose the type of field you are creating from the five available field types.



7. Click **Save**.

The field editor page opens. Select the desired options.

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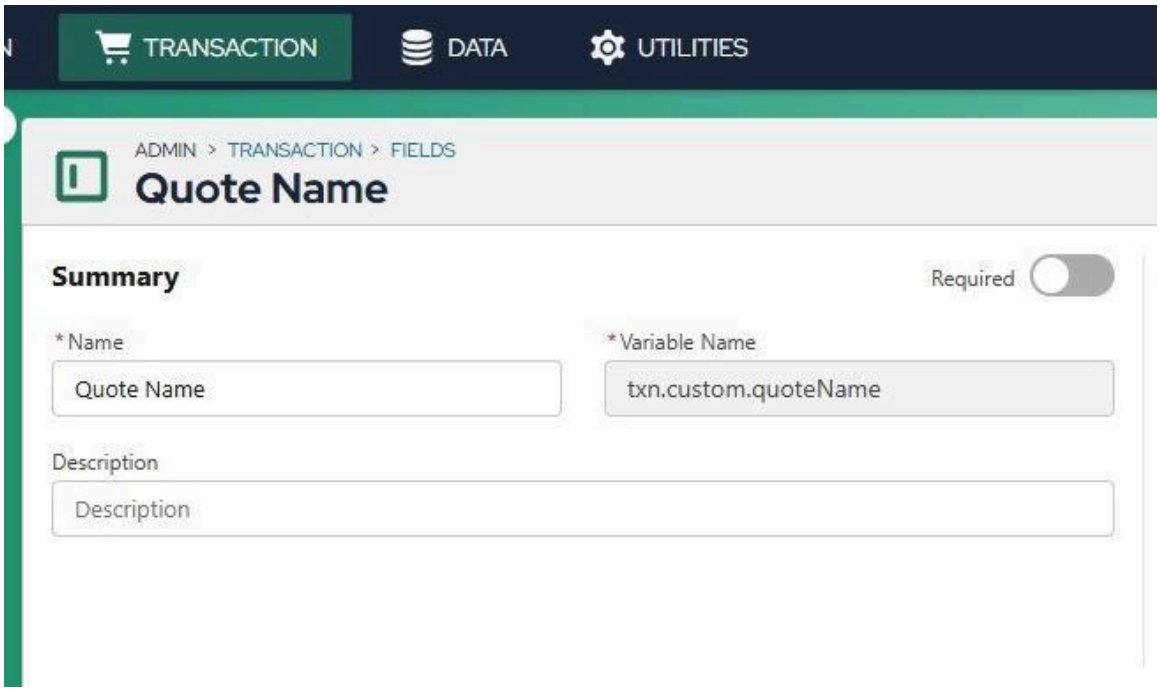
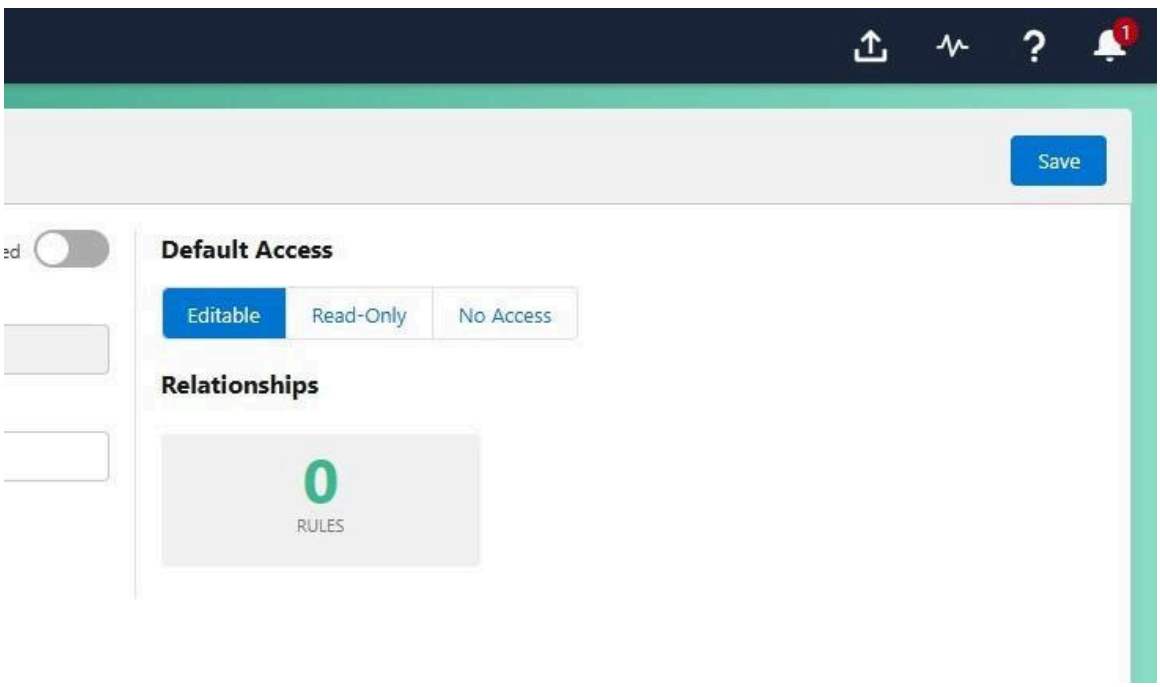
Text field options

The name and variable name appear at the top left of the field editor page. You can change the name, but the variable name is locked and can be changed only by deleting the field and re-adding it to the blueprint. Optionally, you can add a description of the field here. If the field is to be required on the buyside layout, toggle the **Required** switch.



The **Default Access** field controls access to this field in the default view. **Editable** makes this field Read/Write accessible. If you select **No Access**, the field is hidden from view on the buyside layout and is not accessible via APIs.



You can enter a default value for the text field in the **Default Value** field.

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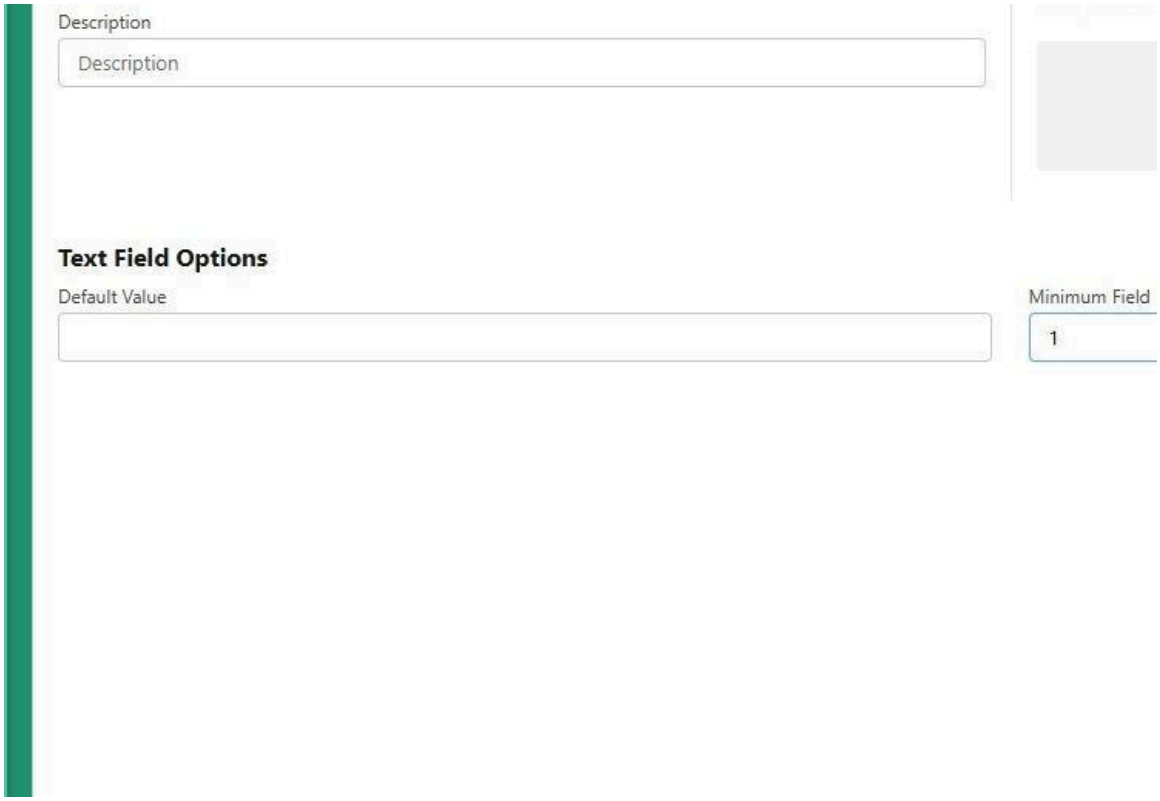
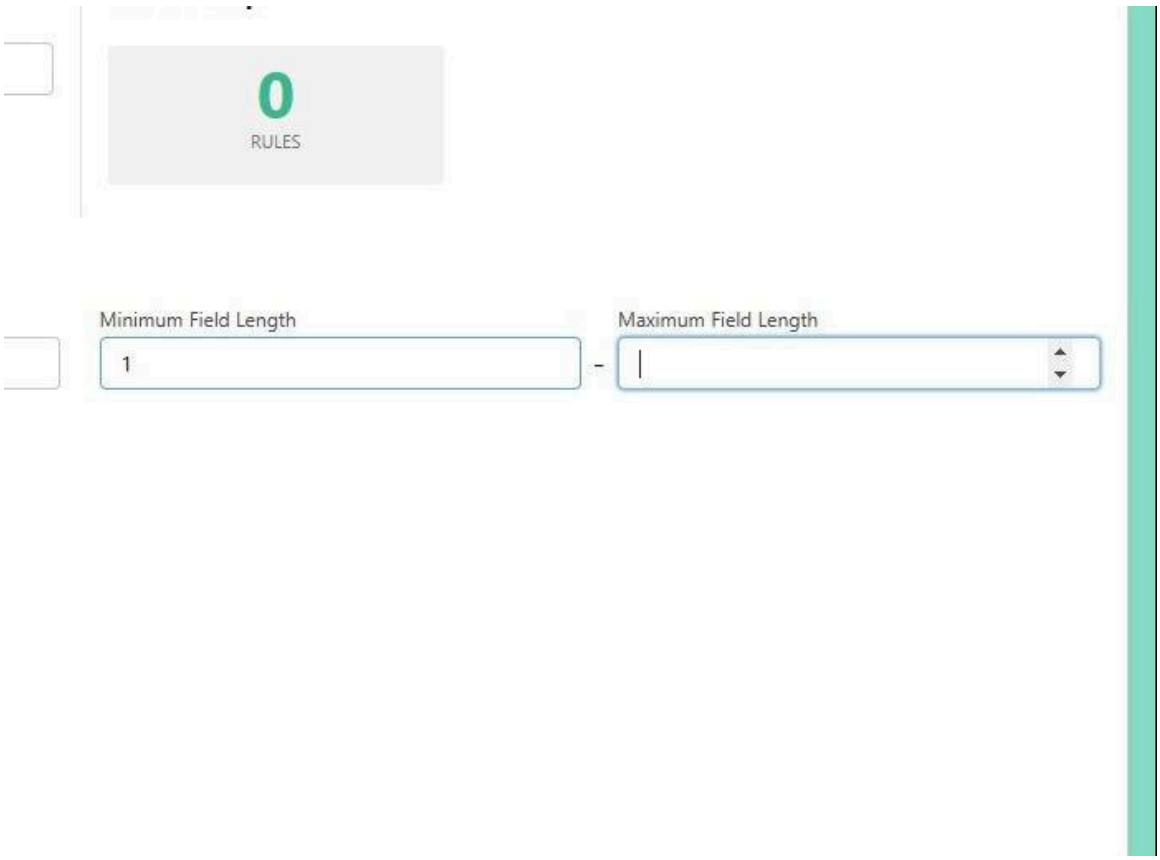


The **Minimum Field Length** and **Maximum Field Length** values let you set the minimum and maximum number of characters that can be entered.



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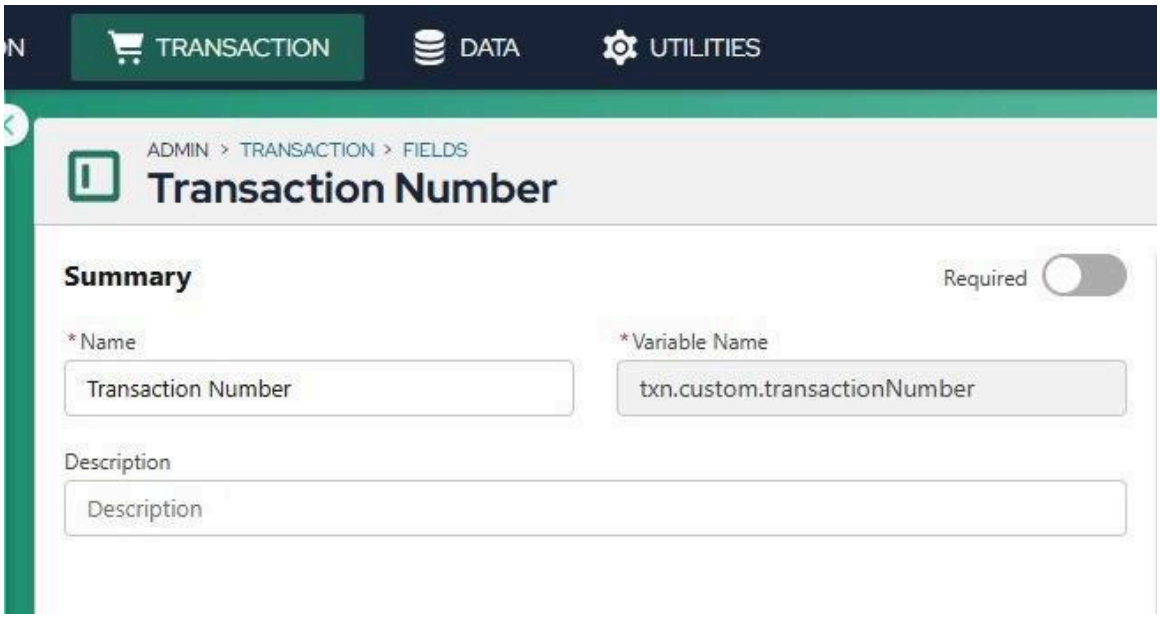
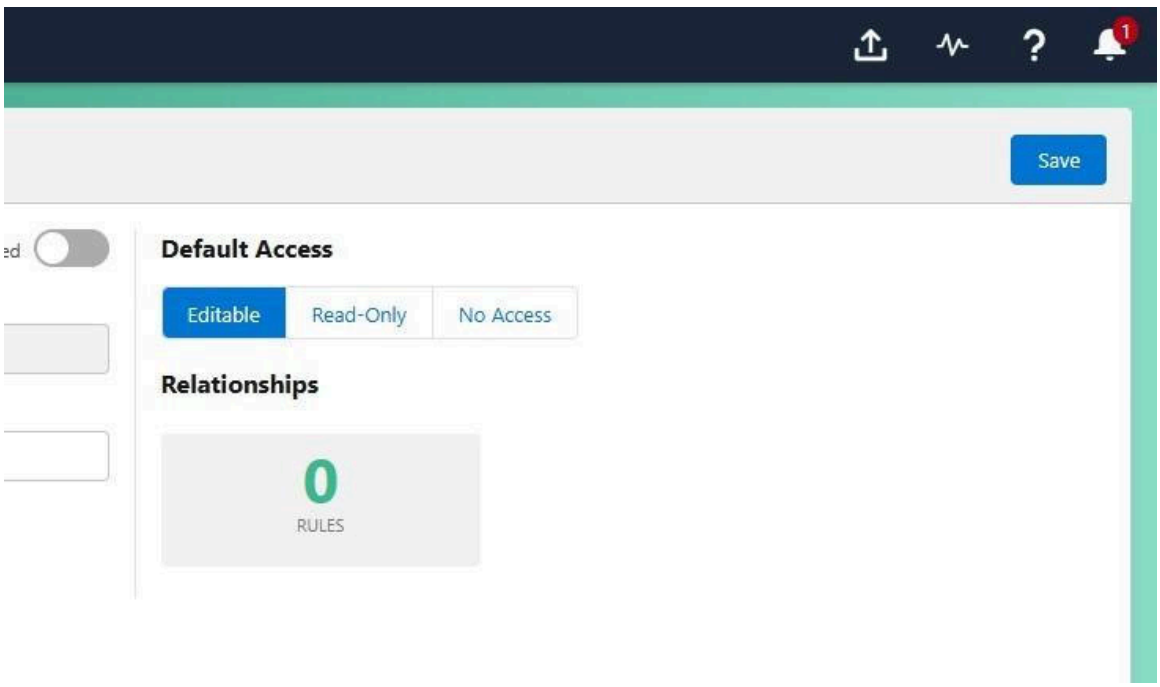
Number field options

The name and variable name appear at the top left of the field editor page. You can change the name, but the variable name is locked and can be changed only by deleting the field and re-adding it to the blueprint. Optionally, you can add a description of the field here. If the field is to be required on the buyside layout, toggle the **Required** switch.



The **Default Access** field controls access to this field in the default view. **Editable** makes this field Read/Write accessible. If you select **No Access**, the field is hidden from view on the buyside layout and is not accessible via APIs.



Number fields can take one of three forms: number, currency, or percentage. Choose which form you want the field to take.

The **Unit Label** field lets you specify the unit label for the number field. If the field is for currency, the unit label is the default currency symbol for your CPQ site. If the field is a percentage, the unit label is the percent symbol (%).

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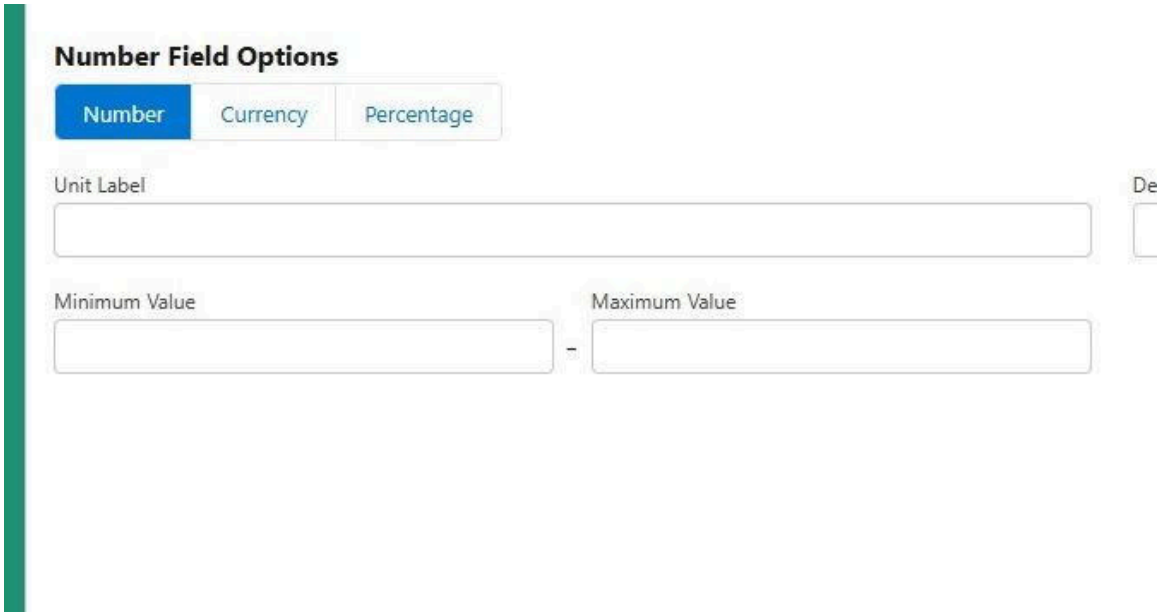
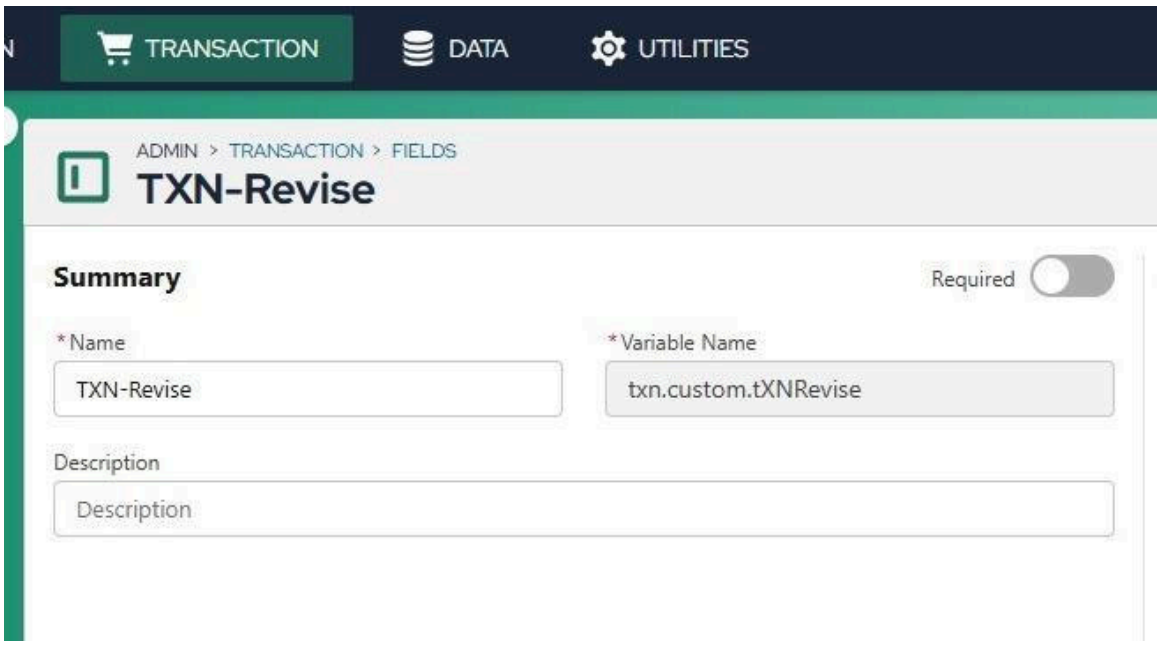
The **Minimum Value** and **Maximum Value** fields let you set the minimum and maximum allowable values for the field.



You can enter a default value for the number field in the **Default Value** field.

Boolean field options

The name and variable name appear at the top left of the field editor page. You can change the name, but the variable name is locked and can be changed only by deleting the field and re-adding it to the blueprint. Optionally, you can add a description of the field here. If the field is to be required on the buyside layout, toggle the **Required** switch.



The **Default Access** field controls access to this field in the default view. **Editable** makes this field Read/Write accessible. If you select **No Access**, the field is hidden from view on the buyside layout and is not accessible via APIs.

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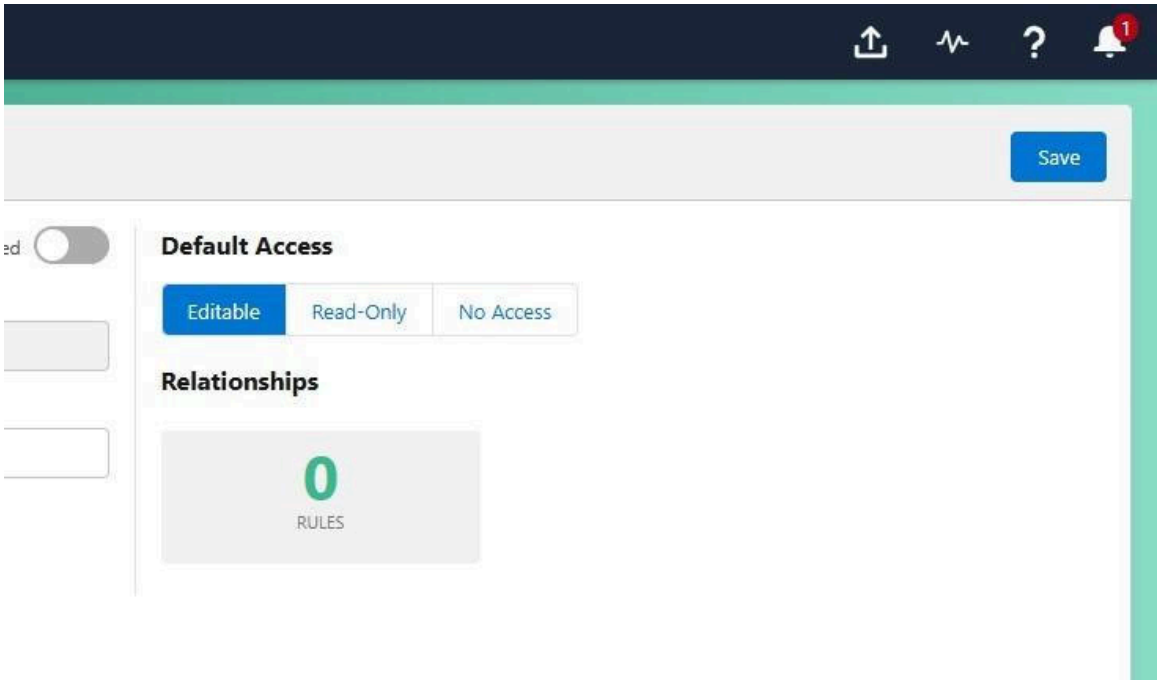
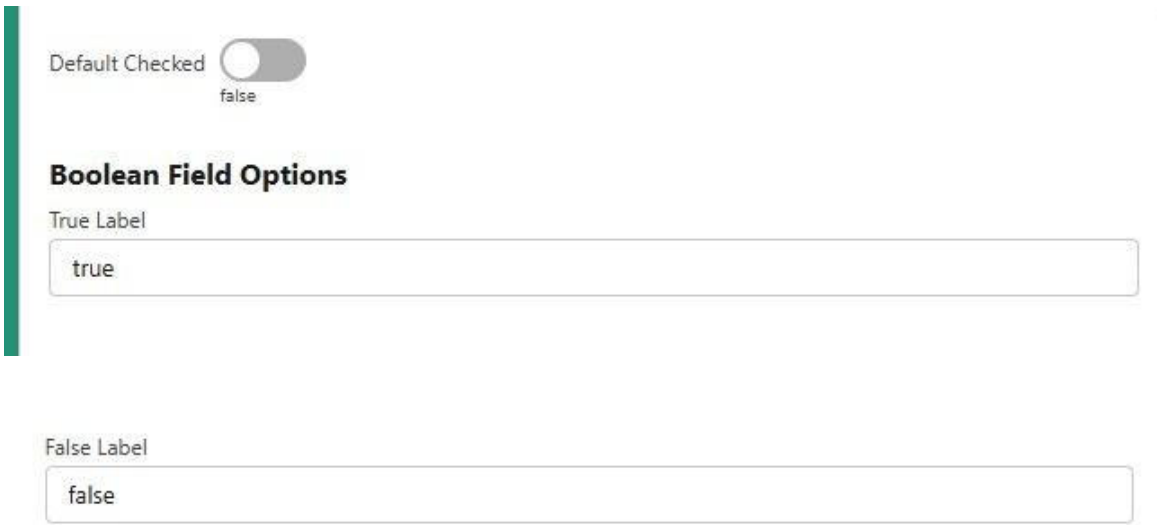


You can set whether the Boolean field defaults to True by setting the **Default Checked** toggle. If the toggle is not set, the field defaults to False.

In the **True Label** field, you can set the text value of the field when the Boolean value is True. For example, you can set the displayed value to "Yes" when the value is True. Similarly, the **False Label** field lets you set the text when the field value is False.



Picklist field options

The name and variable name appear at the top left of the field editor page. You can change the name, but the variable name is locked and can be changed only by deleting the field and re-adding it to the blueprint. Optionally, you can add a description of the field here. If the field is to be required on the buyside layout, toggle the **Required** switch.

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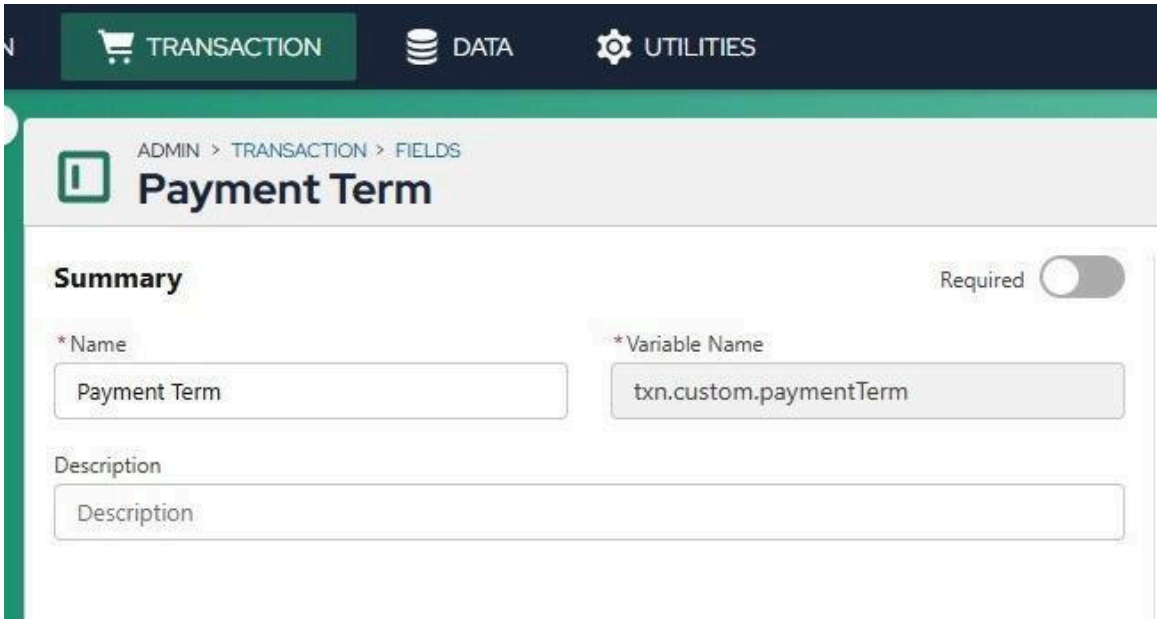
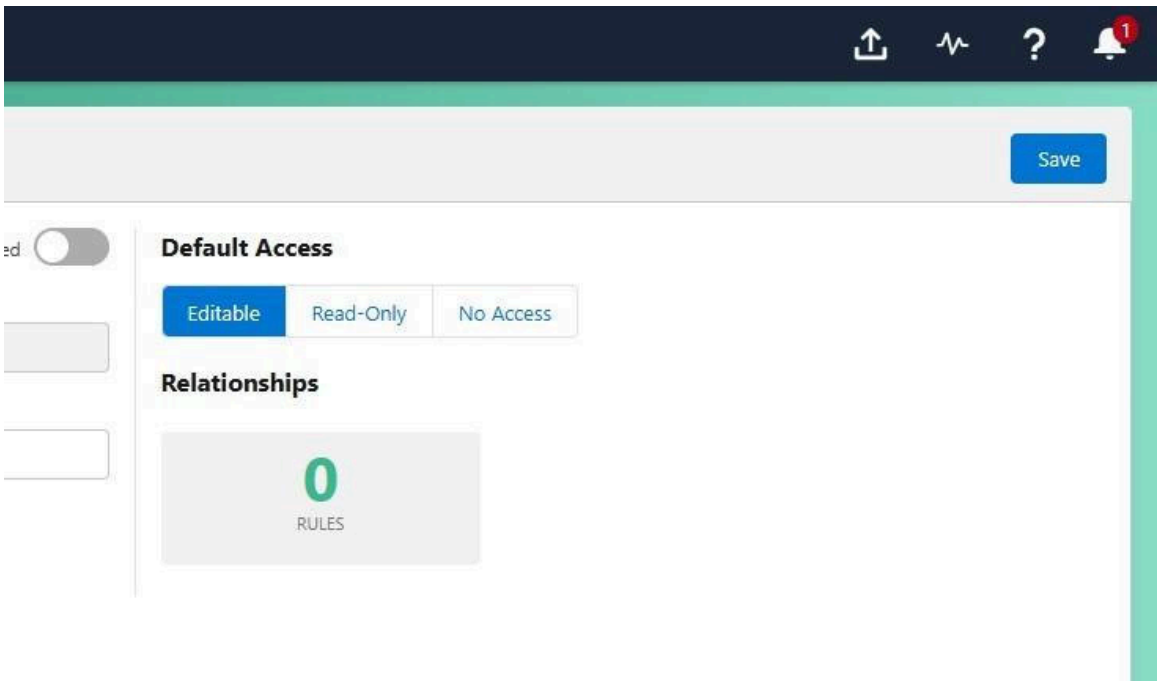


The **Default Access** field controls access to this field in the default view. **Editable** makes this field Read/Write accessible. If you select **No Access**, the field is hidden from view on the buyside layout and is not accessible via APIs.



Selection Type defines the picklist as either single-select menu or multi-select.

Comparison Type lets you determine how the value of the menu option is treated when it is used in a comparison: as a text value or as a number value.

The **+ Add Picklist Options** link allows you to add the first menu option to this picklist menu field.

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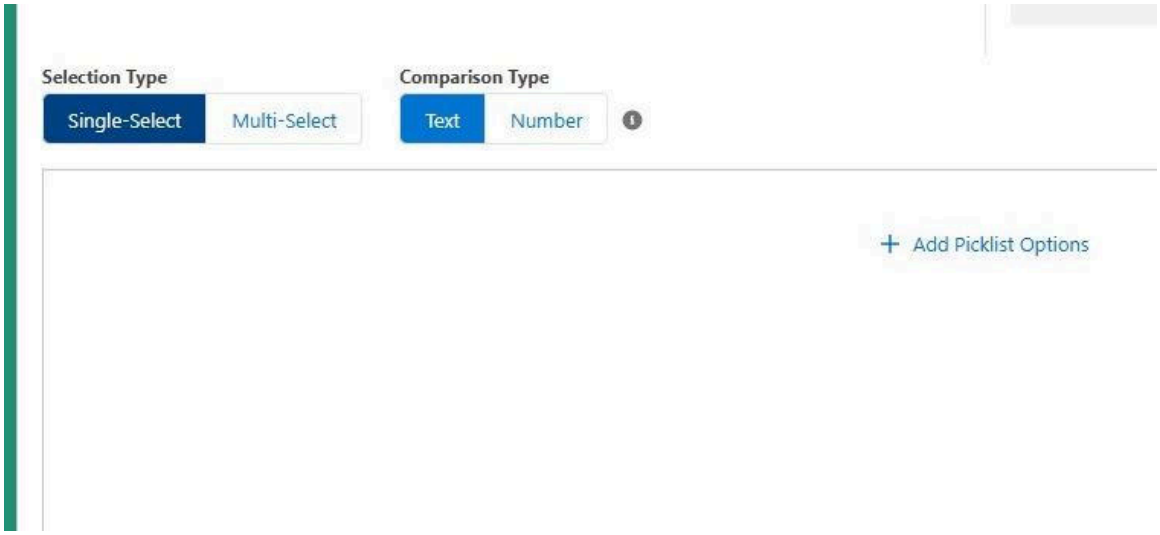
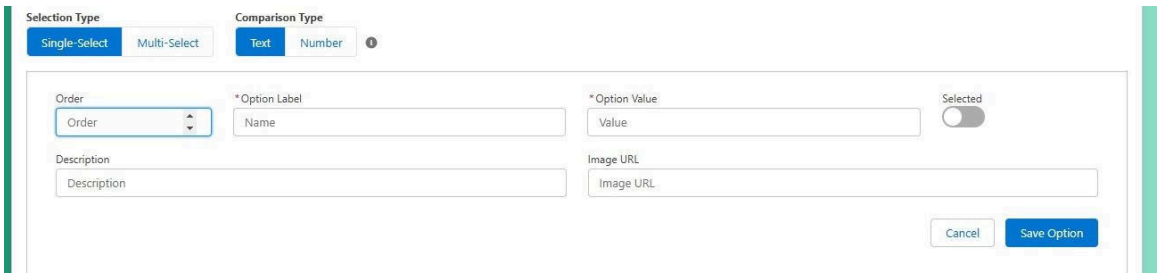


When adding a picklist option, consider the following field values:



Order

Use this field to determine the order of the menu options in the menu. The lower the number, the higher the place in the menu. As a general guideline, number your menu options 10, 20, 30, 40, and 50 instead of numbering them 1 to 5. This leaves room in the sequence if you new items must be inserted later.

Option Label

The option name that the user sees in the Transaction Manager layout.

Option Value

The value that CPQ uses to identify this menu option.

Selected

Determines whether a menu option is the default menu value.

Description

A description of the menu option.

Image URL

The URL of a graphic image that can be displayed instead of text.

Click **Save Option** to add the option to the list of options for the picklist field. To add additional menu options, click **+Add Option**.

Date/Time field options

The name and variable name appear at the top left of the field editor page. You can change the name, but the variable name is locked and can be changed only by deleting the field and re-adding it to the blueprint. Optionally, you can add a description of the field here. If the field is to be required on the buyside layout, toggle the **Required** switch.

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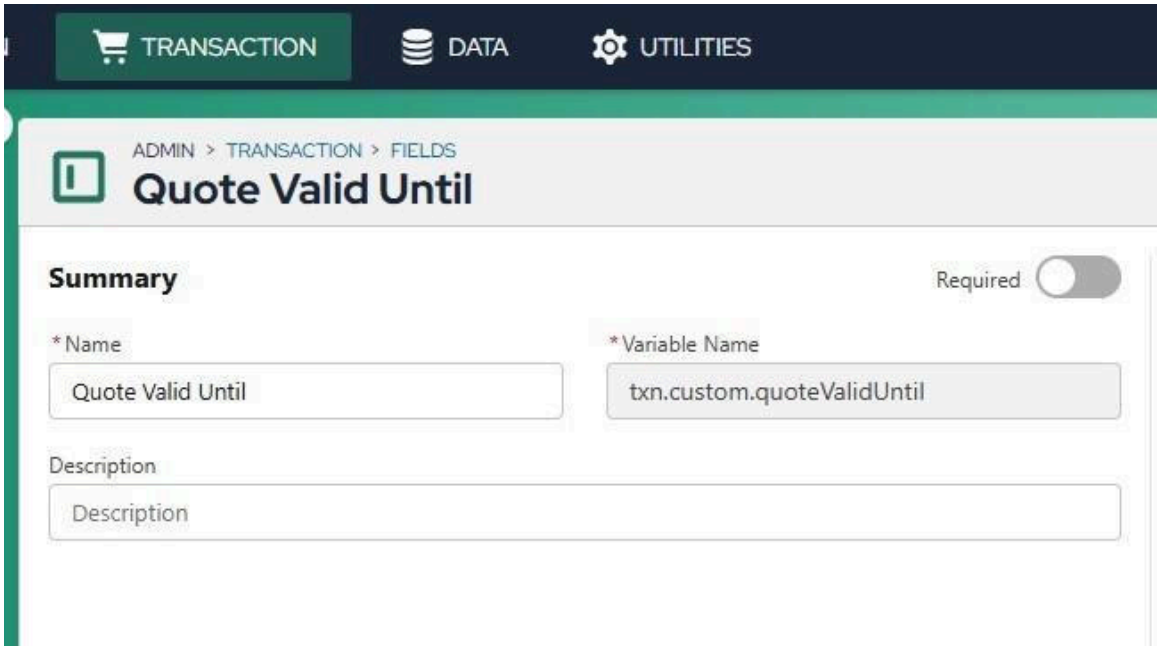
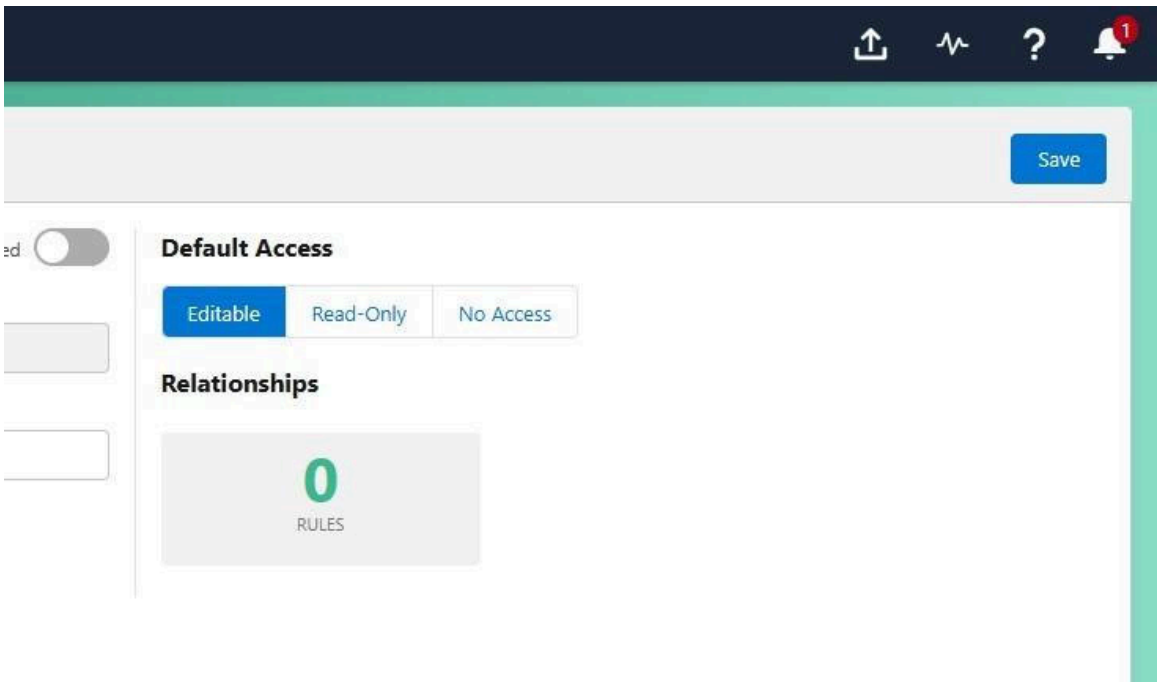


The **Default Access** field controls access to this field in the default view. **Editable** makes this field Read/Write accessible. If you select **No Access**, the field is hidden from view on the buyside layout and is not accessible via APIs.



The **Default Value** field lets you set the default date and time setting for the field. The value is converted to UTC in YYYY-MM-DDTHH:MM:SSZ format.

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The **Not Before** and **Not After** fields let you to set the minimum and maximum date and time values for the field.



For more information about the Date/Time field type, see Transaction Manager: Date and time fields.

Related topics

- Transaction Manager
- Transaction Manager: Transaction-level system fields
- Transaction Manager: Line-level system fields
- Transaction Manager: Date and time fields

Transaction Manager: Transaction-level system fields

Learn about the Transaction Manager fields that provide information about a transaction, such as the quote number and account information.

The fields available in Transaction Manager are categorized into two levels in the user interface (UI):

- Transaction-level fields: Also known as header-level fields, these fields provide general information about the transaction, such as the quote number, opportunity details, and account information.
- Transaction line-level fields: Also referred to as line-level fields, these fields capture specific information about the products associated with the transaction lines, including price, product details, and order information. For more information about line-level fields, see Transaction Manager: Line-level system fields.

System-provided fields in Transaction Manager

By default, Transaction Manager offers a set of system-provided fields that assist administrators in transaction processing.

This article focuses on transaction-level (header-level) fields that are predefined by the system.

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- System-generated fields at the header level use the prefix “txn” followed by the actual field name.
- Custom header-level fields created by administrators are prefixed with “txn.custom” followed by the desired field name.

List of system-provided header-level fields

The following table outlines the system-provided fields at the transaction level.

- Variable name: The system-defined name of the field as configured in the environment.
- Description: A brief overview of the purpose and use case of the system field.
- Modifiable by: Indicates who can edit the field configurations:
  - System: The values of system-modifiable fields can only be set by the application. End-users cannot edit these fields. Administrators cannot determine the values of these fields via rules.
  - User: Any authorized end user with the appropriate permissions can update the field value. Determination rule actions can also modify the field value.
- Default value: The initial value assigned to the system field, specifying what can be set as the default during configuration.

System-provided header-level fields

Variable name	Description	Modifiable by	Default value
txn.id	UUID or unique ID of the transaction	System	<Generated> Auto-generated by the system upon creation
txn.account.id	ID of the account which was used while creating a new transaction	User	<Empty> Expected to be passed in on create
txn.opportunity.id	ID of the opportunity through which the transaction is created	User	<Empty> Expected to be passed in on create
txn.pricebook.id	Pricebook entry associated with the products chosen by user	User	<Empty> A blank value is interpreted as the default pricebook
txn.pricing.currencyCode	Currency associated with the products chosen by the user	User	<Empty>

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System-provided header-level fields (continued)

Variable name	Description	Modifiable by	Default value
			A blank value equals base currency for the tenant
txn.created	Timestamp of when the transaction was created	System	<Generated> Auto-generated by the system upon creation
txn.createdBy	Name of the user who created the transaction	System	<Generated> Auto-generated by the system upon creation
txn.modified	Timestamp of the last modification on a transaction	System	<Generated> Auto-generated by the system upon update
txn.modifiedBy	Name of the user who performed the last modification on the transaction	System	<Generated> Auto-generated by the system upon update
txn.externalId	Unique identifier used to reference a transaction in external connections/ integrations	User	<Empty> Expected to be passed in on create
txn.stage	Stage or status of a transaction	System	<Generated> Auto-generated by the system; depends on configuration
txn.persona	Persona of the user who performed the request	System	<Generated> Auto-generated by the system; depends on configuration

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Related topics

Transaction Manager: Fields

Transaction Manager: Line-level system fields

Transaction Manager: Date and time fields

Transaction Manager: Line-level system fields

Learn about the Transaction Manager fields that provide information about a product, including price, product details, and order information.

The fields available in Transaction Manager are categorized into two levels in the user interface (UI):

- Transaction-level fields: Also known as header-level fields, these fields provide general information about the transaction, such as the quote number, opportunity details, and account information. For more information about transaction-level fields, see Transaction Manager: Transaction-level system fields.
- Transaction line-level fields: Also referred to as line-level fields, these fields capture specific information about the products associated with the transaction lines, including price, product details, and order information.

System-provided fields in Transaction Manager

By default, Transaction Manager offers a set of system-provided fields that assist administrators in transaction processing.

This article focuses on transaction-line-level fields that are predefined by the system.

- System-generated fields at the line level use the prefix “txn.line” followed by the actual field name.
- Custom line-level fields created by users are prefixed with “txn.line.custom” followed by the desired field name.

List of system-provided line-level fields

The following table outlines the system-provided fields at the transaction line level.

Columns:

- Variable name: The system-defined name of the field as configured in the environment
- Description: A brief overview of the purpose and use case of the system field
- Modifiable by: Indicates who can edit the field configurations:
  - System: Only the System Administrator can modify the field
  - User: Any authorized end user with the appropriate permissions can update the field configurations
- Default value: The initial value assigned to the system field, specifying what can be set as the default during configuration

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System-provided line-level fields

Variable name	Description	Modifiable by	Default value
txn.line.id	UUID for the transaction line - must be unique across sectors and regions for any one tenant; may not be unique across tenants	System	<Generated > Auto-generated by the system
txn.line.parent.id	ID of the parent line	User	<Empty> Expected to be passed by user
txn.line.isProduct	Boolean field indicating whether the product to be added is available in the catalog	System	FALSE
txn.line.product.id	Product ID of the product to be added	System	<Generated> Auto-generated by the system Stage setting “Refresh Product Data” refreshes data if enabled
txn.line.product.name	Name of the product to be added	System	<Generated> Auto-generated by the system Stage setting “Refresh Product Data” refreshes data if enabled
txn.line.product.externalId	External ID of the product to be added (defined in the CPQ Admin utilities)	System	<Generated> Auto-generated by the system Stage setting “Refresh Product Data” refreshes data if enabled

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System-provided line-level fields (continued)

Variable name	Description	Modifiable by	Default value
txn.line.product.partnerId	Partner ID of the product to be added (defined in the CPQ Admin utilities)	System	<Generated> Auto-generated by the system Stage setting "Refresh Product Data" refreshes data if enabled
txn.line.product.productCode	Product code of the product to be added (defined in the CPQ Admin utilities)	System	<Generated> Auto-generated by the system Stage setting "Refresh Product Data" refreshes data if Enabled
txn.line.product.description	Description of the product to be added	System	<Generated> Auto-generated by the system Stage setting "Refresh Product Data" refreshes data if enabled
txn.line.created	Timestamp indicating when a transaction line was added	System	<Generated> Auto-generated by the system.
txn.line.createdBy	Name of the user who added the transaction line	System	<Generated> Auto-generated by the system
txn.line.modified	Timestamp indicating when a transaction line was last modified	System	<Generated> Auto-generated by the system
txn.line.modifiedBy	Name of the user who last modified the transaction line	System	<Generated>

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System-provided line-level fields (continued)

Variable name	Description	Modifiable by	Default value
			Auto-generated by the system
txn.line.isConfigured	Boolean indicating whether the line is a configured line (a simple product added) or a top-level configured line (top line level of a configuration consisting of parent and child products)	System	FALSE Auto-set to true if the configuration is added
txn.line.configuration.id	UUID of the configuration	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.solutionId	UUID of the solution the configuration is a part of	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.id	Configuration item ID of the items in BOM once a configuration is added	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.price	Configuration item price of the items in BOM once a configuration is added	System	0 Remains unused if there is no configuration
txn.line.configuration.item.quantity	Configuration item quantity of the items in BOM once a configuration is added	System	0 Remains unused if there is no configuration
txn.line.configuration.item.type	Configuration item type of the items in BOM once a	System	<Empty>

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System-provided line-level fields (continued)

Variable name	Description	Modifiable by	Default value
	configuration is added		Remains unused if there is no configuration
txn.line.configuration.item.notes	Configuration item notes of the items in BOM once a configuration is added	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.description	Description mentioned when the configuration item was created	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.parentProduct	Transaction line configuration item ID of the parent product for the configuration item added in BOM	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.uom	The unit of measure used to define the configuration item when it was created	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.bomType	BOM type defined for a configuration item when it was created	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.extPrice	Configuration quantity price (defined in the extPrice column of the configuration item)	System	0 This field will not exist if there is no configuration
txn.line.configuration.item.orderNumber	Order number of the configuration item when it was added	System	<Empty> Remains unused if there is no configuration
txn.line.configuration.item.rollUpPrice	Value defined in the rollupPrice	System	0

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System-provided line-level fields (continued)

Variable name	Description	Modifiable by	Default value
	column for the configuration item when it was created		Remains unused if there is no configuration
txn.line.configuration.item.uniqueIdentifier	Unique identifier used to define a configuration item (useful for reconfiguration)	System	<Empty> User generated, but cannot be modified once created
txn.line.configuration.item.key	Fallback to match configuration items on reconfigure when the unique identifier can't be used	System	<Empty> Generated by system when the lines are added
txn.line.isVisible	Determines whetherto show the entry on the line item grid	User	TRUE To be selected by the user
txn.line.selected	Used in rule conditions to perform actions on selected lines - set to TRUE when a line-level event runs	System	False Field is set to TRUE when an event runs - affects all lines affected by the event For example, if you delete a top level line, this field is set to TRUE for all child lines that are deleted when the event runs. After all actions are complete, the value is set back to False
txn.line.isReorderable	Indicates whether a line can be reordered	User	TRUE
txn.line.configuration.status	Indicates configuration validation status -	System	<Empty>

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System-provided line-level fields (continued)

Variable name	Description	Modifiable by	Default value
	supports validate configured items on event setting		Generated by the system when lines are added
txn.line.configuration.validatedAt	Indicates date of last configuration validation. Supports validation of configured Items on event setting	System	<Empty> Generated by the system when lines are added
txn.line.isNew	Indicates whether a line is new (true) or existing (false)	System	<Empty> Generated by the system when lines are added Value is TRUE during the operation of the event that creates the line.

Related topics

- Transaction Manager
- Transaction Manager: Transaction-level system fields
- Transaction Manager: Date and time fields

Transaction Manager: Date and time fields

Learn about Transaction Manager fields for times and dates.

In CPQ, dates and times are critical for determining how long a contract or subscription lasts, when renewals are due, and how pricing is applied over time.

A new date or date/time field might be introduced to support term calculations or to audit events.

Term calculations calculate contract terms, start and end dates, renewals, and lengths. Blank or null dates can affect term accuracy. System defaults, such as the current date, or error flags can handle missing dates.

Auditing events can track activities such as quotes, payments, and contract signings. Missing dates may indicate incomplete data, and must be flagged for review.

The following examples show how date and time fields appear in the end-user UI.

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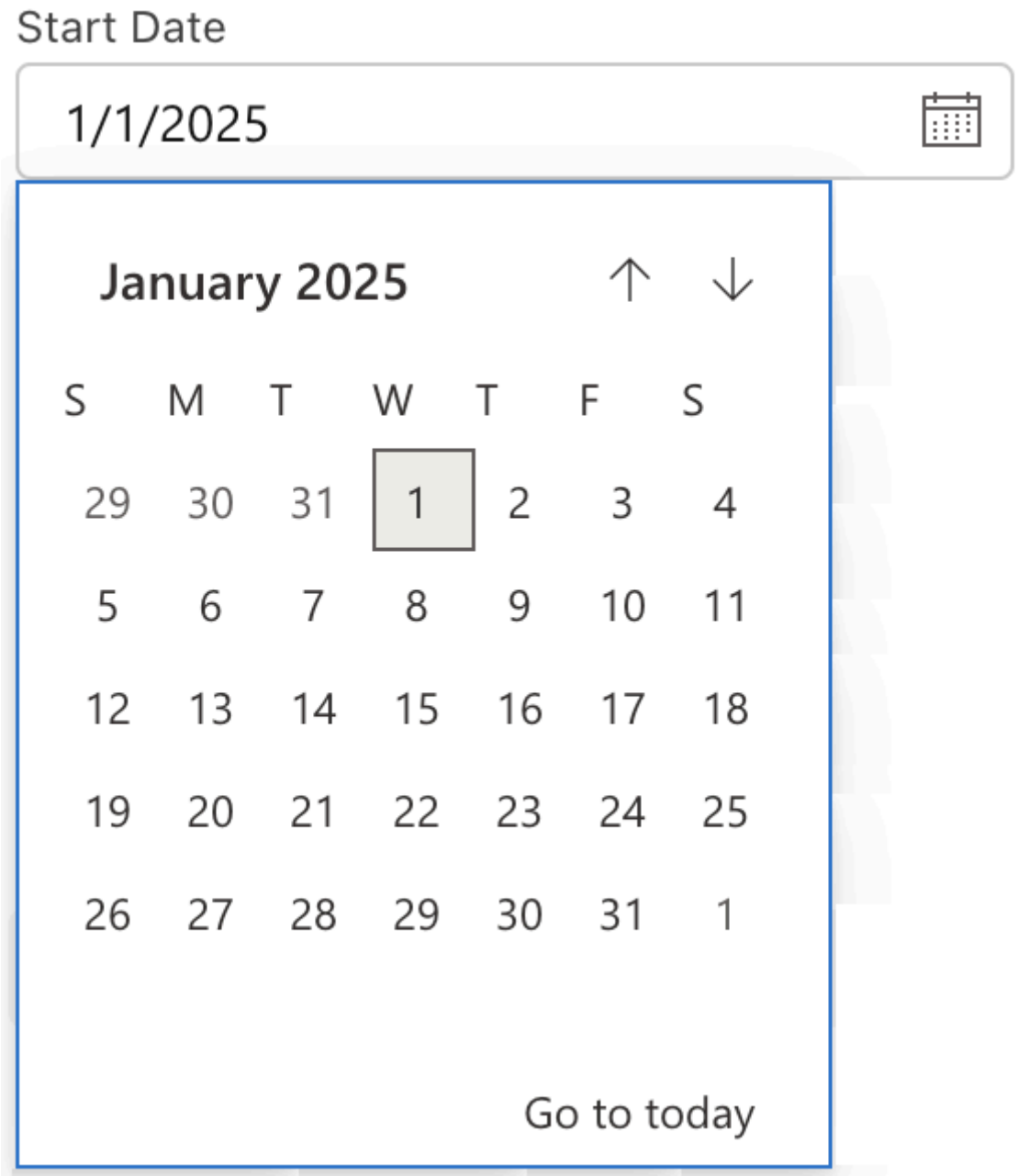
- Date-only calendar display:



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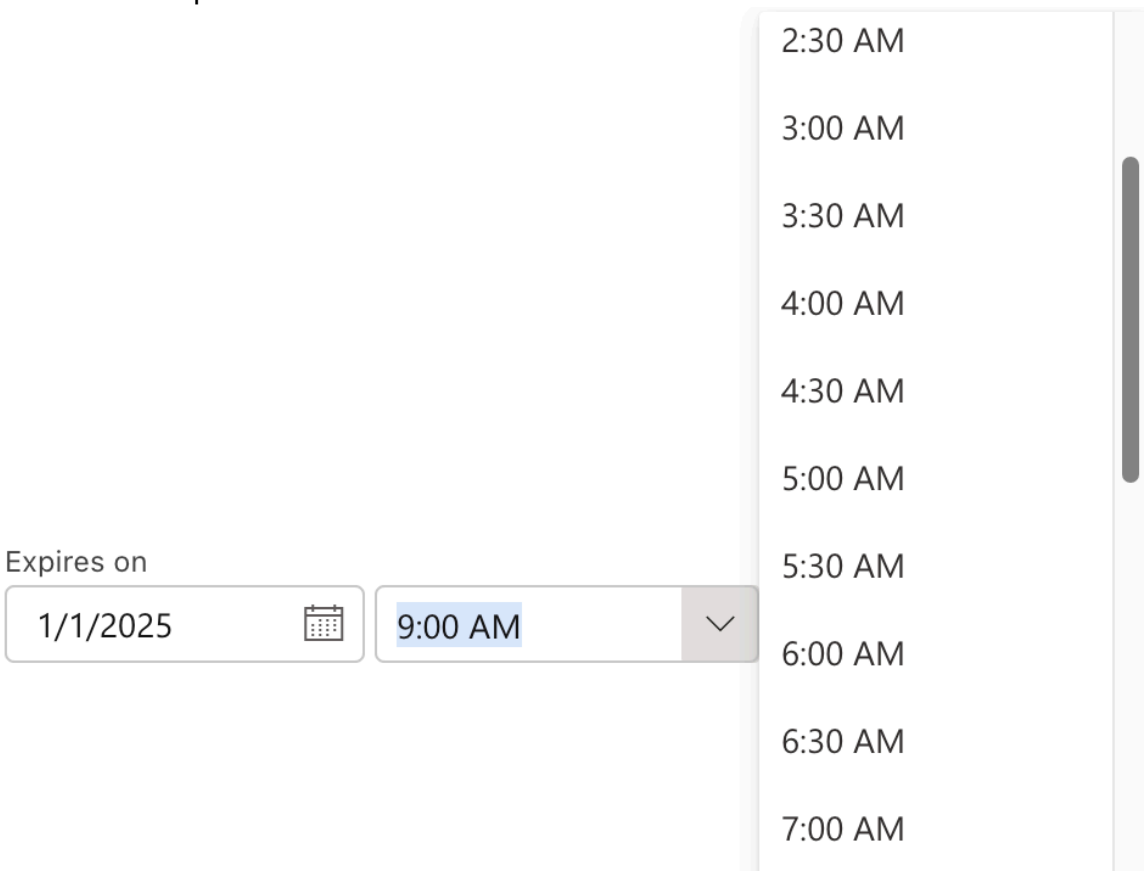
- Date and time input:



- Date only: `YYYY-MM-DD` (for example, `2024-11-07`)
- Date and (optional) time: `YYYY-MM-DDTHH:MM:SS` (for example, `2024-10-22T14:30:00`)

  Administrators can decide whether to include the time component.

Date-only fields are time-zone agnostic. To avoid time-zone discrepancies, dates and times are stored in Universal Coordinated Time (UTC).

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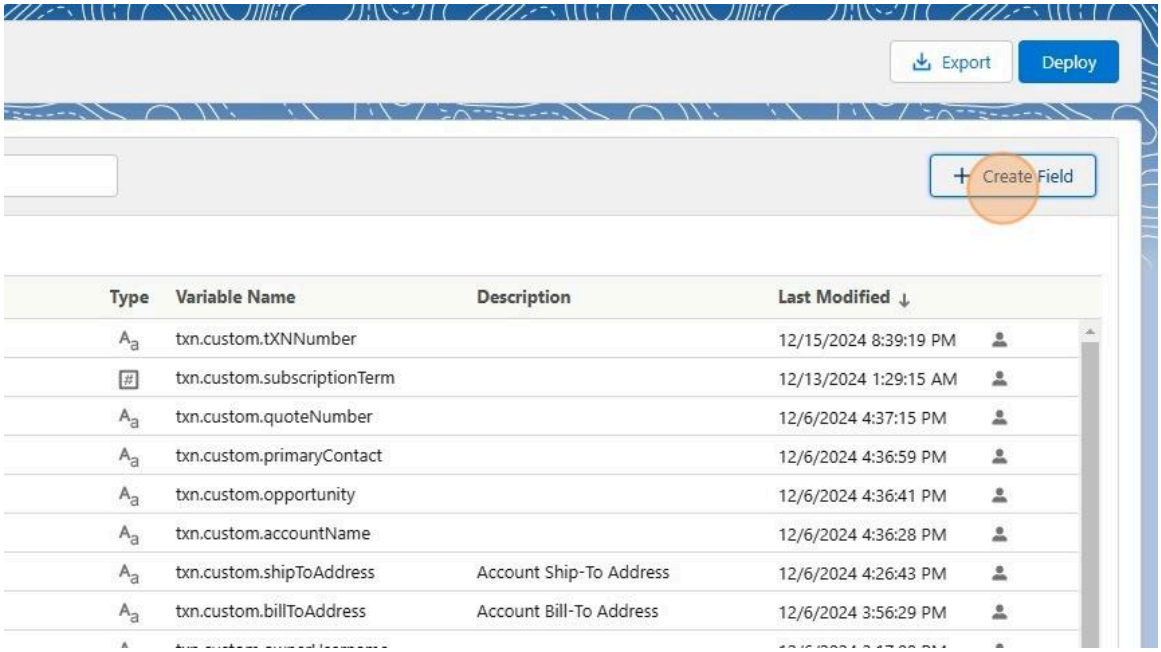
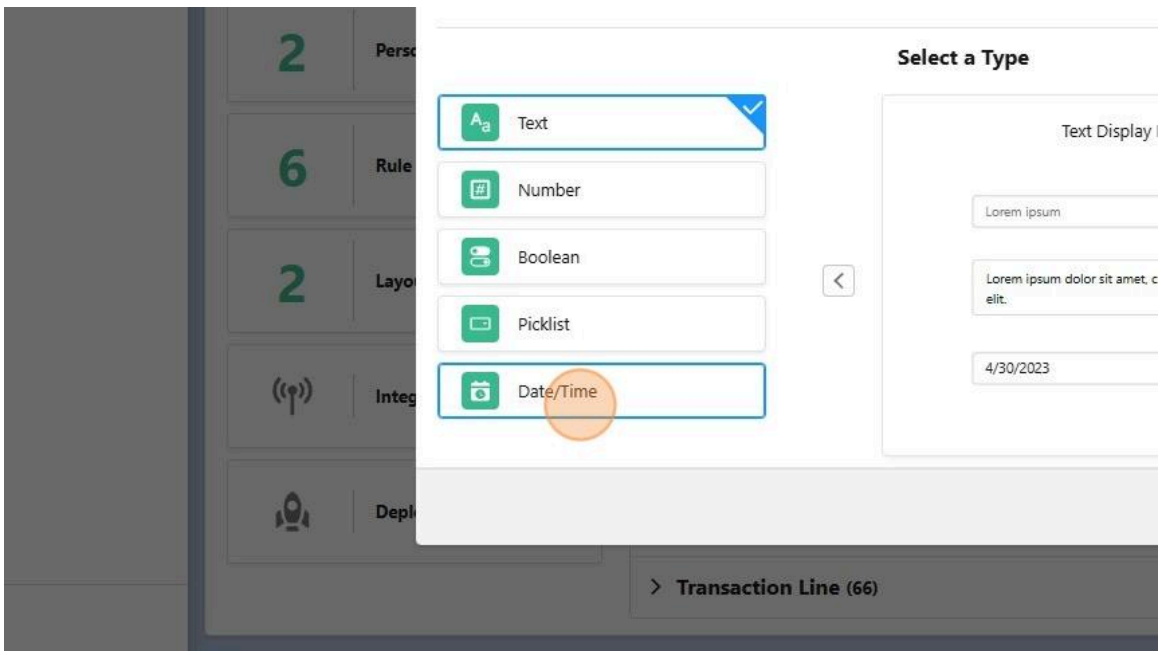
Create a new date and time field

1. From Admin, click **Transactions**, click **Associated fields**, and then click **+ Create Field**.



2. In the dialog box, enter the name of the field. Set the type as Date/Time, and click **Save**.



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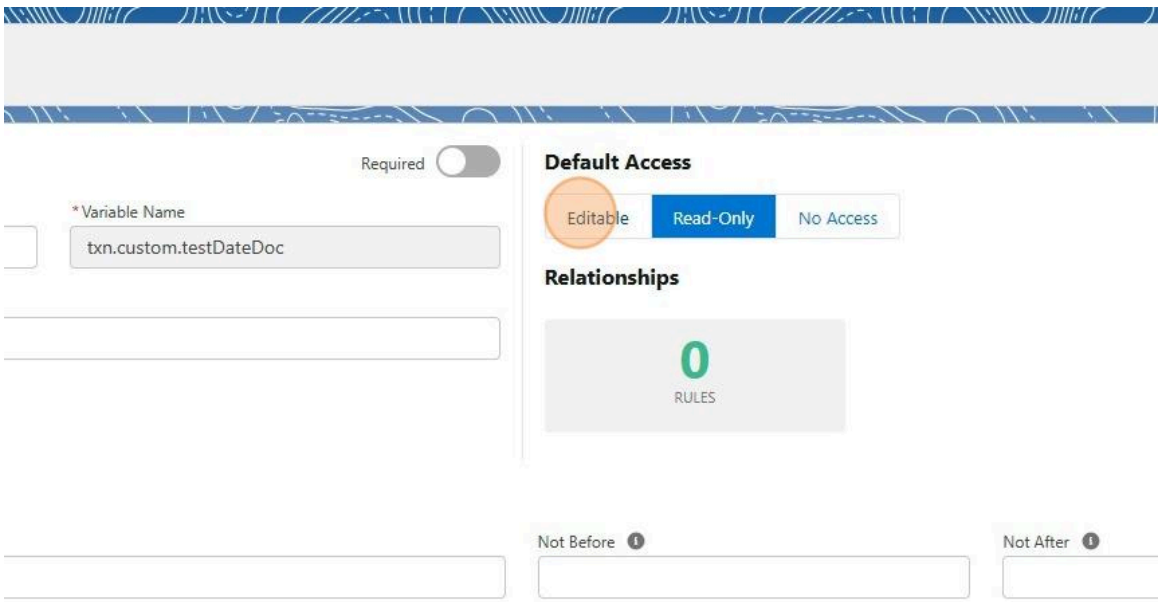
3. Open the field, set the access based on your use case, and click **Save**.



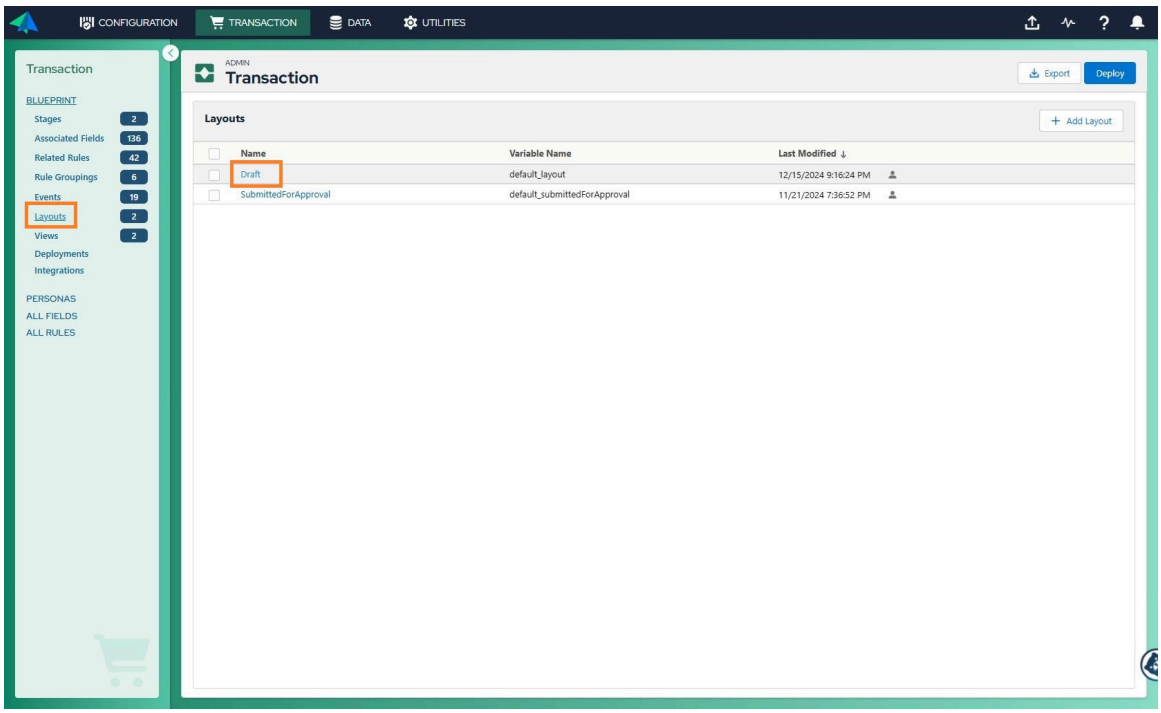
Display the new date and time field in the buyside interface

To appear in the end-user UI, the field must be included in the layout for the blueprint. The layout is defined by the JSON input file. Changes to the end-user UI can be made by modifying this file.

Sample JSON file

To add a “Test date doc“ field to layout, follow these steps.

1. From Admin, click **Transaction**, click **Layouts**, and then click the name of the stage.



2. The layout JSON must be edited in two places.

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- In the `fields` section, add the new date field with type, label and variableName parameters. In the example below, we add “Test date doc” below the existing field “Start date“. When you write the code for the new field, make sure the variable name exactly matches the associated field's variable name.

  Note: In this example, we use a field that displays only the date, so the type in the layout JSON is `“type“:”Date”`. To create a field that also displays time, the type should be `“type“:”DateTime”`.

```
{
  "fields": [
    {
    },
    {
      "type": "Date",
      "label": "Start Date",
      "variableName": "txn.line.custom.startDate"
    },
    {
      "type": "Date",
      "label": "Test date doc",
      "variableName": "txn.line.custom.startDate"
    },
    {
      "type": "Date",
      "label": "End Date",
      "variableName": "txn.line.custom.endDate"
    },
    {
      "type": "ReadOnlyCurrency",
      "label": "Annual List Price",
      "variableName": "txn.line.custom.annualListPrice"
    },
    {
```

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- In the `"layout": "tiers": "columnSets":` section, define the column order of the new field in the "elements" section. Make sure that the variable name is exactly the same.

```
{
  "layout": {
    "tiers": [
      {
        "columnSets": [
          {
            "elements": [
              {
                "type": "field",
                "columnOrder": 1,
                "variableName": "txn.custom.startDate"
              },
              {
                "type": "field",
                "columnOrder": 2,
                "variableName": "txn.custom.endDate"
              },
              {
                "type": "field",
                "columnOrder": 2.5,
                "variableName": "txn.custom.subscriptionTerm"
              },
              {
                "type": "field",
                "columnOrder": 4,
                "variableName": "txn.custom.expiresOn"
              },
              {
                "type": "field",
                "columnOrder": 5,
                "variableName": "txn.custom.firstSegmentTermEndDate"
              },
              {
                "type": "field",
                "columnOrder": 6,
                "variableName": "txn.custom.testDateDoc"
              }
            ],
            "variableName": "Contract1"
          },
```

3. Click **Save**, and then click **Deploy**.

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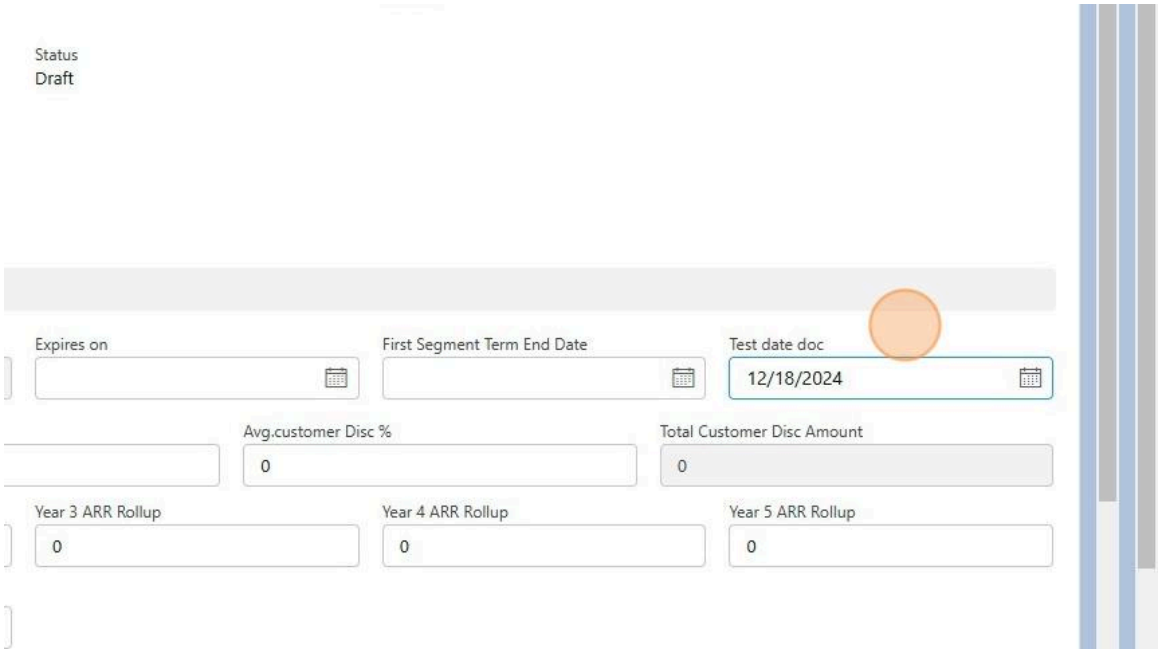
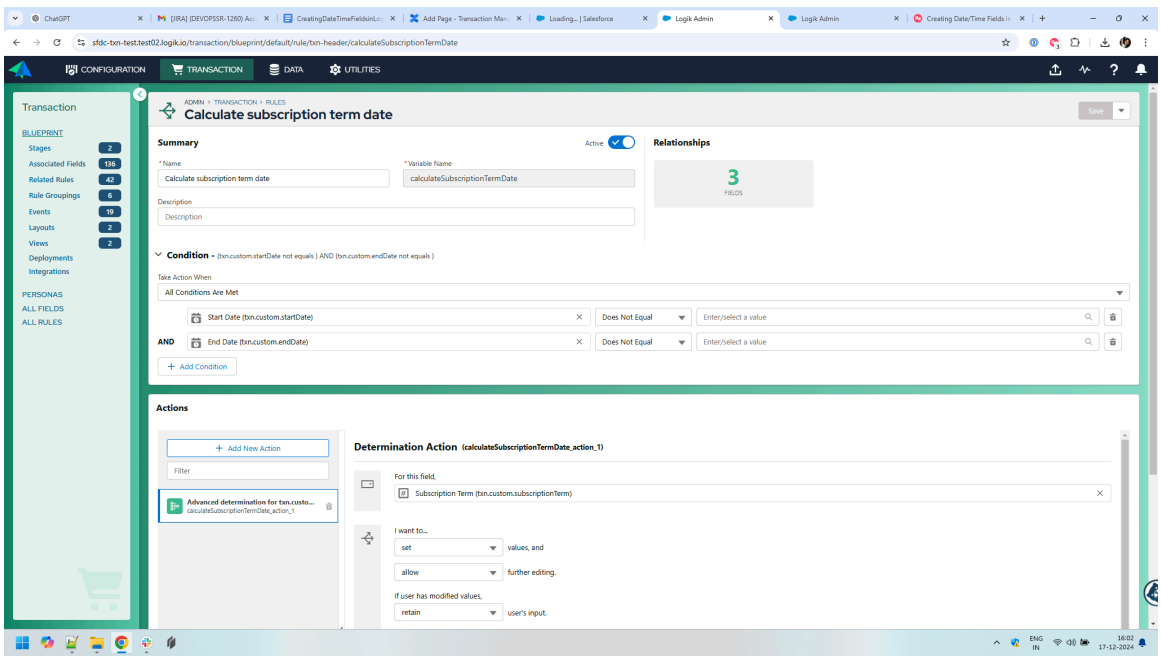
4. Create a new transaction, and click **Edit transaction**. The new field looks like the following.



Calculating Dates in Rules

Term calculations can determine the duration of a contract, subscription, or pricing agreement. Sometimes we may need to calculate the data and display the output in another field for auditing purposes. In the following example, we consider the start date and end date available in the buyside UI and calculate the difference between the dates in terms of months and days. We display the value in another field called “Subscription term“.

1. In CPQ Admin, click **Related Rules**, and then click **New Rule**. Enter the name of the rule and define the conditions. In this example, name the rule “Calculate subscription term date“ and its condition as “Start date.“ “End date“ should not be null.



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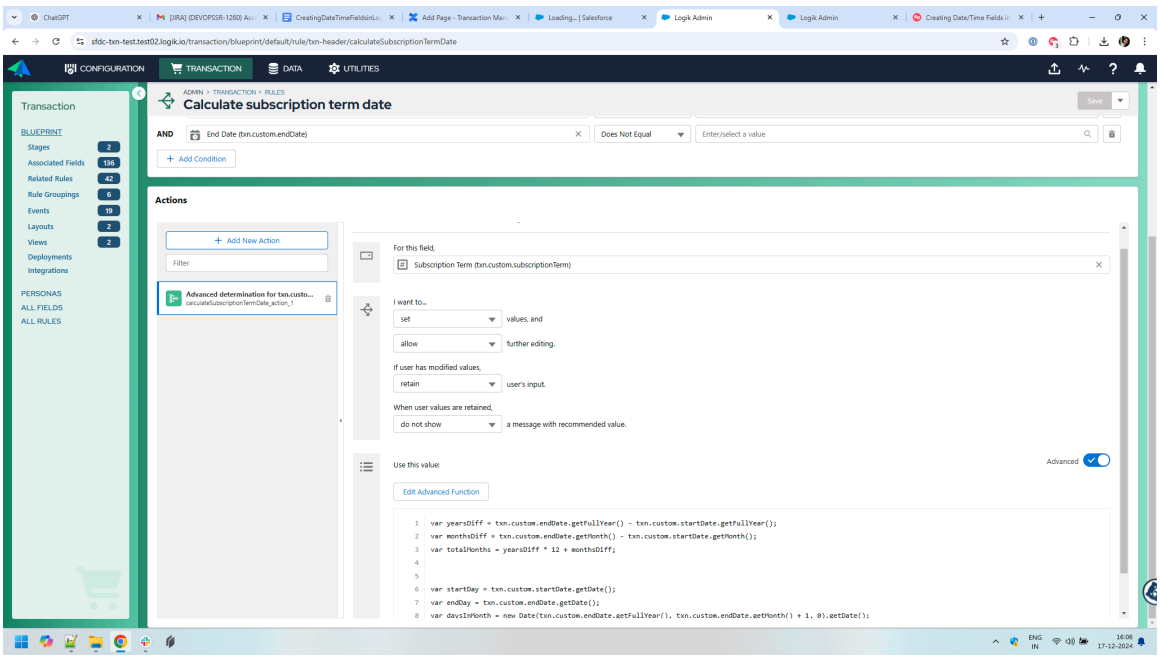
2. To determine the value of another field, add a determination action and provide a script file in the advanced script section. The following script snippet performs the calculation.

```
// Script calculates the difference between start and end dates
 in months and days and displays the output in Subscription
 Term (Months).

var yearsDiff = txn.custom.endDate.getFullYear() -
 txn.custom.startDate.getFullYear();
var monthsDiff = txn.custom.endDate.getMonth() -
 txn.custom.startDate.getMonth();
var totalMonths = yearsDiff * 12 + monthsDiff;

var startDay = txn.custom.startDate.getDate();
var endDay = txn.custom.endDate.getDate();
var daysInMonth = new Date(txn.custom.endDate.getFullYear(),
 txn.custom.endDate.getMonth() + 1, 0).getDate();
var dayFraction = (endDay - startDay + 1) / daysInMonth;

totalMonths += dayFraction;

return Math.floor(totalMonths * 1000) / 1000;
```

Enter the script in the script editor, and click **Save**.



3. Associate the newly created rule to the blueprint. Navigate to **Rule Groupings**, and then to the name of the stage where rule should be applied (in this case, draftStageRuleGroup). Click **Associate Rules**, and search for the name of the rule. Drag the rule to the left pane, an click **Done** to deploy.

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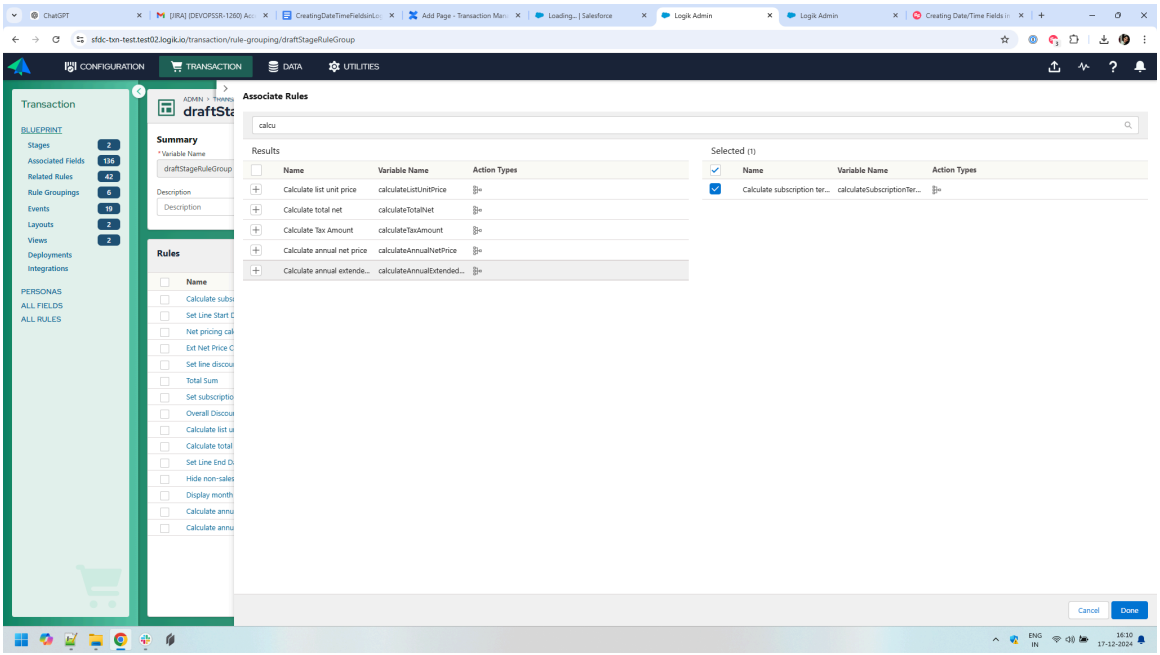
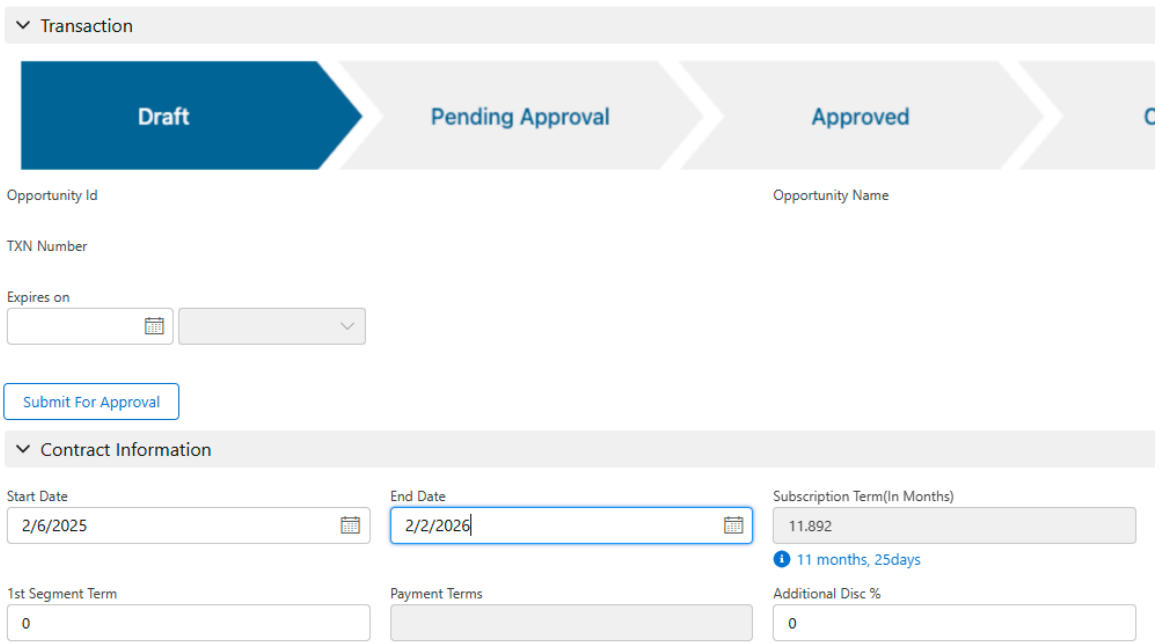


4. Test the functionality in the buyside interface by providing values for the start date and the end date. The subscription term is auto-populated based on the script.



Behavior of date and time fields in scripts

Blank/null dates compare as FALSE unless compared to another blank value.

- `date123 = ""`: TRUE
- `date123 != ""`: FALSE

Comparisons `<`, `<=`, `>`, `>=`, `=`, `!=` are supported. Comparisons involving blank or null dates always evaluate to FALSE. Default values for date fields are empty (null) unless specified.

Aggregate operations:

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- `Max`: find latest date
- `Min`: find earliest date
- `Count`: counts non-empty date values

`Sum` and `Avg` are not recommended because they may trigger compile-time errors.

Related topics

Transaction Manager

Transaction Manager: Fields

Transaction Manager: Transaction-level system fields

Transaction Manager: Line-level system fields

Transaction Manager: Layouts

Layouts in Transaction Manager can be managed in the Admin UI by using the layout editor or directly in the YAML format. This topic provides the details of the various layout structures, fields, buttons, and effects, and provides code snippets.

In Transaction Manager, layouts retain much of the look and feel of the configuration user experience. In January 2026, a visual layout editor was introduced in Transaction Manager. Layouts can be edited in YAML format; however, the option to edit in JSON was retired in favor of the visual editor. Fields, events, UI effects, and lines are available for display and are detailed below.

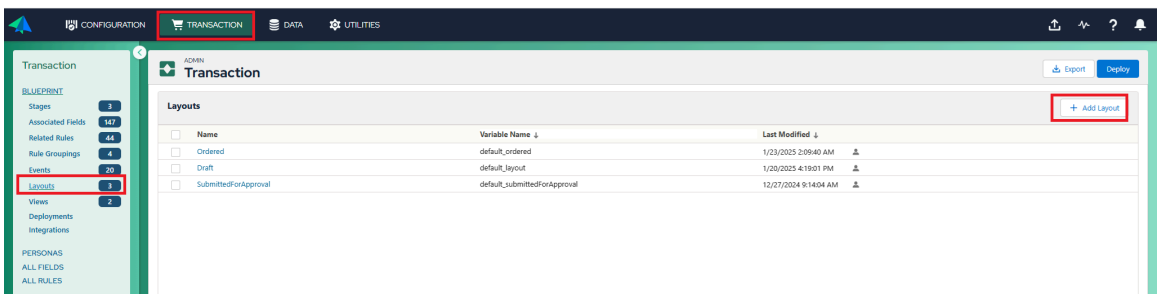
Layout formats (visual and YAML)

Layouts can be managed in either the visual editor or in YAML. The visual editor is selected by default, but admins can toggle to YAML.

Creating a new layout

To create a new layout, navigate to the Transaction Manager Admin UI, click **Layouts** in the menu on the left, and then click **+ Add Layout** to add a new layout to the blueprint.

An existing layout can be copied by using the Save As function in the layout.



The layout requires a name and a variable name. Click in the Name field, enter the name of the new layout, and click **Save** to proceed. Although the name can later be edited in the layout, the variable name is not editable after the layout is saved.

When the layout is saved, the visual editor opens. The default layout includes a few key items, such as the main tier, a line item grid, and a product search capability.

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Layout names and stage association

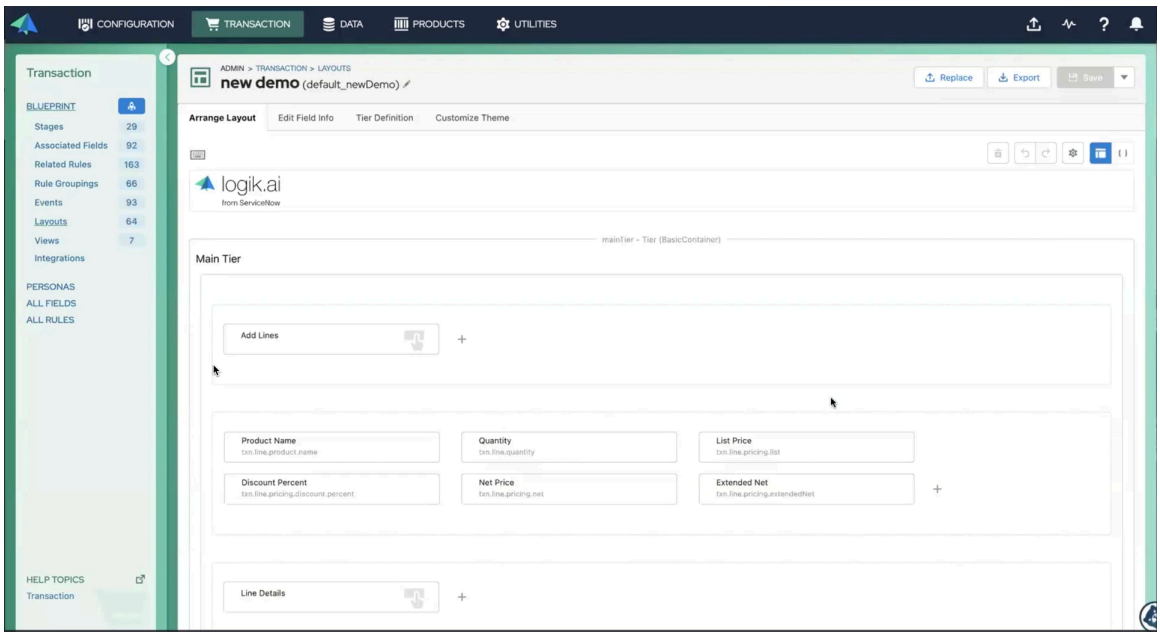
The layout's variable name is used to map layouts to stages. To map a layout to a stage, use the stage name as the layout name. A layout named "layout" maps to any stage that has no layout mapped to it. The text `default` is appended to all layout variables.

For example, when the stages are named Draft, Approved, and Fulfilled, and the layouts are named Draft and Layout, the mapping is as follows:

Stage association

Stage	Layout name
Draft	draft
Approved	layout
Fulfilled	layout

The optional Line Detail layout displays details on a selected line in the line item grid. This view is initiated via the Line Detail UI effect. This layout requires its own layout file and the variable name must end with `_linedetail`. These layouts follow the same mapping as stages. Continuing the example above, if you want a Line Detail layout for the Draft stage, the name must be `draft_linedetail`.



The YAML code for the layout can be accessed by using the view toggle in the subheader. Admins can update the layout either by using the visual editor or by directly editing the YAML code. The YAML for each element can also be accessed in the Raw Value section of the element properties.

The **Save** button saves the current version of the layout. However, the blueprint must be deployed for the new version to be used in runtime. If there are errors in the layout, the Save button is disabled. To identify errors, select the error messages button in the subheader. In the YAML view, look for red marks on the right side of the display that indicate the location of the error.

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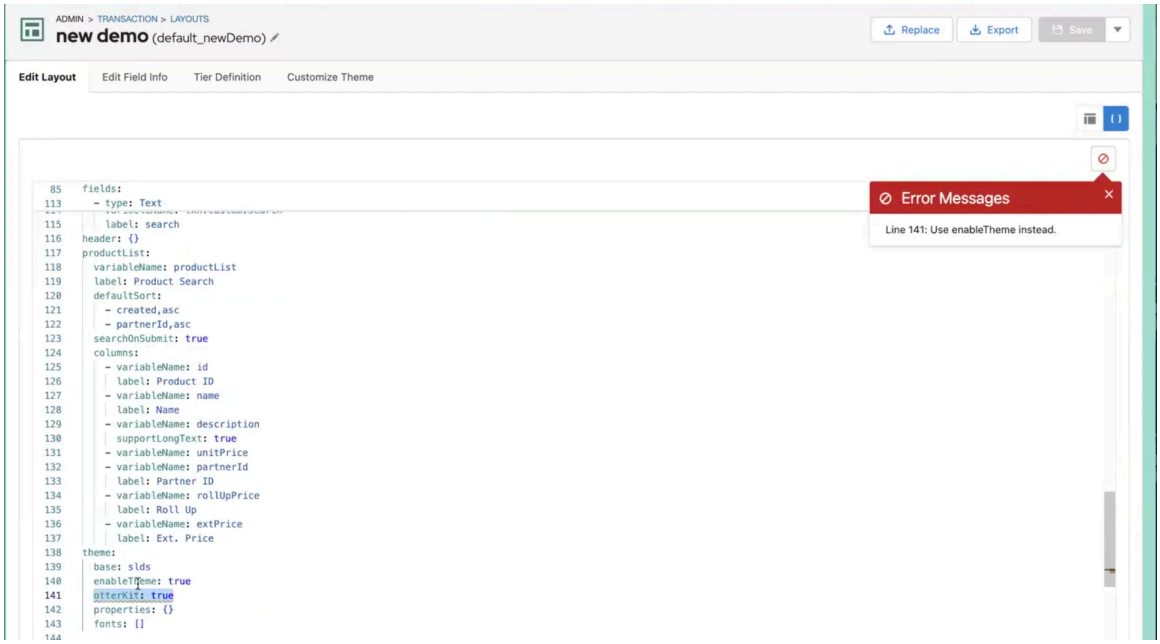
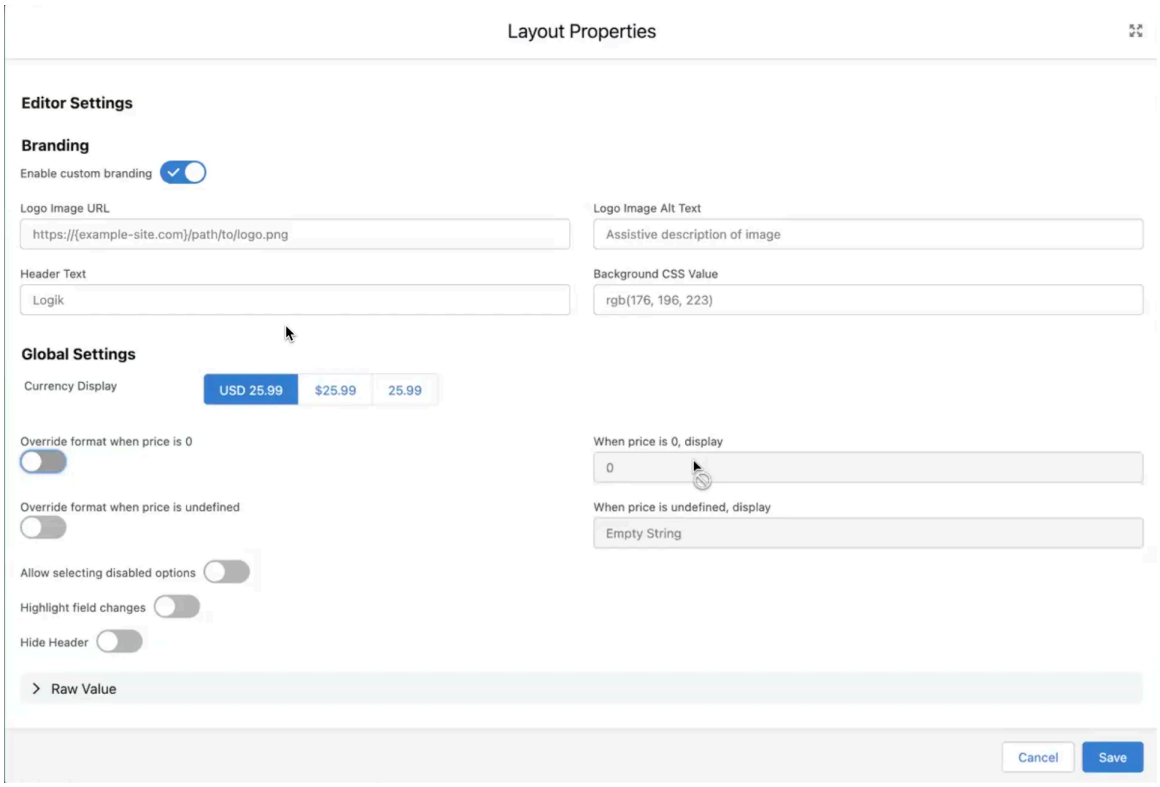


General layout information

Click the gear (settings) icon in the subheader to access the layout settings.



Settings include the following:

Branding

Customize the header.

Currency Display

Set the currency display style: code, symbol, or neither.

When price is 0, display

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Set the behavior when the price is zero.

When price is undefined, display

Set the behavior when the price is undefined.

Allow selecting disabled options

Allow the user to select disabled items from a picklist. Use case is to display an explanation message if selected.

Highlight field changes

When enabled, fields are briefly highlighted. Recommended when fields are updated via rules or integrations or if concurrent users are expected.

Hide Header

Hides the header section of the layout.

Theming

Transaction Manager layouts can be customized with themes. Themes can be enabled on the Customize Theme tab. For more information, see Customizing CPQ with themes.

Stage progress chevrons

The Stages Progress Chevron component displays a horizontal chevron bar to visually represent a transaction's progression through stages. It can be defined statically or dynamically and is configurable through layout YAML. For more information, see Transaction Manager: Layouts - The stages progress chevron.

Tiers

Tiers are sections of information for your transaction. Tiers are the top of the hierarchical structure of a Transaction Manager layout. You can use tiers to organize your transaction information so that it is easier to find and understand for the buyside user. Columnsets, tiers, or a line item grid can be added within a tier, but a line item grid must be the only element in a tier.

Tier types include Accordion, Expandable, Tabs, Vertical tabs, Headings, and Pages. The type and depth of a tier can be configured on the Tier Definition tab.

Columnsets

As in configuration, columnsets are objects in the layout that enable you to organize fields and events on the runtime display. Fields and events can be arranged horizontally in a columnset. Fields and events are arranged vertically by using multiple columnsets in the same tier. You can add fields, images, text, and buttons within a columnset.

Columnsets: fields

Fields are one type of object that can be placed in the Elements array of a columnset. Fields provide the data input source for the transaction. Fields can be added, removed, and ordered in a columnset on the Arrange Layout tab. Once added, additional field properties can be set on the Edit Field Info tab.

On the Edit Field Info tab, changing the field display type to "text area" lets the user resize the field.

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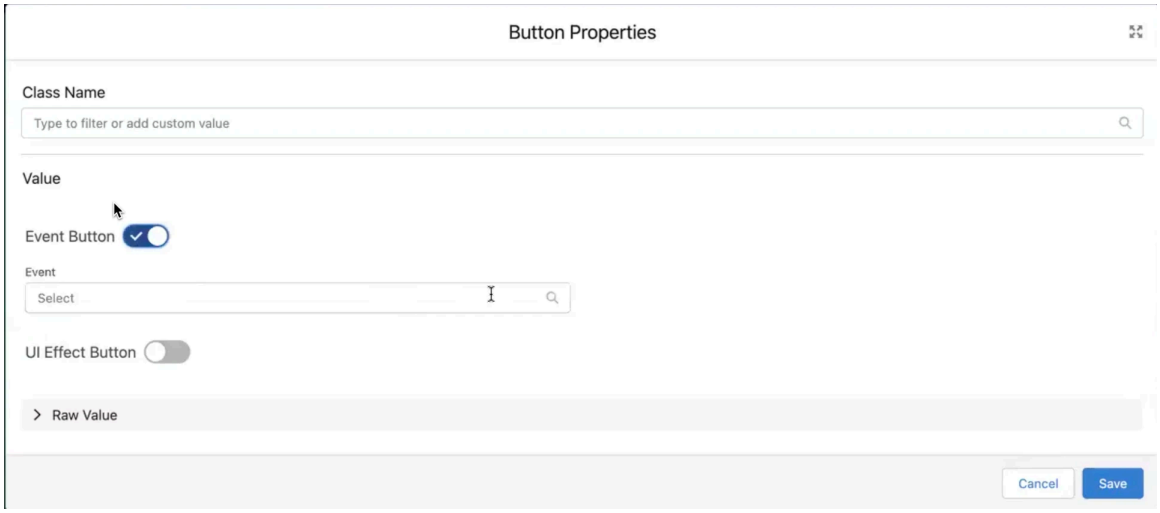
ColumnSets: events

Events are objects that cause certain actions to be taken. Events are typically represented in the layout as a button. To add an event, add a button to a columnset, and then toggle the **Event Button** setting. Once it is enabled, an event can be selected from the Event picklist.



Line item grid

The Line Item Grid object displays the product information that is included in the transaction. Detailed product information and pricing information is displayed in the Line Item Grid object.

In the layout editor, a line item grid is included by default, and has the following three sections:

Line item grid header

Buttons can be added and display atop the line item grid in runtime.

Line item grid column

Fields can be added, removed, and ordered and display as columns on the line item grid.

Line level buttons

Buttons can be added and display on each line in the line item grid.

The line item grid has the following layout properties, each of which is enabled when its value is `true`. The properties must be defined in the main YAML editor.

- *`showLineNumbers`*: enables user-friendly line numbers
- *`supportLongText`*: a Line Item Grid field property that enables a popover on the field when selected
- *`autoScrollIntoView`*: smooths the scroll interaction between the transaction body and LIG

YAML code snippet:

```
    - depth: 1
      label: Line Items
      lineGrid:
        columns:
          - order: 1
            variableName: txn.line.product.name
          - order: 2
```

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```
          variableName: txn.line.product.partnerId
      showLineNumbers: true
      lineLevelButtons:
        - icon: settings
          label: Line Details
          uiEffect:
            type: lineDetail
            target: slideout
          variableName: reconfig
        - event: cloneLine
          label: Clone Lines
          variableName: cloneLine
        - label: Add To Favorites
          uiEffect:
            type: addFavorite
          variableName: addFavorites
      gridHeaderButtons:
        - label: Add Lines
          uiEffect:
            type: productSearch
            target: slideout
            options:
              products: true
              favorites: true
          variableName: productSearch
        - label: Add To Favorites
          uiEffect:
            type: addFavorite
          variableName: addFavorites
        - label: Reconfigure Lines
          uiEffect:
            type: reconfigure
            target: slideout
          variableName: reconfig
      autoScrollIntoView: true
    variableName: lineItems
```

Line-level event buttons can have an icon defined. Icons must be defined in the YAML code in either the Raw Value section of the line button properties or in the main YAML editor. Buttons can use specified icons from the SLDS Utility library.

Available icons

automate	buyer_group_qualifier	chevrondown	chevronleft	chevronright	chevronup
choice	clear	clock	close	custom_apps	delete

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Available icons (continued)

 down	 edit	 favorite	 left	 lightning_extension	 right
 question	 search	 settings	 target_mode	 threedots	 threedots_vertical

YAML code snippet:

```
        lineLevelButtons:
          - icon: settings
            label: Line Details
            uiEffect:
              type: lineDetail
              target: slideout
            variableName: reconfig
          - event: cloneLine
            label: Clone Lines
            variableName: cloneLine
          - label: Add To Favorites
            uiEffect:
              type: addFavorite
            variableName: addFavorites
```

Finally, there are three ways to display line numbers in the line item grid: by means of a layout property, or by either of two system fields:

- The *showLineNumbers* layout property. Because it performs efficiently and has no limit to the number of lines, this is the recommended method.

  showLineNumbers displays sequential line numbers for visible lines. The numbering resets when a filter or a search applies to the line item grid.

- The *txn.line.orderNumber* system field

  txn.line.orderNumber displays hierarchical line numbering for all lines (for example: 1, 1.1, 2, 2.1, 2.2, 2.2.1). The numbering does not reset when a filter or a search applies to the line item grid. Numbering can be applied to up to 2,000 lines.

  The field has the same layout properties as other line-level fields and can be added to the layout in the `lineGrid` section of the layout.

  To enable this field, submit a request to customer support.

- The *txn.line.number* system field

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txn.line.number displays sequential line numbering for all lines (that is, 1, 2, 3, and so on).

As with *txn.line.orderNumber*, numbering does not reset when a filter or a search is applied, and there is a maximum of 2,000 lines. The field has the same layout properties as other line-level fields and can be added to the layout in the `lineGrid` section of the layout. To enable this field, submit a request to customer support.

Product list search

The Product List Search object provides a set of layout properties for the product list search results in the add lines/product search flow. By default, the product list search is added via the **Add Lines** UI effect button. Fields can be added, removed, and reordered in the Product Search object to define the runtime UI. Related properties can be found in three locations:

- The button properties of the button with the Product Search UI effect
- Product list search properties accessed via the Product Search object in the layout
- Each of the fields in the Product List Search object on the layout

UI effect button properties include:

UI Effect Target

Options for Product Search display

Show Products

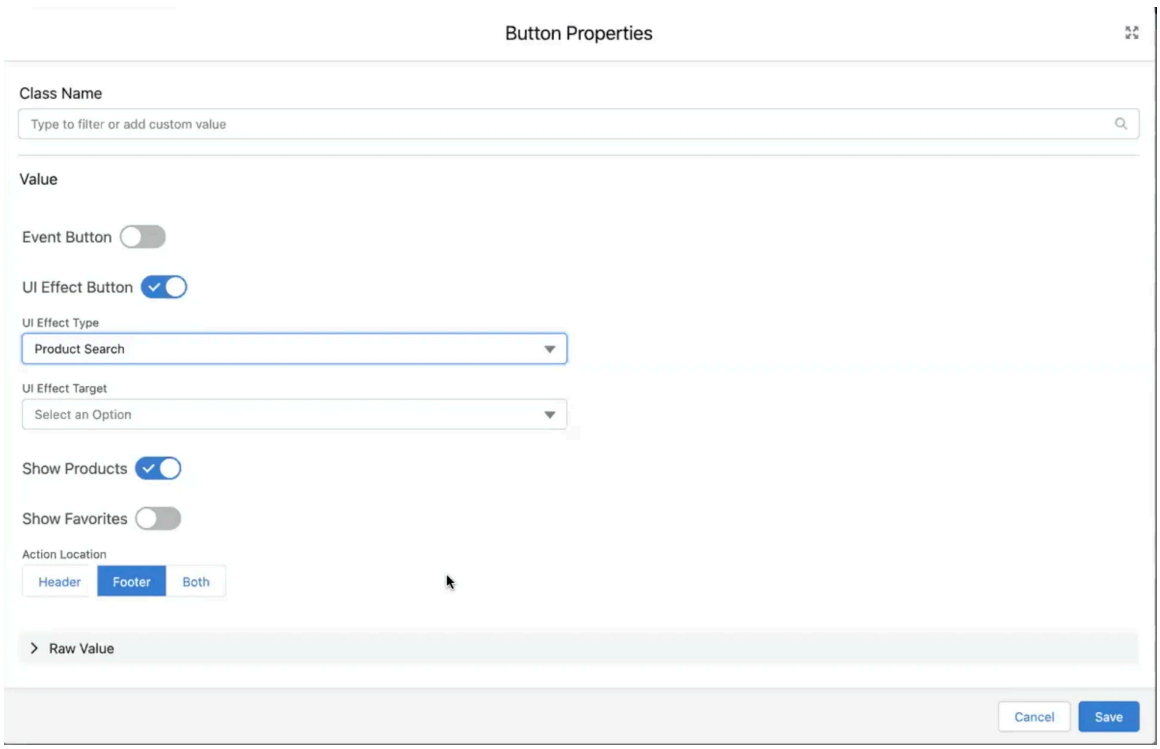
Adds the Products tab to the product search

Show Favorites

Adds the User Favorites tab to the product search

Action Location

The location of action buttons on the product search display



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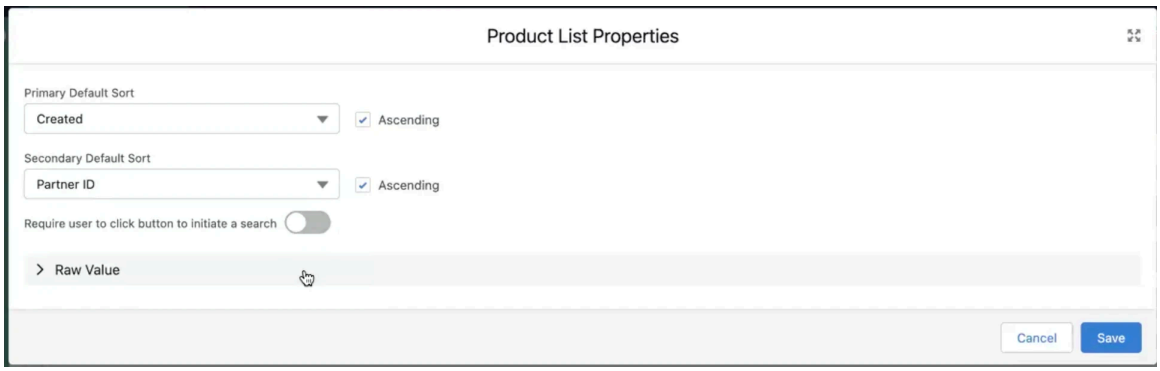
The properties of the Product List Search object include:

- Primary Default Sort: Define up to two parameters used to sort search results. The following fields can be used as parameters:
  - modified
  - created
  - Name (default if no parameters are defined)
  - partnerId
  - productCode
  - description
  - unitPrice
  - externallyConfigurable

  The order can be defined per parameter as `asc` or `desc`.
- Search on Submit: Determines whether search results are updated as the user types or only when the user clicks **Submit**.



Field-level properties include:

Column Width

CSS compatible value to define width

Alignment

Alignment of header and values

Enable Sorting

When enabled, allows column to be sorted

Enable Long Text Popover

When enabled, a popover is displayed when value in field is selected

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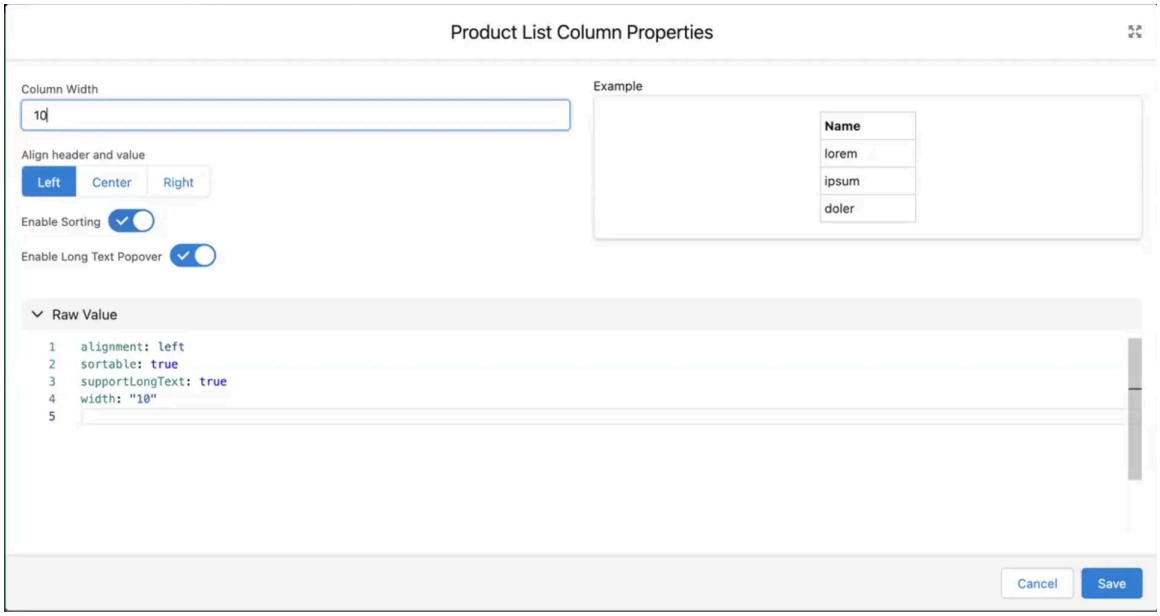

UI effects

UI effects are layout elements that add specific functionalities to a Button. UI effects include:

URL

Opens the associated URL inline, in a modal window, in a slideout panel, or in a new tab or window.

Anchor

Navigates to specified location in the transaction

Product search

Opens the product catalog, starting the Add Products flow

Line detail

Opens the line-detail layout

Reconfigure

Opens the selected products to configuration UX

Add favorite

Opens a modal window to describe and create a favorite from the selection

Manage favorites

Opens the Favorites Manager

Refresh session

Checks whether the session has been modified, and if so, refreshes the sessionId and merges changes.

Export lines

Exports to a CSV file all lines in a transaction that meet the sort, filter, and show/hide column settings.

YAML code snippets

Layout properties:

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```
# Layout version
version: 1
# Layout identifiers
label: Example layout
variableName: default_ExampleLayout
# Tier definitions
tierDef:
  - depth: 1
    representation: BasicContainer
# Layout
layout:
  label: layoutsection
  variableName: layoutsection
  tiers:
    - label: tier1
      variableName: tier1
      depth: 1
```

Tiers:

```
# Layout
layout:
  label: layoutsection
  variableName: layoutsection
  tiers:
    - label: tier1
      variableName: tier1
      depth: 1
```

Columnsets:

```
columnSets:
        - elements:
            - type: field
              columnOrder: 1
              variableName: txn.opportunity.id
          variableName: col1
```

Columnset with fields:

```
columnSets:
        - elements:
            - type: field
              columnOrder: 1
              variableName: txn.opportunity.id
            - type: field
              columnOrder: 1
              variableName: txn.custom.opportunityName
            - type: field
              classInfo: mw20
              columnOrder: 1
              variableName: txn.custom.primaryContact
          variableName: col1
```

Columnset with events:

```
To be added
```

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Field properties:

```
fields:
  - type: Text
    label: Custom line field
    variableName: txn.line.custom.customText
  - type: ReadOnlyText
    label: TXN Number
    variableName: txn.custom.tXNNumber
```

Product list search:

```
productList:
  columns:
    - label: Product ID
      sortable: true
      variableName: id
    - label: Product Name
      variableName: name
    - label: Product description
      variableName: description
      supportLongText: true
    - label: Price
      variableName: unitPrice
  defaultSort:
    - externallyConfigurable,desc
    - name
```

Related topics

Transaction Manager: Layouts - UI effects

Transaction Manager: Layouts - Theming options

Transaction Manager: Layouts - UI effects

Learn how to add functionality to a button by programming UI effects in either YAML or JSON.

In Transaction Manager, UI effects are layout elements that add functionalities to a button. Users can customize the UI effects that CPQ has established. However, users cannot create new UI effects as they do events.

If a UI effect and an event are present on the same button, the UI effect runs after the event runs.

Example: Opening a list

As an example, a UI effect might enable a button to open a searchable list of products that could be added to a transaction. Here's how that could be written in the layout:

```
      ...
      {
        "type": "button",
        "event": "productSearch",
        "label": "Add Products",
        "uiEffect": {
          "type": "productSearch",
          "target": "slideout"
        },
        "columnOrder": 6,
        "variableName": "productSearch"
```

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```
    },
    ...
```

Here's how that button might appear in the resulting UI:



Programming UI effects

A UI effect is defined by a combination of parameters. All UI effects have a type, and some may have a target, location, or options.

Each parameter has the following possible values:

- *type*: *url*, *anchor*, *productSearch*, *lineDetail*, *reconfigure*, *addFavorite*, *manageFavorites*, *refreshSession*, *showTier*
- *target*: *inline*, *tab*, *window*, *modal*, *slideout*, *lineDrawer*, *fullScreen*
- *location*: [a URL or an element id]
- *options*: [depends on type]

Analysis of types

- *url* requires a location in the form of a URL. Pressing the button takes users to the URL by way of a particular target (inline, tab, window, modal iframe, or slideout iframe). Using curly braces, admins can dynamically pass field values into the URL. Common use cases are passing a value to an output document or opening a record page in Salesforce.
- *anchor* requires a location as an element ID in the layout. Pressing the button focuses on or scrolls to the element. Related parent elements are opened in tabs or an accordion structure. The target should be inline.
- *productSearch* opens the product catalog in the target in either a slideout or a modal window. A variable name is required. The UI effect must be added to the gridHeaderButtons element. Options include the following:
  - Show products list: *products* - *true* (show), *false* (hide)
  - Show favorites list: *favorites* - *true* (show), false (hide)
  - Location of button placement: *actionLocation* - *footer*, *header*, or both
    - Defaults to *footer* if not specified
    - Buttons include "Cancel", "Add Line", "Configure", and "Done Configuring"

  The following code shows products, hides favorites, and places buttons only on the header:

```
...
"options": {
  "products": true,
  "favorites": false,
  "actionLocation": header
},
...
```

- *lineDetail* must be on a line-level button. Pressing the button opens the line-detail layout in the target (*modal*, *slideout*, or *lineDrawer*).

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- *exportLines* must be on a header-level button. Pressing the button exports the transaction lines to a CSV file.
- *reconfigure* can be on a line-level or a header-level button. If the button is header-level, it requires a selection of lines. The *reconfigure* type opens configurations in the target (*modal*, *slideout*, or *lineDrawer*). *reconfigure* includes the option to define the location of buttons. For more detail, see *productSearch* above.
- *addFavorites* can be on a line-level button or a header-level button. If the button is header-level, it requires a selection of lines. *addFavorites* opens a window to describe and create a favorite from the selection. No other properties are supported.

  Note: To share favorites, a tenant setting must be enabled. To enable favorites sharing, submit a support ticket.

- *manageFavorites* opens the Favorites Manager in the specified target (*modal*, *slideout*, or *inline*).
- *refreshSession* checks whether the session has been modified. If so, *refreshSession* refreshes the sessionId and merges in changes.
- *showTier* opens the Line Item Grid in full screen if `target = fullScreen` and `location = lineItems`. *showTier* works with any tier, but for the purposes of this feature, the location should be filled in with the tier variable name of the line items.

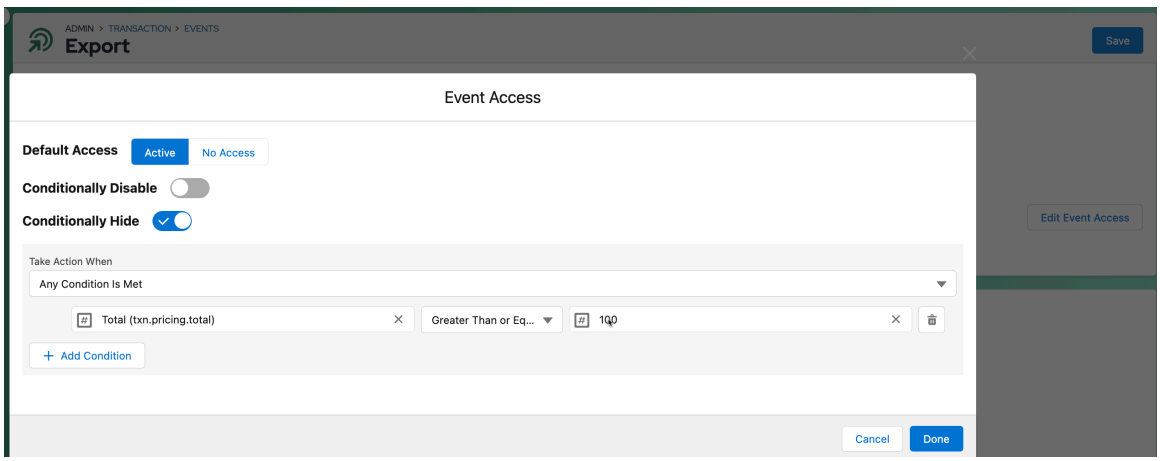
Currently, layout JSONs are not validated, and some property combinations are not supported. Unsupported combinations are likely to fail without indicating errors.

Implicit event calls

Some UI effects involve running related events. For example, triggering either the *productSearch* UI effect or the *reconfigure* UI effect runs the *upsertLines* event.

Access conditions

A user's ability to access a UI effect cannot be controlled in the same way as events. There are no setting comparable to the following event settings:



However, the access conditions for a UI effect can be changed by its context in the transaction or by related events.

When a UI effect has an implicit event associated with it, the access conditions of the event determine the access conditions of the button and, in turn, the UI effect. Therefore, if an

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administrator wants to limit the conditions under which a *productSearch* UI effect can be triggered, they can add those limitations to the *upsertLines* event.

A button on the line grid that has the *reconfigure* UI effect is hidden on lines that are not configurable. At the header level, it is enabled only when every selected line is configurable.

If an event and a UI effect are both present on a button, access for both is determined by the intersection of their individual access settings. For the button to be accessible, both the UI effect and the event must be accessible. If either is disabled or hidden, the entire button is disabled or hidden.

Common cases

- Product searching (the `addLines` UI effect implicitly calls the `upsertLines` event):
  - JSON code snippet

```
{
  "type": "button",
  "variableName": "addLines",
  "label": "Add Lines",
  "uiEffect": {
    "type": "productSearch",
    "target": "slideout"
  }
}
```

  - YAML code snippet

```
type: button
variableName: addLines
label: Add Lines
uiEffect:
  type: productSearch
  target: slideout
```

- Line details drawer:
  - JSON code snippet

```
"lineLevelButtons": [
 {
   "icon": "settings",
   "label": "reconfig",
    "uiEffect": {
       "type": "lineDetail",
        "target": "lineDrawer"
      },
    "variableName": "reconfig"
  }
```

  - YAML code snippet

```
lineLevelButtons:
-icon: settings
 label: reconfig
 uiEffect:
   type: lineDetail
   target: lineDrawer
 variableName: reconfig
```

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- Product search with favorites enabled:
  - JSON code snippet

```
{
  "type": "button",
  "variableName": "addLines",
  "label": "Add Lines",
  "uiEffect": {
    "type": "productSearch",
    "target": "slideout"
    "options": {
      "products": true,
      "favorites": true,
    }
  }
}
```

  - YAML code snippet

```
type: button
variableName: addLines
label: Add Lines
uiEffect:
  type: productSearch
  target: slideout
  options:
    products: true
    favorites: true
```

- Open URL link in new tab:
  - JSON code snippet

```
{
  "columnorder": 1,
  "label": "Google it",
  "type": "event",
  "variableNane": "LinkToSite",
    "uieffect": {
        "type": "url",
        "target": "tab",
        "location":
 "https://google.com/search?q=I{txn.search}"
    }
}
```

  - YAML code snippet

```
columnorder: 1
label: Google it
type: event
variableName: LinkToSite
uieffect:
  type: url
  target: tab
  location: "https://google.com/search?q=I{txn.search}"
```

- Refresh session:

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- JSON code snippet

```
{
  "type": "button",
  "variableName": "Refresh",
  "label": "Refresh",
  "uiEffect": {
    "type": "refreshSession"
  }
}
```

- YAML code snippet

```
type: button
variableName: Refresh
label: Refresh
uiEffect:
  type: refreshSession
```

- Reconfigure:
  - JSON code snippet

```
"lineLevelButtons": [
  {
     "icon": "settings",
     "label": "Reconfigure",
      "uiEffect": {
          "type": "reconfigure",
          "target": "modal"
       },
     "variableName": "reconfig"
  }
```

  - YAML code snippet

```
lineLevelButtons:
-icon: settings
 label: Reconfigure
 uiEffect:
   type: reconfigure
   target: modal
 variableName: reconfig
```

- Add to favorites:
  - JSON code snippet

```
{
  "label": "Add To Favorites",
  "uiEffect": {
    "type": "addFavorite"
    },
  "variableName": "addFavorites"
}
```

  - YAML code snippet

```
label: Add To Favorites
uiEffect:
```

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```
  type: addFavorite
variableName: addFavorites
```

- Manage favorites:
  - JSON code snippet

```
{
  "label": "Manage Favorites",
  "uiEffect": {
    "type": "manageFavorites",
    "target": "modal"
    },
 "variableName": "manageFavorites"
}
```

  - YAML code snippet

```
label: Manage Favorites
uiEffect:
  type: manageFavorites
  target: slideout
variableName: manageFavorites
```

- Export lines YAML snippet:

```
label: Export Lines
uiEffect:
  type: exportLines
variableName: exportLines
```

Transaction Manager: Layouts - The stages progress chevron

You can configure a progress bar using layout JSON or YAML and define it either statically or dynamically. See code snippets.

Purpose

The Stages Progress Chevron component is a visual representation of a transaction's stage progression, typically displayed as a horizontal chevron bar. It can be defined statically or dynamically and is configurable through layout JSON.

Configuration options

The component is placed at the root level of the layout JSON (alongside `header` or `tierDef`).

Static definition

Define a list of stages manually.

JSON:

```
"stageProgress": {
  "stageList": [
    { "value": "draft", "label": "Draft" },
    { "value": "stage2", "label": "Stage 2" },
    ...
  ],
```

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```
  "currentStage": "draft"
}
```

YAML:

```
stageProgress:
  stageList:
    - value: draft
      label: Draft
    - value: stage2
      label: Stage 2
    # ... add more stages as needed
  currentStage: draft
```

- `stageList` defines each stage's `value` and display `label`.
- `currentStage` highlights the active stage.

  If `currentStage` is omitted, it defaults to `txn.stage`. This allows you to use in a default layout used by multiple stages.

Custom picklist-based definition

Use custom fields to dynamically populate the chevron.

JSON:

```
"stageProgress": {
  "stageListField": "txn.custom.stageList",
  "currentStageField": "txn.custom.stageList"
}
```

YAML:

```
stageProgress:
  stageListField: txn.custom.stageList
  currentStageField: txn.custom.stageList
```

- `stageListField` specifies where to pull the list of available stages.
- `currentStageField` specifies the field that contains the current stage value.

This method supports:

- Exclusion rules to hide or disable specific stages.
- Determination rules to set the value of the current stage.

  Determination rules are useful when multiple stages should display as a single chevron.

Combination use

You can mix static and dynamic configurations:

- Use a static `stageList` with a dynamic `currentStageField`.
- If neither `stageList` nor `stageListField` is defined, nothing displays.
- If neither `currentStage` nor `currentStageField` is defined, `txn.stage` is used by default.
- If both static and dynamic versions are present, the dynamic version takes precedence.

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Theming

The component supports theming using CSS custom properties. The following table shows a non-exhaustive list of relevant variables.

Variable	Description
`--lgk-ProgressStep-chevron-size`	Overall chevron size
`--lgk-ProgressStep-chevron-width`	Fixed width for chevrons
`--lgk-ProgressStep-chevron-minWidth`	Minimum width per chevron
`--lgk-ProgressStep-chevron-padding`	Padding inside each chevron
`--lgk-ProgressStep-chevron-disabled-opacity`	Opacity for disabled/inactive chevrons
`--lgk-ProgressStep-incomplete-backgroundColor`	Background for incomplete steps
`--lgk-ProgressStep-incomplete-chevron-color`	Chevron icon color for incomplete steps
`--lgk-ProgressStep-current-backgroundColor`	Background for current step
`--lgk-ProgressStep-current-chevron-color`	Chevron icon color for current step
`--lgk-ProgressStep-chevron-label-fontSize`	Font size for stage labels
`--lgk-ProgressStep-chevron-label-fontWeight`	Font weight for stage labels

Tip: You can inspect the element in your browser to explore more custom properties.

Transaction Manager: Layouts - Theming options

Transaction Manager layouts can be adjusted by setting JSON and YAML properties.

Include the following JSON at the top level of the layout JSON:

```
"theme": {
  "base": "slds",
  "otterKit": true,
  "properties": {
    "body-color": "#000",
    "spacing-sm": "0.15rem",
    "label-color": "var(--token-color-black-500)",
    "pill-radius": "2px",
    "header-color": "#30578d",
    "border-radius": "2px",
    "body-font-size": "0.875rem",
    "label-font-size": "0.75rem",
    "body-font-weight": "700",
    "bom-border-color": "#7e8592",
    "body-border-color": "#7e8592",
    "body-border-width": "0",
    "button-font-color": "600",
    "pill-border-color": "#30578d",
```

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```
      "body-border-radius": "0",
      "input-border-color": "#999",
      "input-border-width": "1px",
      "button-border-width": "1px",
      "font-weight-regular": "700",
      "header-border-color": "#7e8592",
      "header-logo-padding": "0.5rem",
      "input-border-radius": "2px",
      "internal-icon-color": "#aeaeae",
      "body-wrapper-padding": "0",
      "button-border-radius": "2px",
      "button-neutral-color": "#30578d",
      "button-primary-color": "#30578d",
      "int-option-font-size": "0.875rem",
      "token-color-black-500": "#444",
      "combobox-option-margin": "0 0 0 10px",
      "header-logo-min-height": "50px",
      "pill-remove-icon-color": "#4d4d4d",
      "container-border-radius": "0",
      "header-margin-block-end": "0",
      "token-color-neutral-950": "#aeaeae",
      "combobox-option-font-size": "0.875rem",
      "slds-c-button-line-height": "1.875rem",
      "slds-c-input-color-border": "#000",
      "button-primary-focus-color": "#0065cc",
      "button-primary-hover-color": "#0065cc",
      "slds-c-input-radius-border": "2px",
      "button-neutral-border-color": "#30578d",
      "button-primary-border-color": "#30578d",
      "expand-header-border-radius": "2px",
      "button-primary-disabled-color": "#666",
      "button-neutral-backgroundColor": "#fff",
      "button-primary-backgroundColor": "#fff",
      "expand-header-border-color-focus": "#7e8592",
      "button-primary-focus-border-color": "#0065cc",
      "button-primary-hover-border-color": "#0065cc",
      "button-neutral-focus-backgroundColor": "#fff",
      "button-neutral-hover-backgroundColor": "#fff",
      "button-primary-disabled-border-color": "#666",
      "button-primary-focus-backgroundColor": "#fff",
      "button-primary-hover-backgroundColor": "#fff",
      "button-primary-disabled-backgroundColor": "#efefef",
      "token-color-primary-outline-border-color": "#ff0000",
      "expand-header-content-padding-inline-start": "0"
    }
  },
```

YAML:

```
theme:
  base: slds
  otterKit: true
  properties:
    body-color: "#000"
    spacing-sm: "0.15rem"
    label-color: "var(--token-color-black-500)"
    pill-radius: "2px"
```

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```
    header-color: "#30578d"
    border-radius: "2px"
    body-font-size: "0.875rem"
    label-font-size: "0.75rem"
    body-font-weight: "700"
    bom-border-color: "#7e8592"
    body-border-color: "#7e8592"
    body-border-width: "0"
    button-font-color: "600"
    pill-border-color: "#30578d"
    body-border-radius: "0"
    input-border-color: "#999"
    input-border-width: "1px"
    button-border-width: "1px"
    font-weight-regular: "700"
    header-border-color: "#7e8592"
    header-logo-padding: "0.5rem"
    input-border-radius: "2px"
    internal-icon-color: "#aeaeae"
    body-wrapper-padding: "0"
    button-border-radius: "2px"
    button-neutral-color: "#30578d"
    button-primary-color: "#30578d"
    int-option-font-size: "0.875rem"
    token-color-black-500: "#444"
    combobox-option-margin: "0 0 0 10px"
    header-logo-min-height: "50px"
    pill-remove-icon-color: "#4d4d4d"
    container-border-radius: "0"
    header-margin-block-end: "0"
    token-color-neutral-950: "#aeaeae"
    combobox-option-font-size: "0.875rem"
    slds-c-button-line-height: "1.875rem"
    slds-c-input-color-border: "#000"
    button-primary-focus-color: "#0065cc"
    button-primary-hover-color: "#0065cc"
    slds-c-input-radius-border: "2px"
    button-neutral-border-color: "#30578d"
    button-primary-border-color: "#30578d"
    expand-header-border-radius: "2px"
    button-primary-disabled-color: "#666"
    button-neutral-backgroundColor: "#fff"
    button-primary-backgroundColor: "#fff"
    expand-header-border-color-focus: "#7e8592"
    button-primary-focus-border-color: "#0065cc"
    button-primary-hover-border-color: "#0065cc"
    button-neutral-focus-backgroundColor: "#fff"
    button-neutral-hover-backgroundColor: "#fff"
    button-primary-disabled-border-color: "#666"
    button-primary-focus-backgroundColor: "#fff"
    button-primary-hover-backgroundColor: "#fff"
    button-primary-disabled-backgroundColor: "#efefef"
    token-color-primary-outline-border-color: "#ff0000"
    expand-header-content-padding-inline-start: "0"
```

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Remove padding on page body

`"body-wrapper-padding": "0"` in the layout JSON above.

Style field labels

`"label-color": "var(--token-color-black-500)"` and

`"label-font-size": "0.75rem"` in the layout JSON above.

Style buttons and button labels

`"button-font-color": "600"` and

`"button-font-weight": "700"` in the layout JSON above.

Number formatting

Administrators can use the `minPrecision` property to require a minimum number of decimal places.

You can use the `showCurrency` property to display or hide the currency symbol.

- minPrecision

  JSON:

```
{
 "type": "FormattedNumber",
 "label": "Just minPrecision",
 "format": {
   "type": "decimal",
   "minPrecision": 2
  },
 "variableName": "txn.custom.someNumber"
}
```

  YAML:

```
type: FormattedNumber
label: Just minPrecision
format:
  type: decimal
  minPrecision: 2
variableName: txn.custom.someNumber
```

  In this example, if txn.custom.someNumber is set to 4.5, the layout will display 4.50.

- showCurrency

  JSON:

```
{
 "type": "FormattedNumber",
 "label": "With Hidden Currency",
 "format": {
   "type": "currency",
   "minPrecision": 2,
   "showCurrency": false
```

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```
  },
   "variableName": "txn.custom.genericNum"
}
```

YAML:

```
type: FormattedNumber
label: With Hidden Currency
format:
  type: currency
  minPrecision: 2
  showCurrency: false
variableName: txn.custom.genericNum
```

In this example, if txn.custom.genericNum, a defined currency type that will show the currency symbol by default, is set to 4.5, the layout will display 4.50.

Transaction Manager: Rules and rule groupings

Rules in Transaction Manager are similar to configuration rules. You can also group rules together when they are intended to run together.

As in configuration, rules in Transaction Manager govern what actions are taken when a user makes an input into the Transaction Manager buyside UI. Rules consist of three components in Transaction Manager: level, conditions, and actions.

The level determines whether the rule runs at the transaction level or the transaction line level. The level dictates which fields can be used in the definition of conditions and actions in the rule.

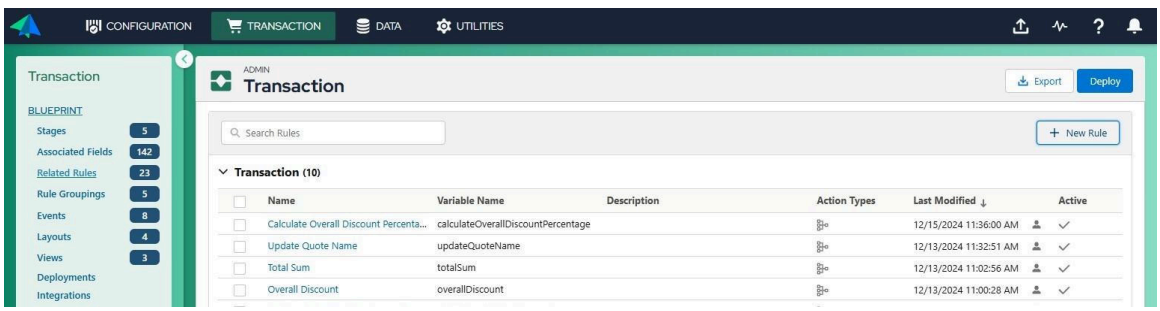
Conditions determine when a rule executes its actions. If the conditions defined for a rule evaluate to TRUE, the rule actions are executed. If the conditions for a rule evaluate to FALSE, rule actions do not execute.

Actions determine what rules do when they are executed.

Each type of action has a unique set of rule parameters that must be defined. Actions are more fully described in the sections following.

Create a new rule

In the Transaction Manager Admin menu, click **Related Rules**. To create a new rule, click **+ New Rule**.



In the **New Rule** popup window, enter the name of the new rule, and verify the variable name. To change the variable name, click the pencil icon on the right.

To set the level of the new rule, click either **Transaction** or **Transaction Line**.

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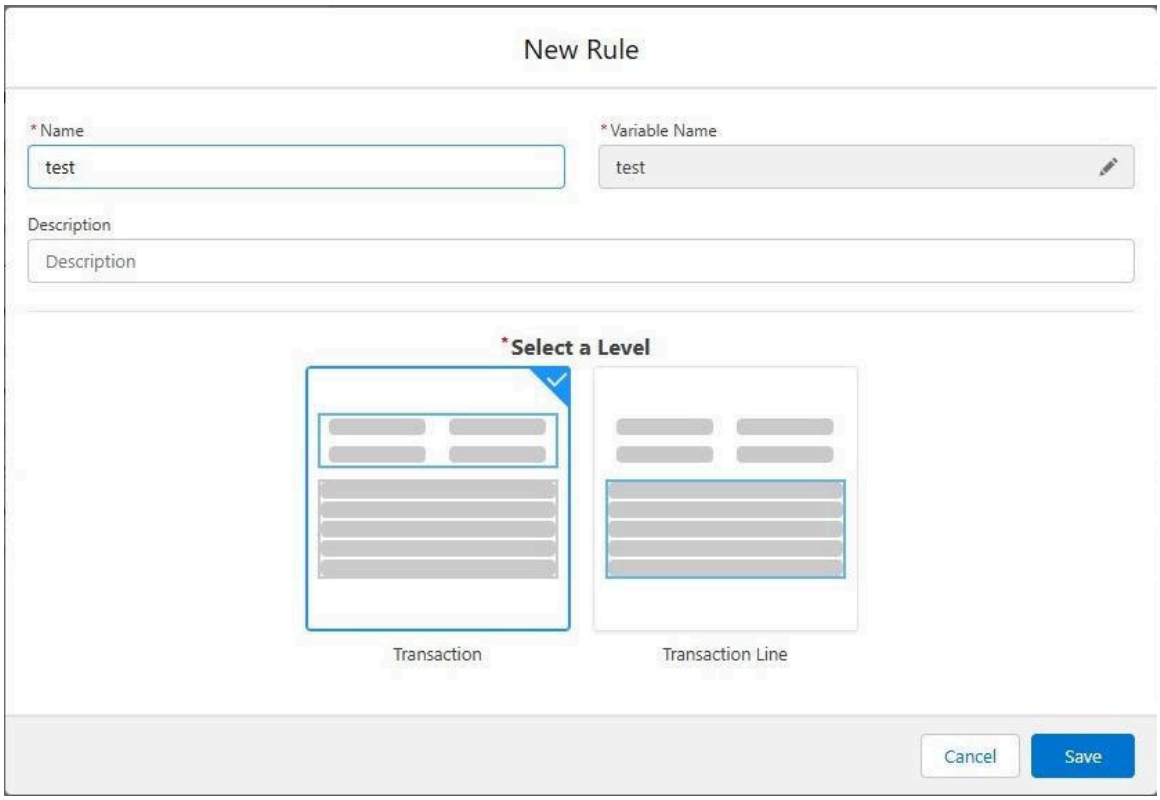
- Transaction-level rules can use transaction-level fields in both the conditions and actions in the rule.
- Transaction line-level rules can use transaction-level and transaction line-level fields in the conditions of the rule, but only transaction line-level fields in the actions in the rule.

Click **Save**.



On the rule editor page, you can modify the name and the description of the rule. The Active toggle lets you activate or deactivate the rule.

Below the Description field is the Condition area. Clicking the **Take Action When** menu displays options for implementing the conditions for this new rule. Select the conditions method to use for this new rule.

- **Always True** executes the rule every time a user makes a change to the Transaction Manager buyside UI.
- **Any Conditions are Met** executes the rule if any condition evaluates to TRUE. (Conditions are logically OR'd together.)
- **All Conditions are Met** executes the rule if all the conditions evaluate to TRUE. (Conditions are logically AND'd together.)
- **Custom Logic** enables the use of parenthesis and a mixture of ANDs and ORs to create a custom logic evaluation of the conditions in the condition list (for example, If Cond_1 AND (Cond_2 OR Cond_3)).
- **Advanced Function** enables the admin to write a script to determine whether the rules should be executed. The script returns a value of either TRUE or FALSE.

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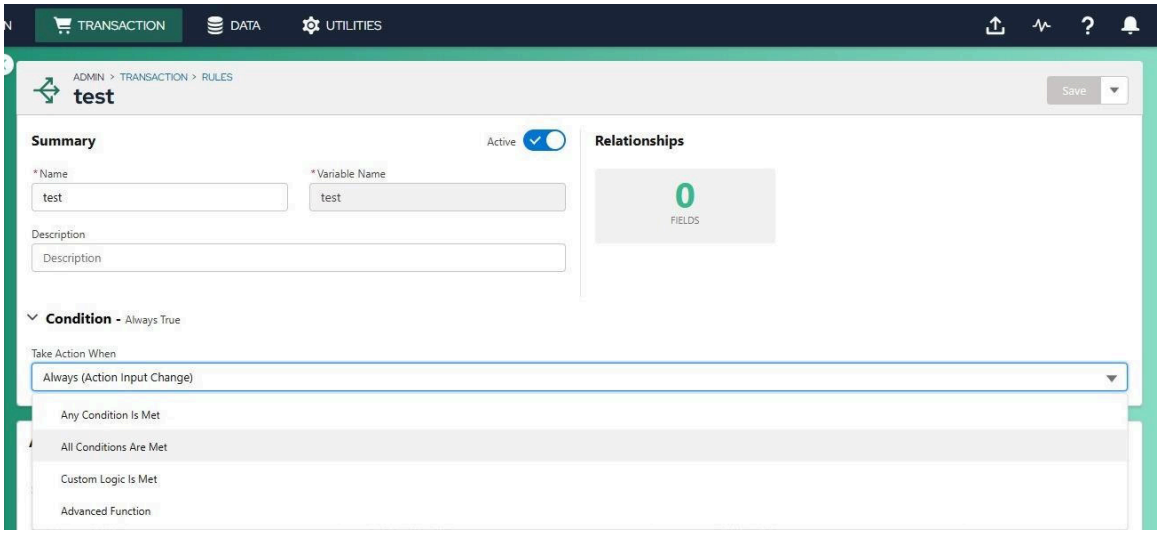
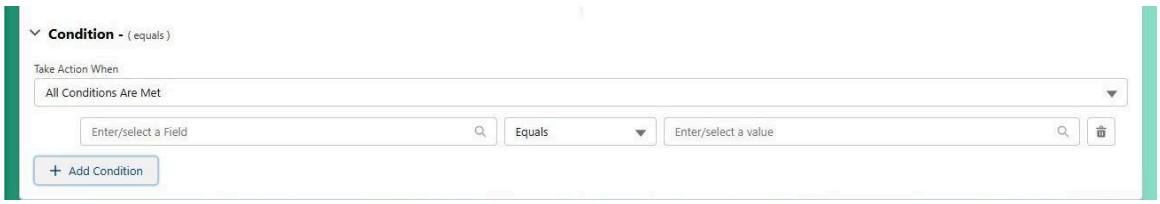


If you change the value of the **Take Action When** menu from the default value of **Always**, you need to specify the list of conditions that determine whether the rule executes. You can define one or more individual conditions for a rule. To define a condition use the Enter/Select a field menu to select the Transaction Manager field to test, then choose the operator for the condition in the Equals menu, then set the test value for the field in the Enter/Select a Value menu to determine whether the condition is TRUE or FALSE. Use the +Add Condition button to add multiple conditions to the rule.



Once the conditions are defined, then you can define the actions that the rule executes. As with conditions you can add one or more actions to a rule, and different types of actions can be included in the same rule.

To add an action, select the type of action to add and click it in the Actions area. You are then be taken to the Action Type parameter set to define the action.

- A hiding action conditionally hides a field.
- A message action displays a text message to the buyside user.
- An exclusion action hides or disables a menu option in a picklist field.
- An inclusion action displays a menu option in a picklist field.
- A determination action sets or clears the value of a field.

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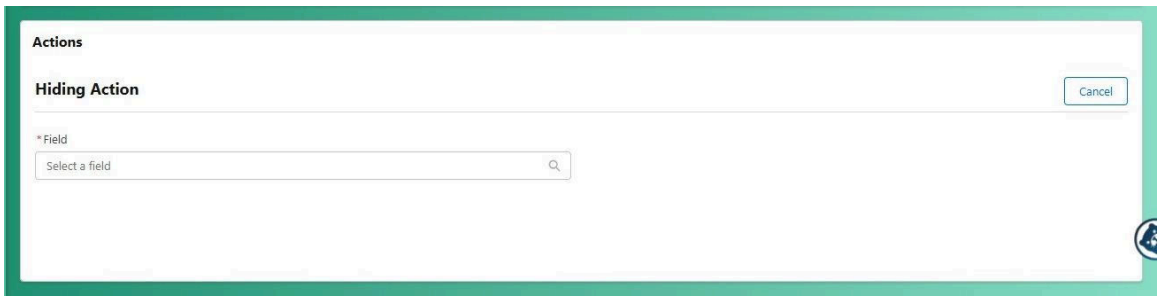
A review of the different action parameter sets follows.

The Hiding action

The Hiding action lets you hide a field on the buyside layout. The only parameter for this type of action is the field to hide. Use the field search box to identify the field.



The Message action

A Message action enables the display of a text message to the buyside user in the Transaction Manager layout. Four message types are found in the **I want to display** menu:

- An info message uses a circular blue icon and blue message text. The icon and text color cannot be changed.
- A warning message uses a triangular yellow icon and yellow message text. The icon and text color cannot be changed.
- An error message uses a triangular red icon and red message text. The icon and text color cannot be changed.
- Custom messages can have any icon and text color.

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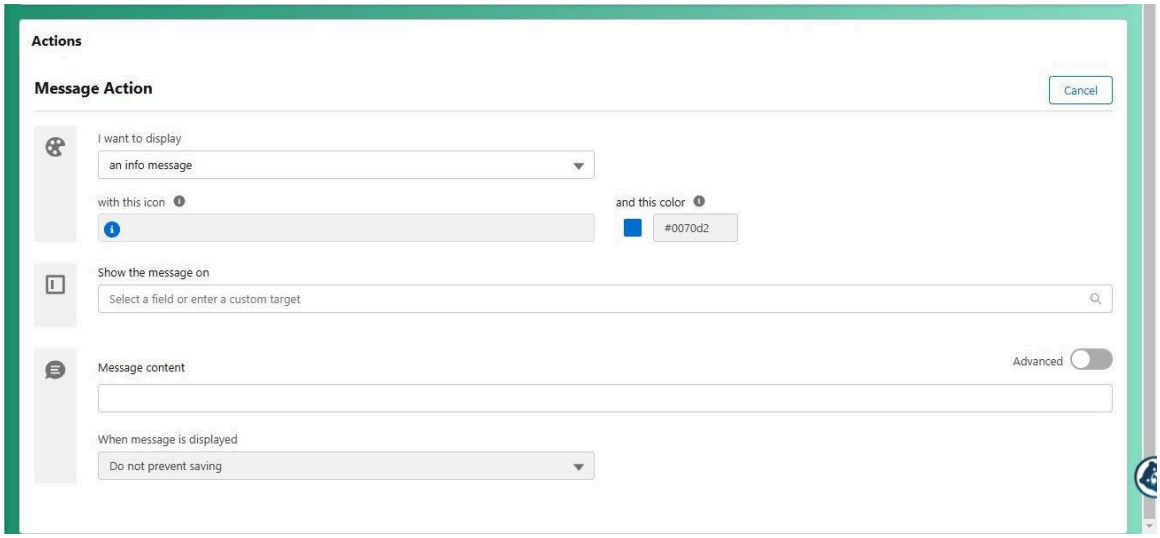


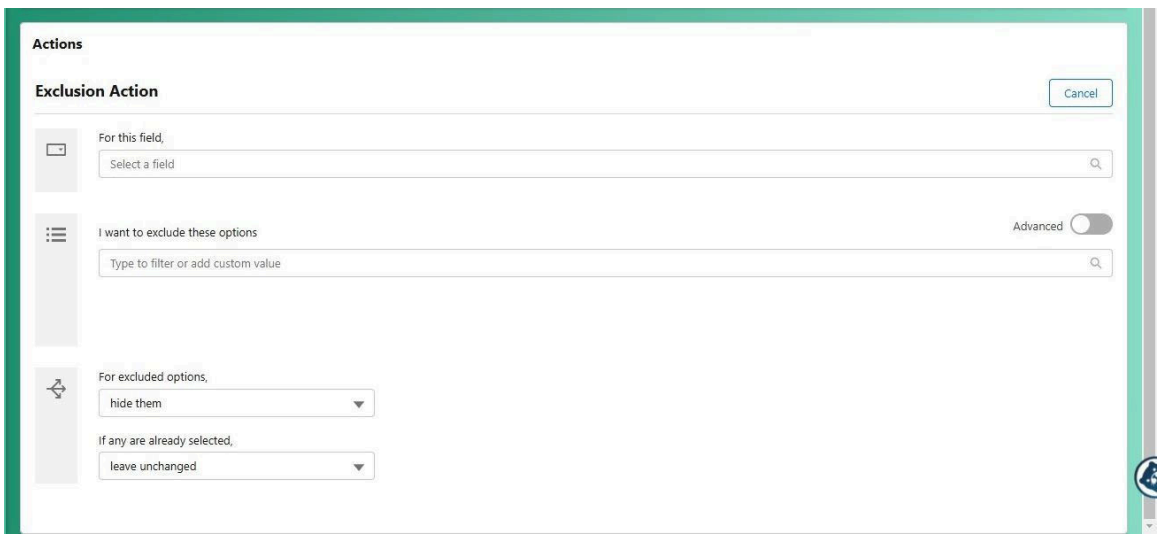
Use the **Show the message on** field to define where on the buyside layout you want the message to appear. The message is often attached to a field, but it can also be attached to a layout component such as a tier or a columnset.

The **Message Content** field lets you write the message to be displayed to the buyside user. Setting the **Advanced** toggle lets you write a script to build the message. Use the **When Message is Displayed** field to determine whether the transaction can be saved when the message is displayed.

The Exclusion/Inclusion action

Exclusion and Inclusion actions let you set the visibility and the use of the menu options that are defined for a picklist field. Exclusion actions let you hide or disable menu options. Inclusion actions let you show or enable menu options. Exclusion and inclusion actions use the same set of parameters.

Use the **For this Field** menu to select the picklist field whose menu options to exclude or include in the menu.



Use the **I want to [exclude|include] these options** menu to select the picklist menu options to exclude or include in the menu. You can select multiple options one at a time. Use the **Advanced** toggle to use a script to determine which menu options are part of the rule execution.

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Use the **For excluded options** menu to determine how excluded menu options are treated. (In an Inclusion action, menu options not included in the menu are treated as excluded menu options.) Choose **hide them** to hide the options. Choose **disable them** to retain them in menu in a disabled state.

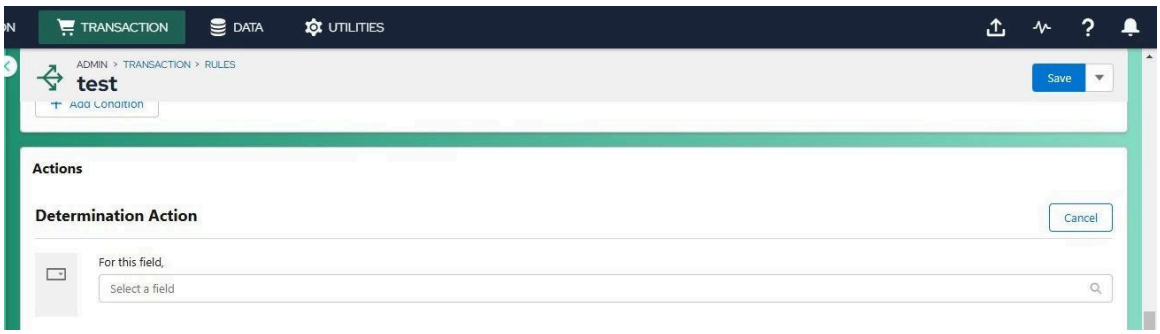
Use the **If any are already selected** menu to determine what to do when the user has already selected an excluded menu item when the rule is executed:

- **leave unchanged** leaves the excluded item as the selected item.
- **deselect them** deselects the excluded option, forcing the user to select another option.
- **select the first valid option instead** deselects the excluded option but replaces it with the first available option in the menu following the execution of the rule.

The Determination action

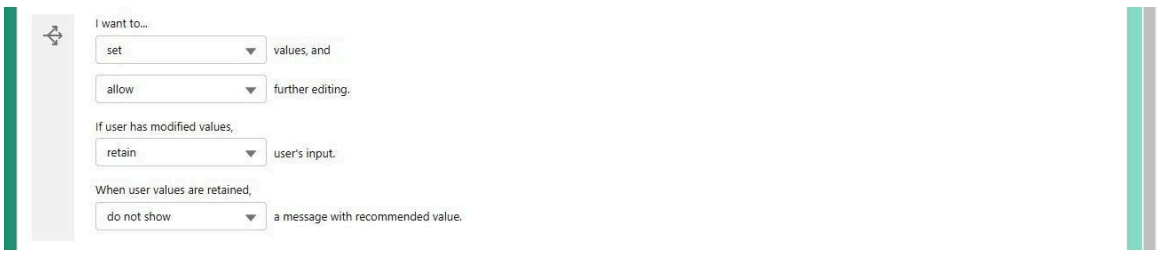
Determination actions enable you to set and clear the value of a field in Transaction Manager.

Use the **For this Field** menu to search for and select the field for the rule to act upon.



Under **I want to...**, define whether to set or clear the value of the field and whether to allow or prevent the user from editing its value after it has been modified by the rule.

In the **If user has modified values** menu, you can choose whether to retain a value in the field that the user modified or to override the value with the value in the rule. To retain the value that the user entered, use the **When user values are retained** menu to define whether to show the user a message with a recommendation about the value of the field.



Finally, define the value to assign to the field. The **Use this value** field defines this value. You can use the **Advanced** toggle to enable a script to determine the value.



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Rule groupings

Rule groupings are collections of rules to be executed together. A rule grouping can contain both transaction-level and transaction line-level rules.

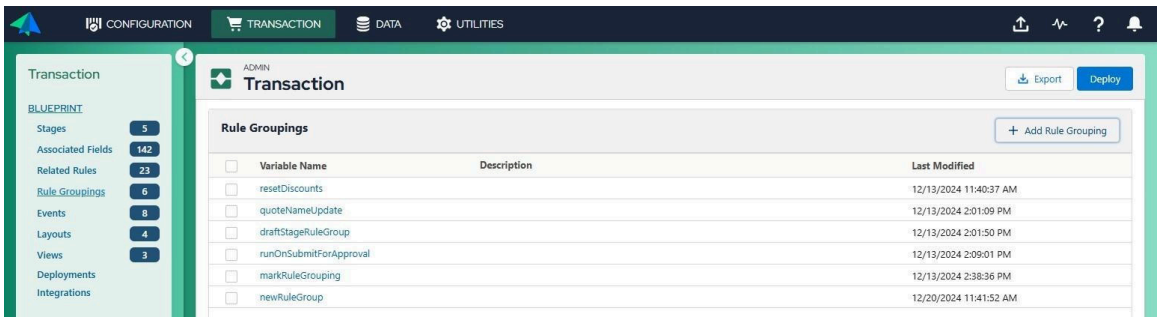
Rule groupings are used in stages and events to link groups of rules for execution. Each stage can have any number of rule groupings associated with it, determining which rules execute when a user makes changes to a field in the stage. For rules to execute, the admin must associate a rule grouping with a stage or event. For instructions on how to do so, see the following articles:

Transaction Manager: Events

Transaction Manager: Stages

Creating a rule grouping

To begin, click **Rule Groupings** in the Admin menu, and then click **+ New Rule Grouping**.



In the **New Rule Grouping** window, enter a variable name for the new rule grouping, and click **Save**.



The rule Grouping Editor page opens. Click **+ Associate Rules**.

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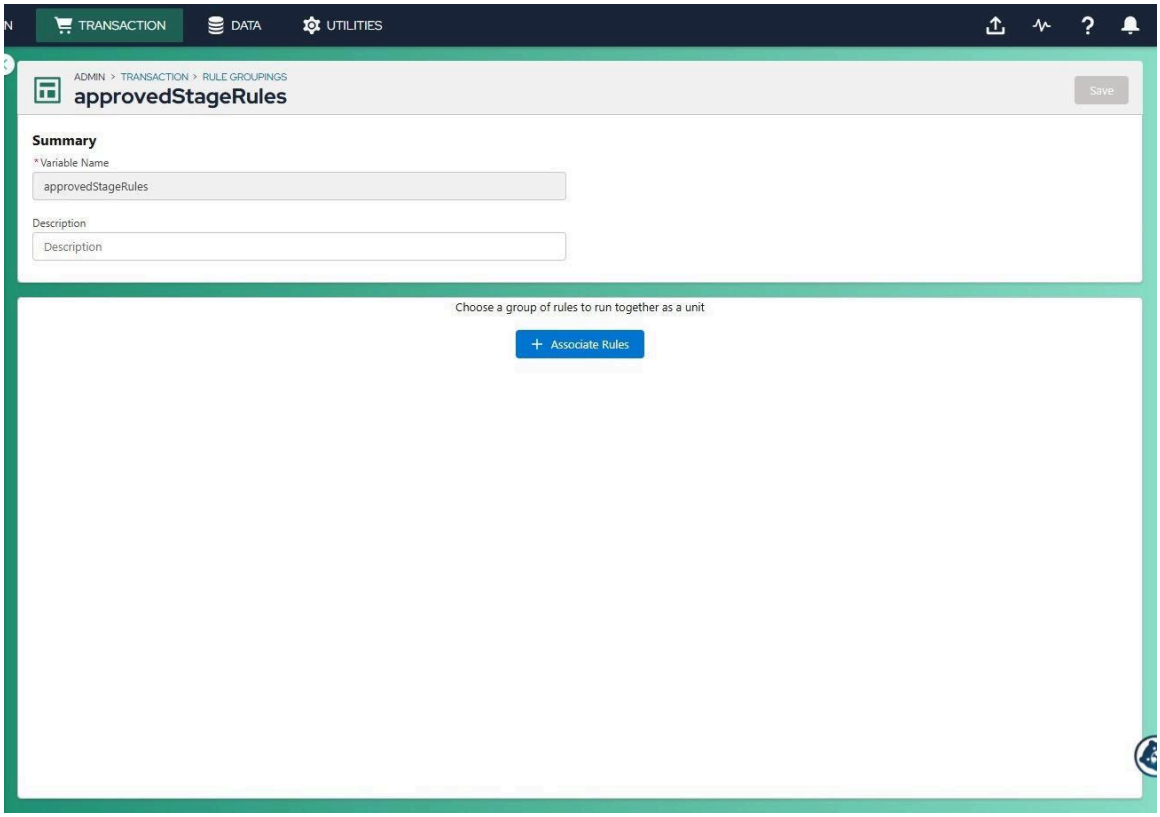
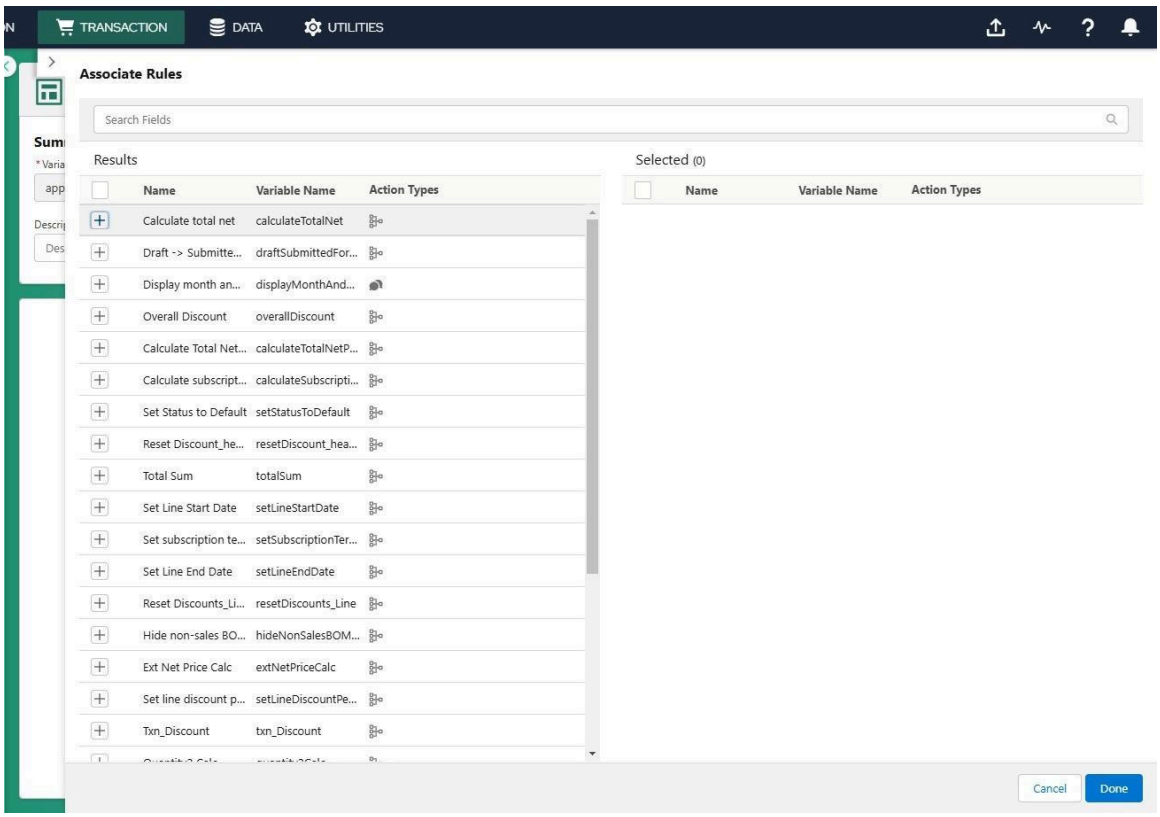


A slideout pane appears, where you can select the rules to include in the new rule grouping. Click **+** in the **Results** column to move a rule to the **Selected** column. Repeat this for each rule to include in the rule grouping.



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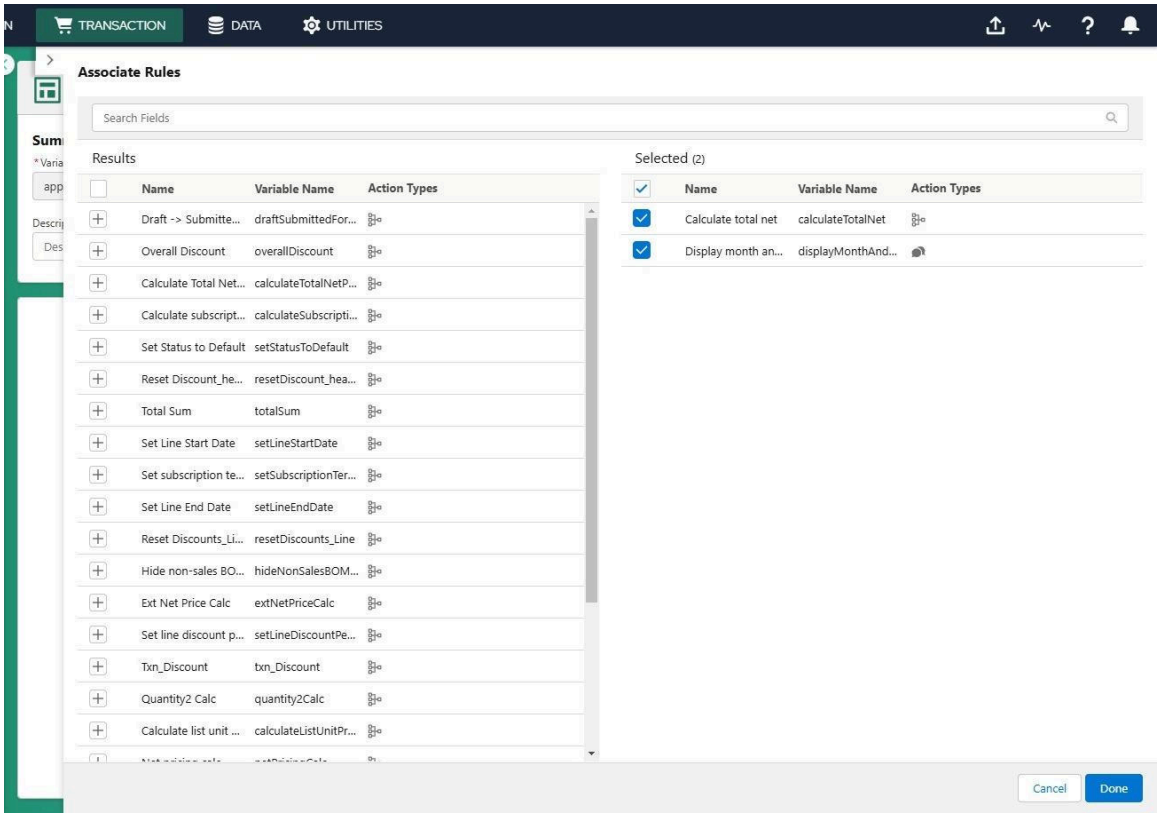
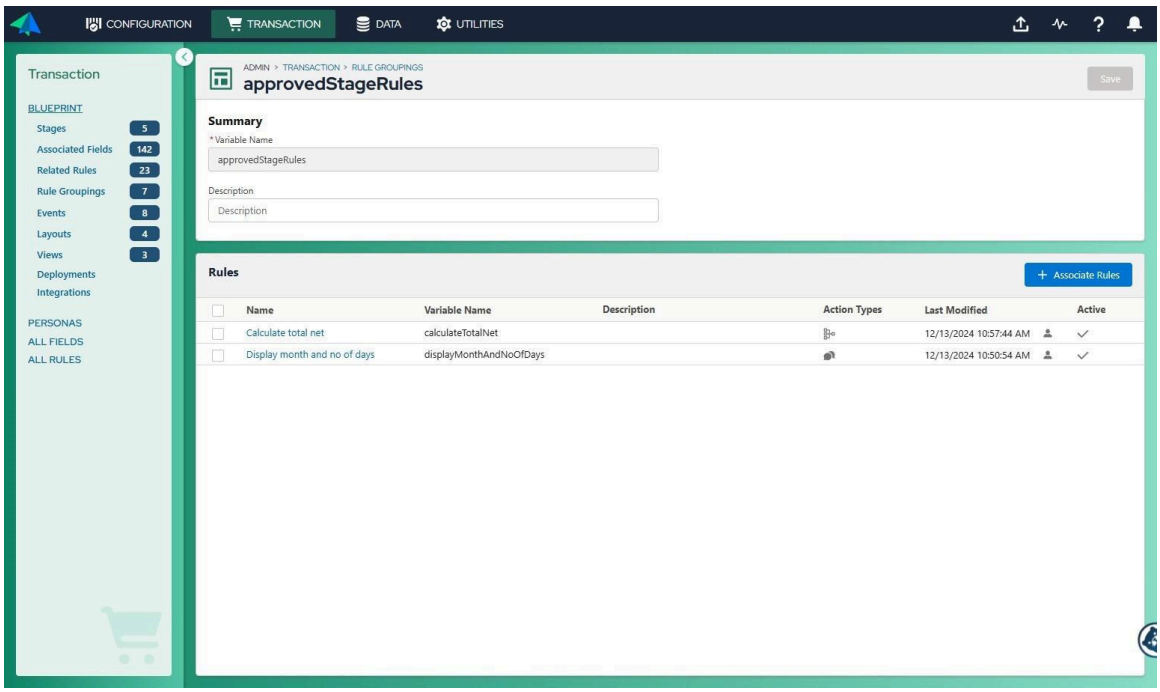


When you have finished selecting rules, click **Done**. You are taken back to the rule grouping editor page, where you see the rules that have been added to the group.



Rule Aggregates

Aggregates are script functions for use in a rule determination action. Aggregates can enhance automation, optimize pricing calculations, and improve data organization in quoting and transaction workflows and were created to optimize rule engine performance in Transaction Manager.

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Aggregate functions perform various math calculations on transaction line fields. Results of these calculations are stored in either a transaction (header) field or in a transaction line field.

Note: Aggregates always run, even in cases when the aggregate function has no children. If an aggregate function does not have a default set and there are no children, the value returned by an aggregate is null, and for lookups, the value returned is an empty array. To avoid errors, set a default or handle empty array responses.

Rule aggregates include the following categories:

- Avg, Count, Min, Max, Sum
- AvgIf, CountIf, SumIf
- SumChildren
- Lookup

Avg, Count, Min, Max, Sum

These aggregate functions aggregate the transaction line field value for all lines and store the result in a header field (the target field of the determination action):

```
return txn.line.functions.<function>(txn.line.<fieldVarName>)
```

Values for <function> include avgField, countField, minField, maxField, and sumField.

AvgIf, CountIf, SumIf

These aggregate functions apply a filter to the transaction line field value for all lines, then perform the calculation on the remaining lines, storing the result in a header field (the target field of the determination action):

```
txn.line.functions.<function>(txn.line.<fieldVarName>,
<condition> [, <default>])
```

Values for <function> include avgFieldIf, countFieldIf, and sumFieldIf.

<condition> can be set to an expression such as the following:

- booleanField = true
- txn.line.functions.sumChildrenField(txn.line.<fieldVarName>)> 0

If there are no children to aggregate and the default value is undefined, the function returns `null`.

Conditional checks for text are case sensitive.

Use case example: Summing list prices for sales BOM type

The draft-stage sample transaction below calculates the sum of the list prices of items whose BOM type isSALES. The BOM type is a system-derived line field that reflects the type set first when the configuration item was created.

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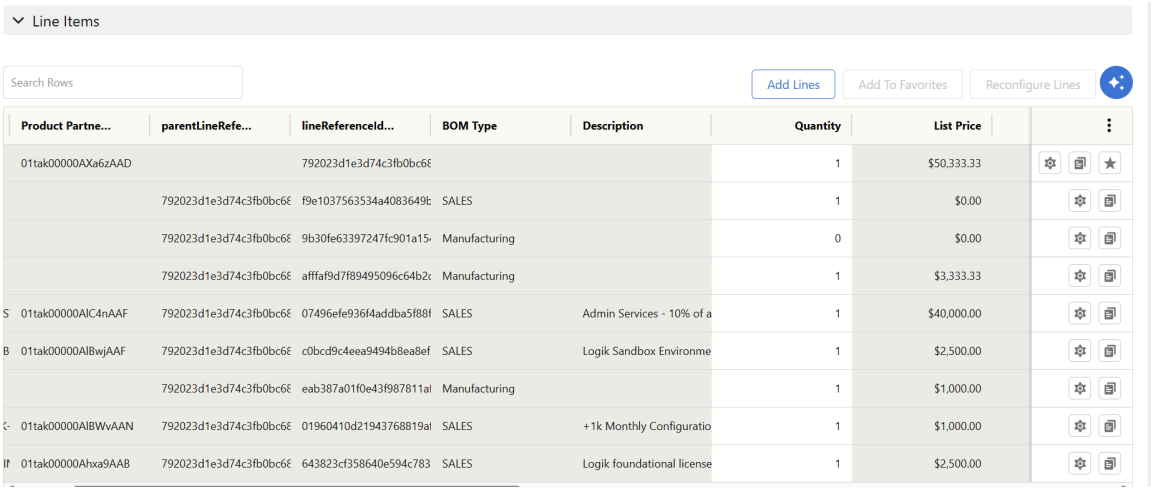
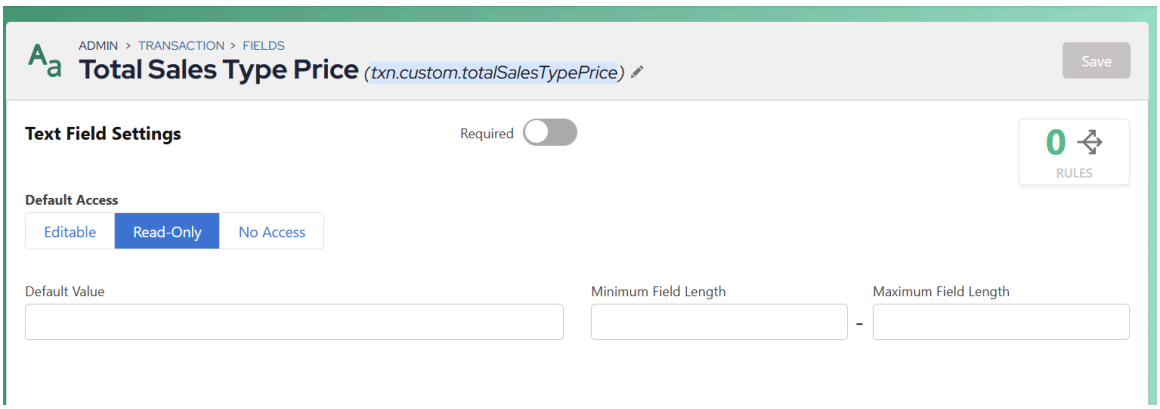
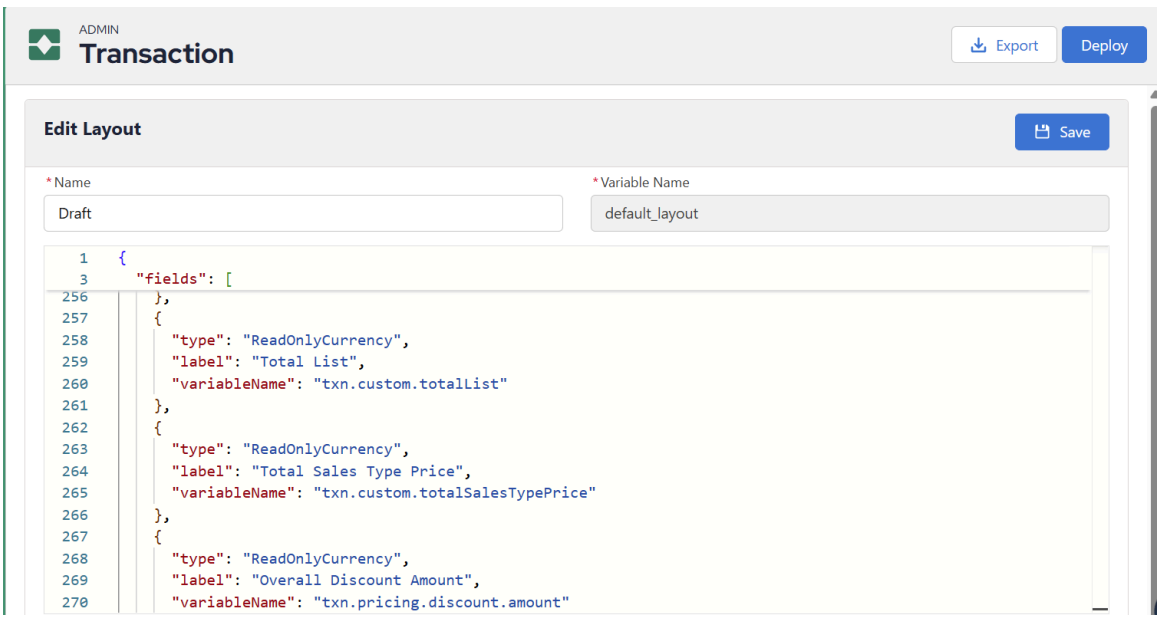


Steps:

1. Create a header field named **Total Sales Type Price**.



2. Add it to the layout and deploy the transaction.



3. Set up a determination rule using the `sumFieldIf` function, applied at the draft stage with the following script:

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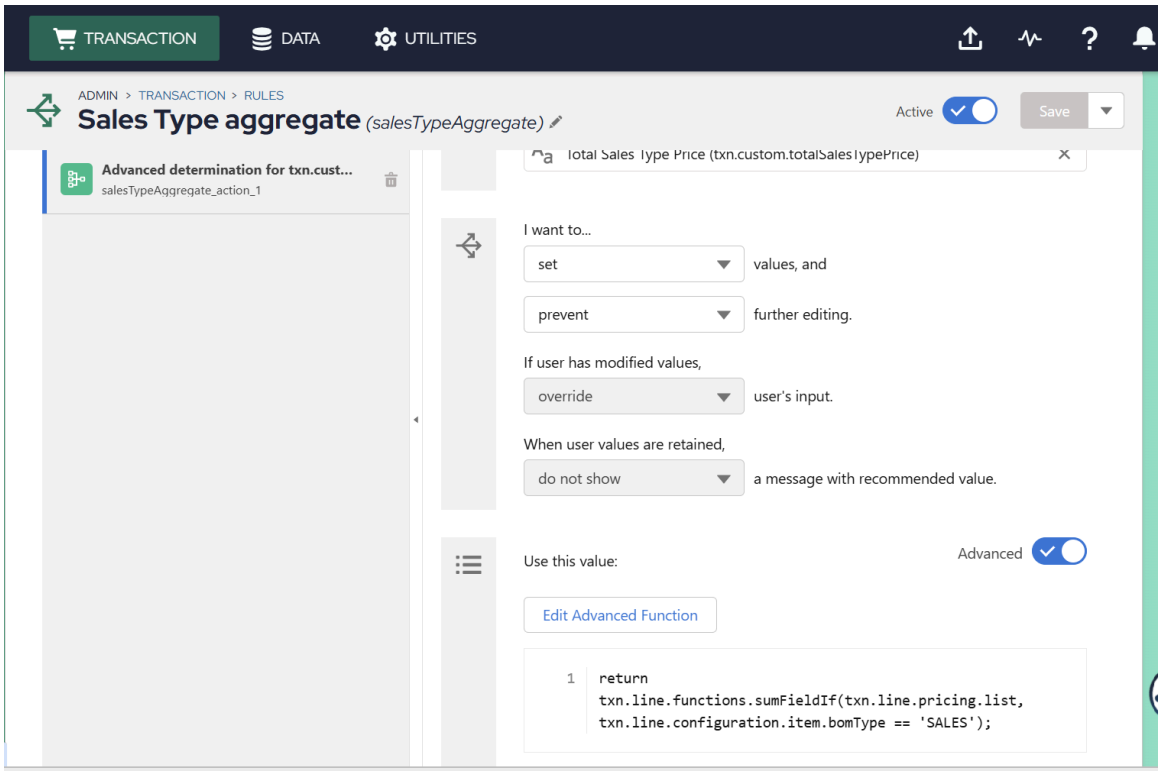
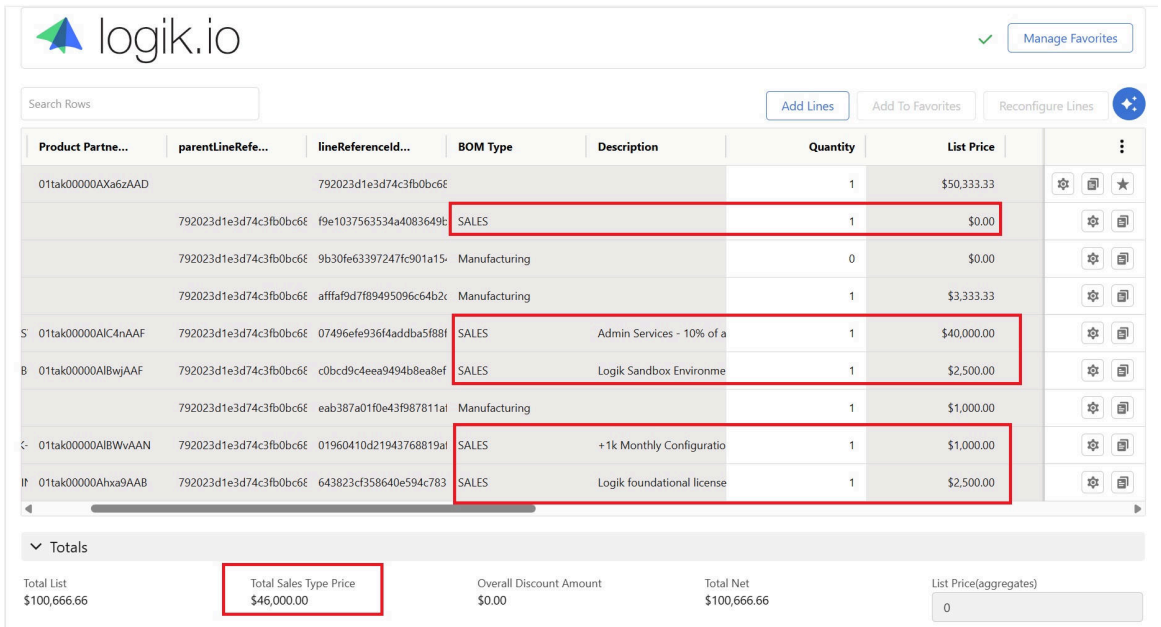
```
return txn.line.functions.sumFieldIf(txn.line.pricing.list,
       txn.line.configuration.item.bomType == 'SALES');
```

Note: The conditional check is case sensitive. Use `SALES`, not `sales`. Incorrect casing yields no error, but results in a sum of 0 because in the use case no lines have a BOM type of Sales.



4. Deploy and reload the transaction. The field correctly returns the total of matching line prices: $46,000 (from 0, 40,000, 2,500, 1,000, 2,500).



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SumChildren

This aggregate function aggregates the transaction line field value for all child lines and stores the result in the immediate parent line-level field of the child lines (the target field of the determination action):

`txn.line.functions.sumChildrenField(txn.line.<fieldVarName>)`

Lookup

These aggregate functions retrieve values instead of computing totals. They return either a single value or an array of values, enabling users to extract key information dynamically for use in pricing calculations, validation rules, and output documents.

Basic lookup functions include:

- `txn.line.functions.lookupField(<field>)`

  Retrieves an array of values from the specified field across all transaction lines.

- `txn.line.functions.lookupFirstField(<field> [, <default>])`

  Retrieves the first matching field value. If none is found, returns the optional default.

- `txn.line.functions.lookupChildrenField(<field>)`

  Retrieves an array of values from child line items.

- `txn.line.functions.lookupFirstChildrenField(<field> [, <default>])`

  Retrieves the first matching value from child line items, with an optional default.

Conditional checks for text are case sensitive. Conditional lookup functions include:

- `txn.line.functions.lookupFieldIf(<field>, <condition>)`

  Retrieves an array of field values based on a condition.

- `txn.line.functions.lookupFirstFieldIf(<field>, <condition> [, <default>])`

  Retrieves the first matching field value based on a condition, with an optional default.

- `txn.line.functions.lookupChildrenFieldIf(<field>, <condition>)`

  Retrieves an array of values from child line items based on a condition.

- `txn.line.functions.lookupFirstChildrenFieldIf(<field>, <condition> [, <default>])`

  Retrieves the first matching child line item field value based on a condition, with an optional default.

Functions follow a structured naming convention for clarity and consistency.

- `lookup` returns an array. `lookupFirst` returns a single value.
- Context: No context (all lines), or `Children` (child line items only).

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- Object: `Field` (applies only to a field lookup).
- Condition: No condition, or `If` (conditional lookup).

Lookup functions store retrieved values in intermediate fields, making them available for further calculations and automation. This enables integration with pricing rules, approvals, and output documents.

The benefits of intermediate fields include the following:

- They minimize redundant calculations by storing commonly referenced values
- They maintain a consistent set of field values across pricing and quoting processes
- They enable dynamic updates to dependent fields, ensuring real-time accuracy in pricing and approvals

Lookup aggregations dynamically adjust when quoted line items are removed. The system ensures that references to deleted transaction lines are cleared, maintaining data accuracy in recalculated pricing and discounts. See the following examples.

```
var taxCodes =
             txn.line.functions.lookupFieldIf("taxCode",
 txn.line.amount > 0);
          var firstPrice =
          txn.line.functions.lookupFirstField("price", 0);
 var childService =

 txn.line.functions.lookupChildrenField("serviceType");   var
 totalTax =

 txn.line.functions.lookupFirstField(txn.line.taxAmount, 0);
 return totalTax * 1.05; //
          Applies a 5% surcharge based on retrieved tax amount
```

Related topics

Transaction Manager: Events

Transaction Manager: Stages

Transaction Manager: Events

Events such as transaction creation, modification, and deletion can be set to trigger rule groups or integrations and to move a transaction from one stage to another.

Events are a way to trigger stage rules and integrations or rule groups. These events are usually activated by buttons or API on a layout helping a user to transition from one stage to another.

System events

System events are frequently used behaviors available for customers out of the box.

Transaction (header)

When Transaction Manager is embedded in a CRM, the user is presented with a button in the CRM UI corresponding to these Transaction events. When the user clicks one of these buttons, the CRM calls corresponding CPQ API:

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- Create Transaction: Event triggered to create a new transaction.
- Edit Transaction: Allows editing an existing transaction, enabling stage-based rule and integration actions.
- Copy Transaction: Event to clone a transaction and its line items.
- Upsert Lines: This event manages the creation/update of transaction lines after the user browses catalog (UI Effect "productSearch") to add new lines or reconfigures an existing line. Upsert Lines is automatically run after the user finishes selecting products from the catalog, configuring products, or reconfiguring (UI Effect “reconfigure”). Although this event works on lines with the transaction, it works at the transaction level, on all lines in the transaction.

  For more information about UI Effects, see Transaction Manager: Layouts - UI effects.
- Delete Transaction: Event triggered to delete an existing transaction.

Transaction Line:

Transaction Manager line-level events are represented on the native CPQ Transaction Manager UI as buttons:

- Clone Line: Clones a line and its children, but only for top-level lines in the transaction. Header-level rules also apply after cloning.
- Delete Lines: Deletes one or more lines from a transaction; UI supports selecting lines, and IDs can be passed in headless mode.

Event APIs

Event APIs are authorized via session cookie only.

⚠ **Warning:** Avoid building a scenario in which the user initiates an event that fires an event API on the same transaction. Because both the UI and the APIs are acting upon the same record, such an implementation can result in unpredictable behavior.

Custom events

In addition to system events, the admin can define custom events to meet business-specific requirements. To create a custom event, follow these steps.

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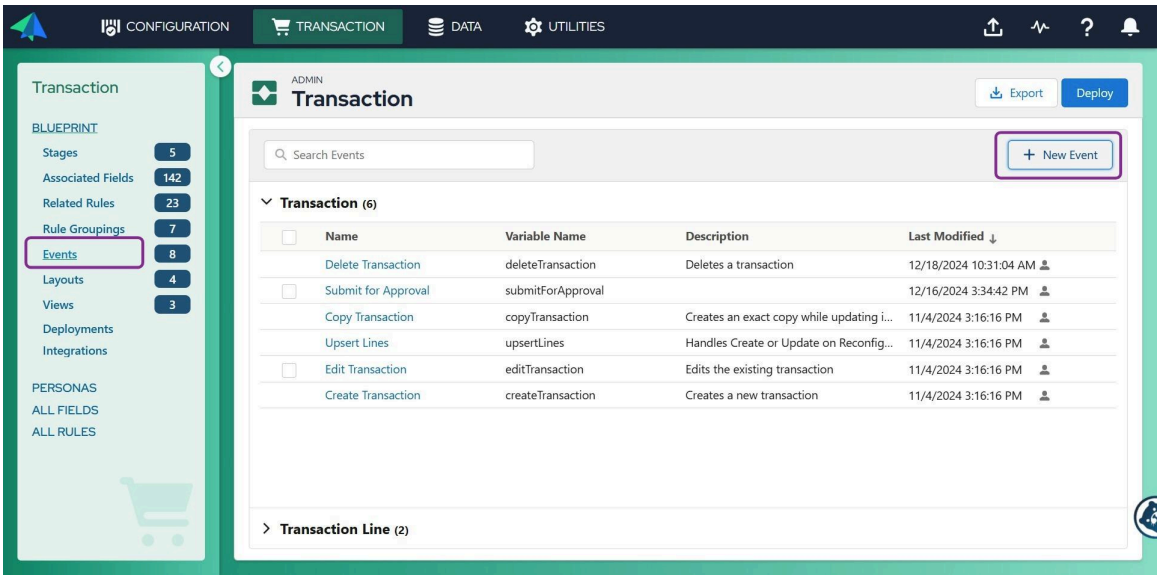
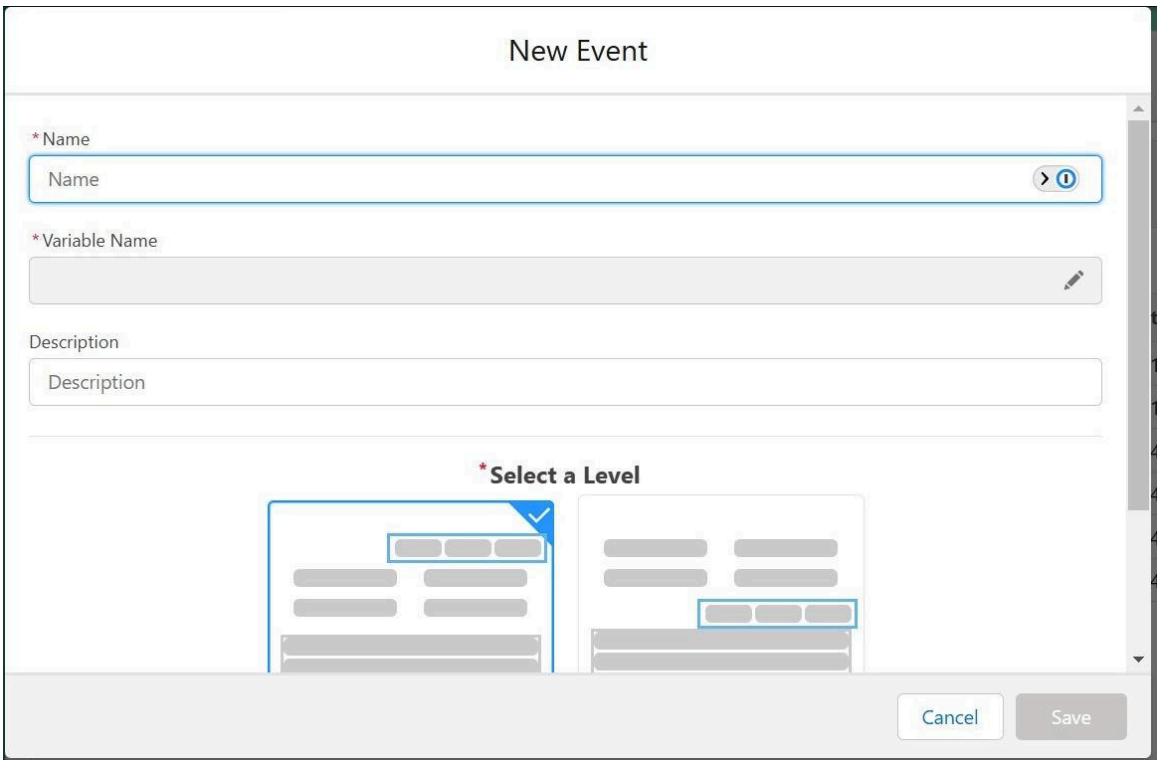
1. In Transaction Manager Admin, click **Events**, and then click **+ New Event**.



2. In the New Event window, enter a name. As the name is entered, it is mirrored in the **Variable Name** field. By default, the variable name is the same as the entered name, but in camel case with all spaces and special characters removed. For example, if you enter the name Total of Manufacturing Lines, the automatically entered variable name is totalOfManufacturingLines. To create a custom variable name, click the pencil icon to the right of the variable name field and enter your own value.



3. Select the **Transaction Line** level, and then click **Save**.

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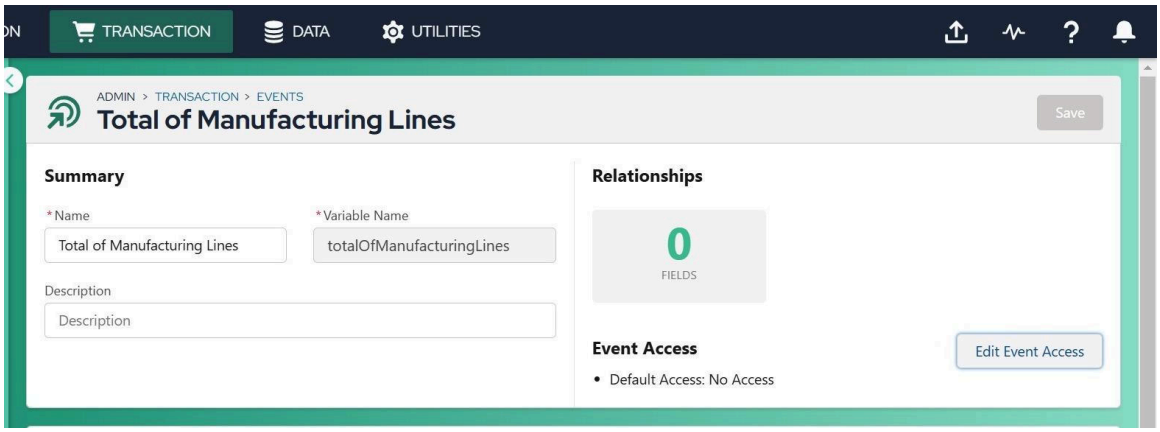
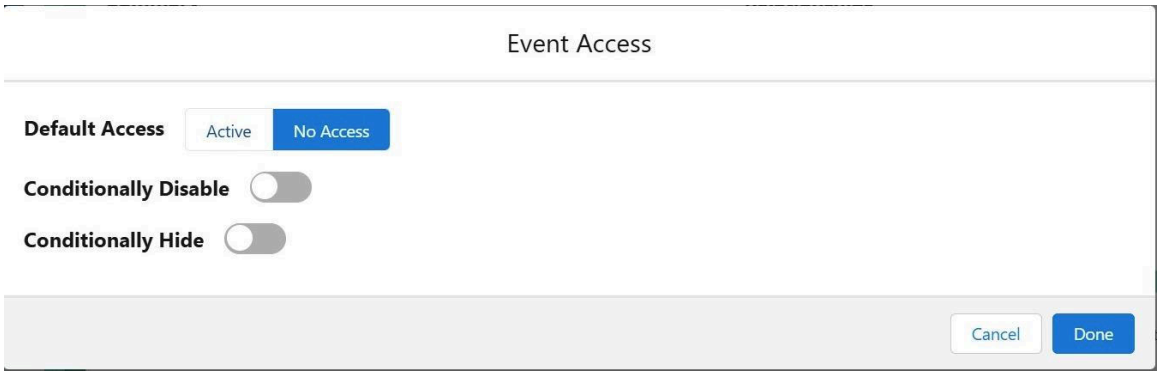
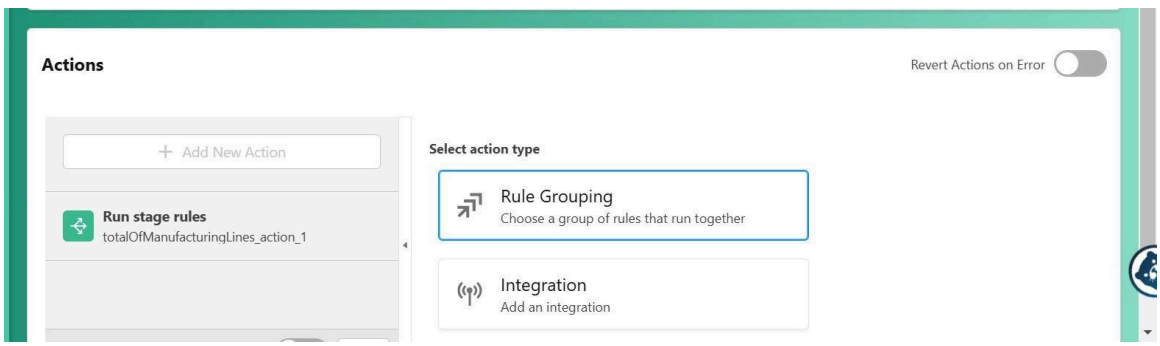
The event editor opens. By default, events have their event access set to No Access. Click **Edit Event Access**, change the event access level to **Active**, and then click **Done** to return to the event editor.





In the Actions area, you can assign either rule groupings or integrations to fire when the event is triggered. To add a new action to the event, click **+ Add New Action** and choose either rule groupings or integration. A menu of the available rule groupings or integrations appears. Choose the rule grouping or integration to apply to the event. You can add multiple rule groupings or integrations to the same event.



Use the **Transition** toggle to determine whether the event transitions the transaction forward or backward in the stage sequence. By default, the event does not transition the transaction to another stage. Clicking the **Transition** toggle enables the transition function.

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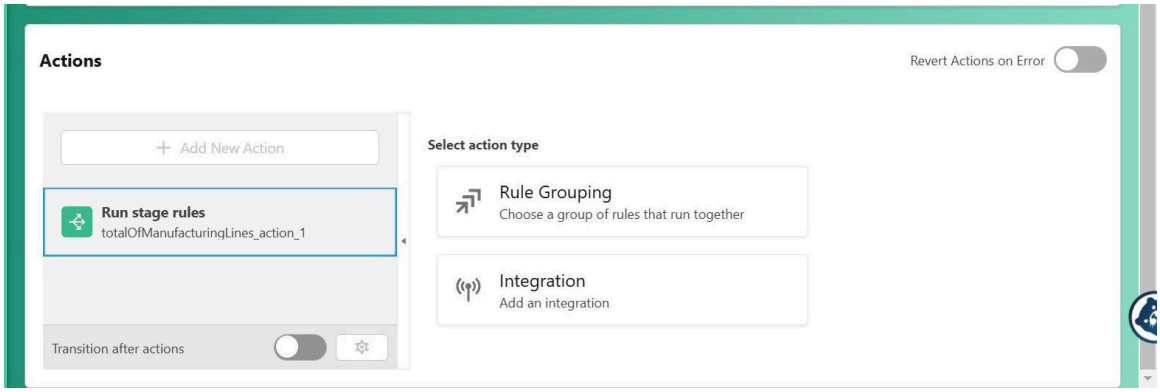
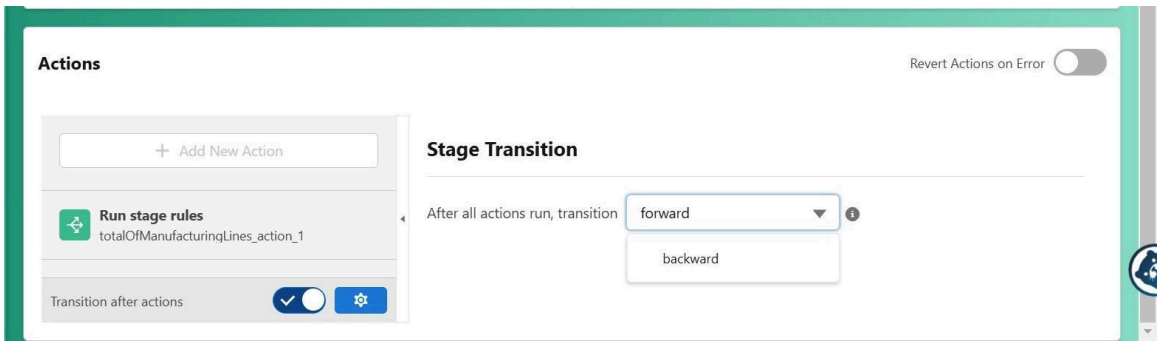
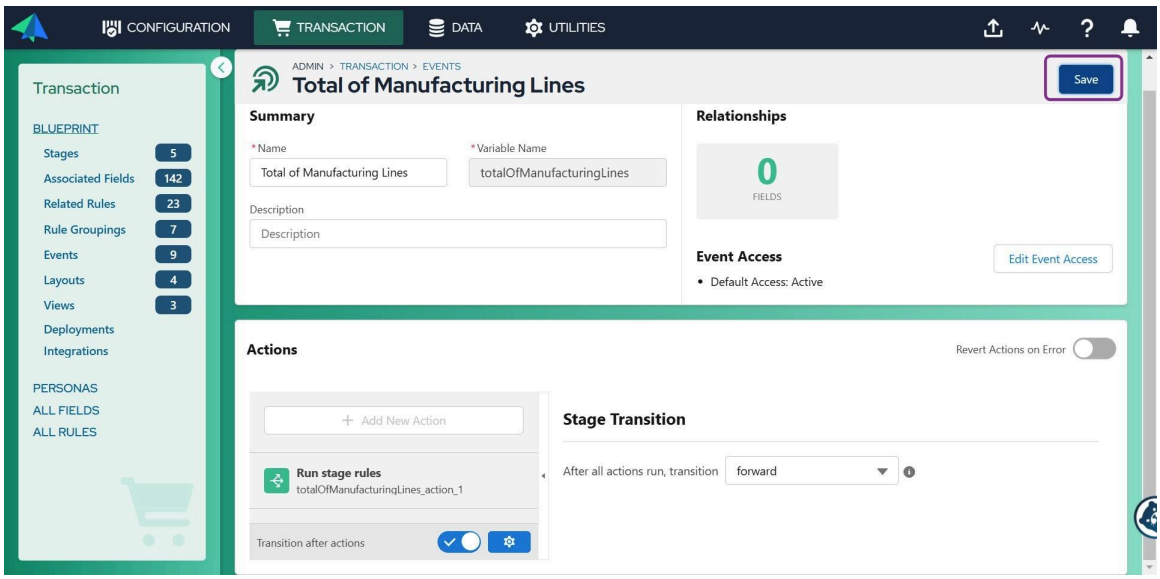




When you're finished, click **Save**. The new event appears in the event list as either a transaction-level event or a transaction line-level event, depending on which level you chose when the event was created.



Event settings: Validate configured items

The **Validate configured items** setting on custom header events validates product configurations in the transaction when the event executes. Validation occurs before event actions, which execute regardless of the validation status.

The setting includes a validity period that excludes products validated within a time frame. For example, if the validity period is set to 15 days and a product was validated 7 days ago, the product does not have its configuration validated. If a product was validated 20 days ago, the product has its configuration validated.

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Two line-level system fields support this function: *txn.line.configuration.status* (Boolean) and txn.line.configuration.validatedAt (date).

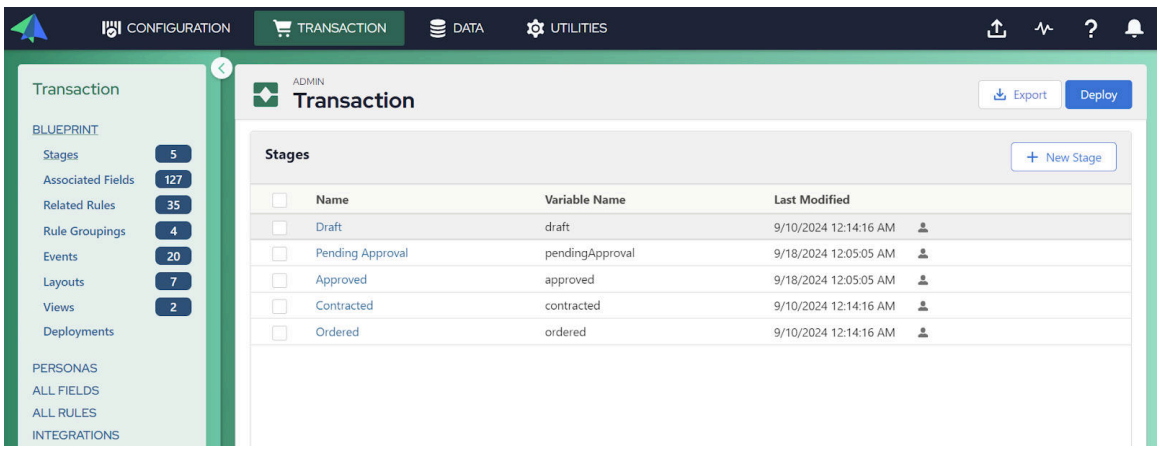
Related topics

- Transaction Manager: Rules and rule groupings
- Transaction Manager: Stages

Transaction Manager: Stages

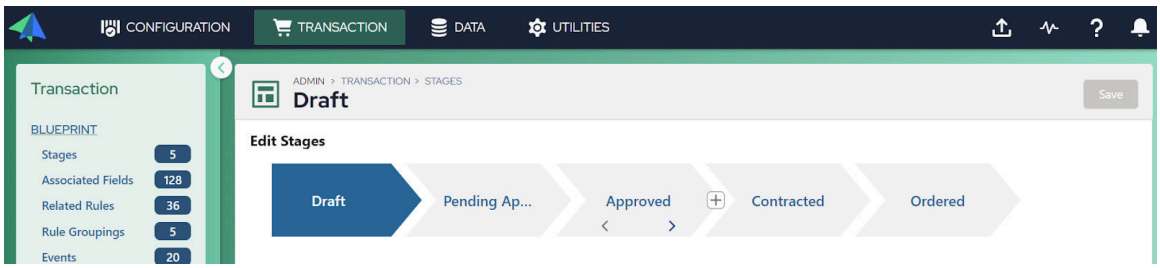
A stage represents a phase in an organization's selling process. This article illustrates a process with five stages that you can modify to suit your needs.

Stages represent phases in an organization's selling process. In this example, we demonstrate a process with five stages: Draft, Pending Approval, Approved, Contracted, and Ordered. Your implementation will add or delete stages to accommodate your selling process.



Ordering stages

An admin can change the order in which stages are evaluated. Select a stage, and then hover over the chevron graphic to alter the order of evaluation. Use the **<** and **>** buttons to change the order. The **+** button creates a new stage at that place in the sequence.



Transitions between stages

Transitions represent structured movement from one stage to the next in a workflow. Each stage has entry criteria—conditions that must be met before advancing—to ensure consistency and readiness for the next phase.

A transaction cannot automatically transition between stages without an event, which can be represented in the UI as a button, such as **Submit for Approval** or **Revise**. In addition, stage transitions can also be defined for when a new transaction is created or edited.

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Entry criteria

As users progress through the transaction life cycle and execute events tied to transitions, the app evaluates entry criteria to determine which stage applies to the transaction. When an event transition is set to *forward*, CPQ evaluates the entry criteria of the proceeding stages until a stage's entry criteria are met. If no stages meet the entry criteria, no transition occurs. When an event transition is set to *backward*, the transaction transitions to the stage defined by the administrator without checking its entry criteria. (Note that the first stage in a process has no entry criteria.)

For example, a transaction might transition to the *pending approval* stage, or, if approval is not required, it might bypass *pending approval* and move directly to the *approved* stage. This setup can be accomplished using entry criteria.

Stages and rule groupings

Rule groupings are associated with stages. Rule groupings are executed when the stage is transitioned to and when users update fields or run events while in the stage.

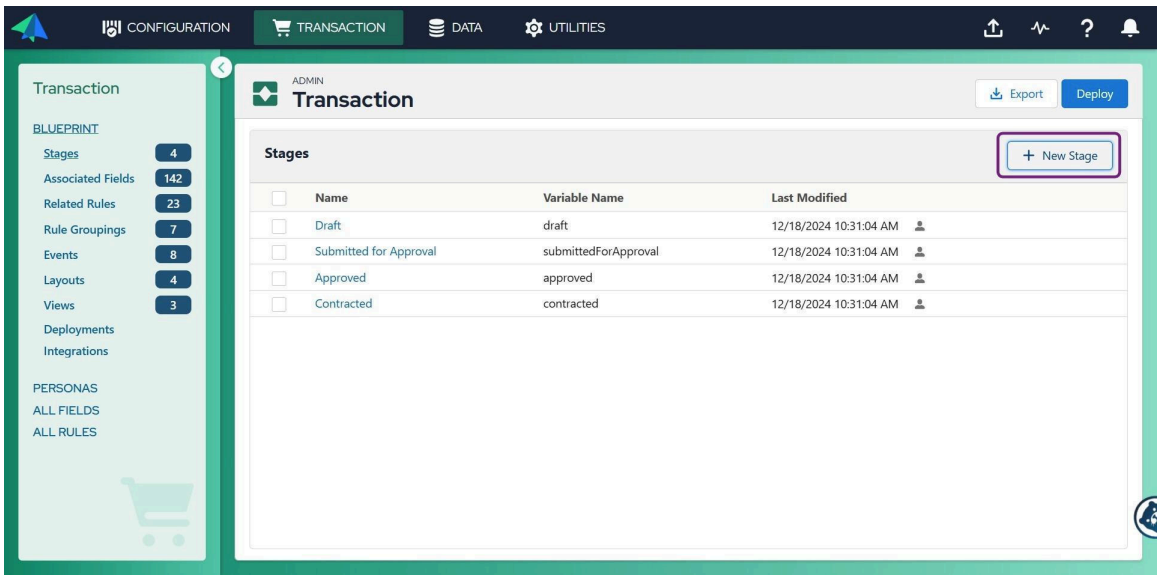
Stages and views

Stages enable the admin to assign distinct permissions (views) to determine how personas observe field data.

For more information about defining views for stages, see Transaction Manager: Views.

Create a new stage, associate rule groups, and set entry criteria

In the Transaction Manager Admin UI, you start in Stages by default. The defined stages are listed on the page. To create a new stage, click **+ New Stage**.



Enter a name in the **Name** field. As you enter the name, a similar value is entered in the **Variable Name** field. By default, the variable name is the same as the name entered by the admin. However, spaces and special characters are removed from the variable name, which is created using camel case. For example, If you type `Ordered` in the **Name** field, the **Variable Name** field contains *ordered*. To create a custom variable name, click the pencil icon to the right of the field to enter your own value.

Once the name and the variable name are set, click **Save**.

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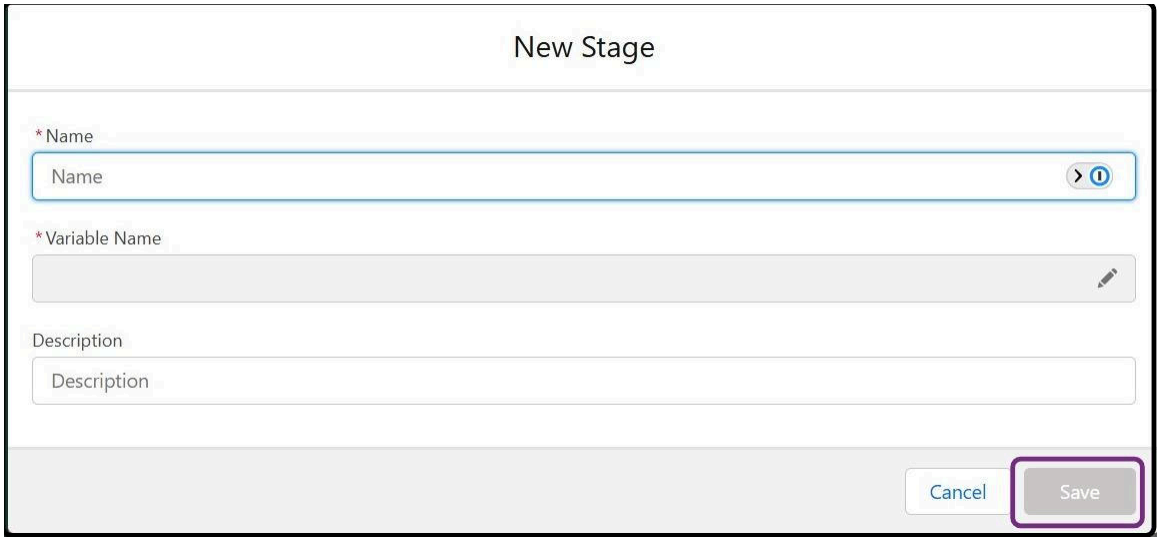
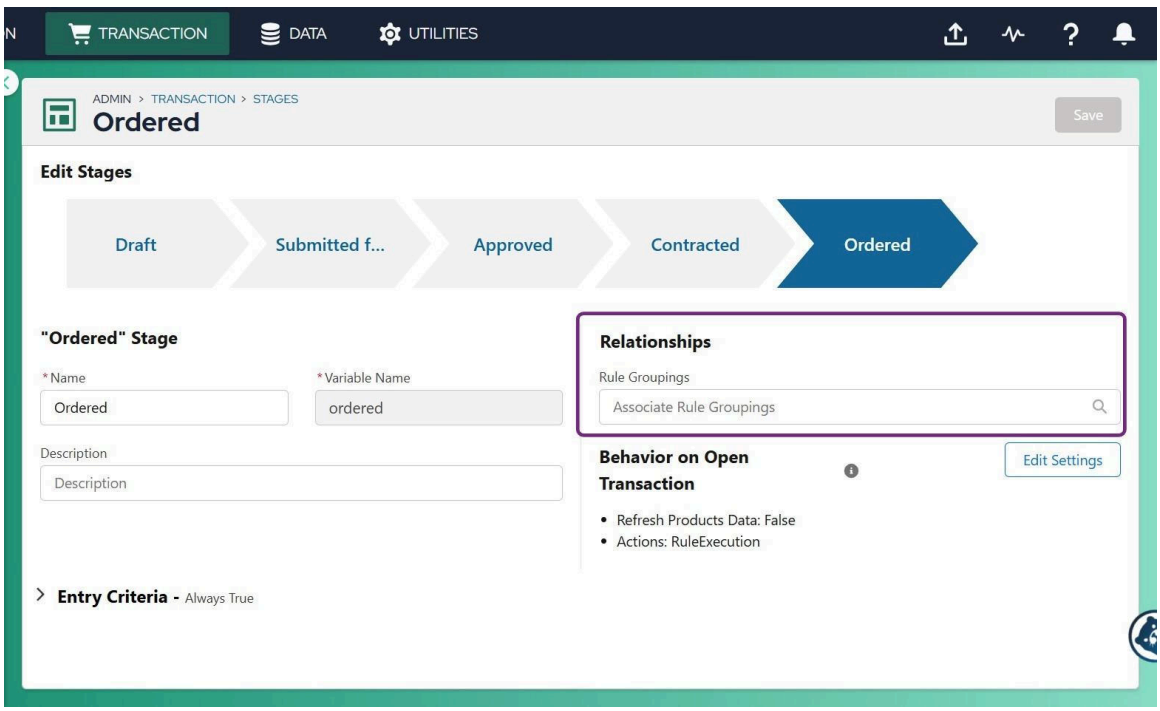


When you click **Save**, you see the stage editor page. In the stage editor, you can assign rule groupings to the stage being created. Use the **Rule Groupings** menu to choose the rule groupings to assign to the new stage.



In the stage editor, in the **Entry Criteria** section, you can create the conditions that are tested before the transaction is allowed to transition into the new stage. The method is the same as the method you use to create conditions in rules. Click **Entry Criteria** to choose the type of condition logic you want to implement.

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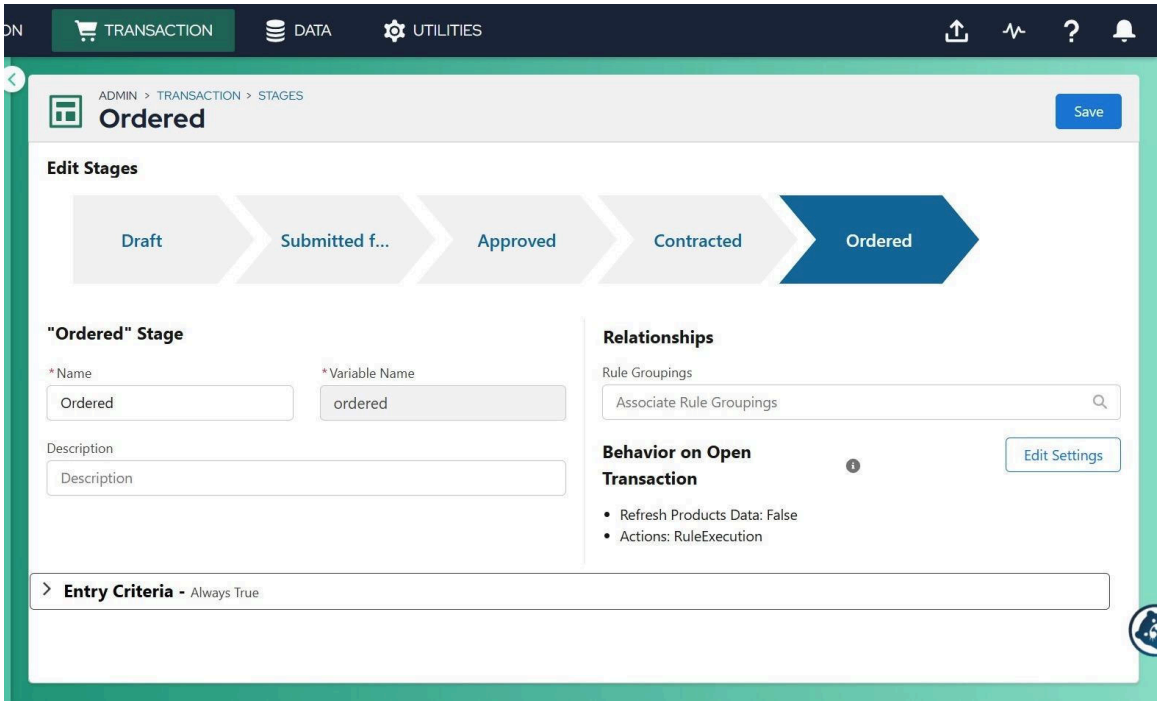
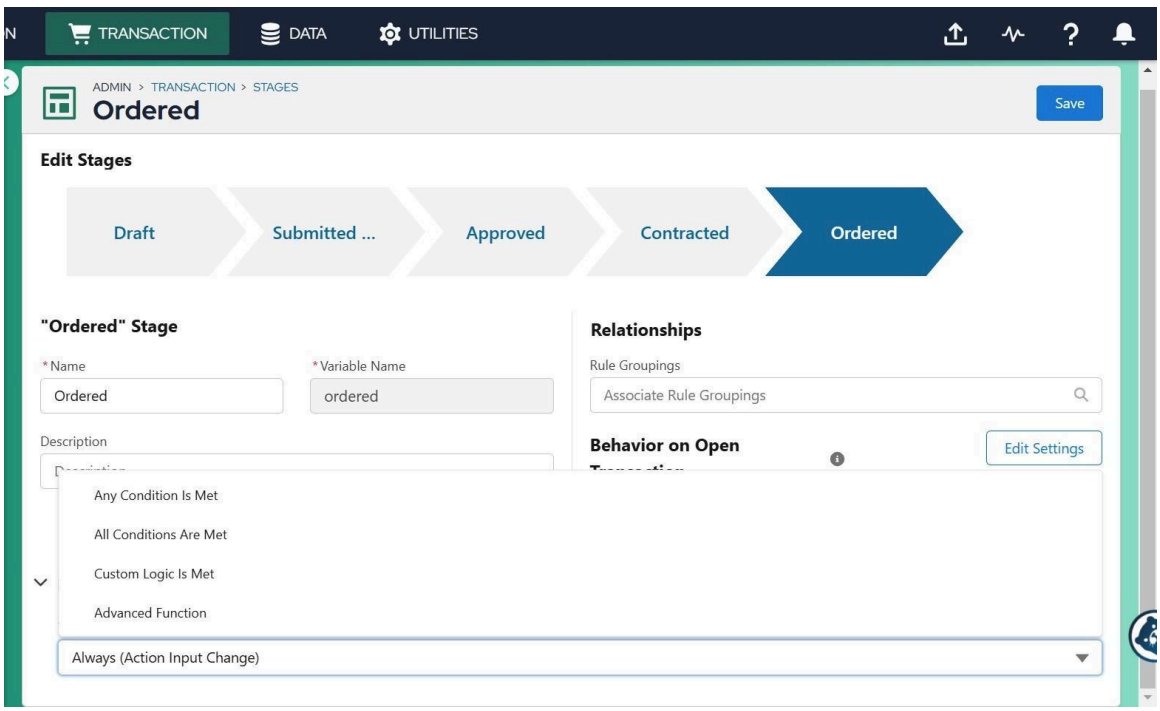


Click **Take Action When** to select the condition logic.



After you choose the condition logic method, click **+ Add Condition** to add the condition to be tested. You can add multiple conditions to the stage entry criteria. For each conditional statement, choose the field to test, the operator to use, and the value to test for.

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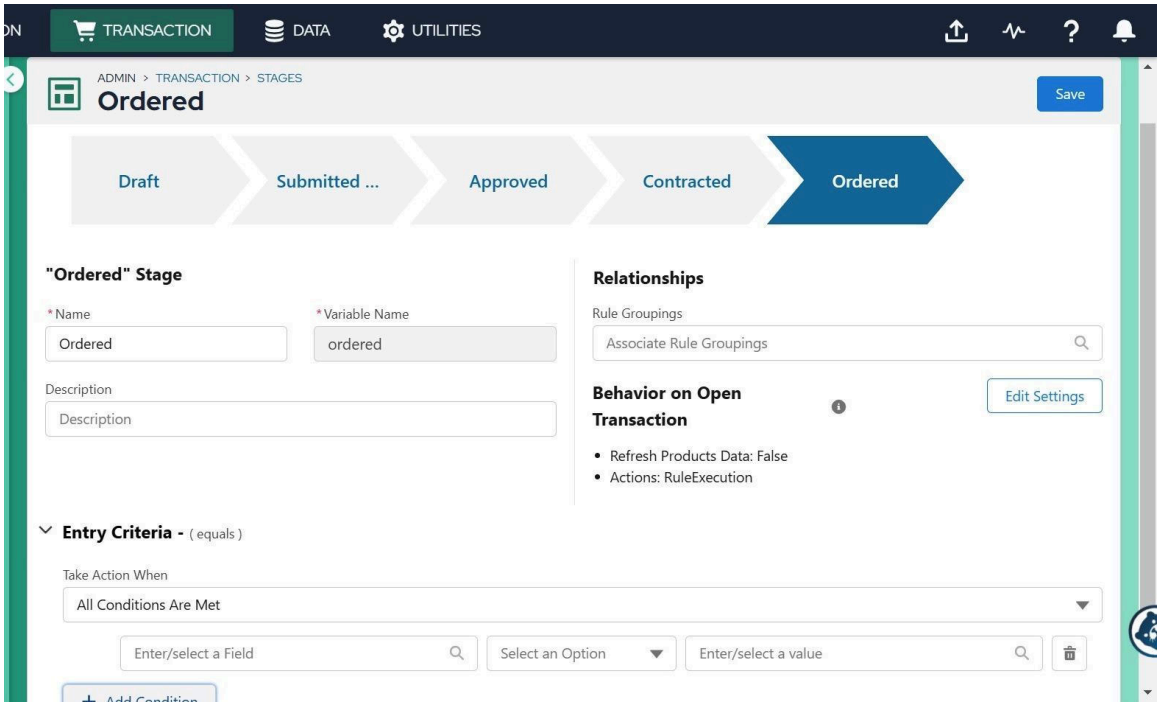
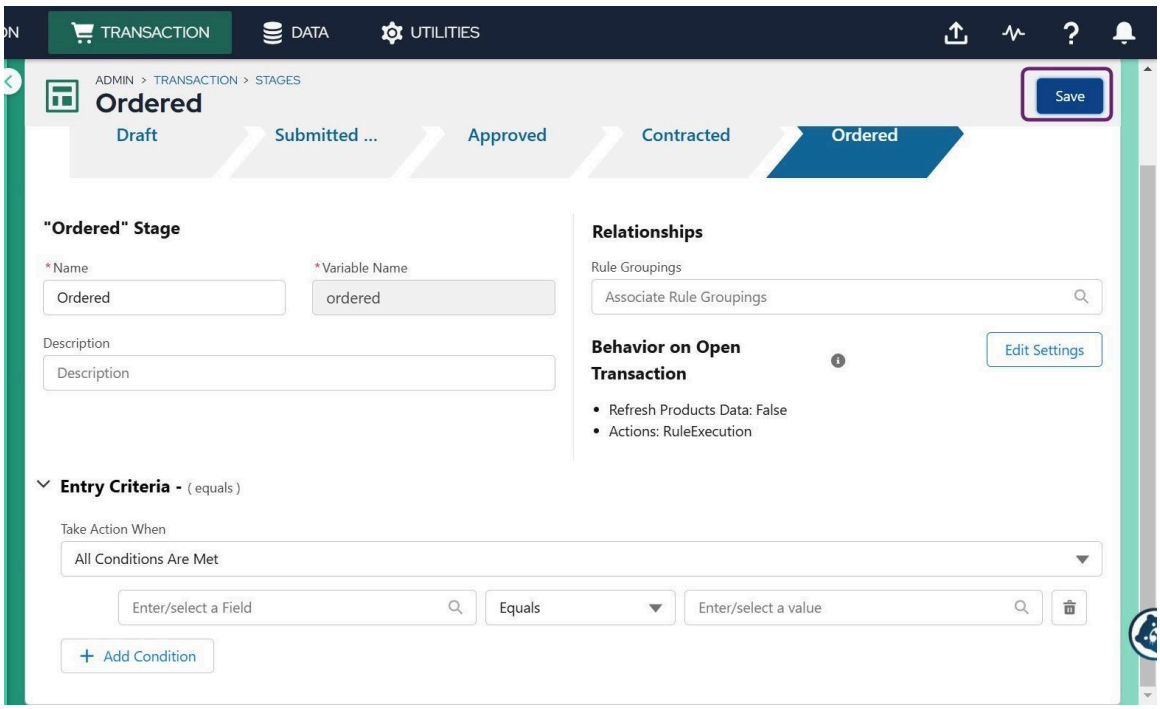


When the new stage is fully configured, click **Save**.



Settings: Behavior on Open Transaction

The **Behavior on Open Transaction** area enables an administrator to determine what rule groupings and integrations run when the user opens a transaction in the stage. Click **Edit Settings**.

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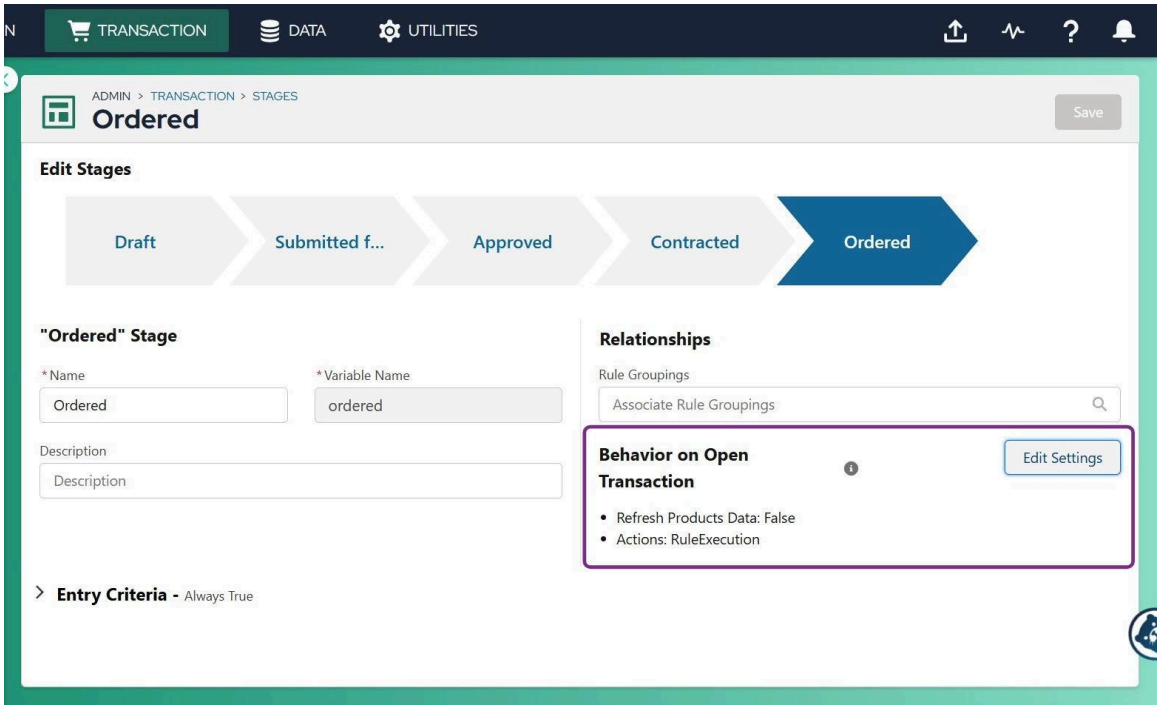
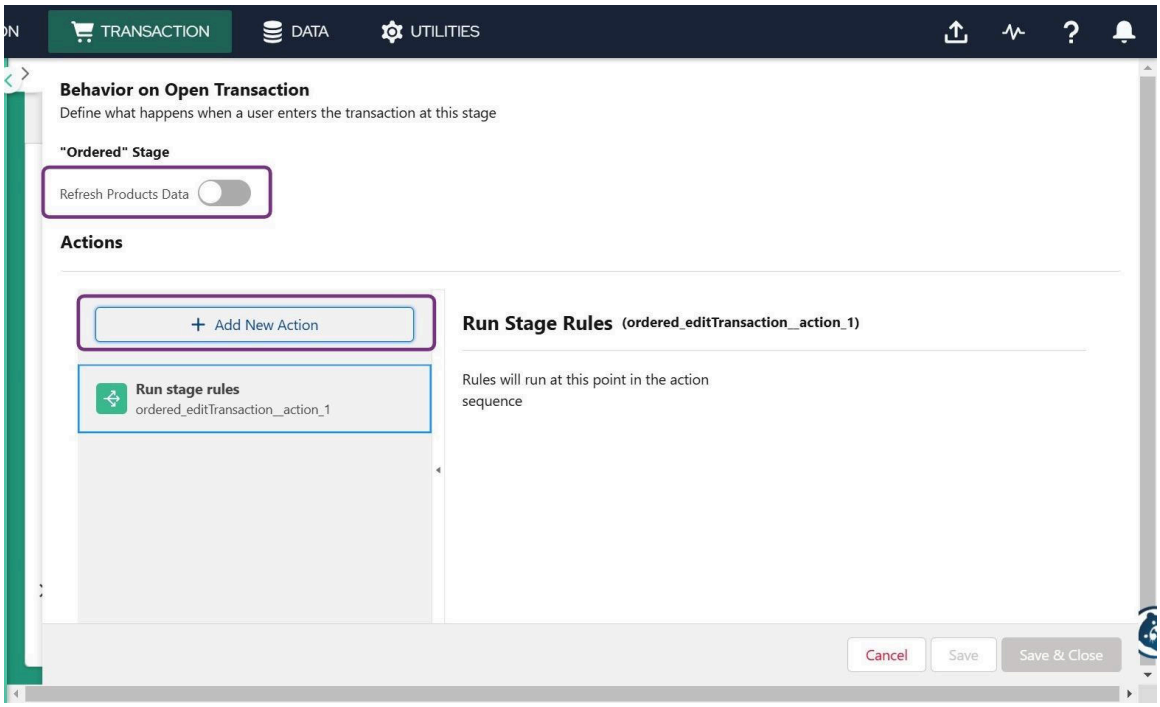


On the Settings page, use the **Refresh Product Data** toggle to set the product data for the transaction to refresh when the transaction opens.

Click **Add New Action** to add a rule grouping or an integration to the action list.



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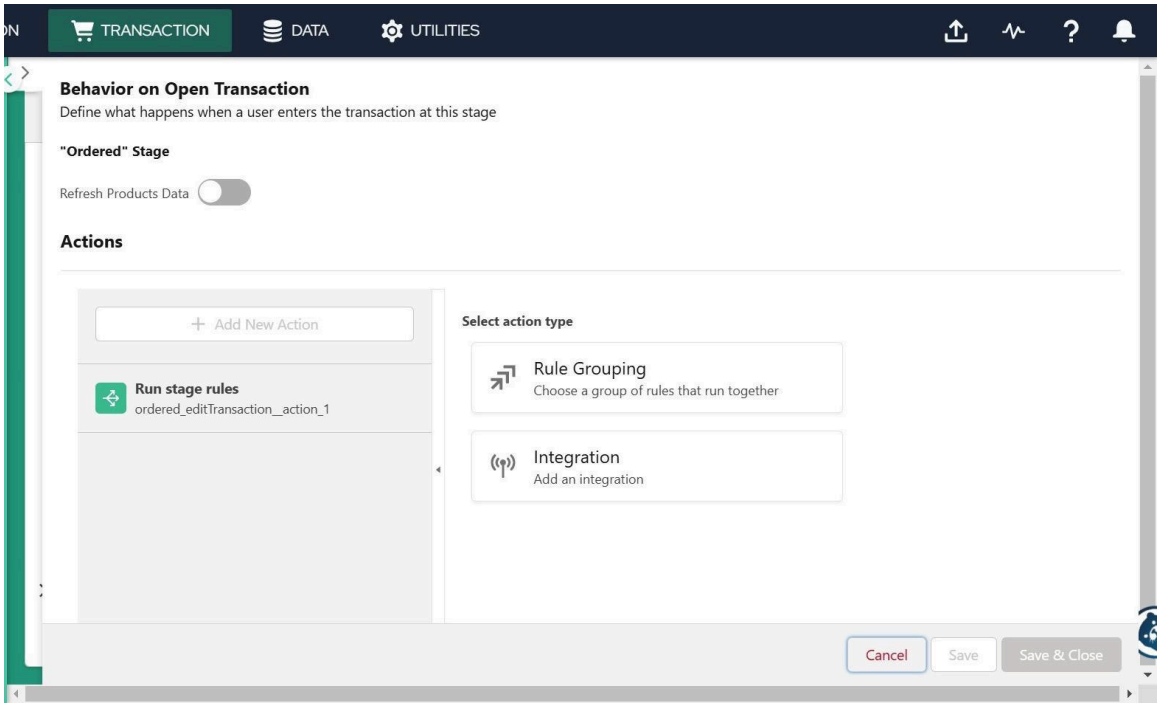
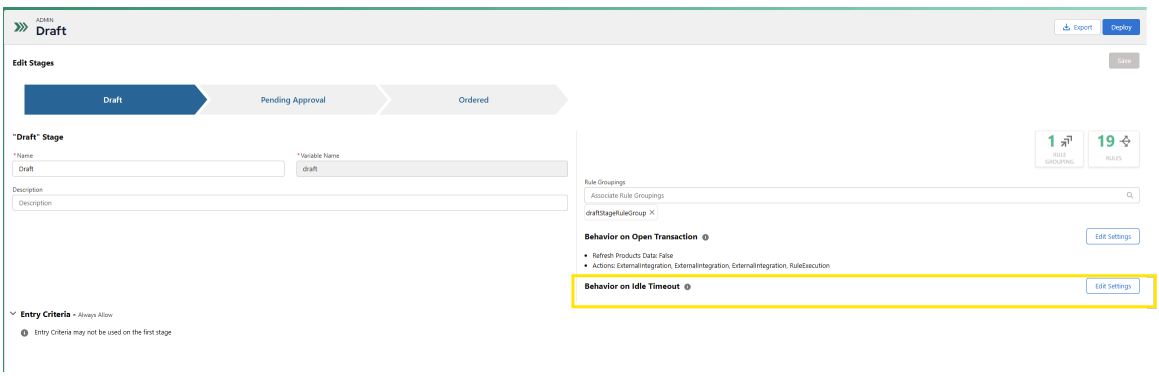


Settings: Behavior on Idle Timeout

In the **Behavior on Idle Timeout** section of a stage's settings, you can define an event that triggers after a user remains inactive for a time that you specify. This helps improve user experience by executing predefined actions—such as rule groups, integrations, or stage rules—when inactivity is detected.

You can define one such event per stage. If the event fails on its first execution, it is not retried or requeued. To activate this setting, follow these steps:

1. In the stage's settings, make **Behavior on Idle Timeout** active.



2. To add actions, click **Edit Settings** next to **Behavior on Idle Timeout**.

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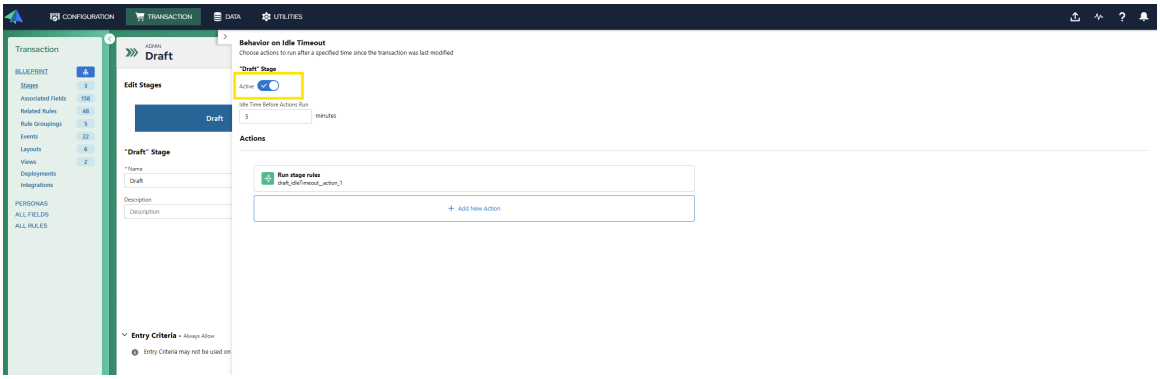


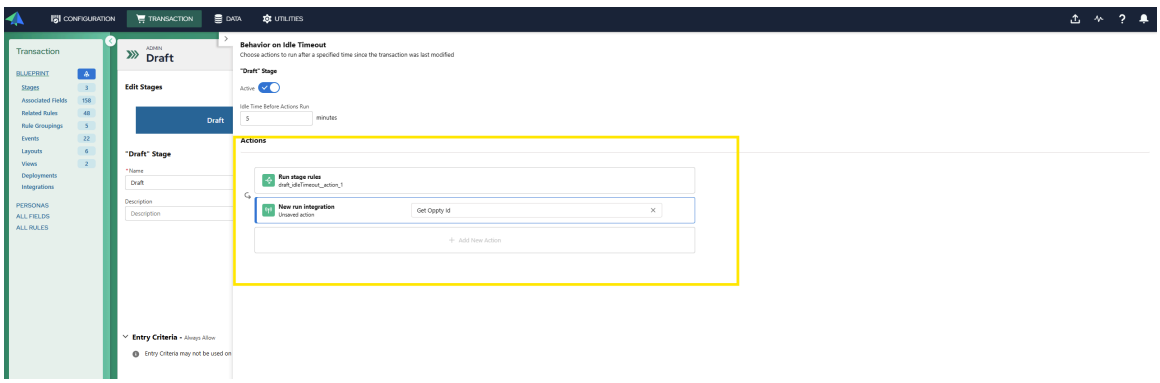
3. Set the idle time.

   The **Idle Time Before Actions Run** setting defines how long a user must remain inactive before the configured actions are triggered. The user is considered inactive when there are no clicks, interactions, or key presses.

4. Add actions to execute on timeout.

   You can define one or more actions that run once the idle timeout is reached. Supported action types include rule groups and integrations.

   - Use rule groups to execute conditional logic such as updating fields or modifying the UI.
   - Use integrations to trigger external APIs or services for logging events, sending notifications, or updating external records.



General guidelines:

- Carefully set the idle time to balance user convenience with session management and system efficiency.
- Test all configured rule groups and integrations in a non-production environment before you enable them in live stages.

Deleting a stage

Deleting a stage is restricted because deleting a stage in use by transactions can cause data issues. Contact Customer Support for more information if a stage deletion is needed.

Related topics

Transaction Manager: Rules and rule groupings

Transaction Manager: Events

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Transaction Manager: Personas

Personas let you customize user access according to users' business roles.

Transaction Manager uses personas to define distinct user types and roles that you find in your sales organization. Personas might include a sales rep persona or a sales manager persona.

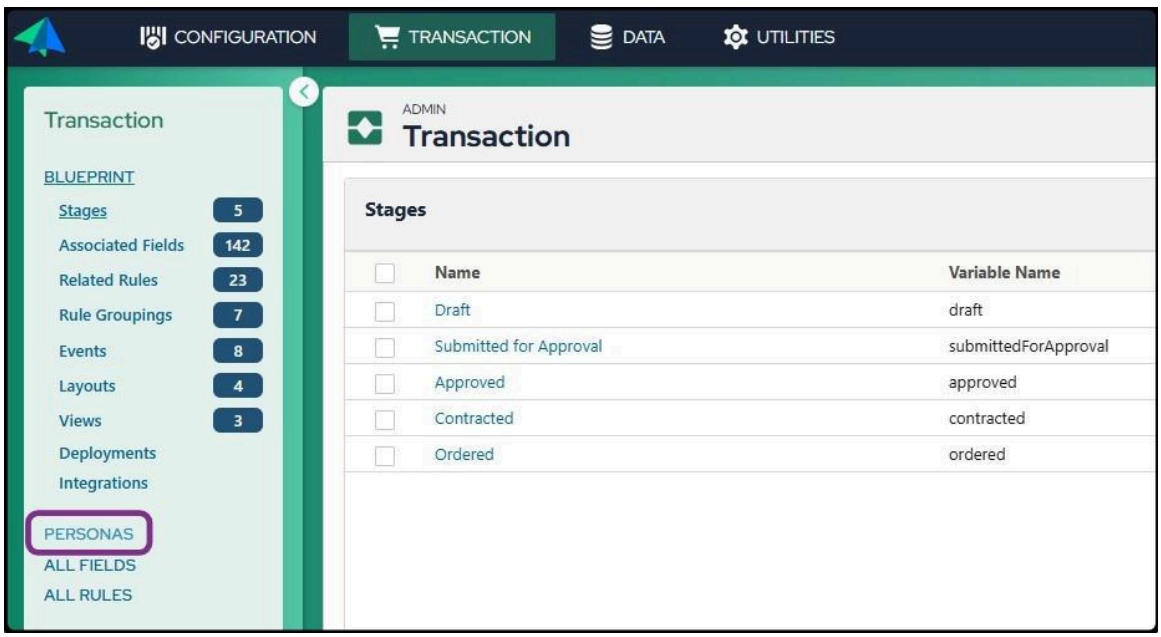
Each persona has customized access to data, including what users with a persona can view and edit, and how the layout appears in each stage of a transaction's life cycle. This lets an admin define how different users experience a transaction based on their roles in the sales organization.

Note: Because personas are not part of the Transaction Manager blueprint, they are not part of the blueprint export file. When a blueprint is migrated to a new system, personas must be recreated.

Creating a persona

To create a persona, follow these steps:

1. In Transaction Manager Admin, click **Personas**.



2. Click **+ New Persona**.

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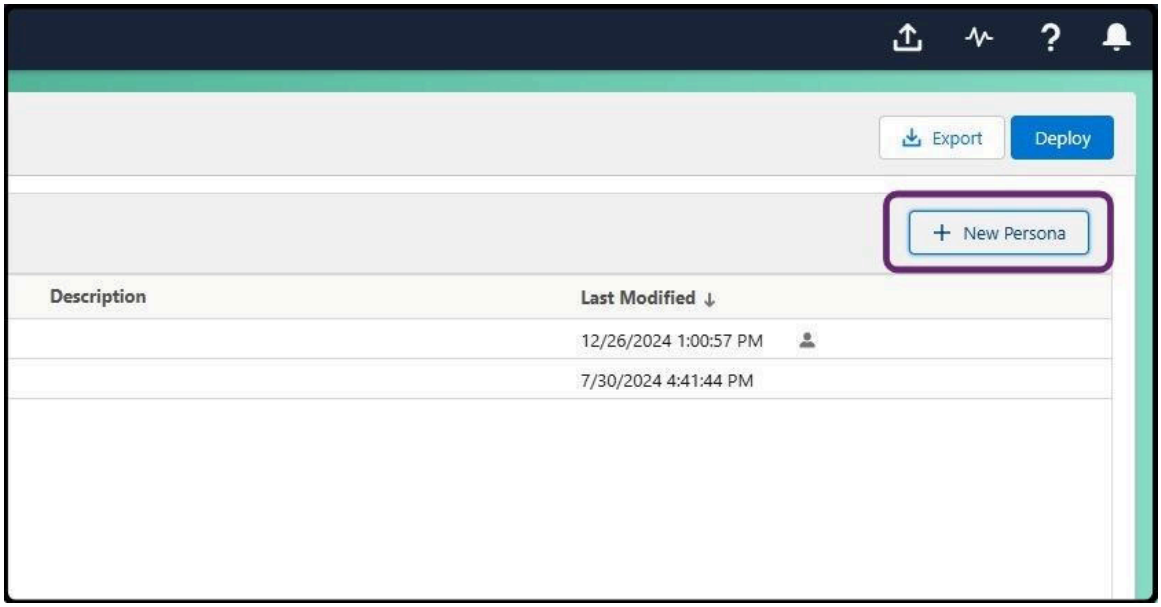
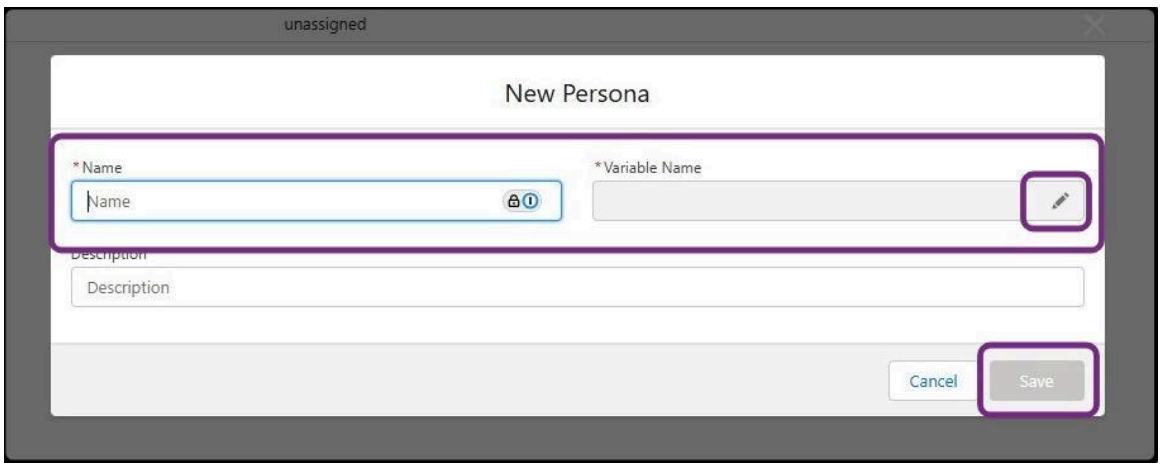


To assign user accounts to a persona, they must have been created by means of the User Access function in Utilities. User accounts that are not listed in the User Access list cannot be assigned to a persona. For more information on granting user access in CPQ, see User access.

3. A persona requires a name and a variable name. Enter the name of the new persona in the **Name** field.

   As the name is entered, it is mirrored in the **Variable Name** field. By default, the variable name is the same as the entered name, but in camel case with all spaces and special characters removed. For example, if you enter the name "Eastern Sales Manager", the automatically entered variable name is "easternSalesManager". To create a custom variable name, click the pencil icon to the right of the variable name field and enter your own value. When you're finished, click **Save**.



4. To assign one or more user accounts to the new persona, click **+ Associate User**.

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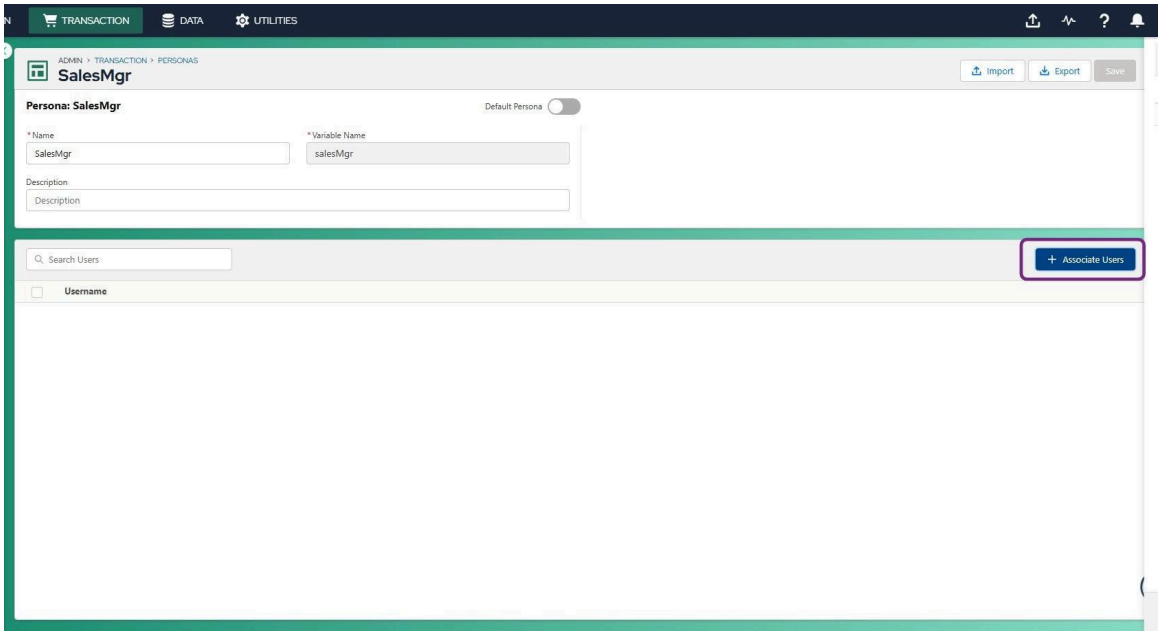
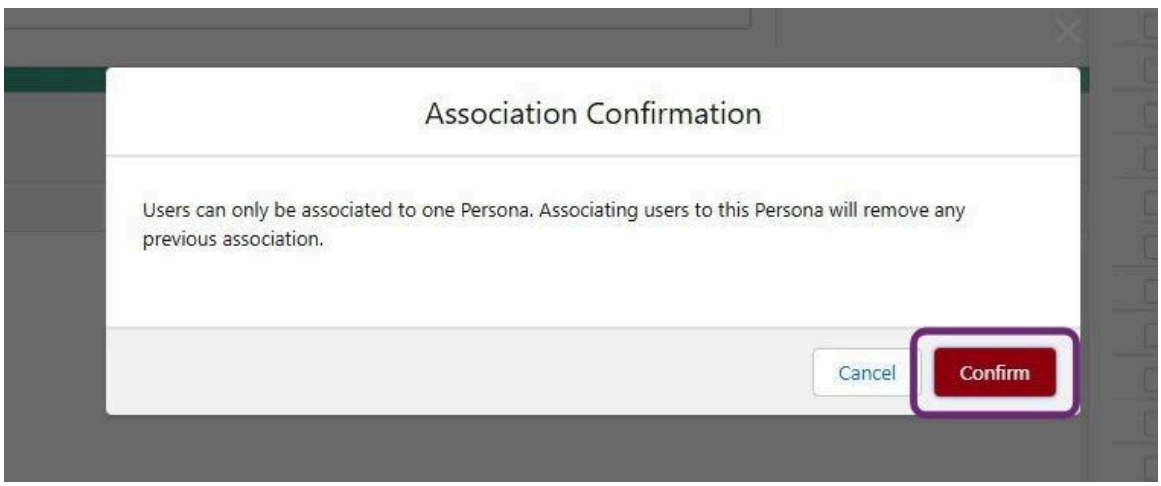


An **Associate Users** control appears and lists the user accounts that can be assigned to the new persona.

5. Click the check box next to each user account that you want to assign to the new persona, and then click **Done**..

> **Note:** Each user account can be assigned to only one persona in Transaction Manager.

6. When you are asked to confirm that you want to assign the selected user accounts to this persona, click **Confirm**.



The assigned user accounts appear in the **Username** list for the new persona. To see your new persona on the Personas page, click **Personas** in the Admin menu.

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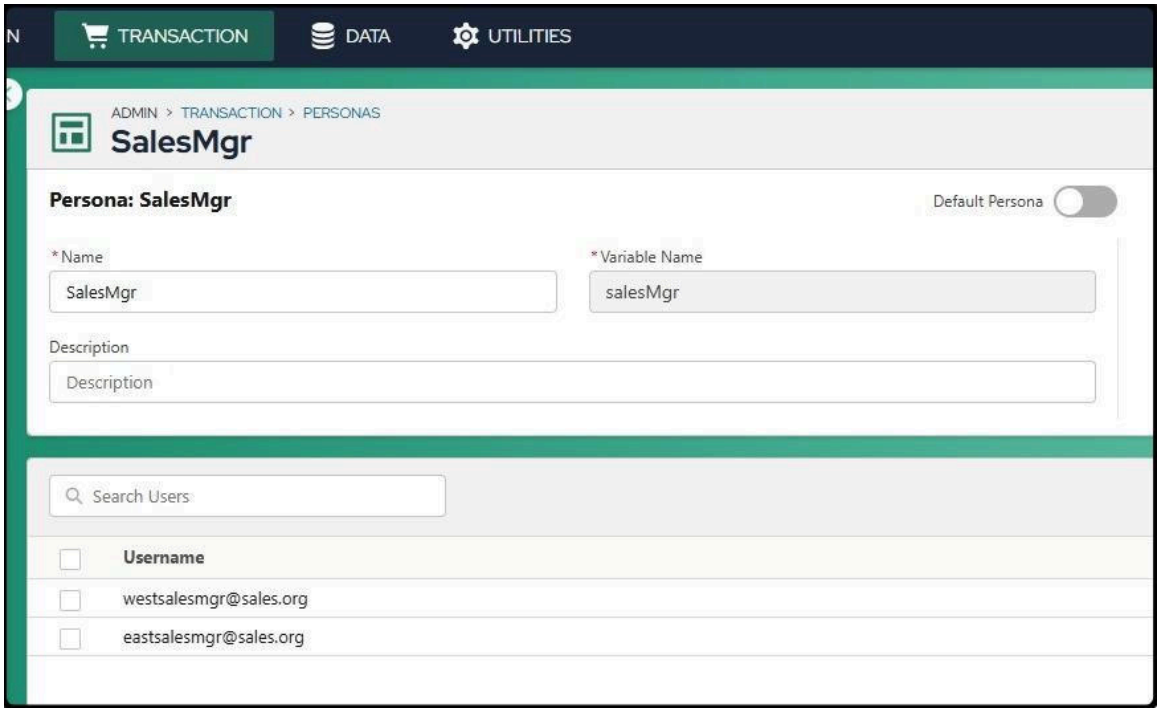
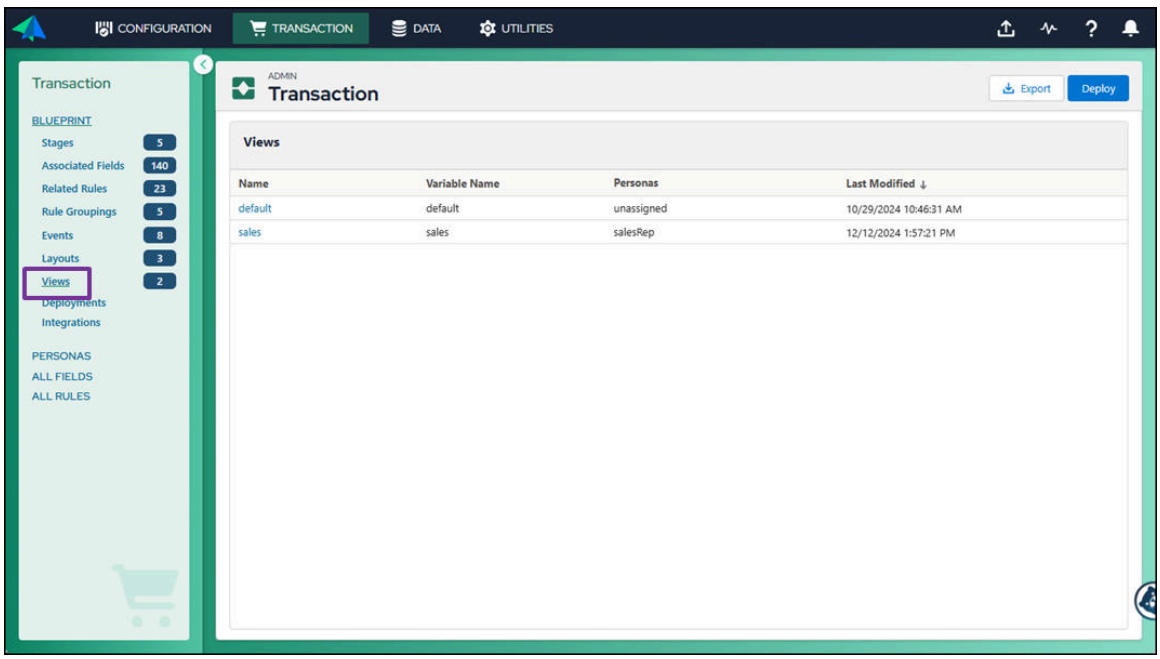


Transaction Manager: Views

Understand how to set rules for access to fields and events according to user persona.

Views allow Transaction Manager admins to control how users with various personas can view and modify fields and events at various stages of a transaction.

To work with views, click **Views** in the Admin menu. The views list page shows the views you have configured for your transaction environment. Clicking a view's name in the list displays the access privileges defined in the view.



Field access

When you click a view name, the view's field and event access privileges are shown in a table.

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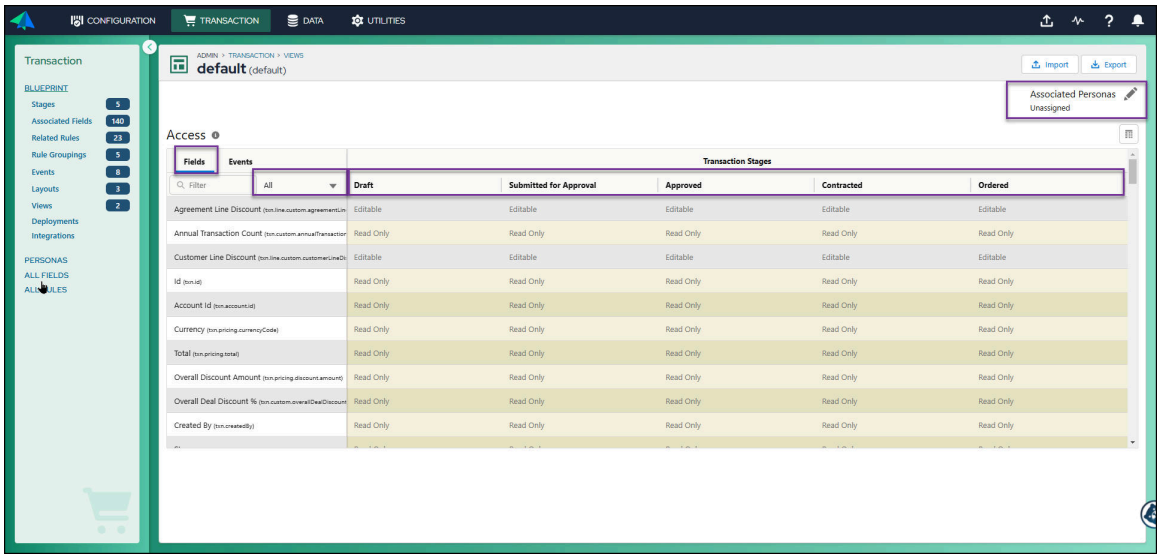
Clicking **Fields** in the top left corner shows the field access privileges defined for the view. The leftmost column in the table displays all of the field names, both transaction level and transaction line level.

Using the **Filter** field lets you filter the display by field name or variable name. An adjacent menu lets you decide whether you want to see all the fields, only transaction level fields, or only transaction line level fields.

The stages appear in the top row of the table. This helps you define the access to each field in each stage of your sales process for the personas assigned to the view.

Clicking the pencil icon for **Associated Personas** lets you choose the personas assigned to the view. A menu shows all the personas. A persona can only be assigned to one view.

The values in the display cannot be modified in the Admin UI. They can be modified only by importing a blueprints.zip file in CSV format.



Events access

The **Events** tab shows the access privileges defined for each event in the Transaction Manager blueprint.

As with the fields display, these values cannot be modified in the Admin UI. They can only be modified via CSV file import.

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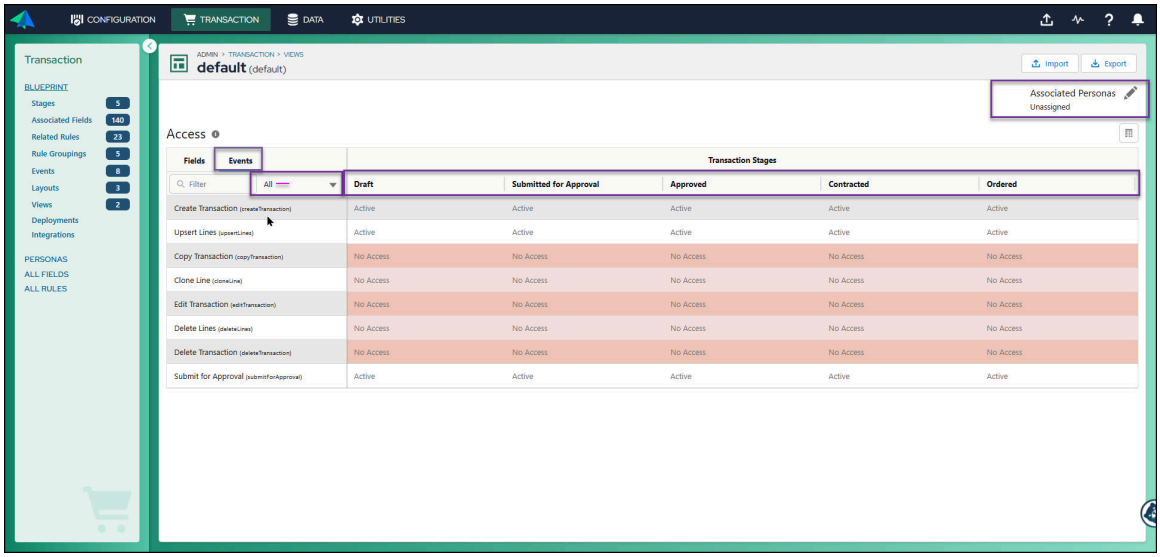

Creating views

To create a new view or modify an existing view, use CSV and YAML files.

- The Fields CSV file defines the field access for a persona or set of personas at each stage.
- The Events CSV file defines the event access for a persona or set of personas at each stage.
- The views.yaml file defines the name of the view being added or modified and the location of the two CSV files.

By default, Transaction Manager provides a copy of each of these files for the default view. To create new views, you can use the default view files, modify them, and save them under new file names. Including the new files in the blueprint.zip file eanbles you to import the new views into your Transaction Manager blueprint.

Fields CSV file

The fields CSV file contains the field access rights to each transaction-level and transaction line-level field in each stage. For each field, you can define one of the following access levels:

- Editable (Read/Write)
- Read Only
- No Access

In the blueprint.zip file, the file should be located in the following folder hierarchy: `blueprints/default/views`

When you modify a view field file, modified values are entered without the asterisk (*).

Original fields CSV file:

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	A	B	C	D	E	F
1	fieldVariableName	draft	submittedForApproval	approved	contracted	ordered
14	txn.line.parent.id	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
15	txn.line.quantity	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
16	txn.line.orderNumber	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
17	txn.created	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
18	txn.modifiedBy	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
19	txn.pricing.discount.percent	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
20	txn.line.product.id	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
21	txn.line.product.name	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
22	txn.custom.totalPriceEstimate	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
23	txn.line.product.productCode	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
24	txn.line.product.description	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
25	txn.line.pricing.discount.amount	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
26	txn.line.pricing.discount.percent	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only

Modified fields CSV file:

	A	B	C	D	E	F
1	fieldVariableName	draft	submittedForApproval	approved	contracted	ordered
14	txn.line.parent.id	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
15	txn.line.quantity	*Read Only	Editable	*Read Only	*Read Only	*Read Only
16	txn.line.orderNumber	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
17	txn.created	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
18	txn.modifiedBy	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
19	txn.pricing.discount.percent	*Read Only	Editable	*Read Only	*Read Only	*Read Only
20	txn.line.product.id	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
21	txn.line.product.name	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
22	txn.custom.totalPriceEstimate	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
23	txn.line.product.productCode	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
24	txn.line.product.description	*Read Only	Editable	*Read Only	*Read Only	*Read Only
25	txn.line.pricing.discount.amount	*Read Only	*Read Only	*Read Only	*Read Only	*Read Only
26	txn.line.pricing.discount.percent	*Read Only	Editable	*Read Only	*Read Only	*Read Only

Events CSV file

The events CSV file contains the event access rights to each transaction-level and transaction line-level event in each stage.

Each field can be defined as Active or No Access.

In the blueprint.zip file, the file should be located in the following folder hierarchy: `blueprints/default/views`

When you modify a view event file, modified values are entered without the asterisk (*).

Original events CSV file:

	A	B	C	D	E	F
1	eventVariableName	draft	submittedForApproval	approved	contracted	ordered
2	createTransaction	*Active	*Active	*Active	*Active	*Active
3	upsertLines	*Active	*Active	*Active	*Active	*Active
4	copyTransaction	*No Access	*No Access	*No Access	*No Access	*No Access
5	cloneLine	*No Access	*No Access	*No Access	*No Access	*No Access
6	editTransaction	*No Access	*No Access	*No Access	*No Access	*No Access
7	deleteLines	*No Access	*No Access	*No Access	*No Access	*No Access
8	deleteTransaction	*No Access	*No Access	*No Access	*No Access	*No Access
9	submitForApproval	*Active	*Active	*Active	*Active	*Active
10						

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Modified events CSV file:

	A	B	C	D	E	F
1	eventVariableName	draft	submittedForApproval	approved	contracted	ordered
2	createTransaction	*Active	*Active	*Active	*Active	*Active
3	upsertLines	*Active	*Active	*Active	*Active	*Active
4	copyTransaction	*No Access	Active	*No Access	*No Access	*No Access
5	cloneLine	*No Access	Active	*No Access	*No Access	*No Access
6	editTransaction	*No Access	Active	*No Access	*No Access	*No Access
7	deleteLines	*No Access	Active	*No Access	*No Access	*No Access
8	deleteTransaction	*No Access	Active	*No Access	*No Access	*No Access
9	submitForApproval	*Active	*Active	*Active	*Active	*Active

YAML file

The views YAML file defines the view. Information in the views YAML file includes:

- The name and variable name of the view
- The variable name of any personas assigned to the view
- The location of the field and event CSV files in the blueprint.zip file

If you have multiple views defined for your Transaction Manager blueprint, this information is repeated for each defined view in your blueprint.

```
---
- variableName: default
  name: default
  personas:
  - unassigned
  fieldViewPolicies: blueprints/default/views/default-fields.csv
  eventViewPolicies: blueprints/default/views/default-events.csv
- variableName: salesMgr
  name: salesMgr
  personas:
  - salesMgr
  fieldViewPolicies: blueprints/default/views/sales-fields.csv
  eventViewPolicies: blueprints/default/views/sales-events.csv
```

When all three files have been modified, they can be placed in the views folder of the blueprints.zip file and imported into Transaction Manager via the Matrix Loader. Assuming that there are no issues with any of the files, changes to any views take effect when the blueprint is deployed.

Related topics

- Transaction Manager: Personas
- Transaction Manager: Stages
- Transaction Manager: Events
- Transaction Manager: Rules and rule groupings

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Transaction Manager: Using Runtime API calls

See a list of the APIs that are used in the runtime end user experience, together with their purposes and responses.

CPQ APIs are divided into two categories: runtime APIs and admin APIs. This article lists the runtime APIs for Transaction Manager.

The runtime APIs are the same APIs that are used in the runtime end user experience and include the following key actions.

- Initialize a session
  - Purpose: Initializes a session to establish a context for executing transaction events, managing state, and processing subsequent API calls. Can initialize for an existing transaction. If a transaction is not specified, a new transaction is created.
  - Response: Returns a session ID, a transaction ID, and transaction information.
- Delete a session
  - Purpose: Deletes a session to securely end user activity, clear session-specific data, and free up system resources.
  - Response: The session is deleted. No information is returned.
- Create a transaction
  - Purpose: Creates a transaction, providing the object to manage the transaction life cycle, configure and add products, and determine pricing.
  - Response: Returns a transaction ID and transaction information.
- Run events on a transaction (system and custom)
  - Purpose: Triggers a specified event on a transaction to execute predefined logic or workflows, such as editing field values, initiating approvals, versioning transactions, and validating configurations.
  - Response: Varies by event.
- Add products to a transactions (upsert)
  - Purpose: Adds a product or products to a transaction, enabling dynamic configuration and pricing updates based on the product’s attributes.
  - Response: Returns updated transaction data with the additional product.
- Get a list of transactions
  - Purpose: Retrieves a list of transactions, enabling users to view, manage, or take action on existing transactions.
  - Response: A list of transactions with transaction IDs and other metadata.
- Get details of a transaction
  - Purpose: Retrieves the header information of a transaction, providing key details such as stage, account, and the summary-level data needed for display or processing.
  - Response: All header field data for the transaction.
- Get a transaction's lines
  - Purpose: Retrieves the line item details for a transaction, returning product-level data such as quantities, pricing, and custom attributes for each item in the quote.
  - Response: All line-level field data for the transaction.
- Get statistics for transactions

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- Purpose: Retrieves metrics on transactions. Metrics include views by user, session time by user, and stage time.
- Response: Summary metrics for the last 30 days or for a specified date range.

For further details about the Transaction Manager metrics API, see Transaction Manager: Transaction metrics API.

Postman Collection

Transaction Manager: Transaction metrics API

Use an API call to obtain user views, user session time, and time spent at a stage.

Transaction Manager provides an API to retrieve metrics on transactions. Metrics include views by user, session time by user, and stage time.

You can query a single transaction by sending the transaction ID. If no transaction ID is provided, all transaction data is returned.

By default, a call returns metrics for the last 30 days. Different periods can be specified by including a date range parameter. The date range parameter specifies `toDate` and `days`, which get statistics from `(toDate - days) -> toDate`. If no `toDate` is provided, the current time is assumed.

Example call:

```
curl -X GET
 "{{baseUrl}}/api/txn/metrics/v1/overview?txnId={{transactionId}
}&days=30&toDate=2025-09-18T15:28:04Z" \
  -H "X-Logik-Customer-Id: <tenant-id>" \
  -H "Content-Type: application/json"
```

Metrics details

Views by user:

- The total sessions for a user in the specified time period
- Unit: count

If filtered to a single transaction, sessions are for only that transaction.

Session time by user:

- The average time per session of each user
- Unit: minutes

Sessions are calculated using activity windows based on common events, including transaction created or edited, stage enter or exit, upsert lines, and custom transaction events. There is a five-minute threshold after the last event to end the session.

If filtered to a single transaction, the total time for a user can be calculated by multiplying the views per user by the session time per user.

Stage time:

- The average time that a transaction spends in a specified stage
- Unit: minutes

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If filtered to a single transaction, the metric reflects the time that the transaction was in the specified stage.

Transaction Manager: Advanced product filtering

In Transaction Manager, you can dynamically filter products based on any number of factors, with real-time data synchronization from managed tables and fast search speeds even in very large catalogs.

CPQ Advanced Product Filtering feature enables dynamic product catalog filtering using Admin-defined business rules. This includes support for real-time data synchronization from managed tables and sub-second search speeds, even with product catalogs over millions of SKUs.

This article explains how to use and manage this feature, and outlines performance benefits, configuration steps, and common use cases.

Use case

As your catalog grows and your business logic becomes more dependent on regions or rules, it becomes essential to dynamically filter products based on:

- Country, region, or compliance constraints
- Available pricing or configuration status
- Transaction-specific input fields

Key features

Feature	Description
Advanced filter rule search	Contextual product filtering with sub-second results
Real-time data sync	Managed Table and rule changes take effect immediately (no redeploy needed)
Rule-based filtering engine	Include and exclude products using dynamic logic
No-code admin experience	UI-based rule builder with mapping and conditions
Scales with catalog size	Performance maintained even with more than a million products

Prerequisites for product rule filtering

The tenant setting `enableCatalogFilter` must be turned ON. This setting activates the filtering logic during catalog interactions. To enable this, submit a request to DevOps.

Additionally, The Transaction Manager module must be enabled. This ensures that Add Lines operation uses the defined Product Rule Filters to dynamically include/exclude products during configuration.

Configuration steps

First, define a managed table. Follow these steps:

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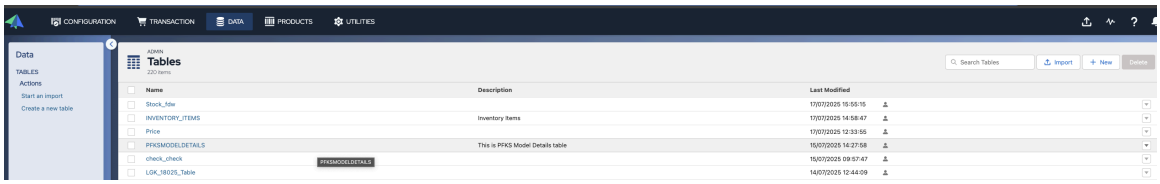
1. Navigate to the `Tables` tab in Logik Admin.
2. Create or upload a table that contains your business logic (for example, region-to-product mapping, availability flags, and so on).
3. Ensure column mapping. The table must include at least one column that can be mapped to the product catalog, such as `Region`, SKU, or `Product Family`.
4. Deploy the table once to make it available for use in filter rules.

> **Note:** Updates made to the managed table data are automatically synced with the product filter engine. A tenant setting must be enabled on a 15-minute interval.

The Product Filter Rule does not have to be redeployed when only table data changes. This behavior is enabled when `filterrules.scheduler.enable = true`.

The system syncs the updated data every 15 minutes, making the latest information available during product filtering.



Next, create a product filter rule.

1. Navigate to `Products` > `Product Filter Rules`.
2. Click `Create New Rule`.
3. Enter the following details:
   - Rule Name: A descriptive name for your rule
   - Variable Name: A unique identifier used internally
   - Description: A brief summary of the rule's purpose
4. Select a reference table: Choose the managed table that contains the reference data for filtering (such as region availability, pricing eligibility, and so on).
5. Define the filter conditions. Use fields from the managed table and transaction data to define when the rule should apply.
6. Map columns. Match the reference table columns to corresponding product table columns (for example, `Region` in the managed table to `Region` in the product catalog).
7. Set the rule behavior by choosing one of the following:
   - Include: Only products that match the condition are shown
   - Exclude: Products that match the condition are removed
8. Save and deploy.
   - Click **Save** to store the rule.
   - Toggle the Active button to mark the rule as ready for deployment.
   - Click **Deploy** to apply the rule and enforce it in the product catalog.

> **Note:** Any change made to an existing rule must be redeployed for it to take effect.

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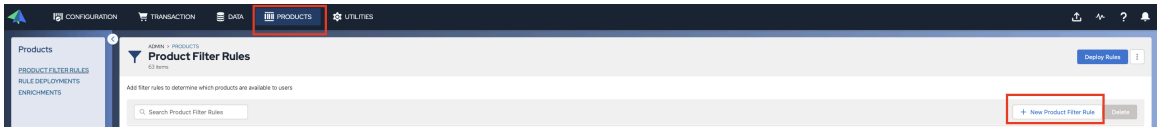

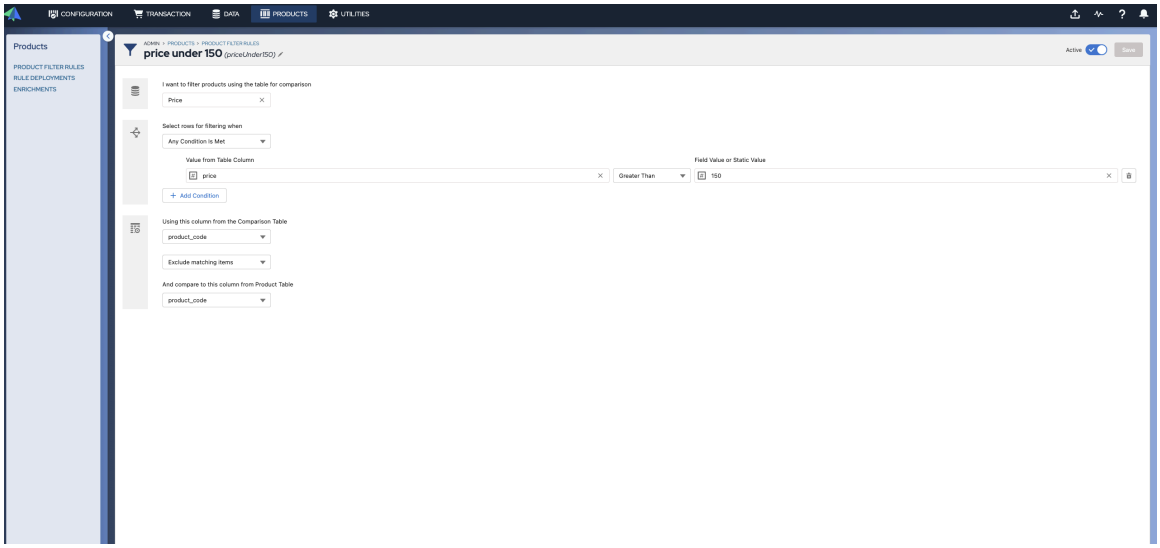

To test the filter in a transaction, start a transaction in the Transaction Manager, and the proceed to the product selection stage.

Only products that match the filter logic will be displayed.

Transaction Manager: Transaction Access Control

Using the Transaction Access control feature, you can precisely control which users can view or modify a transaction.

The Transaction Access Control feature improves security and compliance by providing precise control over who can view and edit each transaction. In headless use cases, it can limit a list of transactions to those the current user has access to.

This feature is controlled by a tenant setting and is disabled by default. When the feature is disabled, all users can access all transactions.

Access levels

Admin:

- Can view and edit all transactions
- Can grant full access to others
- Can revoke full access, but not owner status
- Cannot be removed

Owner:

- Assigned to the creator of a transaction
- Can view and edit the owned transaction
- Can grant or revoke full access
- Cannot be removed (if last owner)

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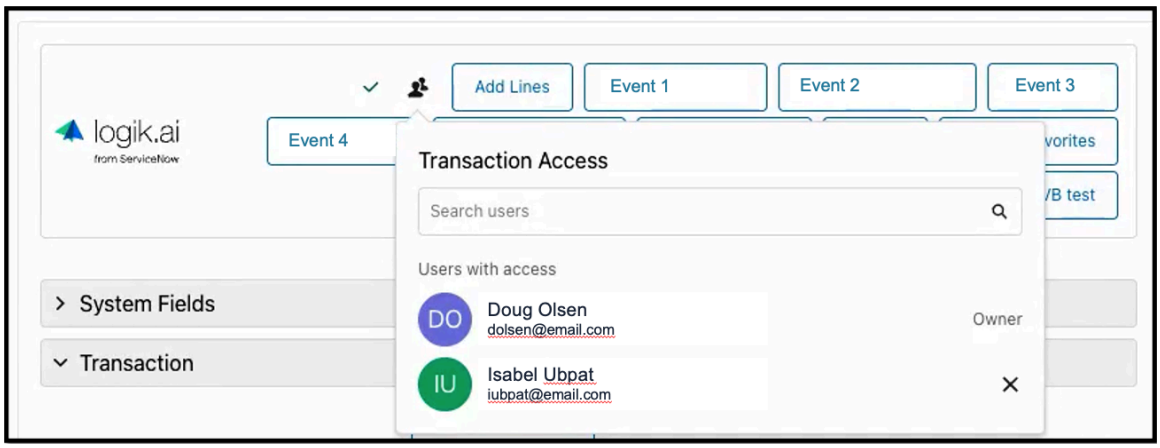
Full access:

- Can view and edit specified transactions
- Can grant or revoke full access of others

Usage

Access control can be accessed through the runtime UI.



Any user with access can grant or remove access for others. However, admins and owners cannot have their access removed. When users without access try to open restricted transactions, they receive an error.

When Transaction Access Control is enabled on an instance that has transactions, transaction creators automatically become owners. Users who have edited a transaction receive full access.

API support

Access can be granted or revoked through API calls. API can also be used to retrieve a list of transactions to which a user has access, and return a history of users who were granted or revoked access. For a Postman colleciton of Transaction Manager access control API calls, contact support.

Transaction Manager: Use cases

View a list of example use cases for CPQ Transaction Manager.

Transaction Manager use case: Apply parent line discounts to child lines

Transaction Manager can help manage transactions whose configurable products have many child and grandchild transaction line items.

A single transaction may include multiple configurable products, and each configurable product may have more than 100 child, grandchild, or other descendant transaction line items.

Discounting at the transaction header level could apply a uniform discount across all products and transaction line items. Conversely, applying discounts at the transaction line-level lets you discount individual products and lines at different rates. However, for a product with many descendant line items, this may become burdensome.

Using the `.parent` system field enables the look up of a parent line-item field, which can then be applied to only the child lines of that product. For example, a picklist can be used at the header level to designate the discounting method to apply.

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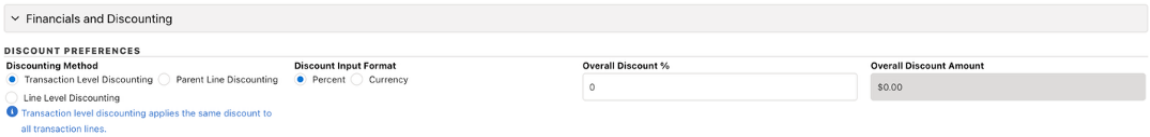
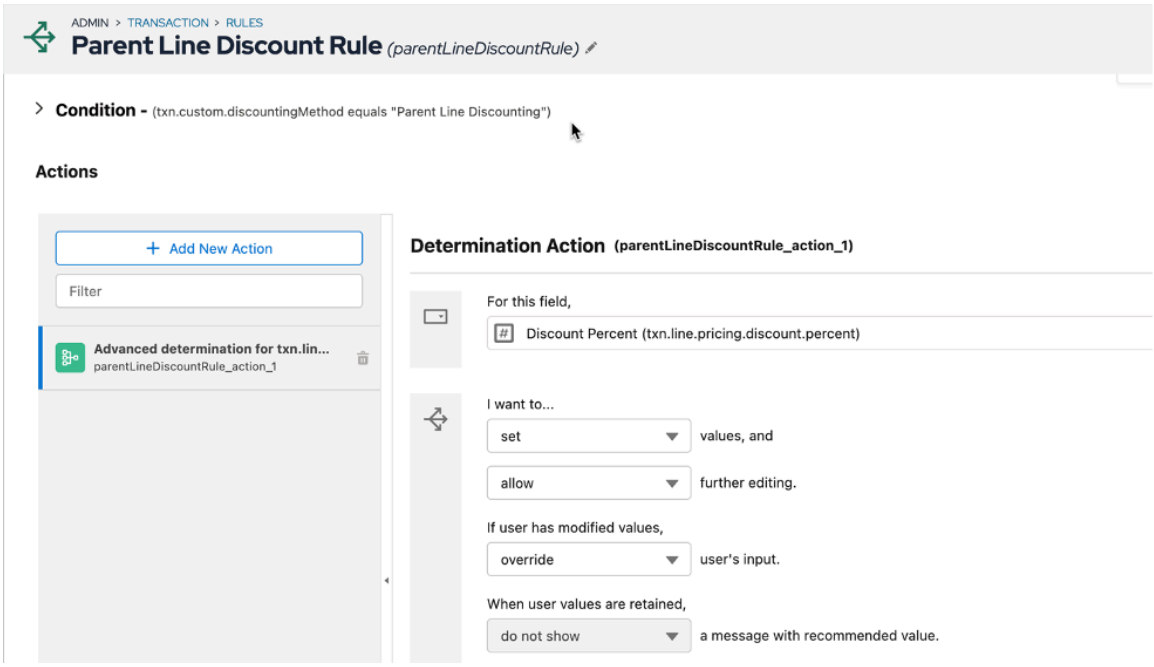


When **Parent Line Discounting** is selected, a rule sets the descendant line's discount field equal to that of its parent line.



Transaction Manager use case: Calculate prices for line-level fields

Transaction Manager can apply rules to line-level fields that dynamically calculate prices according to changes to the field, such as when products are added or removed.

In the Transaction Manager, we can apply rules on line-level fields to cover various price calculations relevant to selected products. These calculations adapt dynamically to changes, such as the addition or removal of products. This article outlines a use case involving three types of price calculations and the steps required to configure them.

The use case involves three types of price calculations:

- Annual List Price: This is the list price multiplied by the number of months chosen in the subscription period.
- Unit Net: The price of a product after the discount amount has been deducted.
- Extended Net: The unit net of the product multiplied by the quantity of the product.

Step 1: Create Custom Fields

- Navigate to CPQ Admin > Transaction > Associated Fields.
- Create all the custom fields required for your use case. For the detailed steps on how to create fields, see Transaction Manager: Fields.

In this example, we intend to use the following fields:

Start Date

Custom header (dateTime type) field that stores the subscription start date.

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End Date

Custom header field (dateTime type) that stores the subscription end date.

Subscription Term (Months)

Custom header (Number type) field that calculates the difference between the start date and end date, displaying the subscription term. For the detailed steps on how to do DateTime field calculations, see Transaction Manager: Date and time fields.

Target Line Item Discount

Custom header (Number type) field where users select the discount rate.

Quantity

Line-level system field specifying the quantity of the product chosen.

List Price

Line-level system field specifying the product's price.

Discount Percent

Line-level system field storing the discount rate. This field is automatically populated with the value selected in the Target Line Item Discount field using a rule.

Annual List Price

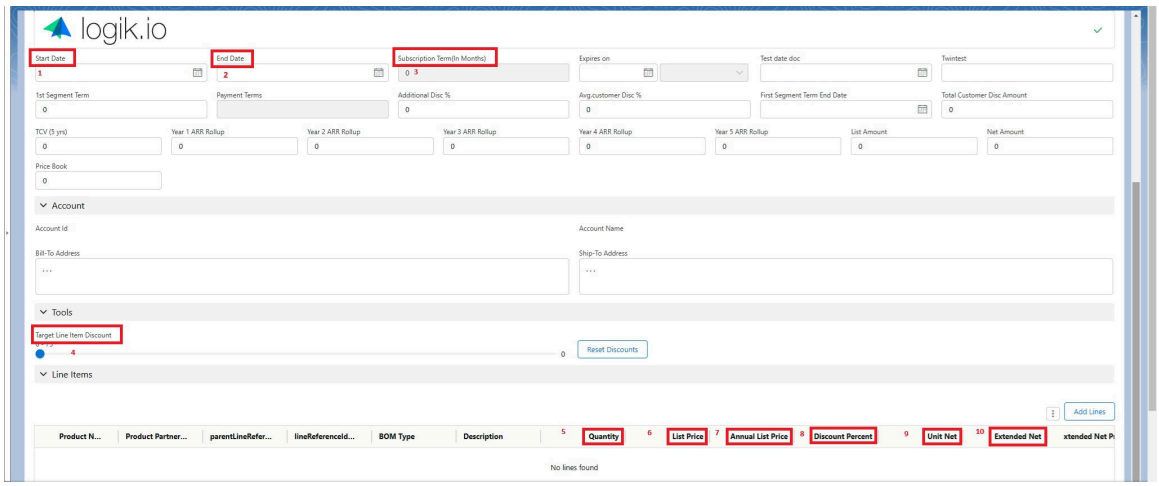
Custom field used to store results of price calculations for annual list price. This is a transaction line level custom field (Number Type)

Unit Net

System field labeled as "Net Price" in the system but renamed "Unit Net" by layout definition. This field stores results of price calculations.

Extended Net

System field that stores the total unit net price for the product in the line entry.



Step 2: Add fields to layout

Map the configured fields into the appropriate layout for visibility. For the detailed steps, see Transaction Manager: Layouts.

Step 3: Create the rules

Three rules are to be created:

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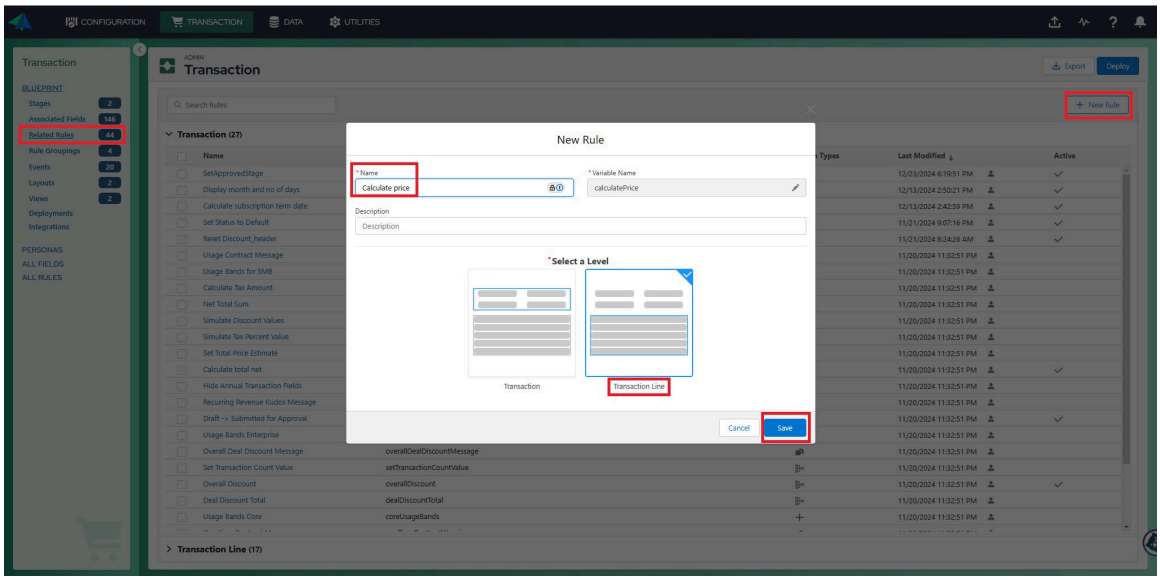
- Calculate Annual List Price
- Calculate Unit Net Price
- Calculate Extended Net Price

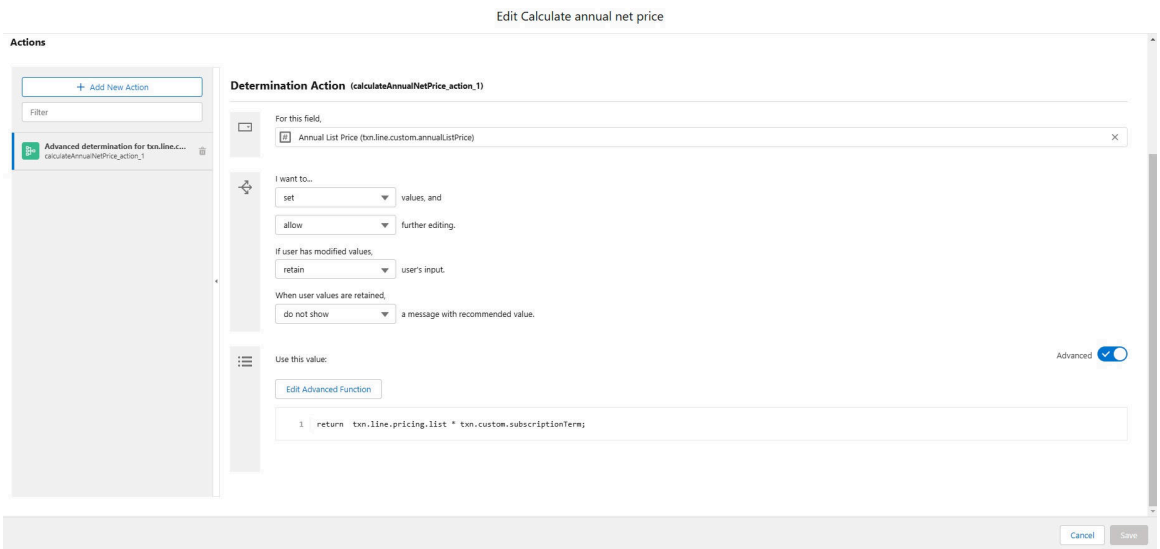
Follow these steps:

1. In **Related Rules**, click **New Rule**.
2. Enter the name of the rule and select **Transaction Line** as the rule type.
3. Click **Save**.



Step 4: Create and configure rule actions

1. Select **Determination** as the action type for the rule.
2. Define the rule's conditions and action items.
3. Add the advanced script to perform the calculation for Use Case 1 (Annual List Price). Refer to the snapshot below.



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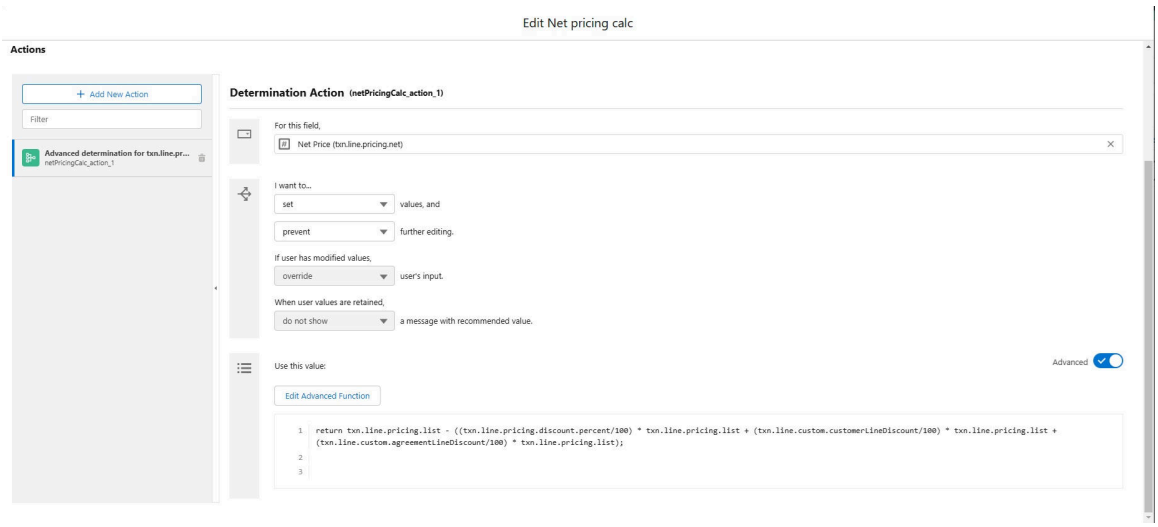
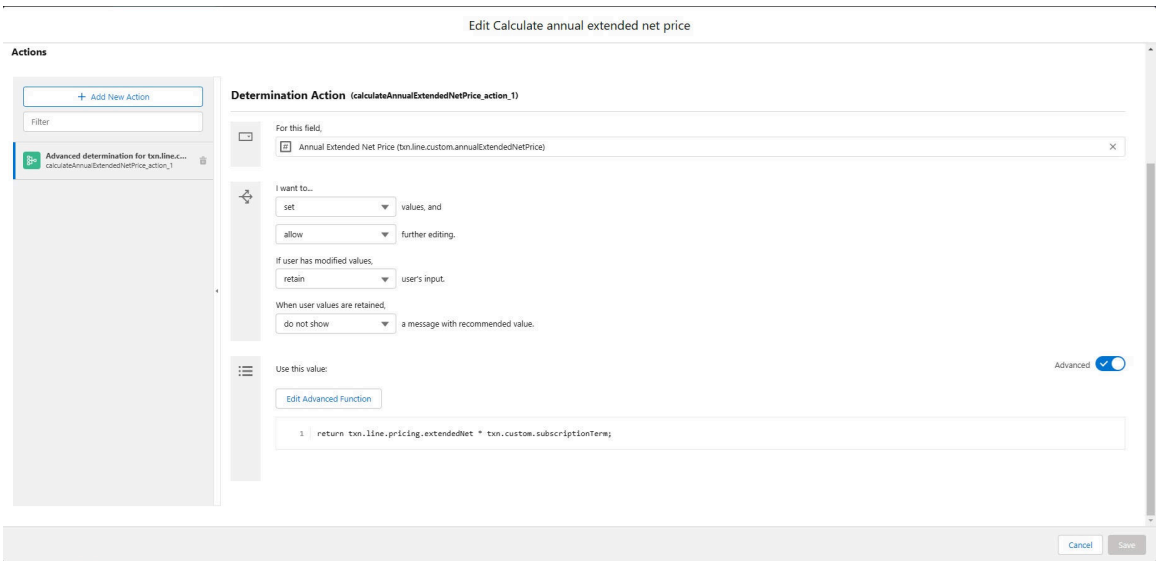
4. Click **Save**.
5. Repeat steps 1 through 4 to configure rules for Use Case 2 (Unit Net) and Use Case 3 (Extended Net). Refer to the snapshots below.

Use Case 2 (Unit Net) - Edit Net pricing calculation:



Use Case 3 (Extended Net) - Edit Calculate annual extended net price:



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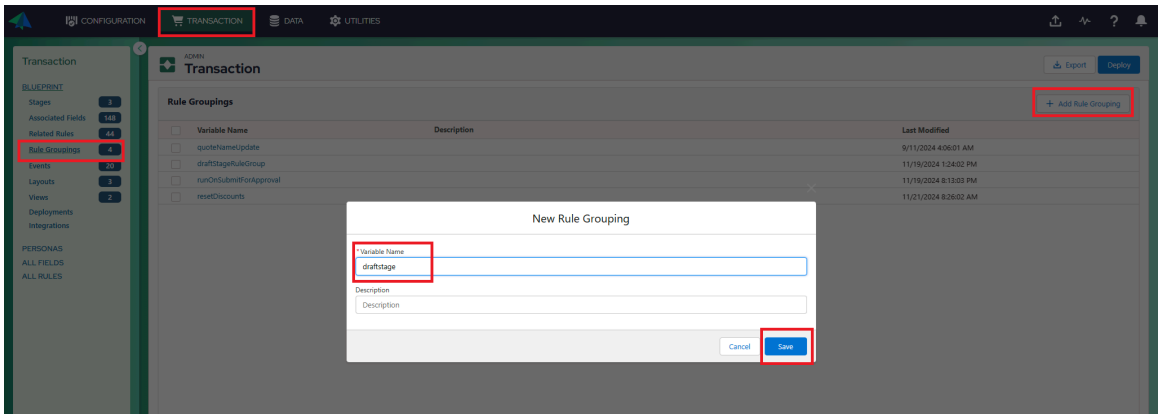
Step 5: Associate rules to rule groupings

1. On the Admin page, click **Rule Groupings**, and then click **Add Rule Grouping**. Enter the variable name as the stage in which rule should run (Draftstage), and then click **Save**.

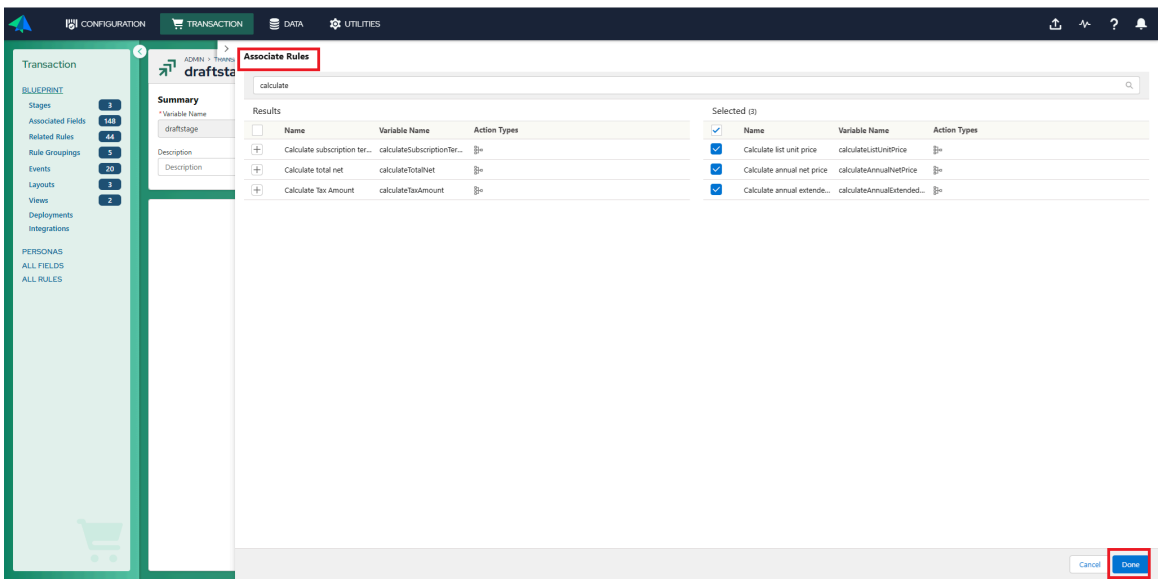


2. Associate the newly created rules:

   a. Click **Associate**.

   b. Select the name of the rule you created.

   c. Click **Done**.



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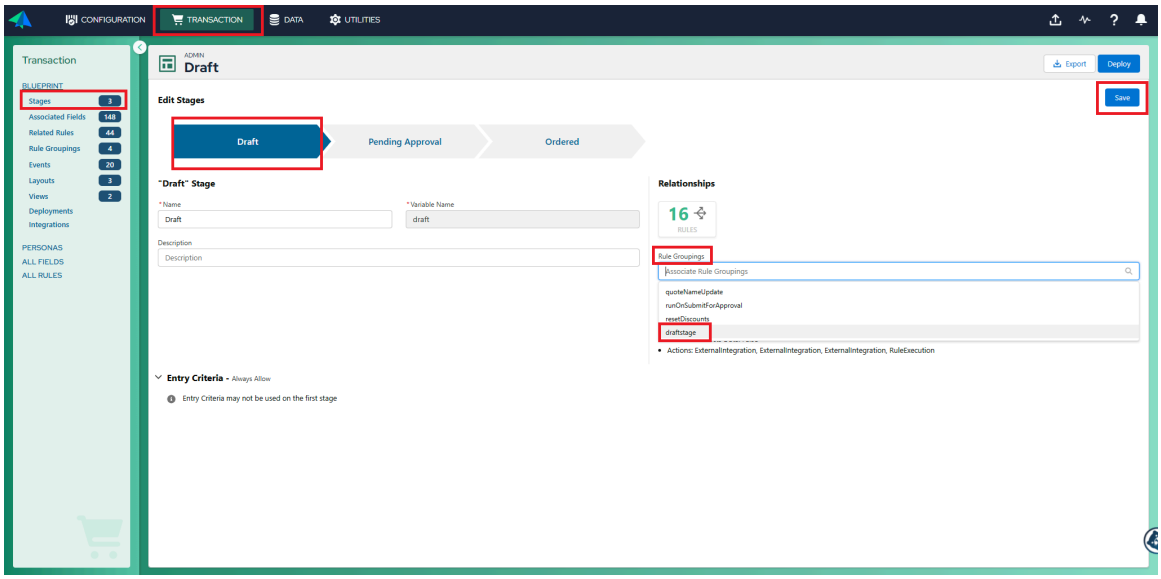
3. To link the newly created rule grouping with the stage (Draft in the sample use case) where your rules should run, click **Stages** on the transaction page. Click **Draft**, and then click **Rule groupings**. Search the new rule grouping, select, and then click **Save**.



Step 6: Deploy and test

Deploy the configured blueprint to make the rules active, and then test the implementation in the UI to confirm the scripts are working as expected.

Below is an example of the final implementation:

- Use Case 1: Entering the start date and end date header fields auto-populates Annual list price (List Price * Subscription Term i.e. $2,500.00 * 4 Months 11 Days = $10,885.00)
- Use Case 2: Setting the target line item discount as 5 %, auto-populates the unit net price [List price - Discount/100 * List price i.e. $2,500.00 - (0.05 * $2,500.00) = $2,375.00]
- Use Case 3: Setting the quantity of each entry auto-changes the Extended Net price (Unit net price * Quantity i.e. $2,375.00 * 10 = $23,750.00)

Final output

Transaction Manager use case: Calculate the total of line-level prices

Transaction Manager can include a determination rule that calculates the sum of line-level net prices so that it can be stored in a header-level field.

In CPQ Transaction Manager, you can use a determination rule to calculate the sum of line-level total net prices and store the result in a header-level field. This is particularly useful when multiple fields need to be aggregated from line items to the transaction header.

Example Rule Configuration

- Rule Action Type: Determination Rule
- Trigger Point: After line-level updates (that is, when line items are added, removed, or updated)
- Scope: Transaction Header

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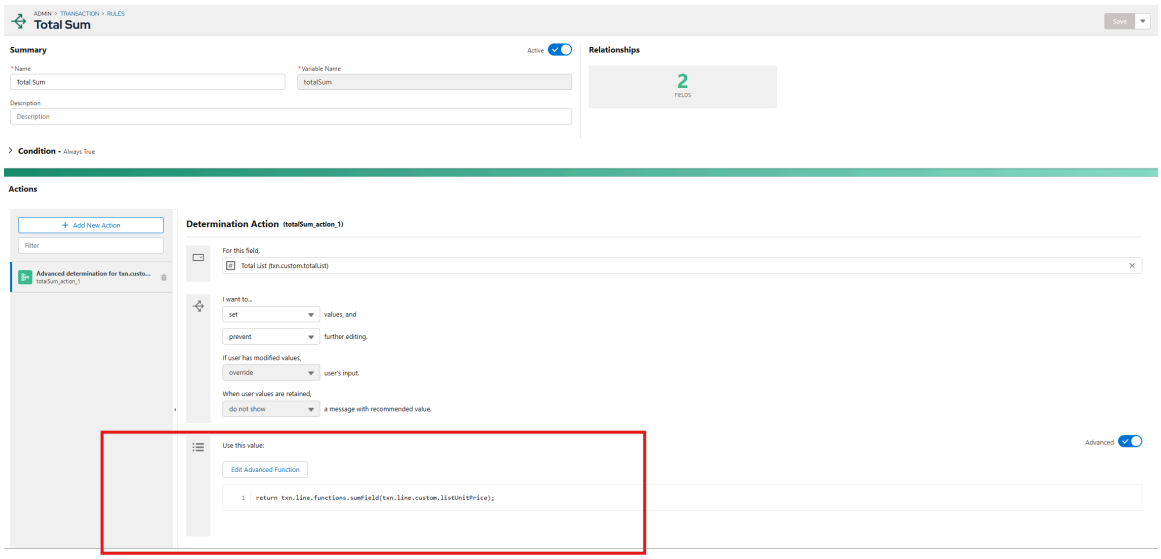
Steps to create and use the rule

1. Ensure that there is a header-level field.

   Alternatively, you can create a custom field (for example, txn.custom.totalList) in the Associated Field section where the sum is to be stored.

2. Create a header level rule with the appropriate condition for which the rule will be executed.
3. Set the action type to determination.
4. In **Use this value**, set **Advanced** to true, and write an advanced script to calculate the fields.

   For example, calculate the sum aggregate of the list price of every line item. To calculate the total list price, we use the `sumField` function to calculate all the line-level list prices into a single field.



5. Save and activate the rule so it applies in real time during the transaction life cycle.
6. To test the rule, create a transaction and add line items with varying net prices.

   Verify that the sum of the line-level net prices is correctly calculated and displayed in the header-level field.

More examples

Here are two more examples of line-level calculations stored in a header-level field.

- Overall Discount Amount

  Advanced Script:

```
return
txn.line.functions.sumField(txn.line.custom.listUnitPrice) -
txn.line.functions.sumField(txn.line.pricing.extendedNet);
```

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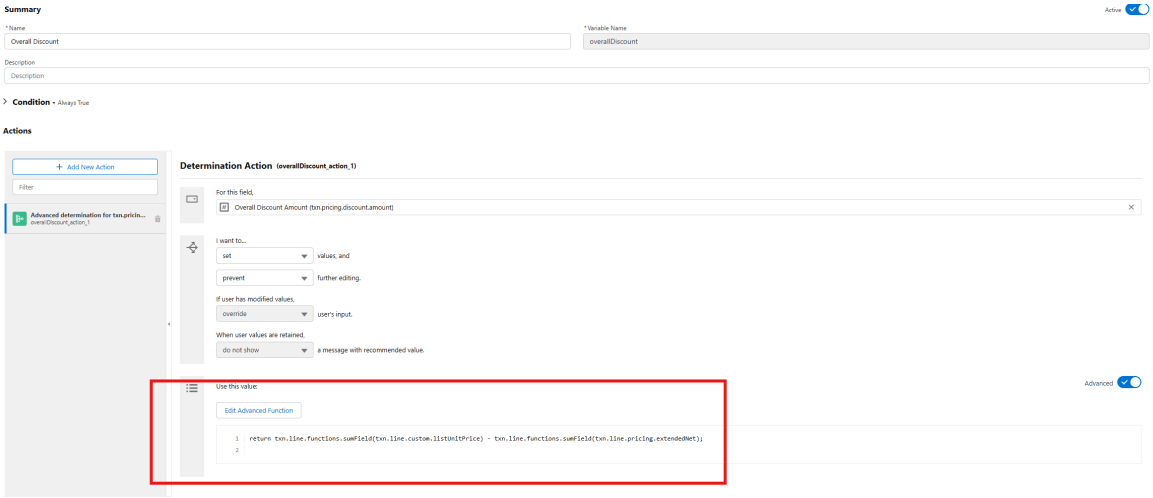
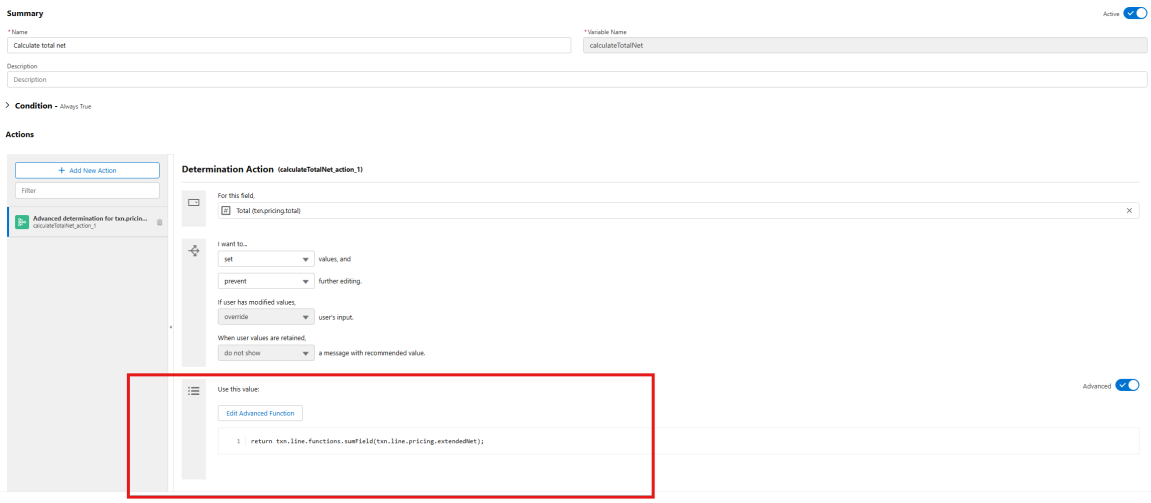


- Total Net

  Advanced Script:

```
return
txn.line.functions.sumField(txn.line.pricing.extendedNet);
```



Transaction Manager use case: Display LIG line number on line detail

How to display the line item group line number in the line detail.

This document outlines the implementation approach for displaying the line item group (LIG) line number in the line detail layout. This enhancement lets users easily reference and correlate the line detail with the appropriate line in the LIG.

To display the line number in the line detail view, follow the steps below. This requires using a line detail layout (for example, `default_layout_linedetail`).

1. Create a custom read-only line-level field to store the row number.
   - Variable name: `txn.line.custom.rowNumber`
   - Default value: `{{txn#rowNumber}}`

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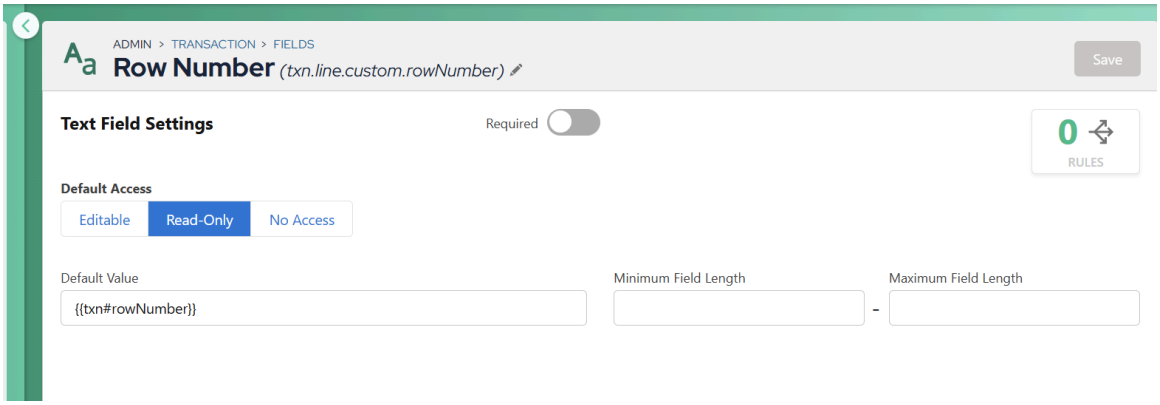
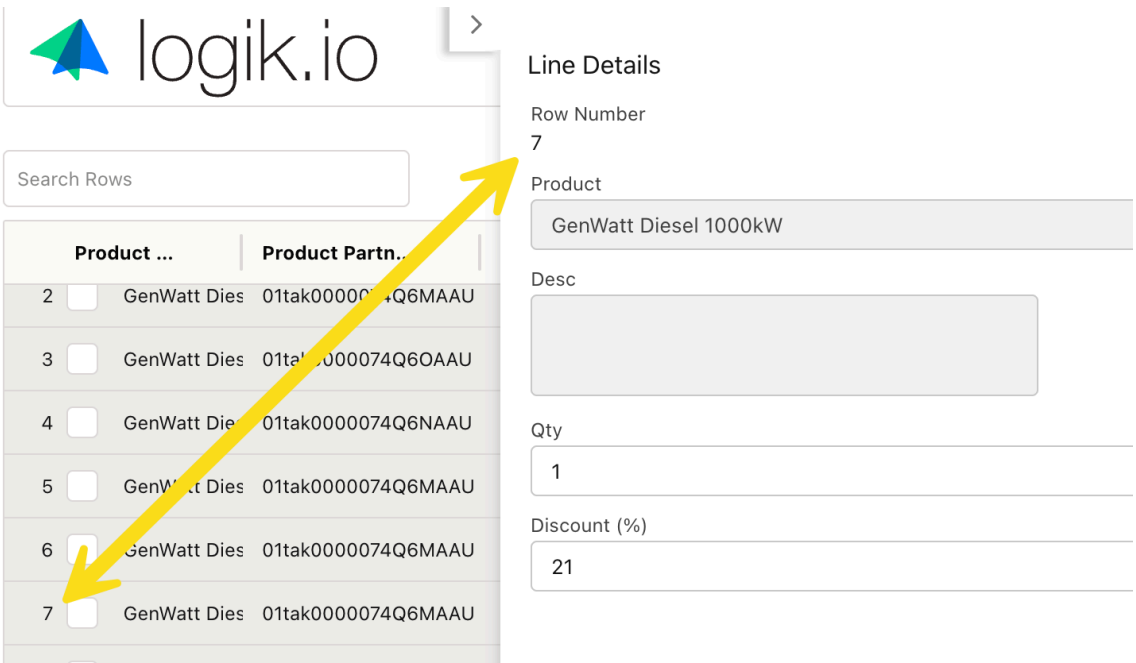


2. Add the new field to your line detail layout to make it visible when viewing line items.

   Ensure that the field has the setting `"enableMarkdown": true`. Additionally, to display the row number on the LIG line, add the `"showLineNumbers": true` property to the `lineGrid` layout object in the non-line detail layout (or layouts).

3. Save and deploy the updated blueprint with the modified layouts.
4. In the Transaction UI, create a new transaction or open an existing one.

   The line number appears in the line detail view, as in the following example:



Transaction Manager use case: Document generation with Google Docs

Generate documents from Transaction Manager by using Google Docs and Google Apps Script.

To generate a document from Transaction Manager, Google Docs combined with Google Apps Script provides an efficient and straightforward solution. By creating custom APIs using Apps Script, you can easily receive GET and POST requests from a direct URL. This eliminates the need for middleware, streamlining integration with services like CPQ or Transaction Manager.

You can trigger document generation by either of these methods:

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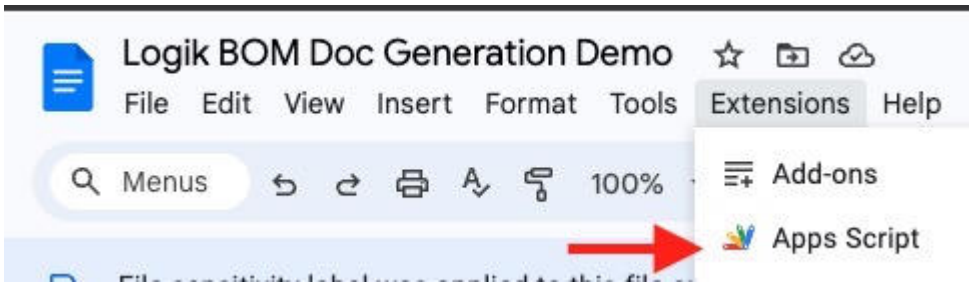
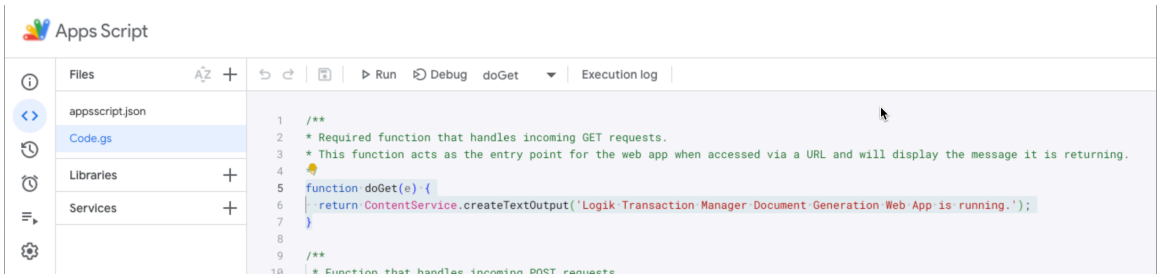
- CPQ Webhook: Automatically send POST requests to initiate document creation.
- Transaction Manager: Use this for managing and automating processes.

Setting up a Google doc to pull CPQ data

To access the developer window, open the Google doc where you want to integrate the script. In the menu bar, go to Extensions > Apps Script to open the development environment.

You can write custom JavaScript to process data and interact with Google Docs by using the Apps Script editor.





Coding

Google Apps Script includes GET and POST requests.

- GET requests (`doGet`) respond with a simple text output, useful for verifying that the web app is running.
- POST requests (`doPost`) handle incoming data (usually JSON), generates the document based on the template, and returns a link to the newly created document.

This video explains how the `doGet` and `doPost` work in a Google Doc app script.

When using Transaction Manager, you need to transform the JSON to send over to Google Docs. Below is an example template. If you are using a webhook, see Webhooks for how the data will be sent over to Google Docs.

The following code block shows an example Transform Template, sent as a POST to the doPost function.

```
{
  "transaction": {
    "uuid": "{{txn.uuid}}",
    "term": {{txn.term}},
    "stage": "{{txn.stage}}",
    "status": "{{txn.status}}",
    "account": "{{txn.account}}",
    "endDate": "{{txn.endDate}}",
    "netTotal": {{txn.netTotal}},
```

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```
    "termUnit": "{{txn.termUnit}}",
    "createdBy": "{{txn.createdBy}}",
    "quoteName": "{{txn.quoteName}}",
    "startDate": "{{txn.startDate}}",
    "accountName": "{{txn.accountName}}",
    "createdDate": "{{txn.createdDate}}",
    "opportunity": "{{txn.opportunity}}",
    "paymentTerm": "{{txn.paymentTerm}}",
    "quoteNumber": "{{txn.quoteNumber}}",
    "contractTerm": {{txn.contractTerm}},
    "contractType": "{{txn.contractType}}",
    "currencyCode": "{{txn.currencyCode}}",
    "estTaxAmount": {{txn.estTaxAmount}},
    "modifiedDate": "{{txn.modifiedDate}}",
    "billToAddress": "{{txn.billToAddress}}",
    "hardwareTotal": {{txn.hardwareTotal}},
    "servicesTotal": {{txn.servicesTotal}},
    "shipToAddress": "{{txn.shipToAddress}}",
    "softwareTotal": {{txn.softwareTotal}},
    "discountAmount": {{txn.discountAmount}},
    "expirationDate": "{{txn.expirationDate}}",
    "lastModifiedBy": "{{txn.lastModifiedBy}}",
    "primaryContact": "{{txn.primaryContact}}",
    "customerSegment": "{{txn.customerSegment}}",
    "discountPercent": {{txn.discountPercent}},
    "transactionType": "{{txn.transactionType}}",
    "estTaxPercentage": {{txn.estTaxPercentage}},
    "agreementDiscount": {{txn.agreementDiscount}},
    "taxEntityLocation": "{{txn.taxEntityLocation}}",
    "transactionNumber": {{txn.transactionNumber}},
    "totalPriceEstimate": {{txn.totalPriceEstimate}},
    "overallDealDiscount": {{txn.overallDealDiscount}},
    "annualTransactionBands": "{{txn.annualTransactionBands}}",
    "annualTransactionCount": {{txn.annualTransactionCount}},
    "accountSpecificDiscount": {{txn.accountSpecificDiscount}}
  },
  "lines": [
  {{#each lines}}
    {
      "uuid": "{{txn.line.uuid}}",
      "productInfo": {
        "productId": "{{txn.line.productId}}",
        "productSku": "{{txn.line.productSku}}",
        "productCode": "{{txn.line.productCode}}",
        "productName": "{{txn.line.productName}}",
        "productType": "{{txn.line.productType}}",
        "productDescription": "{{txn.line.productDescription}}"
      },
      "pricing": {
        "netPrice": {{txn.line.netPrice}},
        "listPrice": {{txn.line.listPrice}},
        "discountAmount": {{txn.line.discountAmount}},
        "discountPercent": {{txn.line.discountPercent}},
        "netTotal": {{txn.line.netTotal}},
        "customerLineDiscount":
{{txn.line.customerLineDiscount}},
```

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```
        "agreementLineDiscount":
 {{txn.line.agreementLineDiscount}}
      },
      "dates": {
        "startDate": "{{txn.line.startDate}}",
        "endDate": "{{txn.line.endDate}}",
        "createdDate": "{{txn.line.createdDate}}",
        "modifiedDate": "{{txn.line.modifiedDate}}"
      },
      "quantity": {{txn.line.quantity}},
      "currencyCode": "{{txn.line.currencyCode}}",
      "configUUID": "{{txn.line.configUUID}}",
      "orderDetails": {
        "globalOrder": {{txn.line.globalOrder}},
        "orderNumber": {{txn.line.orderNumber}},
        "transactionLineNumber":
 {{txn.line.transactionLineNumber}}
      },
      "termDetails": {
        "term": {{txn.line.term}},
        "termUnit": "{{txn.line.termUnit}}",
        "termMultiplier": {{txn.line.termMultiplier}}
      },
      "approvals": "{{txn.line.approvals3}}",
      "lastModifiedBy": "{{txn.line.lastModifiedBy}}"
    }
    {{#unless @last}},{{/unless}}
  {{/each}}
  ]
}
```

If you do not set the `doGet` function and try to access the URL you will receive an error. If not using the `doGet` for other purposes, it is best to always set it to the following and just modify the text.

```
function doGet(e) {
  return ContentService.createTextOutput('Logik Transaction
 Manager Document Generation Web App is running.');
}
```

When you access the live URL, you receive this message:

```
Logik Transaction Manager Document Generation Web App is running.
```

The `doPost` is important, because it will probably handle the Webhook or Integration payloads being sent from CPQ via POST requests.

Next, we create a function to generate a Google Doc using the `doPost` function.

In your Google Apps script, the `doPost` function will receive a POST request containing data (in JSON format) that you want to populate into a Google Doc template. The main logic for interacting with the Google Doc (i.e., replacing placeholders like `{{EXAMPLE}}` with actual values) will be placed in a separate function that is called from `doPost`.

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To set up the `doPost` function, define the `doPost` function to handle incoming POST requests and call your custom document generation function. Below is an example of how to structure it.

```
function doPost(e) {
  // Parse the JSON data from the POST request
  const postData = JSON.parse(e.postData.contents);

  // Call the function to create and populate the Google Doc
  const docLink = createGoogleDocFromTemplate(postData);

  // Return the public link to the generated document in the
 response
  return ContentService.createTextOutput(docLink);
}
```

In this code:

- The `postData` object contains the parsed data sent in the POST request.
- `createGoogleDocFromTemplate(postData)` is the function you will define to handle the Google Docs generation.
- The `docLink` is the public link to the generated Google Doc, returned to the caller.

Next, create the document generation function. The `createGoogleDocFromTemplate` function will:

1. make a copy of a Google Doc template.
2. replace placeholders (e.g., `{{EXAMPLE}}`) in the document with the corresponding data.
3. return a public link to the generated document.

The following code block shows an example `createGoogleDocFromTemplate` function:

```
function createGoogleDocFromTemplate(data) {
  // Specify the ID of the Google Doc template
  var templateId = 'YOUR_TEMPLATE_DOC_ID_HERE';
  // Make a copy of the template
  var templateDoc = DriveApp.getFileById(templateId).makeCopy();
  var doc = DocumentApp.openById(templateDoc.getId());
  var body = doc.getBody();
  // Replace placeholders with actual data from the POST request
  body.replaceText('{{ACCOUNT_NAME}}',
 data.transaction.accountName);
  body.replaceText('{{QUOTE_NUMBER}}',
 data.transaction.quoteNumber);
  body.replaceText('{{USER}}', data.transaction.createdBy);
  // Continue to replace all other placeholders...
  // Save and close the document
  doc.saveAndClose();
  // Make the document public (optional, based on your needs)
  templateDoc.setSharing(DriveApp.Access.ANYONE,
 DriveApp.Permission.VIEW);
  // Return the public link to the newly created document
  return templateDoc.getUrl();
}
```

In this function:

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- The templateId variable stores the Google Doc template's ID. You should replace `'YOUR_TEMPLATE_DOC_ID_HERE'` with the actual ID of your template.
- `makeCopy()` creates a copy of the template.
- `replaceText('{{EXAMPLE}}', data.key)` replaces each placeholder in the document with actual data from the incoming POST request. For example, `{{ACCOUNT_NAME}}` is replaced by `data.transaction.accountName`.
- The document is made public with `setSharing()`, but you can adjust the sharing settings as needed.

Logging

Google Apps Script offers built-in logging via Logger.log() for debugging, but better logging is available in Google Cloud Logs. To access logs:

Go to > **View** > **Executions** to check outputs from your script. Then, connect your project to the Google Cloud Platform to view the logs.

In the Google Cloud Logs Explorer, apply the filter `resource.type="app_script_function"` to view logs related to your app.

Deploying

- Click the "Deploy" button in the top right corner of the Apps Script editor.
- Select "Deploy as web app."
- Set the project version (you can create a new one).
- Define who can access the app:

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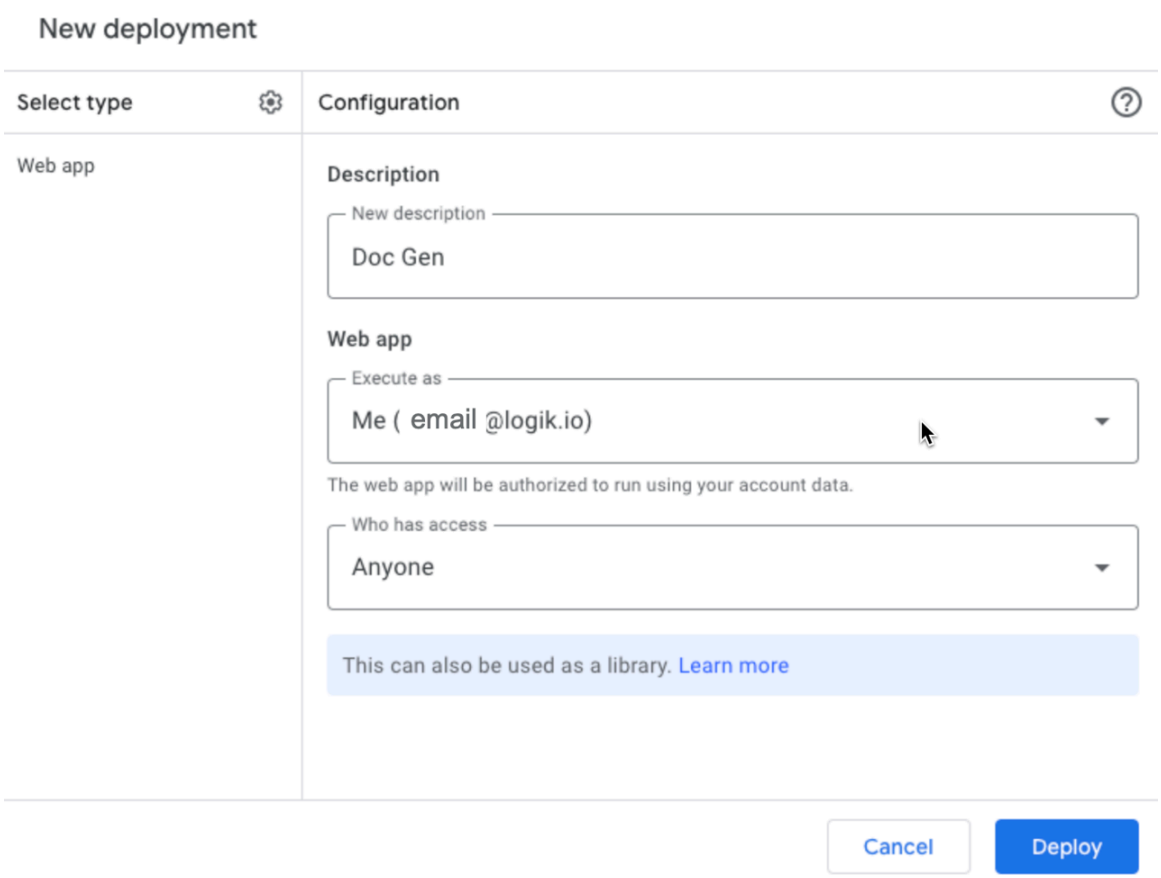
- Execute as: This should be set to Me, so the script runs with your permissions.
- Who has access: Choose “Anyone” (public).



Once deployed, you’ll get a URL ending in `/exec` for live usage and `/dev` for testing. This is the URL that users will target to trigger the `doGet` function or send POST requests to trigger `doPost`.

In the following examples, the ellipsis (...) represents the unique App Script number for your script.

- Live: `https://script.google.com/macros/s/.../exec`
- Dev: `https://script.google.com/macros/s/.../dev`

If you want to test your changes before pushing them live, use the Dev URL to test your script with real data.

Every time you redeploy, you need to create a new version of your script. Follow these steps:

1. In the Google Apps Script editor, click the **Deploy** button in the top right.
2. Select **Manage deployments** from the menu.
3. In the Deployments window, click **Edit** on the existing deployment, or create a new deployment.
4. Click **Select Version**, and then click **New version**.

In the pop-up window, you can give your version a name or description. This is optional, but helpful for tracking changes. Click **Save** to create the new version.

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To view or manage your current deployments:

1. In the Google Apps Script editor, click the **Deploy**.
2. Select **Manage deployments**. Here you'll see all active versions of your script.
3. You can edit, delete, or redeploy any version by clicking the three-dot menu next to the version.

- Edit: Update an existing deployment to point to a new version.
- Delete: Remove the deployment entirely (Note: the live link will stop working if the deployment is deleted).

If needed, you can roll back to an older version of your web app:

1. Go to **Deploy > Manage deployments**.
2. Find the previous version you want to return to and click **Edit**.
3. Select the earlier version from the Select Version menu.
4. Click `Deploy` to activate the previous version.

This provides an easy way to revert any issues that may arise with newer versions.

Order management

The Order Management application streamlines the order life cycle from capture to fulfillment. It automates decomposition, enrichment, and orchestration workflows, empowering users to accelerate delivery, reduce fallouts, and manage complex orders efficiently through a unified workspace and customer portal.

Order Management overview

Automate and streamline the complex process of capturing and fulfilling customer orders with Order Management, a central hub that connects sales, operations, and technical teams.

- Order decomposition: Automatically break down a single, complex customer order into smaller, manageable tasks using predefine product catalogs and decomposition rules.
- Pricing capabilities: Ensure accurate billing with dynamic price lists, pricing matrices, and adjustment features.
- Order enrichment: Add necessary data to orders post-capture before they're decomposed.
- Single source of truth: Establish a unified source for all order data, eliminating silos and ensuring real-time consistency for all stakeholders.
- Jeopardy and fallout management: Proactively flag at risk orders and automate the handling of fulfillment errors to manage issues effectively.

With Telecommunications Service Management (TSM) or Technology Provider Service Management (TPSM) subscriptions, you can use workflows that help you manage your industry-specific products and services.

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Order Management users

Users

User	Description
Customer	Accesses the Business Portal to browse catalogs, place and track orders, raise issues or request changes to orders, or work offline with agents to place orders or request services.
Order agent	Engages with customers and helps them place orders.
Order fulfillment agent	Monitors the fulfillment process and updates fulfillment tasks such as receiving, reviewing, and processing orders.
Order manager	Manages customer and service orders.
Order approver	Approves customer orders and ensures order accuracy.
Order fulfillment manager	Manages order fulfillment tasks, reviews and approves orders.
Order fallout agent	Investigates and diagnoses order fallout issues, eliminates order processing errors, and unblocks blocked orders.
Order fallout manager	Oversees order fallout agent and monitors fallout tasks to ensure that order fallouts are being addressed.
Process admin	Manages automated Order Management workflows such as order enrichment, order decomposition, jeopardy management, and so

1. Process admins create order enrichment flows, decomposition rules, order orchestration plans, and order fallout logic using Workflow Studio and decision tables. Optionally, they also install and configure Jeopardy Management.
2. Order agent initiates the order life cycle by capturing an order in Order Management.
3. The fulfillment agent captures additional technical information essential to fulfillment.
4. The fulfillment manager reviews the order for accuracy and approves the order.
5. The system creates domain orders (product, service, and resource orders) based on the specification relationships set in the product catalog and decomposition rules. If some of the information isn't available when order decomposition starts, Order Management can stagger the decomposition to create certain orders using the information available at the time. Order tasks and work orders are created and assigned to the fulfillment based on the orchestration logic.
6. Using the order timeline view and orchestration UI, the fulfillment manager monitors the order status, fallouts, and jeopardy scenarios.
7. The fulfillment agents fulfill the order. This could involving installing products at customer sites or provisioning services.
8. After all order tasks are complete and order is closed, the product inventory records are created, which can be used to cater to future customer requests like disconnecting, suspending, or resuming products or services. The system also creates contracts and entitlements against the sold products and services respectively.

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Order Management benefits

Order Management benefits

Benefit	Feature	Users
Create and implement enrichment flows that the system applies during order orchestration.	Configure order enrichment flows using Decision Tables	Process admin
Configure jeopardy management rules to monitor fulfillment tasks ans alert managers when tasks are at risk.	Configuring Jeopardy Management	Fulfillment managers
Detect errors or exceptions during order processing and take corrective actions to improve SLA compliance and expedite order processing.	Managing order fallout	Fallout agent
Create and track orders via the workspace, or import orders from third-party systems.	Methods of creating orders in Sales Customer Relationship Management	Order agents
Speed up fulfillment with orchestration workflows driven by an advanced product catalog using the order orchestration UI.	Using the order orchestration UI	Fulfillment agents, fulfillment managers
Track orders, prioritize tasks, and allocate resources using Gantt charts to see order status and risks.	View an order timeline	Fulfillment agents, fulfillment managers
Boost productivity and reduce manual tasks for changes to confirmed orders.	Managing inflight order changes and cancellation requests	Order agents, order managers
Drive flexibility and efficiency of complex order orchestration by processing domain orders when the required information becomes available.	Staggered decomposition	Fulfillment agents
Enable post-sale support and drive customer satisfaction by effectively managing customers requests for disconnecting, suspending, or resuming products or services.	Managing post-fulfillment order changes	Order agents

Related links

To learn more about configuring and using Order Management, see:

- Configuring Order Management
- Using Order Management
- Extending Order Management with ServiceNow applications and integrations
- Order Management reference
- Now Assist for Sales Force Automation (SFA)

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Jeopardy Management

Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

Overview of Jeopardy Management

Jeopardy Management consists of multiple components in the Order Management application that work together to monitor and report on task completion time in a fulfillment plan.

If a task is taking longer than expected, the system assesses the percentage of delay and assigns a risk level.

In Order Management, some customer orders are expected to be fulfilled in a committed time frame. The time commitment may be part of a contract that the customer and customer service provider (CSP) have signed to ensure delivery and assurance of products and services. To fulfill an order in the target date and time, a CSP depends on order management systems to monitor the fulfillment progress. Jeopardy Management proactively identities any delays and shares alerts, which can be addressed by fulfillment managers.

Jeopardy Management provides proactive risk management for the order fulfillment process through the following steps:

1. Monitor order fulfillment progress.
2. Predict jeopardy and risk for domain orders and order tasks.
3. Make jeopardy information available to users.
4. Fulfillment managers resolve tasks in jeopardy.

How Jeopardy Management works

Jeopardy Management works by tracking tasks in an order fulfillment process. Order task relationships are created and task durations are set. Planned tasks are set in the Draft state and have a start time and an end time. As an order task is being fulfilled, any delays in the task's assigned amount of time triggers a jeopardy alert.

Jeopardy Management uses the following components to monitor and manage risk in order fulfillment:

Define subflows and decision tables

- Define subflows that create order tasks upfront and define task relationships.
- Configure jeopardy policy decision tables.

Monitor order fulfillment progress

- Define and launch SLA for order tasks.
- Monitor fulfillment progress and closure of domain orders and order tasks.

Predict jeopardy and risk

- Leverage planned task date fields and date roll-up logic to produce timelines for order task fulfillment progression.
- Monitor the progress of each order task and produce jeopardy information.
- Roll up jeopardy date changes for all order entities.

Share jeopardy information

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Use the order forms, list, and orchestration UI forms to show jeopardy details for orders, domain orders, and order tasks to prioritize tasks to take action.

Resolve tasks in jeopardy

Based on jeopardy condition, customers can implement notifications or other logic as required based on the jeopardy level flag on each entity jeopardy.

Jeopardy Management alert levels

In Jeopardy Management, the fulfillment manager can set different levels of alerts for each task. As the system monitors task duration, any delay triggers adjustments to the jeopardy level of predecessor and successor tasks in the fulfillment plan.

The following table compares how Jeopardy Management assesses risk levels across tasks in a fulfillment workflow for three scenarios: expected, on-time, and delayed.

Scenario	Product order	Task A	Task B	Task C	Task D
Expected	Duration: 48 hours	12 hours	12 hours	12 hours	12 hours
Scenario 1: On-time	Duration: 34 hours	10 hours	10 hours	8 hours	6 hours
Scenario 2: Delayed	Duration: uncertain	10 hours	18 hours (in jeopardy, task delayed)	Uncertain fulfillment time	Uncertain fulfillment time

The following table shows how Jeopardy Management assesses risk levels for tasks in a fulfillment workflow and the impact on the successor tasks.

Scenario	Task status	Risk level	Impact on successor tasks
Task completed within the expected time	On time	None	No adjustment to successor task risk levels
Task slightly delayed but within the acceptable threshold	At risk	Low	Successor tasks flagged as low risk
Task significantly delayed, exceeding the acceptable threshold	Delayed	High	Successor tasks escalated to high risk; jeopardy alert triggered

Jeopardy Management assesses all tasks in a workflow and adjusts the risk level for tasks that occur later in the workflow. In the delayed scenario, a delay in Task B causes the fulfillment time for all successor tasks to become uncertain, and the product order duration can no longer be determined.

Related links

For information on configuring and using Jeopardy Management, see:

- Configuring Jeopardy Management
- Monitoring order jeopardy

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Order operations

Explore tools that help manage exceptions, returns, and process visibility across the order life cycle.

Get started

Select a link from the following table to explore tools that support exception handling, returns, process visibility, and sales operations across the lead-to-cash life cycle.

Order operations applications

Application	Description
Order Operations Case Management	Capture and manage order exceptions.
Case Lines and Workflows	Track and manage multiple related issues in a single case.
Case Management for Invoice Operations	Capture and manage invoice exceptions.
Lead-to-Cash Process Management	Create dashboards using consolidated sales data across ERP and ServiceNow systems to gain visibility into the full sales process.
Return Merchandise Authorization	Manage return, replacement, or refund cases for installed products.

Related links

Configure the order operations applications, so your agents and customers can use them in their sales workflows. For more information, see Configuring the order operations applications.

Related topics

- Using order operations applications
- Order operations reference

Lead-to-Cash Process Management

The ServiceNow® Lead-to-Cash Process Management application empowers sales teams by providing a consolidated view of all critical sales data and activities.

Lead-to-Cash Process Management overview

Lead-to-Cash Process Management is a centralized, real-time command center that aggregates information from various sources like Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) platforms into a dynamic dashboard.

Lead-to-Cash Process Management users

Users

User	Description
Sales admin	Define and create the sales process and relationships between the sales entities to be monitored using Lead-to-Cash Process Management.

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Users (continued)

User	Description
Contract admin	
Sales process manager	Create sales process records for an account and monitor, manage, and follow-up on tasks.

Lead-to-Cash Process Management workflow

The following illustration describes the tasks involved in configuring and using Lead-to-Cash Process Management to monitor the end-to-end sales process from a single interface.

Lead-to-Cash Process Management workflow

1. Sales admins create a business object group in the Next Experience UI, is a logical entity that defines your business process and the entities involved. For example, order-to-cash.
2. Create business entities (business object type) you want to monitor in your sales process and define relationships between them.
3. Add the business entities as members of the business object group.
4. The sales process manager creates sales process records in the CSM Configurable Workspace.
5. Sales process managers create sales process records for monitoring a customer account. A dashboard is created that contains the hierarchical node map view of the opportunities, quotes, orders, and other related entities.
6. Manage tasks, status, documents, and emails related to the business entities, and follow up with respective teams to expedite the process.
7. Track other tasks at the sales process record level by creating business process records.

Lead-to-Cash Process Management benefits

Lead-to-Cash Process Management benefits

Benefit	Feature	Users
Create a hierarchical relationship between sales entities using built-in or custom business	Create business objects and set up	Sales admin

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Lead-to-Cash Process Management benefits (continued)

Benefit	Feature	Users
objects that mirror your organization's structure and strategic goals.	relationships between the entities	
Customize the number of levels and tile content on the node map, enhancing clarity and control so that the sales process managers can focus on relevant data and navigate through complex sales processes effectively.	Customize the sales process dashboard	Sales admin
Select parent entities (such as Opportunity, Quote, or Order) and child entities (such as Quote lines or Order lines) to create a customized view of the sales life cycle that reflects the structure and needs of each account. This capability helps you track only relevant records, reducing noise and improving focus.	Create account-specific sales process records	Sales process manager
Gain end-to-end visibility of the defined sales process through a consolidated view that provides a real-time snapshot of opportunities, quotes, orders, and related entities. The ability to see an entity's details eliminates the need to toggle between systems.	Consolidated view and nodal hierarchy for monitoring a sales process	Sales process manager
Adjust which entities are actively tracked by linking and delinking records or changing how records are linked to focus on relevant sales activities.	Link and delink records	Sales process manager
Streamline communication, task management, and documentation, which accelerates decision-making and improves cross-functional alignment and collaboration without having to leave the workspace.	View consolidated emails and tasks, create checklists and attachments, and use integrated chat	Sales process manager

Related links

The following topics provide more information about configuring and using Lead-to-Cash Process Management:

- Configuring Lead-to-Cash Process Management
- Using Lead-to-Cash Process Management
- Lead-to-Cash Process Management reference

Return Merchandise Authorization

Return Merchandise Authorization (RMA) enables the return, replacement, and repair for install base items. It offers simplified processes, decreased turnaround time, and a unified workflow.

The RMA Case Management application includes the RMA case type. This case type provides the ability to reference multiple install base items as case line items on an RMA case record.

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Using case line items, multiple issues can be tracked for the same RMA case. Also, the issues can be resolved in each case line item independently before resolving and closing the RMA case.

Related links

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

Related topics

Activate the Return Merchandise Authorization plugin

Return Merchandise Authorization Case Management

Return Merchandise Authorization case end-to-end workflow

The Return Merchandise Authorization (RMA) end-to-end process is structured into a four-stage playbook that provides structured guidance and oversight throughout each phase. The RMA case workflow initiates when a customer logs an issue for their products.

The following are the different phase involved in RMA case end-to-end workflow.

Initiate case

- Agent action: Navigate to the RMA Case list and select **New** to open the RMA Case form.
- System action:
  - The playbook record generator renders the RMA Case form.
  - And once the RMA Case form is rendered, Agent fills the customer details and **Request Source** fields, and select **Save**.
  - The system creates the RMA Case in the Draft State.
- Agent action: Add defective install base items as RMA Case Lines.
- System action: Create RMA Case Lines for each selected item.
- Agent action: Update each line with request reason code and customer-expected resolution, then submit.

Review case

Agent action:

- Assign the case to an agent, moving it to Work In Progress (WIP).
- Perform warranty and entitlement checks for each case line.
- Update proposed resolution sales return cases.

Resolve case

Agent action:

- Create tasks for support teams if needed.
- Place case lines in the Awaiting Info state if more information is required.
- Communicate with the customer as needed.
- Update resolution codes and state for all case lines once resolved.

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Close case

Agent action:

- Put the RMA case in Resolved state and formally close the case after all lines are resolved.
- Send a final communication to the customer confirming the closure.

Related links

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

Related topics

Return Merchandise Authorization case user journey

Return Merchandise Authorization case user journey

The Return Merchandise Authorization (RMA) user journey describes the steps a customer and support agent take when handling a sales return cases.

The RMA user journey starts when a customer reports an issue. The agent then manages the request through a clear four-stage process:

1. Initiate the case
2. Review the details and entitlements
3. Resolve the issue
4. Close the case

This approach confirms that every request is handled smoothly, with clear communication and a focus on effective resolution.

Steps involved in the RMA case user journey

Steps	User	Action	System response
1	Customer	Identifies product issue and contacts customer support.	Support request is logged. Customer is guided to provide product and issue details.
2	Agent	Receives request and navigates to the RMA Case list.	Agent selects New to initiate RMA Case creation.
3	Agent	Fills in customer or account details and request source in the RMA Case form.	System renders the form and creates the RMA Case in Draft state.
4	Agent	Adds defective products as RMA Case Lines by selecting from customer's install base items.	System creates RMA Case Lines for each selected item.
5	Agent	Updates each case line with request reason code (such as defective, damaged) and customer expected resolution.	System saves details. Agent submits the case for processing.
6	Agent	Assigns the case to self (or another agent) to begin processing.	RMA Case and lines move to Work In Progress state.

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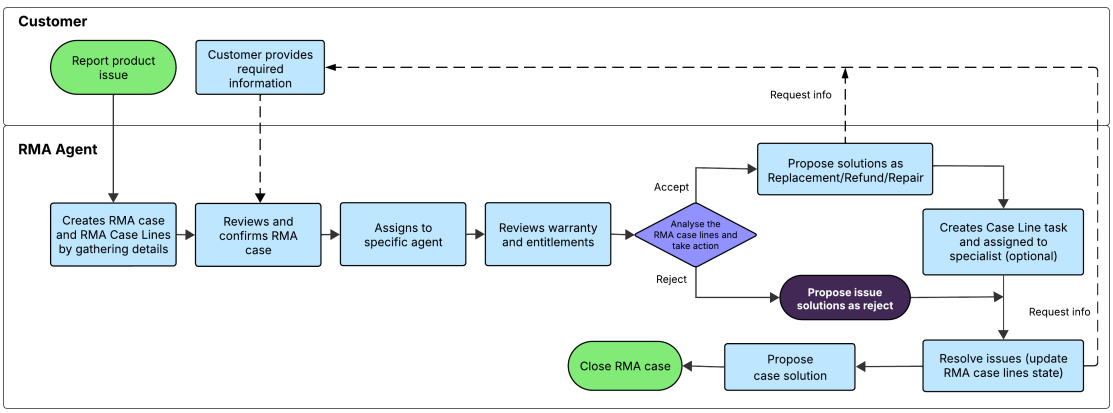
Steps involved in the RMA case user journey (continued)

Steps	User	Action	System response
7	Agent	Reviews warranty and entitlements for each case line.	System displays entitlement status and enables agent to add entitlements as needed.
8	Agent	Decision: Accept or Reject RMA Case?	If accepted, proceed to next step. If rejected, agent notifies customer and closes the case.
9	Agent	(If accepted) Proposed solution and updates repair type.	System records proposed resolution.
10	Customer	Reviews proposed solution and provided feedback (accepts or requests clarification).	System logs customer response.
11	Agent	If additional work is required, create task for specialist.	System assigns task and tracks progress for each case line.
12	Agent	Updates case line and overall case status as tasks are completed and customer feedback is received.	System transitions case through Resolved and Closed states as appropriate.
13	Agent	Communicates final resolution to customer and formally closes the case.	System archives the case and all related records.

RMA case user journey



Related links

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

Related topics

Return Merchandise Authorization case end-to-end workflow

Post-sales engagement

ServiceNow® post-sales engagement applications support adoption and post-sales workflows.

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Get started

Select a link from the following table to learn about key features and benefits of an application and how it can be used for post-sales workflows.

Post-sales engagement applications

Application	Description
Customer Life Cycle Management Workflows	Manage the life cycle of your sold products.

Related links

Configure the post-sales engagement applications to enable post-sales workflows. For more information, see Post-sales engagement.

Related topics

Using post-sales engagement applications

Partner Relationship Management

Learn how the Partner Relationship Management application enables enterprises to hire and engage channel partners to sell their products and services to grow and improve their business.

Overview of Partner Relationship Management

Channel partners streamline and help manage the sales process of a product or a service for an enterprise. The PRM solution offers tools to manage the end-to-end partner life cycle.

PRM enables an efficient and continuous partner engagement and collaboration system with the enterprise to provide essential support. The PRM system enables partner onboarding, life cycle management, and improves the overall collaboration between channel partners and enterprises. To learn how to configure Partner Relationship Management, see Configure Partner Relationship Management.

The collaboration improves case management solutions and enables partners to log in to the Partner Portal to raise concerns or queries and communicate directly with the enterprise. This provides better resolutions leading to improved enterprise and partner collaboration.

In the partner ecosystem, channel partners such as resellers and system integrators are critical to expanding an enterprise's reach and drive customer success. Channel partners often must raise operations, sales, and service related issues directly with the enterprise. However, without a structured servicing and collaboration system, partners experience delays, inefficiencies, and friction that impact both partner satisfaction and business outcomes. The PRM solution can build a bridge between the channel partners and enterprises.

Use case

ABC systems, a global technology reseller and implementation channel partner for XYZ solutions (enterprise), operates across North America with hundreds of active customer engagements. ABC's consulting and delivery teams frequently encounter challenges requiring direct support from XYZ, such as clarification on licensing models or product configurations. With the Partner Relationship Management solution, ABC no longer needs to rely on adhoc emails, informal escalation channels, or multiple sessions leading to delays.

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With the Partner Relationship Management solution, the channel partner ABC can do the following.

- Submit and manage support cases through the Partner portal designed for easy access and case tracking.
- Benefit from a role-based experience where channel partner managers and associates can independently raise cases and monitor the status without dependency on enterprise contacts.
- Gain visibility into program participation and support activities through personalized dashboards.
- Use the unified partner data model to confirm that entitlements and participation in XYZ's partner programs are accurately tracked and easily accessible.

With the Partner Relationship Management solution, the enterprise XYZ can do the following.

- View and fulfill cases raised by the channel partner ABC in a centralized workspace.
- Route assignments to the appropriate support agents.
- Track channel partner engagement levels within ABC via real-time dashboards.

By streamlining support and collaboration through PRM, ABC reduces its resolution time, improves internal efficiency, and strengthens its partnership with XYZ.

Key benefits of PRM

The Partner Relationship Management solution offers the following benefits.

- Enhances partner experience- Support partner onboarding and life cycle management to provide an improved interaction system between channel partners and enterprises. This increases partner satisfaction and reduces onboarding time.
- Increase sales and revenue- Streamline and improve collaboration between enterprises and their partners to increase partner sales and performance to enable higher partner-initiated revenue and efficient deal conversion rates.
- Increase operational efficiency- Provide visibility into the partner ecosystem and enable partners to achieve their business goal to decrease manual intervention and increase partner self-service.

Partner Portal

The Partner portal enables channel partners to create cases, register external members as staff, and view knowledge articles.

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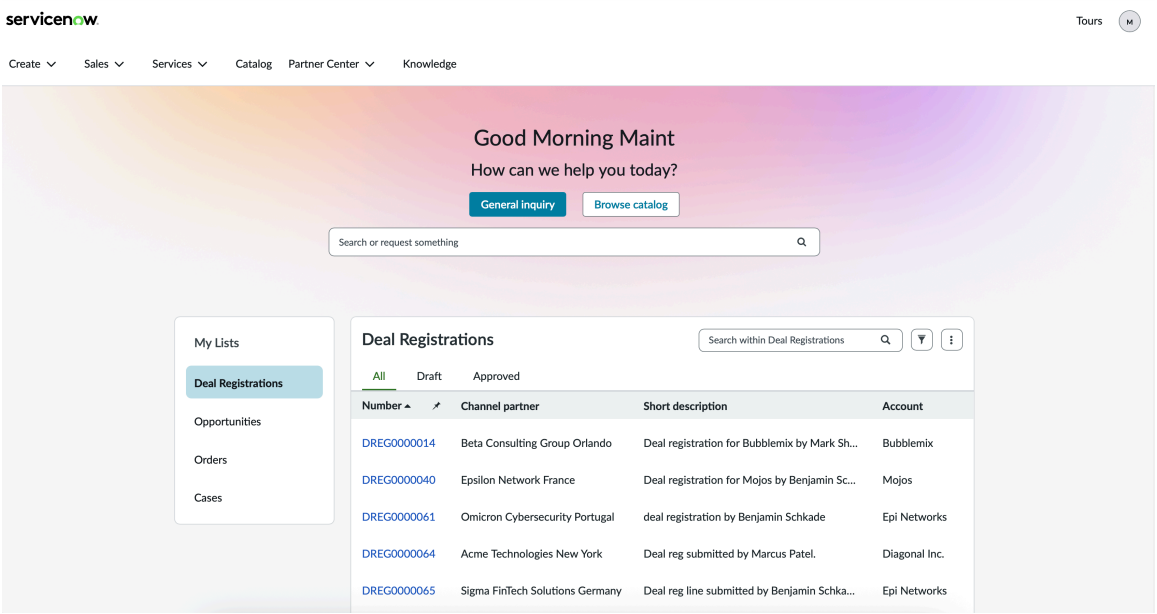
To learn more about the Partner portal, see Using Partner Relationship Management.



Related links

- Configure Partner Relationship Management
- Using Partner Relationship Management

Related topics

Configure Partner Relationship Management

Using Partner Relationship Management

Partner Relationship Management reference

Segment Management

Group entities effectively based on value, performance, or relevance using the Segment Management application (com.snc.segment_mgmt) to make sure that all customers or entities are treated equally.

Define segments and set specific criteria levels to limit the ability to differentiate support levels, incentives, or even visibility. Segmentation enables organizations to engage entities effectively and offer incentives based on the criteria mapped for each segment.

Create and manage various segments to enable structured customer groupings. You can assign different segment structures to different programs and define criteria to drive consistent customer progression.

Related links

- Configure Segment Management

Related topics

Configure Segment Management

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Lead-to-cash foundation

Lead-to-cash foundation applications enable you to manage the end-to-end commercial life cycle from product setup to core transaction flows.

Get started

Select a link from the following table to explore key capabilities that streamline your product setup, pricing strategy, and core lead-to-cash operations.

Lead-to-cash applications

Application	Description
Product Catalog Management	Organize and maintain a unified catalog of products and services.
Pricing Management	Manage price lists, discounts, and rules to support dynamic and region-specific pricing.
Lead to Cash Core	Enable seamless integration of lead generation, quoting, order management, and fulfillment.

Related links

Configure the lead-to-cash foundation applications to enable core capabilities for using Sales Customer Relationship Management. For more information, see Configuring the lead-to-cash foundation applications.

Related topics

Using lead-to-cash foundation applications

Lead-to-cash foundation reference

Product Catalog Management

Product Catalog Management enables your organization to manage your product offerings by grouping them into catalogs and categories, which streamlines the ordering process and helps manage leads, opportunities, quotes, and orders in Sales Customer Relationship Management.

Product Catalog Management provides various features to implement product catalogs and categories in your organization.

- Product catalog user interface: Launch from anywhere in lead, opportunity, quote, and order capture workflows, enabling agents to browse and find products quickly with a full catalog search function.
- Catalog category hierarchy: Use hierarchical structures of catalogs and categories to organize products and services logically.
- Version control: Track changes made to product information over time, helping with transparency and auditability.
- Product offer eligibility: Filter your product catalogs, product offering categories, and product offerings so that agents sell customers only the products for which they're eligible.

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Note: Check your entitlements to determine if you have access to these features. Also, starting with the Yokohama release, customers can use the Business Portal with Order Management to create orders using the product catalog and product configurator. For more information on this self-service portal, see Using the Business Portal.

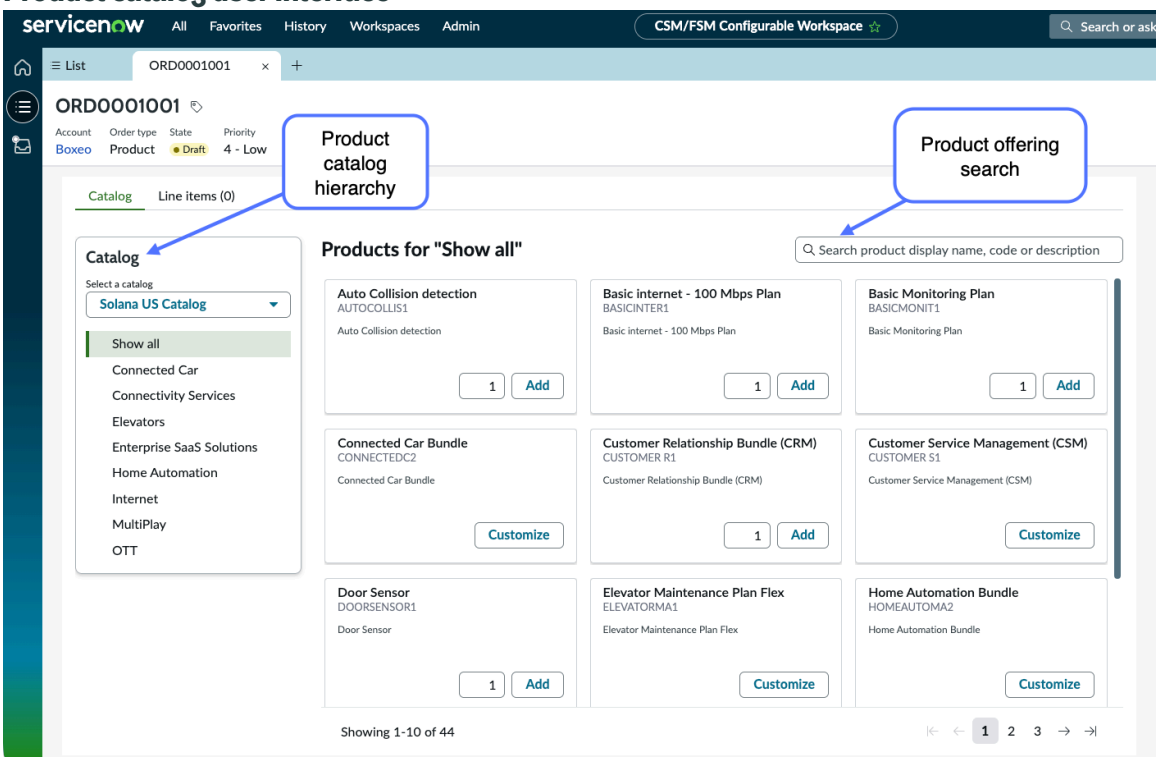
To learn more about setting up product offering catalogs, see Configuring product offerings and catalogs.

Product catalog UI

The product offering catalog enables agents to do the following:

- Browse and search product offerings by using keywords, descriptions, and industry codes.
- Review product offers that are organized by catalog category hierarchy, which streamlines catalog navigation.

Product catalog user interface



Product offering catalogs and categories

Product offering catalogs and categories offer a way to organize product offerings so that agents can easily find products to create orders.

- Product offering catalog: Hierarchical product offering structures of categories and product offerings.
- Product offering categories: Categories are a logical grouping of product offerings.
- Product offerings: Physical goods or non-tangible services that are configurable.
- Characteristic and Characteristic options: Product options that are created based on customer preferences.

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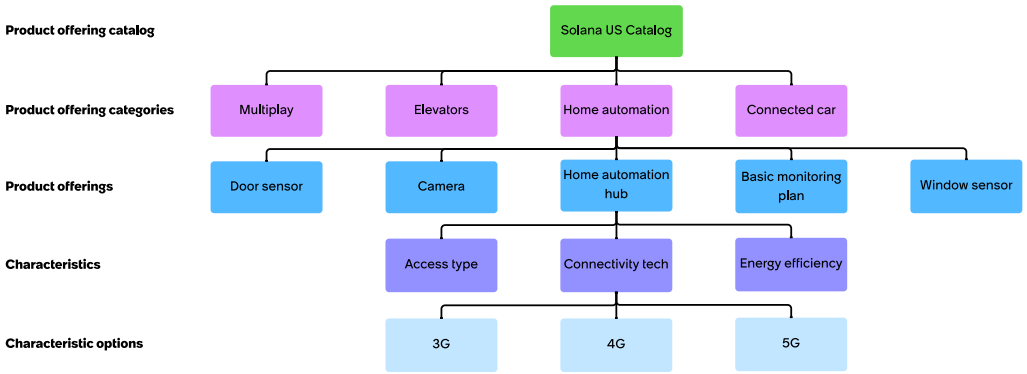
Example catalog hierarchy with categories and product offerings



Product offering families

A product family is a collection of product offerings that share similar or common features. You can use a product family to create a hierarchical classification of product offerings, like a category tree. A product family can have parent-child relationships, where each node in the family tree can have a parent, forming a multi-level hierarchy. This structure allows you to apply attributes, business rules, and product updates to a product family, rather than change products individually. After you create product families, you can assign a product family to a product offering. To learn more, see Create a product offering family.

Product offer bundling

You can create product offer bundles with an offer hierarchy using product offer relationships and relationship groups. These bundle offers can have references to a product specification or specification hierarchy at any level in the bundle. For more information, see Product offer bundling with product specifications.

Product offer eligibility

As a product catalog admin or manager, you can use business rules to filter the product catalog, product offering categories, and product offerings dynamically, displaying only the appropriate catalog, categories, and offerings for which a customer is eligible. These rules enable your sales agents to sell the correct products to customers based on context, such as specific customer accounts, customer location, sales contracts, and more. You define these rules using product eligibility matrices. To learn more about using the product eligibility matrices, see Configuring product offer eligibility.

Product recommendations

In Sales Customer Relationship Management, different types of product recommendations are available to your sales agents. Your agents can get product recommendations as they're generating or updating leads and opportunities, or updating quotes.

- Product recommendations using needs analysis - When your sales agents are generating leads and opportunities, they can use product selection guides to help determine relevant products for their customers. For information on setting up needs analysis, including the product selection guides, see Configuring needs analysis. For details on how your agents can get product recommendations for leads and opportunities, see Get product recommendations for leads using needs analysis and Get product recommendations for opportunities using needs analysis.
- Product offering recommendations for quotes - When your sales agents are updating quotes, they can get product recommendations for upselling or cross-selling additional

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products for existing quote line items. For information on setting up these recommendations, see Configuring product offering recommendations. For details on how product offering recommendations work in quotes, see Using product offering recommendations in quotes.

Related links

- Configuring product offerings and catalogs

Lead to Cash Core

Create the Sales Customer Relationship Management workflows for a product and service through entity configurations and mappings. By creating this workflow, your organization can analyze lucrative business opportunities, customer leads, and the billing, support, and maintenance requirements after a sale is complete.

Workflows overview

A product goes through multiple phases and workflows from the time that a product is identified to the time that it's purchased by the customer. The workflow includes the creation of a quote for a product or services, the creation of orders, the sold products, the install base items, and the contracts and entitlements.

If you're an administrator, you create the workflows for your organization and configure the metadata for your various lead-to-cash entities by activating the foundational Lead to Cash Core (com.snc.l2c_core) application. With the Lead to Cash Core (com.snc.l2c_core) plugin, you can compose and build the workflows that your organization maintains for the life cycle of a sold product. For example, on the Lead to Cash Entities Mapping form on the ServiceNow AI Platform®, you select the sold product entity as a source entity and the order as a target entity. You then map these entities and configurations to create a source to the target flow that is a sold product to order flow. This mapping provides your users with a unified workflow experience across the different entities.

Note: An entity is defined as a collection of tables that have information about an order. The information can come from multiple tables.

Entity configurations

You can configure the definition of a lead-to-cash entity by defining a name and configuration ID on the Lead to Cash Entity form. The definition creates a back and forth flow of the information between the various entities.

To learn how to create entity configurations, see Create an entity configuration. To learn how to create entity mappings, see Create an entity mapping.

Reconfiguration

You can reconfigure an order or a quote that is in the **Draft** state to make customizations in the Configurator UI. After the configuration is complete, all the order line items associated with the order are also updated. To learn more about reconfiguration, see LeadtoCashCore - Scoped.

Related links

- Configuring the lead-to-cash foundation applications

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Customer self-service for Sales Customer Relationship Management

Support your business-to-business (B2B) customers by enabling self-service capabilities through the Business Portal to create and manage orders, invoices, and requests for quotes.

Business Portal overview

The Business Portal is a self-service, customer-facing web interface in Sales Customer Relationship Management that enables B2B customers to discover products, configure offerings, and place orders directly through a secure, web-based experience. The portal complements internal sales workflows, enabling your customers to engage with the sales process independently while remaining fully integrated with core CRM data and processes. The Business Portal, which is based on Customer Service Management, streamlines order placement, reduces dependency on manual sales interactions, and accelerates revenue generation. It also provides integrated access to knowledge articles, community forums, service catalogs, and chatbots.

Business Portal benefits

The Business Portal provides benefits for administrators and B2B customers. Administrators can easily manage and administer the portal and install plugins to enable new features. The following table lists the benefits for B2B customers.

Business Portal benefits for B2B customers

Benefit	Feature
Enable customers to place orders independently, reducing sales cycle time and accelerating revenue realization.	Create orders from the Business Portal
Accelerate pricing and proposal turnaround by enabling customers to request quotes directly within the portal.	Submit a request for quote from the Business Portal
Enable customers to view quotes generated from requests for quotes (RFQs) or quotes created offline by a sales agent.	View quotes from the Business Portal
Reduce customer dependency on customer service agents for routine order inquiries or raising order issues such as quantity or address disputes.	Request updates for one or more orders Request updates for items in a single order
Provide customers access to their invoice and invoice line details so they can track billing information and identify discrepancies.	View invoices on the Business Portal
Simplify invoice inquiries and dispute management through a direct, trackable self#service support channel.	Dispute a specific line item on an invoice against your account using the Business Portal Dispute multiple invoices against your account using the Business Portal

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Business Portal and sales agents

Sales agents don't directly use the Business Portal, but work on orders, order cases, invoice cases, and RFQs submitted through the Business Portal from the CSM Configurable Workspace. Depending on the process for orders, order cases, invoice cases, and RFQs, the agents work on their assignments and work with the customers to provide resolution. For example, reviewing RFQs, converting RFQs to quotes, applying price adjustments, and returning the quote to the customer for approval.

Related links

The following topics provide more information about configuring and using the Business Portal:

- Configuring the Business Portal
- Customer self-service using the Business Portal
- Getting started with the Business Portal: Configure Business and Consumer Portal
- Business Portal reference for Sales Customer Relationship Management
- Using the Business Portal
- Business Portal user roles

Configuring Sales Customer Relationship Management applications

Set up the Sales Customer Relationship Management (Sales CRM) applications so that your agents can work on various stages of the product sales life cycle, such as sales opportunities, quotes, order capture and fulfillment, contracts and entitlements, and also the basic product catalog and pricing features used by each application.

As a user with the admin role, complete the following main configuration tasks to set up your applications. Select a tile to learn about how to install and configure a set of Sales CRM applications to implement and support pre-sales, sales, and post-sales workflows in your organization.

Lead-to-cash foundation	Configure, price, quote	Lead and opportunity management
		
Set up core apps that enable your lead-to-cash processes.	Set up tools to configure products and manage pricing, quotes, and sales agreements.	Set up tools to capture leads, engage customers, manage opportunities, forecast sales, and define sales territories.

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Order management  Set up tools to manage order creation and fulfillment, manage jeopardy, and resolve fallout issues.	**Order operations**  Set up workflows to manage end-to-end lead-to-cash processes and handle product returns.	**Post-sales engagement**  Set up tools to manage customer contracts, entitlements, and life cycle workflows on sold products.
Partner Relationship Management  Set up tools to onboard partners, manage relationships, and enable collaboration.	**Business Portal**  Set up a self-service portal for B2B customers to place orders, submit RFQs, view quotes, and raise order cases.	

Additional configuration tasks

- Assign user roles in Sales Customer Relationship Management applications

  Review and assign roles to users of the Sales CRM applications that you install.

- Configuring agent tools in Sales Customer Relationship Management

  The applications in Sales Customer Relationship Management share common features and tools for agents, such as location-based transactions.

Configuring the lead-to-cash foundation applications

Learn how to configure lead-to-cash foundation applications to establish a unified platform for Sales Customer Relationship Management entities such as managing leads, opportunities, quotes, and orders efficiently.

Installing and configuring the following applications involve installing the applications from the ServiceNow Store store, assigning appropriate roles to users and groups, and then configuring foundational features such as product catalogs, pricing, and customer data models.

1. Configuring product offerings and catalogs

   Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

2. Install and configure Lead to Cash Core

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Install the Lead to Cash Core application which enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.

3. (Optional) Sales and Service API Core

   Configure the Sales and Service API Core plugin to enable seamless tracking and management of Sales Customer Relationship Management workflows through structured inbound and outbound request handling, configurable flow processing, and integration with external systems.

Configuring product offerings and catalogs

Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

As a product catalog administrator or catalog manager, you complete various configuration tasks to create the product catalogs and offerings for products and services sold by your organization. You also work with your pricing administrator, who sets the pricing for your product offerings. For more information on pricing, see Configuring product pricing.

The following workflow example shows a typical series of steps for setting up catalogs and product offerings, including the pricing configuration tasks performed by your pricing administrator. Some steps may be optional in your organization, and other steps, such as setting up product relationships between catalog entities, may occur in a slightly different sequence.

Product catalog and pricing configuration workflow

Note: Review your entitlements to see the product offering options available to you.

Overview of product offering and catalog configuration

Starting with the May 2024 release of Sales Customer Relationship Management applications, you can use the CSM Configurable Workspace to configure product offering catalogs, product offerings, and product offering relationships.

The following table identifies the configuration tasks for setting up the various features available in Product Catalog Management.

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Product offering and catalog management configuration tasks

Configuration task	Description
Create a product offering catalog	Create a catalog, which is the top-level entity in the catalog hierarchy. Catalogs can have categories, and categories can have subcategories or product offers.
Create a product offering category	Define a product offering category used to organize similar product offerings in a catalog. Catalog categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders.
Create a product offering family	Create a product offering family for products with similar or common features that have multiple variations. You can apply common rules or attributes for product offerings at the product offering family level instead of applying them individually to each product offering.
Create product characteristics and characteristic options	Define the specific attributes, properties, and options that distinguish a product offering, influencing its configuration and pricing.
Create product offerings	Configure and add product offerings to catalogs and categories. Once published, product offerings are available to Sales Customer Relationship Management agents as they create opportunities, quotes, and orders.
Add product visuals	Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders.
Create product offering relationships	Create product relationships to bundle products and services together to streamline the order process. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles also let you offer special bundle pricing.
Control cascading quantity values in child product offerings	Control how the quantities for child line items in a product offering for a quote or order are calculated by using the *sn_prd_pm.enable_cascade_quantity* system property.
Add related contracts to product offerings	Add related contracts to your product offerings in the Sales Customer Relationship Management application.
Add a unit of measure to a product offering	Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management.
Create a product offering version	Create a product version to add updates to a published product offering.
Create product offering relationship groups	Combine bundles of product offerings into related groups in Sales Customer Relationship Management.
Configure needs analysis	Create needs templates, which are questionnaires from product selection guides that your agents use to determine what product offers can be added to opportunities.
Configure product offering recommendations for quotes	Create offer recommendations that sales agents can use to complement or supplement items in their quotes.
Export and import product catalog entities	Export and import product catalog entities between ServiceNow instances. For example, you can promote catalog

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Product offering and catalog management configuration tasks (continued)

Configuration task	Description
	entities from a non-production instance to a production instance.
View product offering hierarchy and associated specification hierarchy	View the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.
Configure product offer eligibility	Filter the product catalog, product categories, and product offerings dynamically, to display only eligible product offerings for a customer in the product catalog.

Create a product offering catalog

Create a product catalog that lists the product offerings available to your customers. Catalogs are top-level entities in the catalog hierarchy. Catalogs have categories and categories can have sub-categories or product offers.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offering Catalogs**.
3. Select **New**.
   In the form, fill in the fields.

Product Offering Catalog form

Field	Description
Number	System-generated number that identifies the product catalog.
Name	Name of the catalog.
Thumbnail image	Thumbnail image of your catalog. Select **Attach Image** to upload your image.
Image	Image of your catalog. Select **Attach image** to upl0ad your image.
Default	Option that indicates this catalog is the default catalog displayed to your agents. Agents can switch from one default catalog to another.
Description	A brief description of your product catalog, for example, .
State	State of the catalog. The supported life cycle states are Draft, Published, Retired, and Archived.
Start date	Date and time that the catalog is available for Sales Customer Relationship Management

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Field	Description
	applications. Select the Calendar icon to choose the start date and time, then select **OK**.
End date	Date and time that the catalog is no longer available for use in Sales Customer Relationship Management. Select the Calendar icon to choose the end date and time, then select **OK**.
Code	System-generated product code for the catalog. The system automatically generates a code based on the catalog **Name** entered, but you can change the value to any desired alphanumeric string.

4. Select **Save**.
   The product offering catalog is in the Draft state.
5. Select **Publish**.
   The catalog state changes to Published. The Categories tab opens for creating a product offering category.

What to do next
Create product offering categories.

Create a product offering category

Define a product offering category used to organize similar product offerings in a catalog. Product categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders.

Before you begin
Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offering Categories**.
3. Select **New**.
4. In the form, fill in the fields.

Product Offering Category form

Field	Description
Number	A unique system-defined number that identifies the product category.
Name	Name of the category.
Leaf	Option indicating there are no subcategories for this category. Selecting **Leaf** means the category can have product offers but not

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Field	Description
	subcategories. If **Leaf** isn't selected, the category can only have subcategories but not product offers.
Thumbnail image	Thumbnail image for the product offering category. Select **Attach Image** to upload your image.
Image	Image of the product offering category. Select **Attach Image** to upload your image.
Description	A brief description of the category.
State	State of the category: ○ Draft: Initial state of the category, before it's published. ○ Published: The product category has been published to the catalog. After a category is published, you can update it. You can delete, retire, or archive it if there are no associated product offerings. ○ Retired: Category has been retired and is no longer active. The category can't be updated. ○ Archived: Category has been archived and is no longer available for use. ○ Copied to Catalog: The product category has been copied.
Start date	Date and time that the category is available in the catalog. Select the Calendar icon to choose the start date and time, then select **OK**.
End date	Date and time that the category is no longer used in the catalog. Select the Calendar icon to choose the end date and time, then select **OK**
Code	Product code for the category. The system automatically generates a code based on the category **Name** entered, but you can change the value to any desired alphanumeric string.

5. Select **Save**.
6. Associate the category to a catalog.
   a. In the Catalogs tab, select **New**.
   b. In the Catalog Category form, select the published Catalog to which this category belongs and select **Save**.
7. In the Details tab for the category, select **Publish**.

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The category state changes to Published and is added to the selected catalog.

8. If needed, define the parent category and subcategories for the category using the Parent categories and Child categories tabs.

What to do next

Create product offerings.

Create a product offering family

Create a product offering family for products with similar or common features that have multiple variations. You can apply common rules or attributes for product offerings at the product offering family level instead of applying them individually to each product offering.

Before you begin

Role required: sn_prd_pm. product_catalog_admin or sn_prd_pm.product_catalog_manager

About this task

A product offering family is a hierarchical classification of product offerings, like a category tree. Product families can have parent-child relationships (multi-level tree). You can define parent-child relationships, where each node in the family tree can have a parent, forming a multi-level hierarchy. With a product family you can:

- Apply rules or default attributes at the family level, which are inherited by descendent products in the family.
- Aggregate sales data by family, such as total revenue, including all sub-family products, for revenue reports.

For example, a product offering family hierarchy could be Hardware > Computers > Laptops. Each product offering inherits rules that define items such as required warranties or other features from the parent. Agents can view the product family for products in line items, which can provide context on why certain rules or discounts are applied to a product offering.

After you create product offering families, you assign a product offering to a product offering family when you create a product offering.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Offerings** > **Product Offering Families**.
4. Select **New**.
   Fill-in the form.

Create New Product Offering Family

Field	Description
Number	System-assigned number for the product offering family.
Name	Product offering family name
Description	Short description of the product offering family.
Parent family	If the product offering family that you're creating is a child of an existing product

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Field	Description
	offering family, select the parent product offering family.

5. Select **Save**.
   The product offering family is available for use and can be selected when you create a product offering.

What to do next
Create product offerings

Activate the display of product catalog visuals

Turn on the display of product images shown in the product tiles of product catalogs by using the *sn_prd_pm.show_product_visuals_on_catalog_ui* system property.

Before you begin
Role required: admin

About this task
The *sn_prd_pm.show_product_visuals_on_catalog_ui* system property controls the images displayed in commercial product catalogs. This property doesn't apply to service catalogs or product inventory catalogs.

Procedure
1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_prd_pm.show_product_visuals_on_catalog_ui* system property.
3. In the **Value** field, enter `true` to activate the display of product offering images in the product catalog.
4. Select **Update**.
   The product offering visuals are loaded in the catalog. If a product offering doesn't have a visual, the text **Image not available** is presented in the product offering tile instead.

Control cascading quantity values in child product offerings

Control how the quantities for child line items in a product offering for an opportunity, quote, or order are calculated by using the *sn_prd_pm.enable_cascade_quantity* system property.

Before you begin
Role required: admin

About this task
The *sn_prd_pm.enable_cascade_quantity* system property, if enabled, automatically cascades the quantity value for a top-level offer to child lines, when the quantity for the top-level offer is greater than 1. For example, when an agent creates an opportunity, quote, or order for a configurable offer and updates the quantity so that it's greater than 1, the quantity on the child line items is multiplied by the quantity for the top-level offer. Pricing for the child lines is based on the cascaded quantity. If you use the quantity on the child offers as the total quantity ordered, using cascading quantities considers the quantity on the parent offer as well.

However, if you consider the quantity on the child offer as the quantity of the child offer per one quantity of the parent offer, you might not want cascading quantity values.

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Note: If you're upgrading from a release before the November 2024 release, this property is enabled by default. If you don't want the quantity values to be cascaded to child lines, suppress this feature by setting the property to false.

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_prd_pm.enable_cascade_quantity* system property.
3. Set the property value for the cascading quantity feature in the **Value** field.
   - Enter `true` to activate this property.
   - Enter `false` to suppress this property if it's currently enabled.
4. Select **Update**.
   If you enabled this property, quantity values are cascaded to the child lines for product offers. If you suppressed this property, quantity values are not cascaded to the child lines for product offers.

Create product offerings

Create and publish a product offering in Sales Customer Relationship Management. Product offerings represent entities that are orderable from the provider of the catalog and includes pricing information. Once published, product offerings are available to agents as they create leads, opportunities, quotes, and orders and to customers placing orders.

Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Offerings** > **Product Offering** and select **New**.

   Note: You can also create a product offering from the product specification.

4. In the Details tab, fill in the fields.

Create New Product Offering form

Field	Description
Number	System-assigned number for the product offering.
Name	Alternative name for the product offering to differentiate it from similar product names.
Display name	Name of the product offering to be added.
Code	System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry-specific product codes.
Product family	The product offering family to which this product belongs. Select the product offering family, which is a collection of

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Field	Description
	products that share similar or common features. A product offering can belong to a single family only.
Sellable	Option, if selected, indicates that the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item.
Configurable	Option that indicates the product is customizable and can be configured by agents and customers using the CPQ Configurator, if implemented in your organization. For more information, see Using the CPQ Configurator.
Allow multiple configurations	Option that enables agents or customers to create and manage multiple configurations of a child product offering so each configuration can be handled as a separate line item in a configurable product. **Note:** If the product has an associated product specification, this option is enabled automatically and can't be deselected. For more information on how multiple configurations work in configurable products, see Multiple configurations.
Transient	Option indicating that the product is for one-time use. **Note:** When the order for a transient product is completed, the sold product or product inventory record for the product is set to an Inactive state, to differentiate the product from persistent products. ○ Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of transient product offerings. ○ The **Create contract** option is not applicable to transient product offerings. For more information on transient products, see Defining transient products.
Description	Short description of the product offering. The description helps the agent identify the product when creating a lead, opportunity, quote, or order.
State	State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state.
Start date	Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select **OK**.
End date	Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon to choose the end date and time, then select **OK**.

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Field	Description
Offering type	Type of product offer. Select one of the following: ○ Product: A product entity that an agent or customer can add to a Sales CRM transaction. For example, agents can add products to a lead, opportunity, quote, or order from the CSM Configurable Workspace. Customers can add products to an order from the Business Portal. ○ Entitlement: An entity such as a warranty or subscription that can be added to a lead, opportunity, quote, or order by an agent.
Offering sub-type	Type of entitlement. Select one of the following: ○ Warranty ○ Extended warranty ○ License ○ Subscription
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. If you're using the Service Exchange Order Management for Providers application, enter Service Exchange.
Owner	Person responsible for the product offering.
Product specification	Functional view of a product offering that drives order fulfillment. Select the product specification associated with the product offering. **Note:** Only published specifications appear.
Product model	Name of the product model.
Copy child specification characteristics	Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification. This field displays when a product specification for a composite product is entered and the product offering is saved.
Pricing method	Pricing method for the product: ○ One-time: A single fee for the product. ○ Recurring: A fee that occurs at scheduled intervals. You can set the **Periodicity** for a recurring fee. **Note:** If you're creating a configurable product offering that can have ramps, select Recurring as the **Pricing method** so that the **Enable ramps** option can be selected.

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Field	Description
Periodicity	Recurring pricing: Monthly or annually.
Monthly recurring charges	Charges that are applied monthly.
Non recurring charges	Charges that are applied once. Supported for backward compatibility. Use price lists to define prices.
Enable ramps	Option that enables the ramp feature, where sales agents can create ramps for transaction lines, such as quotes, to schedule price and quantity increases over certain time periods. To learn more, see Price and quantity ramps.
Create contract	Option indicating to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts. **Note:** For transient product offerings, this option isn't available.
Contract term	Length of the contract: ○ 12 months ○ 24 months ○ 36 months ○ 48 months ○ 60 months
Version	Version number that is assigned to this product offering version.
Initial version	Name of the initial version of the product offering.
Previous version	Several versions of a product offering can exist. This field lets you view previous versions.

5. Select **Save** and then select **Publish**.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

Defining product characteristics and characteristic options

As a product catalog admin, you create the characteristics and characteristic options for product offerings and specifications. Product characteristics are attributes that define and describe a product.

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For example, if a product offering is a bike, the characteristics might include bike size and color. The characteristic options are the choices, such as the various bike sizes and colors available. Characteristics and characteristic options for products are displayed in the product configurator when agents configure products for opportunities, quotes, and orders and when customers order products using the Business Portal.

Characteristic data input types

When you define product characteristics and characteristic options, you provide basic attribute information, including the characteristic name and the data input type for the characteristic options. The data input type indicates how the characteristic options are entered in the product configurator, such as single line text or choice selection.

The following data input types are available for characteristic options:

- Address - Mail address
- Attachment - External document to be attached
- CheckBox - Select or clear an option
- Choice - Options that can be chosen, presented as radio buttons or available from a drop-down list
- Decimal - Numbers that require a decimal point to indicate fractional amounts
- Dates - Date picker for selecting day, month, and year
- Date/time - Date picker for selecting day, month, year and time of day
- Duration - Period of time
- Email - Email address
- Single Line Text - Free-form text
- Integers - Whole numbers
- Yes/No - Yes/no response
- Object - Structure that represents a hierarchy of attributes, also called complex characteristics. An object has parent attribute with one or more child attributes.
- Arrays - Multiple instances of the same attribute type, such as arrays of Date, DateTime, Integer, Single Line Text, Object, and Decimal

You can use the Object type to build a hierarchy of complex characteristics, which has a top-level parent attribute with one or more child attributes. The child characteristics can be any of the data input types, including objects with data arrays.

The following example shows a characteristic hierarchy for Routing Addresses, which is a parent-level attribute with an object data type. This attribute has the following child attributes: Procurement Date, Route, Additional Address Required, BGP, Routing Type, and Address Supplier. Notice that the BGP child characteristic is an array of objects with a minimum size of 2 and maximum size of 4.

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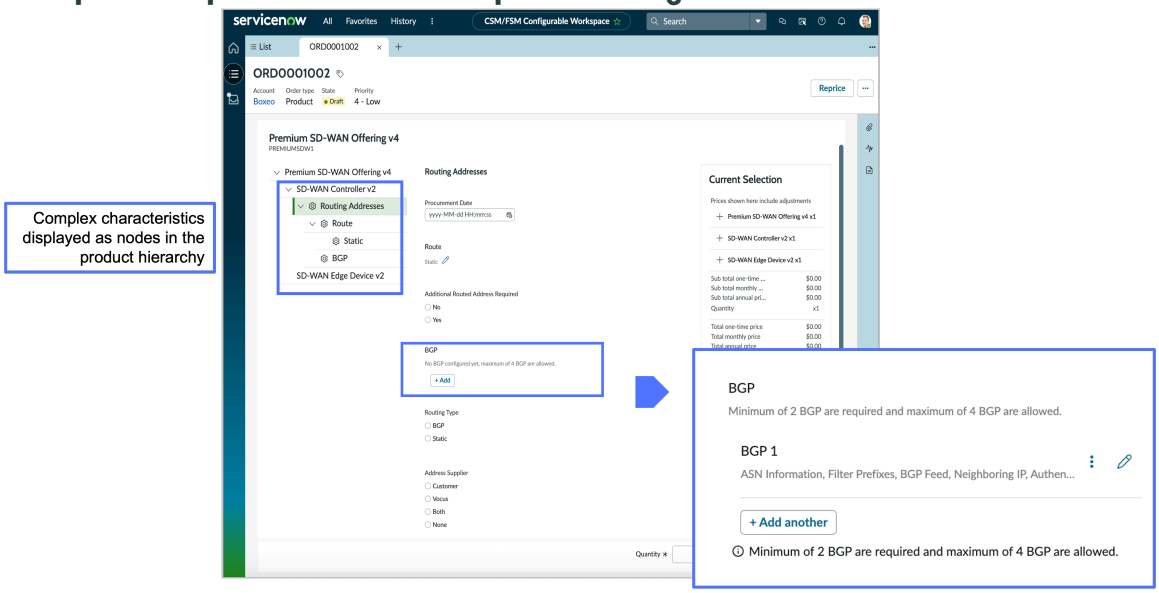
Example of complex characteristics in product configurator



Setting up complex characteristics

Defining a hierarchical attribute structure involves setting up the parent attribute, for example routing addresses, as an object type. You then define the characteristic relationships between the parent attribute and child attributes to establish the hierarchical structure and the order in which the child characteristics display in the product configurator.

For details on defining characteristics, see Create product characteristics and characteristic options

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Create product characteristics and characteristic options

Add product characteristics and characteristic options that you can later add to your product offerings in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

About this task

Use this procedure to build product characteristics (also called attributes) and characteristic options, which you add to product offerings and specifications. For example, if the product offering is a bike, characteristics might include bike size and color. The characteristic options are the option choices, such as the various bike sizes and colors available. These options appear in the configurator when your agents add configurable products to opportunities, quotes, and orders or when customers submit orders using the Business Portal.

When you define a characteristic, you select the data input type, which indicates how the characteristic option is entered in the product configurator, such as Single Line Text, Choice (radio buttons or drop-down list), and Yes/No selections. Complex data input types are also available to define complex characteristics that have hierarchical attribute structures. You use the object data type to define complex characteristics, which have a top-level parent attribute and associated child characteristics. These structures can also include data arrays, another complex data type that you can use to specify multiple instances of the same data input type, such as multiple lines of text or integers.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Characteristics** > **Characteristics**.
3. Select **New**.
4. In the form, fill in the fields.

Create New Characteristic

Field	Description
Name	Name of the product characteristic.
Code	System-generated alphanumeric value based on the product characteristic name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes. **Note:** If you enter a product characteristic name that has non-English characters, special symbols, or both, the **Code** value may be a hash of alphanumeric characters that uniquely identifies the characteristic, if your admin has set the *sn_prd_pm.use_hash_to_generate_characteristic_coo* system property to false. If this property is set to true, the system can't generate an alphanumeric **Code** value that includes non-English characters, special symbols, or both.
Description	Brief description of the characteristic, for example DSL speed.
Input type	List of input options that identify the functionality for the characteristic, such as check box or a line of text. Depending on the input type, additional options become available: ○ **Address**: Input for the entry of an address. ○ **Attachment**: Input for the attachment of an external document. ○ **CheckBox**: Option that can be selected or cleared. You can specify a **Default value** to be displayed for the option. ○ **Choice**: Options that can be chosen for the characteristic. In the Characteristic options tab, you indicate how the option is to be selected in the product configurator, either as a Radio button or from a Drop-down list. You can also specify a **Default value** to be displayed for the option. ○ **Date**: Date picker for selecting the day, month, and year, for example an activation date. ○ **Date/Time**: Date picker for selecting the day, month, year, and time of day for example, an activation date at a specific hour, minutes, and seconds.

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Field	Description
	○ **Duration**: Input for the entry of a duration of time. ○ **Email**: Input for the entry of an email address. ○ **Label**: Input for the selection that enables the production of a label. ○ **Single Line Text**: Input for the free-form entry of a single line of text. You can specify a **Default value** to be displayed for the option. ○ **Yes/No**: Input that requires the selection of a Yes/No response. You can specify a **Default value** to be displayed for the option. ○ **Integer**: Input that requires a numeric value, such as number of support hours. You can specify a **Default value** to be displayed for the option. ○ **Decimal**: Input for numbers that require a decimal point, such as currency or car mileage that require fractions. ○ **Object**: Input for defining the top-level characteristic in a hierarchy of characteristics that consists of a parent characteristic and its child characteristics. A top-level characteristic has one or more child characteristics. The child characteristics can be any of the data input types or an object or array type. The Characteristic Relationship tab opens for specifying the associated characteristic options. ○ **Array.Date**: Input that includes one or more instances of dates as child characteristics. You specify a Min and Max value for the array size. The default Min and Max value is 1. ○ **Array.Datetime**: Input that includes one or more instances of child characteristic of datetime. You also specify a Min and Max value for the array size. You specify a Min and Max value for the array size. The default Min and Max value is 1. ○ **Array.Decimal**: Input that includes one or more instances of a child characteristic of decimals. You specify a Min and Max value for the array size. The default Min and Max value is 1. ○ **Array.Integer**: Input that includes one or more instances of a child characteristic of the integer data type. You specify a Min and Max value for the array size. The default Min and Max value is 1. ○ **Array.Object**: Input that includes one or more instances of a child characteristic of the object data type. You specify a Min and Max value for the array size. The default Min and Max value is 1. ○ **Array.SingleLineText**: Input that includes one or more instances of a child characteristic of the SingleLineTest data type. You specify a Min and Max value for the array. The default Min and Max value is 1.

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5. Select **Save**.
   Depending on the **Input type** you selected, you may need to complete additional steps if the new characteristic has more options.
6. If the new characteristic has more options, complete the following steps:

   a. In the Characteristic Options tab, select **New**.

   b. Enter the Option for the characteristic and select **Save**.
   The option is added to the characteristic. Repeat this step to add as many options as needed.

   For example, if you create a SIM card type characteristic, you then create the associated Nano, eSim, Micro, Mini, and Standard options.

   Later, when you are configuring product offerings, you can add the characteristics and options.

   c. Select **Save**.

7. If the new characteristic is an object that has child characteristics as part of hierarchical attribute structure, complete the following steps to create a characteristic relationship between the parent characteristic and child characteristics in the characteristic hierarchy:

   a. In the Characteristic Relationships tab, select **New**.

   b. In the form, fill in the fields.

Create New Characteristic Relationship

Field	Description
Display name	The name of the characteristic relationship, for example Routing addresses
Parent characteristic	The parent-level characteristic in the characteristic hierarchy.
Mandatory	Option that indicates the characteristic is required and must be entered or selected in the product configurator.
Order	The position of this child characteristic in the attribute hierarchy.
Child characteristic	Characteristic that is a child of the parent characteristic displayed. Select the characteristic from the drop-down list.

Note: A parent-level characteristic (object input type) must have at least one child characteristic relationship defined for the hierarchical structure.

   c. Select **Save**.

What to do next

Continue working on other areas related to the product offering or specification. For example:

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- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups
- If you're creating technical products such as telecommunications products, you can create the product, service, and resource specification categories and associate them to model categories.

Add characteristic and characteristic options to a product offering

Add characteristic and characteristic options to an existing product offering using the **Product Offering Characteristic** tab in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm.product_catalog_admin

About this task

There are a number of ways to create characteristic and characteristic options. The following procedure lets you add characteristics to product offerings that already exist but have not been published.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. In the **Product Offering Characteristics** tab, select **New**.
4. In the form, fill in the fields.

Product Offering Characteristic form

Field	Description
Characteristic	Product offering characteristic. Select an existing characteristic. Select **New** to create a characteristic.
Characteristic option	Characteristic option for the product offering. Select an existing characteristic option or select **New** to create options.
Characteristic type	Option that lets you select a characteristic type.
Product offering	Name of the product offering.
Order	Numerical order for the options. Options designated with the number 1 appear first in the order.
Mandatory	Option indicating that the characteristic option is required to complete the order.
Default	Option indicating this characteristic option is the default choice.

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Field	Description
Customer input required	Option indicating that consumer input is required for the product option.

5. Select **Save**.
   The product offering characteristic is added to the product offering. Select the characteristic in the **Product Offering Characteristics** tab to make further changes.

Create configurable product offerings and associated blueprints

Create a configurable product offering and generate an associated blueprint using the CPQ Configurator. A blueprint contains the product structure and includes product attributes, product relationships, product and pricing rules, and any child products for the offering. Blueprints drive the agent and customer experience for configuring customizable products with the CPQ Configurator.

Before you begin
Role required: sn_prd_pm_product_catalog_admin

About this task
A configurable product offering, also called a complex product offering, has multiple characteristics and one or more product relationships. The process of creating a configurable product offering involves defining the product in Product Catalog Management, then generating the blueprint. The blueprint is used in the CPQ Configurator to manage the product configuration experience for agents and customers.

Procedure
1. Create the configurable product offering.

   a. In the CSM Configurable Workspace, select the **List** view.

   b. Create an offering or copy an existing offering to make a new offering.
      - To create an offering, navigate to **Offerings** > **Product Offerings** and select **New**.
      - To copy an offering, navigate to **Offerings** > **Product Offerings**, select the offering to be copied, and select **Copy**.

   c. In the Details tab, fill in the fields to create a configurable product or modify the copy to create a product.

      Note: For details on creating a product offering, see Create product offerings. To identify the offering as a configurable product, select the **Configurable** option in the form, even if there are no characteristics or relationships defined. Selecting the **Configurable** option indicates that the product offering is to be configured using the CPQ Configurator.

   d. Select **Save**.
      The **Create Configuration** button is displayed. The Record Information pane shows the synchronization state as *Sync Not Initiated*.

2. Start the synchronization process by selecting **Create Configuration**.
   The synchronization process begins, as indicated by the synchronization state *Sync initiated*. The synchronization process creates the blueprint for the offering. If you

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previously defined attributes, product relationships and groups, and other product or pricing rules for the offering, that information is included in the blueprint.

When the synchronization completes, the status changes to *Sync success*. The Configuration Setup tab (related list) displays the blueprint. The **Update configuration** and **Publish** buttons are also displayed.

Note: If the synchronization fails, use the Configuration Errors tab (related list) to view the errors in the synchronization process.

The product blueprint has the following features:

Blueprint feature	Description
Associated Fields	Attributes and attribute types.
Related Rules	Product and pricing rules.
Layouts	Arrangement of the elements displayed in the configurator interface. A default layout is applied during synchronization, but you can change the layout.
Configurable Products	Child products of the offering.
Enrichments	Scripts used by the rules engine to retrieve external data such as pricing or product data.

For more information on blueprints and how you can use them, see the online help accessible from the interface.

Note: If you defined rules and attributes in Product Catalog Management, those rules and attributes must be updated in Product Catalog Management and not in the blueprint. However, you can add new rules and fields using the blueprint.

3. If you want to make further changes to the product offering, and the offering is still in Draft state, select **Update configuration** and change the offering details.
4. When you're ready to publish the offering, select *Publish*.
   Another synchronization occurs, and the product offering is published to the product catalog.

Add product visuals

Add visuals to your product offering in Sales Customer Relationship Management to show what the product looks like in the product catalog.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. Select the **Product Visuals** tab.
4. Select **New**.
5. On the form, fill in the fields.

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Product Visuals

Field	Description
Name	Name for the visual.
Product offering	Name of the product.
Active	Option indicating that a thumbnail image is used to depict the product.
Thumbnail image	Thumbnail visual of your product offering. Select **Attach Image** to upload the thumbnail image.
Primary	Option indicating that the thumbnail visual is the primary visual.
Image	Visual of your product offering. Select **Attach Image** to upload the image.

6. Select **Save**.

Note: You must turn on the display of product visuals in product catalogs. For more information, see Activate the display of product catalog visuals.

What to do next

- Create product characteristics and characteristic options
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

Add product catalog categories

Use the Product Offering Categories tab to organize your products in groups in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Product catalog categories help organize products into groups, which makes it easier for order agents to find products while creating orders or building quotes. Catalog categories are associated with a catalog. For more information about catalogs, see Create a product offering catalog.

Product offering catalog categories must be published before products can be added.

This procedure explains the Product Offering Category tab. To set up categories before adding products, see Create a product offering category.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you are working with.
3. Select the **Product Offering Categories** tab.
4. Select **New**.
5. On the form, fill in the fields.

Field	Description
Category	Select an existing published category.
Product offering	Name of the product offering you are working with.

6. Select **Save**.
7. Review the category information and select **Publish**.
   The category is published and available to add product offerings too or create child categories.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

Create product offering relationships

Create product relationships to bundle products and services together to make ordering more convenient. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles can also be added to other bundles in relationship groups.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Create product offering relationships that bundle products together. A bundled product offering can be ordered as a group and can't be changed.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationships** tab.
4. Select **New**.
5. On the form, fill in the fields.

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Product Offering Relationship form

Field	Description
Display name	Name of the product relationship displayed in the interface.
Source product offering	System-generated reference to the source product offering.
Target product offering	The offering that is bundled with the source product offering.
Relationship type	Option that identifies how the products are related: ○ None - Indicates that the bundled products have no relationship. ○ Implicit - Indicates the products grouped in a bundle have an implicit relationship.
Product offering relationship group	Reference to offer relationship groups used to logically group similar product offers.
Unit of measurement	Unit of measure for the bundled products. Select a unit of measure, for example Box or Case.
Default	Option indicating that the product offering relationship is the default.
Mandatory	Option indicating that the product offering relationship is mandatory.
Default quantity	Option indicating the default quantity of product relationships.
Max quantity	Option indicating the maximum quantity of products in the bundle.
Min quantity	Option indicating the minimum quantity of products in the bundle. These flags mean different things depending on whether each relationship is or is not part of a relationship group.

6. Select **Save**.
   The relationship is created. Select the relationship on the **Product Offering Relationships** tab to make further changes.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

Add related contracts to product offerings

Add related contracts to your product offerings in the Sales Customer Relationship Management application.

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Before you begin
Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure
1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. Select the **Related Contracts** tab.
4. Select **New**.
5. On the form, fill in the fields.

Contract Product Offering

Field	Description
Contracts	Contract to add to the product offering. Select the contract from the list of contracts.
Product offering	System-generated entry reflecting the product offering you're working with.

6. Select **Save**.
   The contract appears in the product offering under the **Related Contracts** tab. You can select the contract record to make further changes to the contract details.

What to do next
- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Create a product offering version
- Create product offering relationship groups

Add a unit of measure to a product offering

Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management.

Before you begin
Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

Procedure
1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with from the list.
3. Select the **Units of Measures** tab.
4. Select **New**.
5. On the form, fill in the fields.

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Unit of Measure form

Field	Description
Product offering	Name of the selected product offering.
Unit of measure	Option for selecting an existing unit of measure or select **New** to add a new unit of measure.
Default	Option indicating the selected UOM is the default.
Active	Option indicating the selected UOM is active.

6. Select **Save**.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Create a product offering version
- Create product offering relationship groups

Create a product offering version

Create a version of a product offering when updates are needed to a published offering in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

After a product offering is published, changes can't be made. To add changes to a published product offering, create a new version.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with from the list.
3. In the **Versions** tab, select **Create New Version**.
   The next version of the product offering is displayed.
4. In the **Details** tab, make and save any changes, and then publish the offering.

   Version history is maintained. Each version has its own life-cycle status.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories

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- Create product offering relationships
- Add related contracts to product offerings
- Create product offering relationship groups

Create product offering relationship groups

Use relationship groups to organize child offer options or relationships into logical groups and set up cardinality rules at the group level in Sales Customer Relationship Management. Groups of product offerings then appear on the product configurator.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

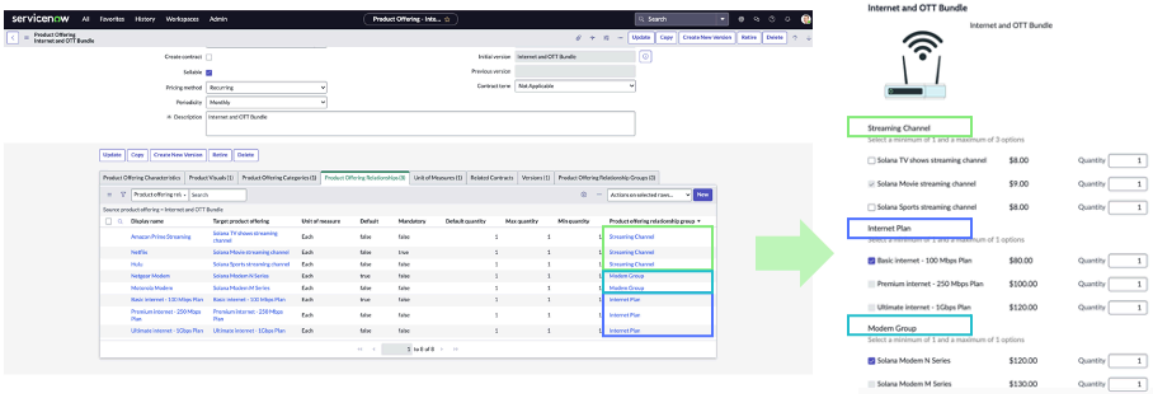
About this task

Create product offering relationship groups to organize product bundles into groups in the product configurator.

For example, an internet and OTT Bundle Product Offering is configured to have three product offering relationship groups: modem group, internet group, and the plan streaming channel group.

Bundled product offerings can be other bundles or individual product offerings.

Assign child product offerings in a bundle to the product offering relationship group, which presents the options in logical groups on the product configurator to the agent. The following example shows how product offering groups appear in the product configurator.



Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationship Groups** tab.
4. Select **New**.
5. On the form, fill in the fields.

Product Offering Relationship Group form

Field	Description
Name	Name of the relationship group.
Description	A description of the relationship group.

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Field	Description
Product offering	Reference to the current product offering in context.
Order	Order in which the relationship group is displayed in the product configurator.
Max options	Maximum number of options that can be selected within the relationship group during configuration.
Min options	Minimum number of options that must be selected within the relationship group.

6. Select **Save**.
   The relationship group is created as part of the product offering.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version

Defining transient products

When you create product offerings and technical specifications, you can identify single-use products and services as transient, to differentiate them from persistent products. Examples of one-time use products include installation or consulting services.

When new orders with transient products are submitted for fulfillment in ServiceNow® Order Management, the sold product or product inventory records are created with an Installation pending state. After new orders with transient products are fulfilled, the sold product or product inventory state changes to Inactive. Your fulfillment managers can then quickly see which products aren't part of the active inventory. Agents can't perform Move, Add, Change, Delete (MACD) actions on inactive sold product or product inventory records.

Guidelines for defining transient products

When you're defining product offerings, use the **Transient** option in the Create New Product Offering form to identify a transient product. If the product has associated technical specifications, you also set the **Transient** option in the appropriate Product, Service, and Resource Specification forms.

When defining transient products, note the following restrictions:

- Create New Product Offering form: The **Transient** option and the **Create contract** option can't be enabled at the same time for the product.
- Parent and child product offerings: Transient parent product offerings and parent specifications must have transient child product offerings and child specifications. However, non-transient parent product offerings and parent specifications can have transient child product offerings and child product specifications.

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- Linking product offerings to product specifications: A transient product offering must be linked to a transient product specification and vice versa.
- Specification relationships: When defining specification relationships for a transient product, you can associate only a transient service specification or resource specification. Transient product orders are decomposed as indicated in the associated specification.

For details on setting the **Transient** option for product offerings and specifications, see Create product offerings

Multiple configurations

As a product catalog manager, when you define a configurable product offering, you can enable agents to add multiple configurations of a child product offering. When agents add multiple configurations, they can change the quantity for each configuration of the offering, define each configuration as a separate line item, and select the appropriate options and characteristics for each configuration.

How multiple configurations work

When you use the Create New Product Offering form to define configurable product offerings and child product offerings, select the **Allow multiple configurations** option to enable the creation of multiple child offering configurations. For information on defining product offerings, see Create product offerings.

Note: If the configurable product has an associated product specification, the **Allow multiple configurations** option is enabled automatically and can't be unselected.

When agents add configurable products to new opportunities, quotes, and orders, they can create multiple configurations for a child offering. They navigate to a summary page for a selected child offering. From this page, they can do the following:

- Change the quantity of a child offering.
- Clone a child offering.
- Split a child offering that has a quantity greater than 1, to create child offering instances with different quantities.

Each offering instance becomes a new line item that can be configured separately.

In the following example, the Home Automation Bundle is a child offering that has a default quantity of 2 in the Quadplay Home Tech Bundle. An information icon displays next to each child offering that can have multiple configurations. The information icon, when selected, displays a message indicating that multiple configurations can be created for the child offering.

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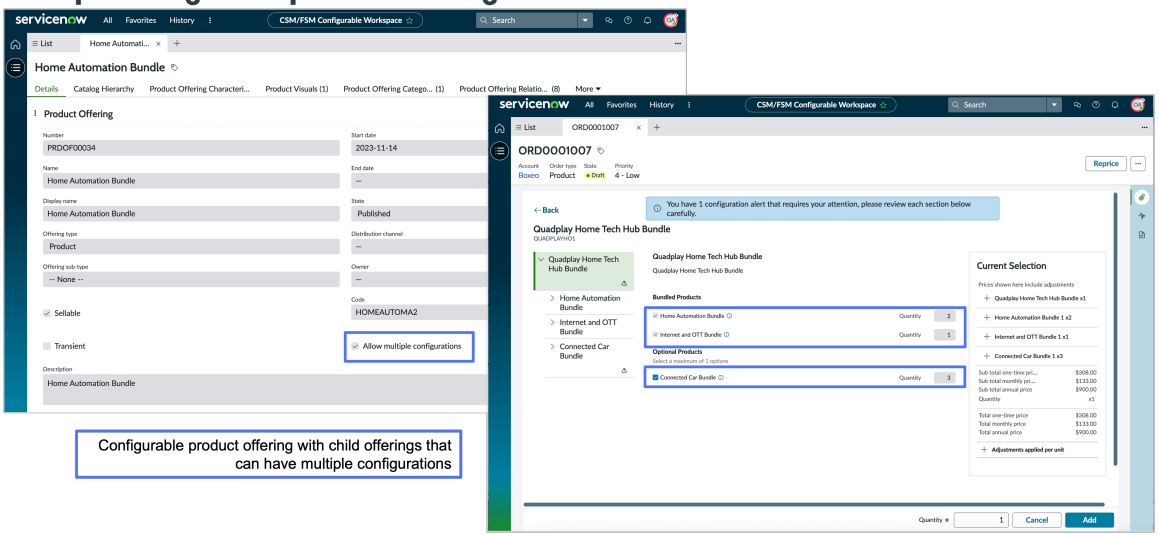
Example configurable product offering for an order



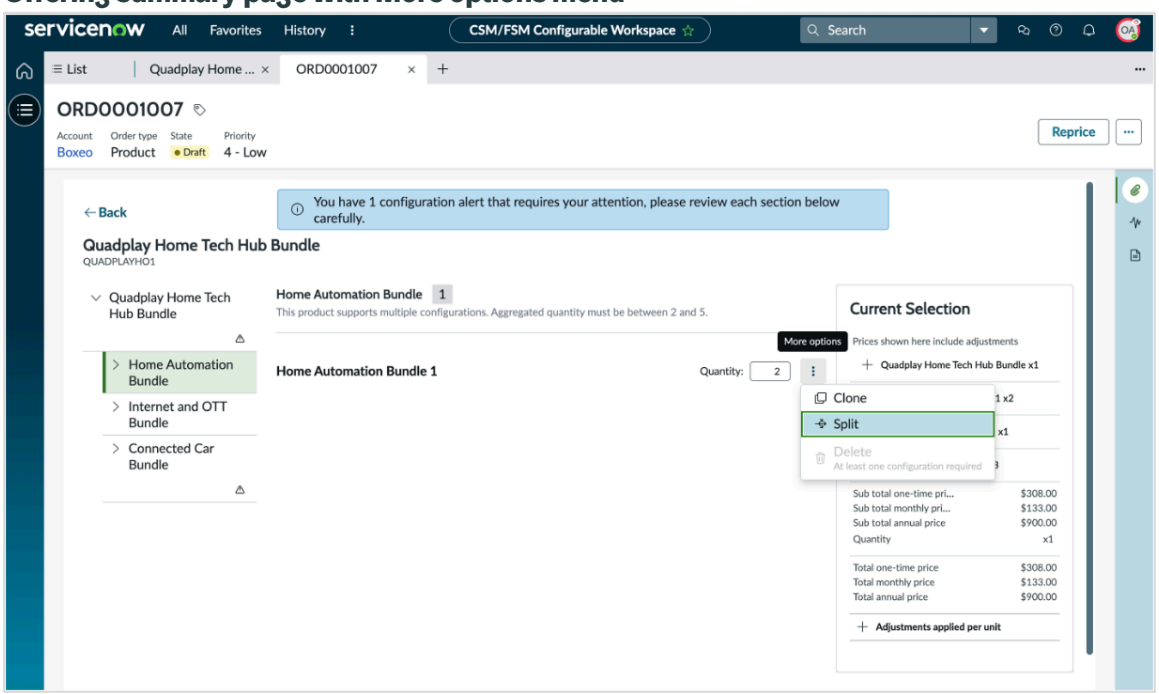
How multiple configurations are created

When agents review a bundle offering in the product configurator, they identify the child offerings that can have multiple configurations. They navigate to the summary page for the appropriate child offering to create multiple configurations.

In the offering summary page, a message indicates that the offering supports multiple configurations and the aggregated quantity of configurations that can be created. Agents can change the quantity of the child offering on this page.

The More options icon displays next to the **Quantity**. Selecting the icon lists the options available for creating and managing multiple configurations.

Offering summary page with More options menu



The following options are available to manage child offering configurations:

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- **Clone**: Create child offering configurations by copying the selected child product offering configuration. The agent is prompted to enter the number of clones to be made.

  For example, if the current child offering quantity is 2, and the agent specifies 2 copies, two identical copies of the child product offering are created. Each clone becomes a separate line item and has a quantity of 1.

- **Split**: Create child offering configurations by splitting the current child offering quantity and distributing the quantity evenly across all the copies. The agent is prompted to enter the number of splits.

  For example, if the child offering quantity is 5, and an agent specifies 3 splits, two child offering instances are created. After the split, there are three child offering instances, where the instances have a quantity of 2, 2, and 1, respectively.

- **Delete**: Removes the child offering instance. If deleting a child offering instance causes the number of child offers to fall below the minimum quantity defined for the product, the **Delete** option isn't available.

When the child offering configurations are created, each offering name reflects the child product offering name followed by an incremental number. For example, Home Automation Hub configurations are named Home Automation Hub 2, Home Automation Hub 3, and so on. Agents can then select the appropriate offering instance to configure it. If the agent changes the **Quantity** value, the Current Selection pane reflects the new quantity and associated pricing.

Validation during multiple configuration creation

As your agents create multiple configurations, the system uses the default, minimum, and maximum cardinality rules defined for the product offering to validate the configurations. If there are violations, the system displays the appropriate information and error messages in the product configurator UI.

The system also uses the cardinality rules to determine when certain configuration options (**Split** and **Delete**) should be enabled or turned off, based on the context. For example, if the minimum child offering quantity is 1 and a child offering has a quantity of 1, the system disables the **Delete** option in the More options menu.

Limitations for multiple configurations

Multiple configurations aren't supported for quotes of type sales agreements. Also, changes for quotes and orders with sold products or product inventory have the following limitations:

- Sold products: When creating a modify order, the **Delete** option for multiple configurations is supported, but the **Clone** and **Split** options aren't supported.
- Product inventory: Multiple configurations are supported. The **Split** option isn't supported.

Setting up multiple configurations

For details on enabling and creating multiple configurations for child offerings, see the following sections:

- Create product offerings
- Create multiple configurations

Setting up specifications and product offerings

By creating and publishing versioned specifications and product offerings in a technical product catalog, your customers can order up-to-date versions of the products or services that they

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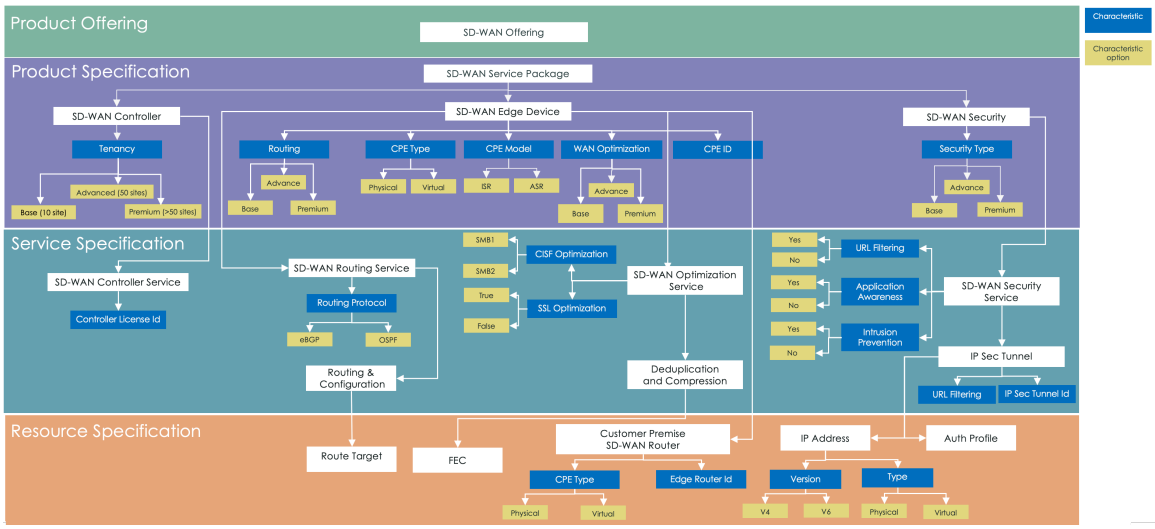
require. Your product catalog manager can create versions of the published specifications and product offerings with the required enhancements to support your customer's business, marketing, manufacturing, or operational changes.

Overview of product offerings with specifications

As a product catalog manager, you set up product offerings in a technical product catalog. A product offering contains the product description, pricing, eligibility, and product options. You use a product catalog to group your product offerings so that your customers can order the products or services that they want. Only published product offerings can be added to customer contracts.

The relationship between product offerings and the product, service, and resource specification determine how a product is fulfilled. For example, the following diagram shows the relationships between the product offerings, the product specification, the service specification, and the resource specification for an SD-WAN product model.

SD-WAN product model



Each product offering has the following components:

Product specification

A product specification defines the various aspects of a product including the following:

- All the specification characteristic options that are available for a product, and how they should be fulfilled.
- Various categories of information, such as the brand, cost, terms and conditions, and product-related materials, which include product visuals. Product specifications are customer-facing and are added to product offerings.
- Its relationship to other product, service, and resource specifications, and how a customer order of a product offering is delivered.

Service specification

A service specification defines a service, and the technical information of that service, including the following:

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- All the specification characteristic options that are available for a service, and how they should be fulfilled.
- Various categories of information, including the cost, terms and conditions, and service-related materials. These resources include the service-related visuals and implementation guides. Service specifications can be customer-facing or resource-facing.
- Its relationship to other product, service, and resource specifications.

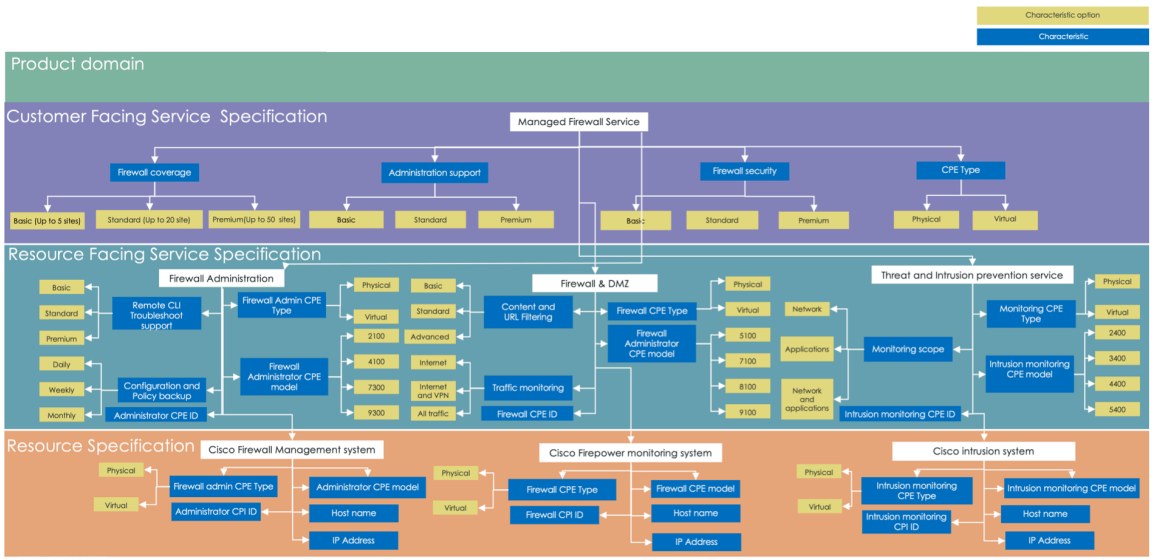
Resource specification

A resource specification defines the technical information for a resource, including the following:

- All the specification characteristic options that are available for a resource, and how they should be fulfilled.
- Various categories of information, such as the manufacture, model, and brand-related information about a resource, including the resource visuals and activation guides. Resource specifications are not customer-facing.
- Its relationship to other product, service, and resource specifications. You can enable the product and service delivery by using the required resource.

The following example shows a managed firewall service structure that incorporates service and resource specifications.

Managed firewall service structure



Create specification characteristics

Define characteristics for a product, service, or resource specification.

Before you begin

Create product characteristics and characteristic options that can be selected for a specification.

Role required: sn_prd_pm_product_catalog_admin

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** and select the specification for which characteristics are to be defined.
3. In the Specification Characteristics tab, select **New**.
4. In the form, fill in the fields.

Create New Specification Characteristic form

Field	Description
Characteristic	Characteristic for the specification. Select the characteristic.
Characteristic option	Characteristic option for the product offering. Select a characteristic option.
Order	Numerical order for the options. Options designated with the number 1 appear first in the order.
Specification	Name of the specification that you selected.
Mandatory	Option indicating that the characteristic option is required to complete the order.
Default	Option indicating this characteristic option is the default choice.

5. Select **Save**.

Updating specification versions

Enterprises frequently create and update new versions of product and service specifications. When these changes occur, it's important to update the existing product specification in ServiceNow®. Failure to update the product specifications can lead to difficulties with MACD (Modify, Add, Change, Delete) operation when orders enter fulfillment.

Updating specification versions helps with:

- Introducing new characteristics along with their options.
- Adding new options to existing characteristics and removing existing characteristics or their options.
- Renaming existing characteristics and options.
- Incorporating new relationships and updating or removing existing relationships.
- Adding compatibility rules.

Specification version updates

The following list shows the types of specification version updates that can occur:

- Characteristics
  - New
  - Changed - enumerations
  - Removed

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- Child Relationships (bundled/composed)
  - New
  - Removed
  - Change cardinality
- Horizontal Relationships/Compatibility Rules
- Attribute Mapping Rules

Batch specification version update

A set of specification versions can be updated using the batch specification utility in Sales Customer Relationship Management. The specification can also be scheduled.

What to do next

Configure update specification versions

Configure update specification versions

Configure specification version updates so that product specification versions can be updated to reflect changes and updates.

Before you begin
Role required: system_catalog_admin

About this task
To configure the product specification version change, modify the check-for-an-incoming-specification ID and the product inventory specification ID.

Procedure

1. Navigate to **All** and enter `sys_properties.list` in the search area to open the **System Properties** list.
2. In the **System Properties** list, search for `sn_ind_tmt_orm.allowSpecVersionUpdateInChangeOrder` then select to open the system property.
   If the system property record is in an uneditable state, select the message to make the record editable.
3. In the **Value** field, set the value to `true`.
4. Select **Update**.
   The specification version update is activated.

Batch update for product specification versions

Use the inventory batch update job to update product specifications when changes occur from one version to another.

Before you begin
Role required: product_catalog_admin and product_catalog_manager

About this task
Batch inventory specification update lets catalog admins and product managers create an on-demand job that triggers a batch specification version update. The update doesn't create change orders but directly updates product inventory in orders. Batch updates also create a log that including errors.

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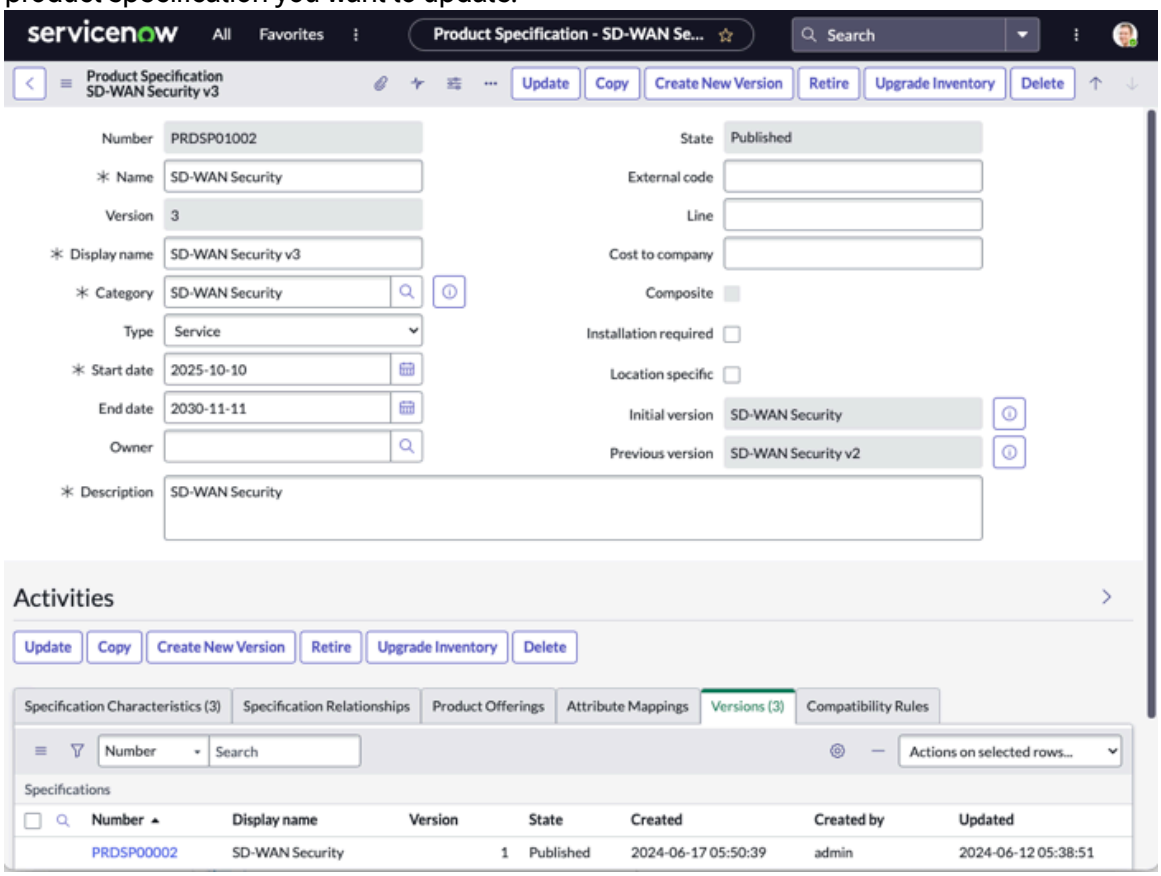
There are two steps to perform this process. The first is to update the specification version from the source version to the target version. The second step is to run an inventory upgrade job.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Specifications** and select the product specification you want to update.



2. Select the **Create New Version** button to create a version of the specification.
3. Select **Publish** to publish the specification version, then select **Update** to update the specifications to add the new version.
   Now there are two published versions of the specification. The initial version is considered the source version and the v2 version is considered the target version.
4. To start the version update on existing product inventories, select **Upgrade Inventory** and select **Yes** at the prompt.
   The job is created for the source specification as v1 and the target is automatically populated as the latest published version of the source specification. The inventory upgrade job starts and runs a series of validation steps to confirm the job runs successfully. When the validation is complete, the job enters an **In progress** state. If an error occurs, the job status turns to **Error**.
5. Navigate to **All** > **Inventory upgrade job** and select the job you're working with to view the status of the job and address any errors.

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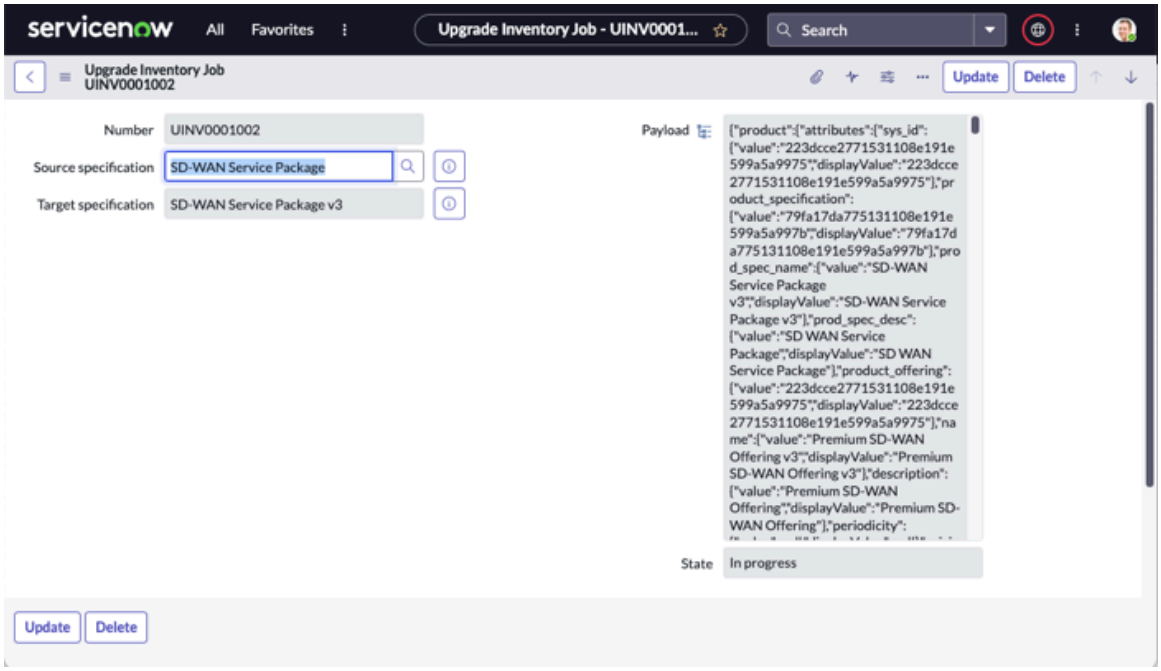

6. Navigate to **All** > **Inbound queue** > **Inbound requests** and select the record id you're working with to view the status.
   The number of inbound queue requests indicates the number of product inventories that matched the source specification. Once all the inbound queue records are processed, the request creates a change order for each of the inbound queue records processed successfully.

View upgrade inventory job status

View the status of a specification upgrade job using the upgrade inventory Job status list form.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Upgrade Inventory Jobs** and select **All**.
2. Select the inventory job that you're working with.

Entry	Description
Number	A system-generated number identifying the inventory job.
Target specification	The target specification that is going to be updated.
Payload	Payload is the specification data that is being added to the target specification.
State	Shows the state of the job.

3. Select **Update** to save any changes.

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Product offer bundling with product specifications

Product Catalog Management supports the bundling of product offers that have associated product specifications or specification hierarchies at any level of the bundle.

Supported product offer bundles

As a product catalog admin or manager, you can create a bundle offer for the following product offer combinations:

- A top-level offer with several offers in multiple levels, but no product specification reference at any level.
- A top-level offer with several offers in multiple levels that can have a product specification reference at any level.
- A top-level offer with two or three levels of nesting, where the leaf-level product offer references a specification hierarchy.

When offer bundles that have a specification reference at different levels are added to a quote or an order, the appropriate transaction lines are generated with specification references and product offer references. If fulfillment is done in ServiceNow Order Management, the applicable domain orders are generated and records for sold products and product inventory are created or updated.

Characteristics inherited from product specifications

When you create a product offering and reference a product specification hierarchy, you can select an option called **Copy child specification characteristics**. When you select this option, the product offer inherits all the characteristics from the specification or specification hierarchy. For example, if a product offer has an associated product specification, the characteristics are inherited from the child specifications in addition to the parent specification. The attributes from parent specification are always inherited by the product offer.

You can also do the following when you create a bundle product offering:

- Add other characteristics to the offering, such as attributes for order enrichment, aside from characteristics inherited from the specification.
- Delete product offering characteristics that were inherited from the specification.

To learn more about product offerings, see Create product offerings.

Product catalog hierarchy visualization

As a product catalog admin or manager, you can view the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.

For product offerings that have associated specifications, you can toggle the hierarchical view of the product offering to show its specification hierarchy. The hierarchical specification view shows the services that enable the product to be realized and the resources that are required to deliver those services. This view helps you visualize different aspects of a product offering, to validate the product and determine that the supporting services and resources are designed as needed. The hierarchy also highlights any relationships between specifications.

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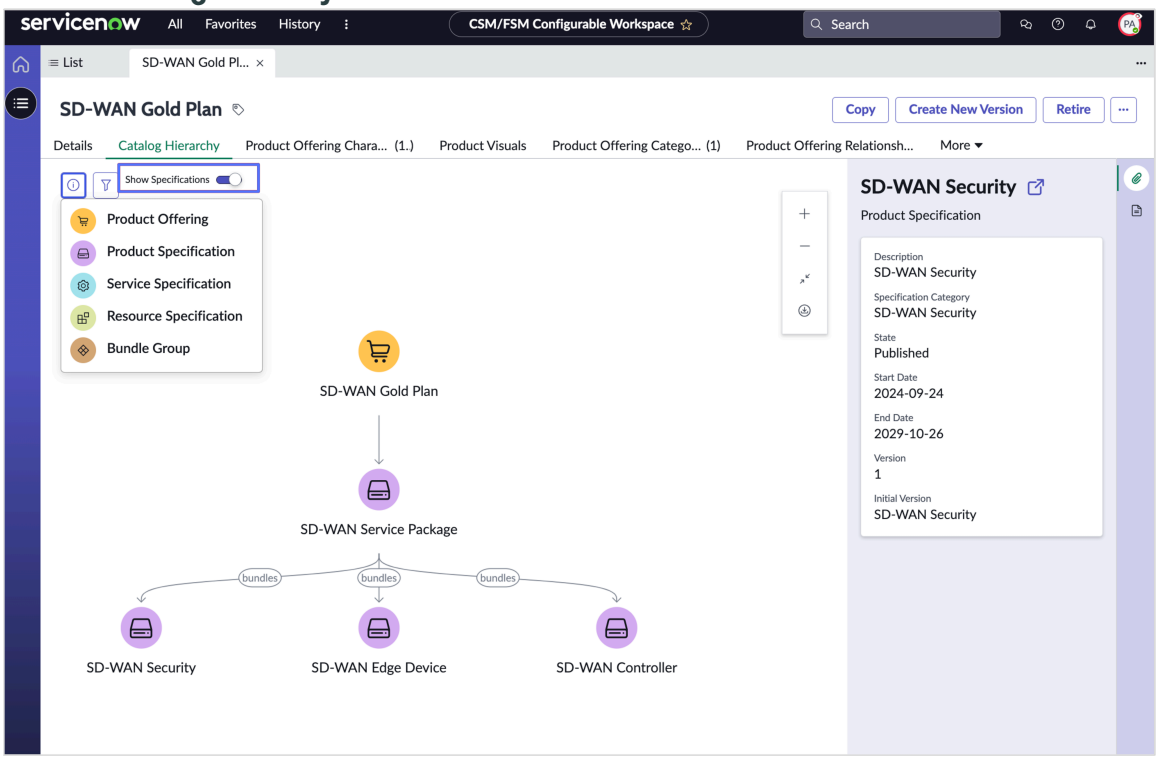
Product catalog hierarchy views



To view the product catalog hierarchy in the CSM Configurable Workspace, in the List view navigate to **Offerings** > **Product Offerings**. Select a product offering, then select the Catalog Hierarchy tab. Use the **Show specification** toggle to switch between the product offering and specification hierarchical views.

The toggle legend identifies the product offering and specification icons displayed in the visualization. Similar to the selection of specification nodes, when you select any product offer node, the side panel displays the high-level details of the product offer. You can use the filter to select a node and display the hierarchy under the node rather than the whole tree.

Minor changes to published product offerings and specifications

As a product catalog admin, you can make minor changes to certain fields in published versions of a product offering or specification, without creating another version. Minor changes include updates such as modifying the product offering display name, description, or product image.

Note: If you want to change fields other than the fields listed in the following sections, those changes are considered major updates. You must generate a new version of the product offering or specification.

How minor changes are processed

The following sections describe the minor changes that you can make to published versions of product offerings and specifications. When you save your changes, the entities are immediately updated.

If you're using the CPQ Configurator, minor changes are handled as follows:

- Minor changes to simple products are synchronized automatically.
- Minor changes to configurable products require synchronization. In the CSM Configurable Workspace, the **Save** and **Update Configuration** buttons are displayed when you make

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minor changes to a product offering. Selecting **Update Configuration** synchronizes the configurable product offering with its corresponding blueprint.

- If any blueprints have a reference to a simple or configurable product with minor changes, you must synchronize those blueprints.

Make minor updates to published product offerings

Make minor changes to certain fields in a published product offering and its related entities.

1. In the CSM Configurable Workspace, select the List view.
2. Navigate to **Offerings** > **Product Offerings**.
3. Select the product offering to be changed and choose the appropriate tab (related list).

   You can change any of the product offering fields listed in the following table.

   Product offering fields that can be changed

Product offering entity	Fields that can be updated
Product offering	○ Name ○ Display name ○ Description ○ Sellable ○ Allow multiple configurations: Change the setting from unselected to selected (true).
Product Offering Characteristics	○ Customer input required ○ Order ○ Mandatory
New Characteristic Option	Add Characteristic option
Product Offering Relationship	○ Display name ○ Order
Product Offering Relationship Groups	○ Name ○ Description ○ Order
Product Offering Relationship Characteristics	Order
Relationship Characteristic Option	Add Characteristic option

4. Repeat step 3 for each product offering entity that has minor changes.
5. When you finish the changes, select **Save**.

   The changes to the published offering are updated immediately.

Make minor changes to published specifications

Make minor changes to certain fields in a published specification and its related entities.

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1. In the CSM Configurable Workspace, select the List view.
2. Navigate to#**Specifications**.
3. Select the specification to be changed (Product, Service, or Resource) and choose the appropriate tab (related list) for the entity to be changed.

   You can change any of the minor fields listed in the following table.

Published product, service, and resource specification fields that can be changed

Entity	Fields that can be updated
○ Product Specification ○ Service Specification ○ Resource Specification	○ Name ○ Display name ○ Description ○ Line ○ External code
Specification Characteristics	Order
New Specification Characteristic	Add characteristic options
Specification Relationships	Order

4. Repeat step 3 for each specification entity that has minor changes.
5. When you finish the changes, select **Save**.

   The changes to the published specification are updated immediately.

Configuring product offer eligibility

You can filter the product catalog, offering categories, and product offerings dynamically, to display only the appropriate catalog, categories, and offerings for which a customer is eligible. Your agents see this filtered product information when they're creating opportunities, quotes, and orders.

Product offer eligibility overview

As a product catalog admin or manager, you create the business rules that filter the product catalogs, offering categories, and product offerings to display only the eligible products for customers when agents are creating quotes or orders. Filtering the products helps agents sell the correct products to customers. The filters are based on decision rules that you set in the following product eligibility matrices:

- **Product Offering Catalog Eligibility**: Define the eligibility rules to be applied to product offering catalogs. For example, you can use this matrix to filter sales catalogs based on customer location, such as country, state, or city.
- **Product Offering Category Eligibility**: Define the eligibility rules to be applied to product offering categories.
- **Product Offering Eligibility**: Define the eligibility rules to be applied to product offerings.

These matrices are frameworks for setting the conditions and the context variables that control the catalogs, product categories, and product offerings displayed. You can use system-defined context variables provided with Product Catalog Management and Pricing Management, or you

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can work with your admin to develop your own custom context variables, such as marketing segment or sales channel, to be used in the eligibility matrices.

Configuration tasks

Complete the following tasks to set up product eligibility matrices.

Product eligibility configuration tasks

Task	Description	Role
Create a custom context variable (if needed)	Review system-defined and existing custom context variables. If needed, add a new context variable, then map the customer variable to a transaction entity.	Admin
Create a rule entity filter	Define the eligibility filters for a product entity.	Product catalog admin or manager
Define product eligibility rules in a product eligibility matrix	Define the eligibility rules in the decision table of a product eligibility matrix.	Product catalog admin or manager

Create a rule entity filter

Create a rule filter for the product entity to be used in a product eligibility matrix. The rule filter defines how the rule is applied, for example to a product catalog, category, or offering.

Before you begin

Determine the entity to which the filter applies, for example a particular product catalog, category, or a product offering.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Entity Filter**.
3. Select **New**.
   On the form, fill in the fields.

Rule Entity Filter

Field	Description
Filter Name	Name of the filter, for example `Ineligible offers for CA`.
Entity	Product entity for the rule: ○ Product catalog ○ Product offering category ○ Product offering
Filter type	Type of filter to be applied:

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Field	Description
	○ Static: Use a particular list to filter the product entity. ○ Dynamic: Set the conditions to filter the entity.
Code	System-generated alphanumeric number based on the filter name.
Product <catalogs, categories, or offerings>	The product catalog, category, or offering to be filtered, based on the **Entity** selected. This field appears only when Static is selected as the **Filter type**.
Condition	Condition to be used to filter the entity. Use the **Set conditions** builder to specify the conditions. This field appears only when Dynamic is selected as the **Filter type**.

4. Select **Save**.
   The rule filter can now be used in a product eligibility matrix.

Define product eligibility rules in a product eligibility matrix

Define product eligibility rules by using the Product Offering Catalog Eligibility, Product Offering Category Eligibility, or Product Offering Eligibility Matrix.

Before you begin

Create the rule entity filters and define any new custom context variables needed to define the eligibility rules.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

When you define eligibility rules, consider the two modes for determining eligibility:

- Ineligible: Determine all the catalogs, categories, and product offers that are considered ineligible by default, then set your eligibility rules as needed.
- Eligible: Determine all the catalogs, categories, and product offers that are considered eligible by default, then set your ineligibility rules as needed.

Use the **Default result** field in the decision table for the product eligibility matrix to control the default mode.

The November 2024 release provides Version 2 of the product eligibility matrices, which now support eligibility rules based on transaction line attributes. You can also use service location context variables to set product eligibility rules for service locations: Service City, Service State, Service Country, and Service Zip.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. Select the product eligibility matrix for the rule to be defined.

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- To set the eligibility rules for a product catalog, select the Product Catalog Eligibility Matrix.
- To set the eligibility rules for a product category, select the Product Category Eligibility Matrix.
- To set the eligibility rules for a product offering, select the Product Offering Eligibility Matrix.

4. Select **Edit Rule**.
   The Decision Table for the selected eligibility matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions that control the eligibility.
5. In the decision table, set the rule to control the eligibility.
   a. In the **Default result** field of the Condition section, review the eligibility mode being used and update it if needed.
   b. Select **Add new decision row**.
   c. In the row, select the column for the input (context variable) to be applied, such as the Billing State or Account.
   d. In the **Active** column, set the value to true.
   e. In the Results section, under the **Eligibility Rules** column, select the eligibility state to be applied, for example Ineligible or Eligible.
   f. Under the **Rule Entity Filter** column, select the filter to be applied.
6. Select **Save**.
   Review the **Validation Status** and **Validation Messages** columns to see if you're missing mandatory inputs, outputs or other information. If so, enter the appropriate information and select **Save**.
   The filtered product entity (product catalog, category, or offering) is displayed or hidden to sales and order agents, depending on the filter.

Use extension points in product eligibility

Use extension points to call custom scripts from external sources that control product eligibility logic used in the Sales Customer Relationship Management (Sales CRM) applications.

To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

Product eligibility extension points

Extension point	Description
`sn_prd_pm.EligibilityRulesExtensionPoint`	Extension point for defining eligibility methods for product catalogs, categories, and offerings.

Exporting and importing product catalog entities

As a product catalog admin, you can both export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance. Each process involves a separate set of steps.

Managing product catalog entities

The first step before exporting product catalog entities is adding the **Code** field values to product catalog entities. The **Code** field value is used by the system to determine whether an entity is to be inserted or updated in the target instance.

You then choose the product catalog entities to be exported and run the export process.

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After you export your product catalog entities, certain base entities must be imported first to your target instance, such as characteristics, characteristic options, template, and Unit of Measure (UOM), since they're referenced by product offerings, product specifications, and service specifications. For this reason, import certain product catalog entities to your target instance in the following order:

1. Import the exported base entities.
2. Import the product offering catalog if you're exporting product offerings.
3. Import product offerings and product specifications.

Export and import process

Follow these steps to export and import product catalog entities.

Export and import product catalog steps

Step	Description
Add Code field values to catalog entities	Add the **Code** field values for the main product catalog entities on your source and target instances.
Export product catalog entities	Export product catalog entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory.
View export job status	Check the state of the export job.
Import product catalog entities	Import product entities exported as JSON files to another instance.
View import job status	Check the state of the import job.

Add Code field values to catalog entities

Add the **Code** field values for the main product catalog entities. The system uses this field as a way to identify catalog entities uniquely and to determine whether the **Code** field values for an export catalog entity are to be inserted or updated in the target instance.

Before you begin

Role required: admin

About this task

The **Code** values for product catalog entities are system-assigned alphanumeric values based on the catalog entity name, such as the name of a product offering. If the **Code** field values for the main catalog entities are empty, run certain on-demand scheduled jobs and fix scripts to add the **Code** field values for the main product catalog entities.

Both the scheduled jobs and fix scripts add the **Code** field values for the catalog entities.

Procedure

1. On the source instance, navigate to **All** > **System Definition** > **Scheduled Jobs** and do the following:

   a. In the filter, enter `Application is Product Catalog Management Core`, then select **Run**.
   A list of jobs for Product Catalog Management Core is displayed.

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b. Run each of the following jobs in the order listed below (select the job, then select **Execute Now**).

- **Migrate prod chars values to char options**
- **Schedule job to modify code field on characteristic records that contain special characters**
- **Schedule job to populate code field on master entities**
- **Schedule job to populate name field on product offering characteristics**
- **Schedule Job with upgrade script to populate code**

2. Navigate to **All** > **System Definition** > **Fix Scripts**.

a. In the filter, enter `*code` to view the list of applicable fix scripts.

b. Run each of the following fix scripts (select the script, then select **Run Fix Script**).

- **Populate Code Field** - For Product Catalog Management Core application
- **Populate Code Field** - For Compatibility Management application
- **Populate Code Field** - For Attribute Propagation
- **Populate Code Field Decomposition Rule** - For Order Management application

These scripts can be run in any order.

3. Repeat Steps 1 through 2 on the target instance.

Result

Your product catalog admin can export product catalog entities from the source instance and import them to the target instance.

Export product catalog entities

Export product catalog entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

Before you begin

Role required: product_catalog_admin

About this task

You can export catalog entities in any sequence, but you must import them to a target instance in a certain order. You import base entities (characteristics and characteristic options, template, and unit of measure) first, followed by the product catalog, product offerings, and product specifications.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.

2. Navigate to **Export** > **Export Entities**.
The Export Entities list shows the previous export jobs.

3. Start an export job by selecting **Export Hierarchy**.
The **Catalog Export** form opens in the **Export-UI** tab.

4. In **Entity Type**, select the product catalog entity to be exported from your source instance.
The product catalog entities include:

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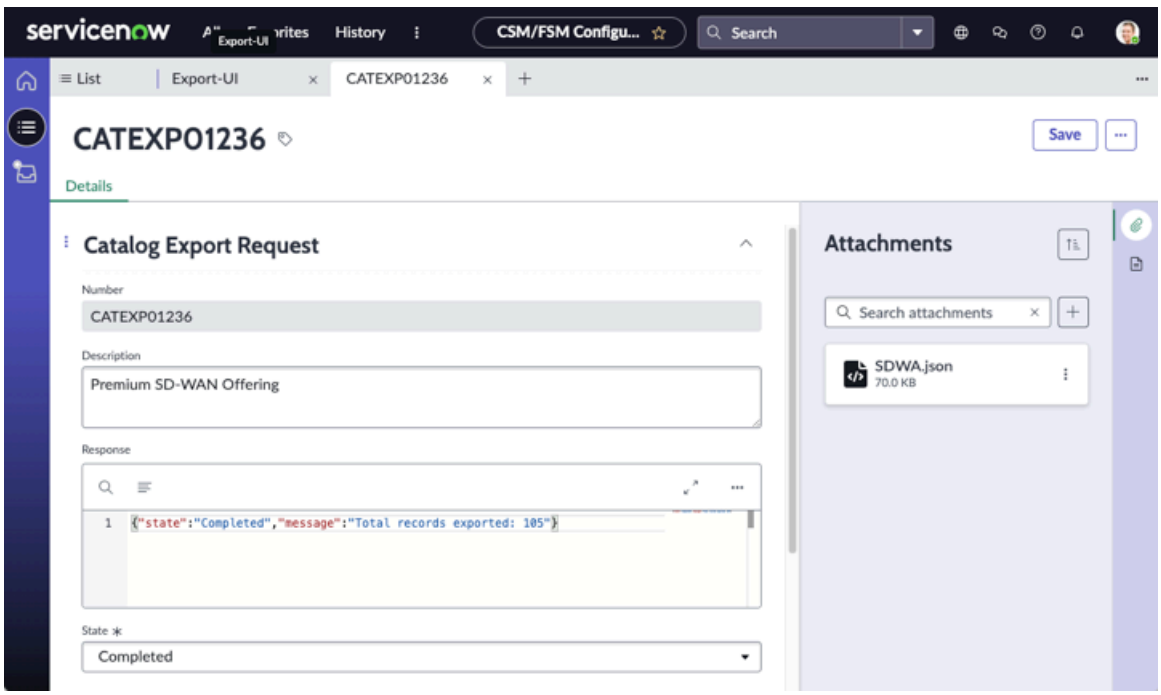
- Product offering catalog
- Unit of Measure
- Template
- Product specification
- Service specification
- Resource specification
- Product offering - The product offering characteristics, including complex characteristic hierarchies, related specifications, and distribution channel values are also exported with an offering.

Note: During export, note the following:

- Versioned entities can be exported in any order. However, if you have many versioned entities that must be exported, the lowest version of the entity must be exported before exporting higher versions of the entity.
- Referenced specifications are also exported. For example, when an attribute mapping is exported, the target service specification in that mapping is also exported.
- Exceptions and errors are captured when required plugins aren't installed, to help identify issues with drop-down menus that aren't populated with catalog entities.

5. Select the items that you want to export and select **Export**.
6. Give the export job a file name and description, then select **Submit**.
   The export process begins and a message displays the catalog export ID.
7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

   The exported file appears in the **Attachments** pane.



8. Select the attachment to download the exported file.
   The file is downloaded as a JSON file and saved to your local download directory.

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What to do next

- Import product catalog entities
- View export job status

View export job status

Check the status of an export job for product catalog or pricing entities to see if it's in progress or completed.

Before you begin

Role required: product_catalog_admin for catalog entities, sn_csm_pricing_pricelist_administrator for pricing entities

Procedure

1. In the **CSM Configurable Workspace**, select the **List** view.
2. Navigate to **Export** > **Export Catalog**.
   The **Export Catalog** list shows the status of export jobs.
3. In the **State** column for the export job, view the status.

What to do next

If the export job is complete, import the product catalog entities or import the pricing entities to your target instance.

Import product catalog entities

Import product catalog entities by using the ServiceNow Platform import function.

Before you begin

The application scope must be set to Product Catalog Management core. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: product_catalog_admin

About this task

You import certain product catalog entities to your target instance in the following order:

- Import the exported base entities.
- Import the product offering catalog if you're exporting product offerings.
- Import product offerings and product specifications.

Procedure

1. Go to the target instance where you want to import the data.
2. Navigate to **All** > **Product Catalog Management** > **Catalog Import** > **Import**.
   The Catalog Import Data Source window opens.
3. Attach the JSON file by selecting the **Attachments** icon.
4. Select **Choose file** and select the file you want to import.
   Versioned entities can be imported in any order. However, if you have many versioned entities that must be imported, the lowest version of the entity must be imported before higher versions of the entity.

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Note: When you're importing files to a target instance, import the files in a certain order, based on the type of entity:

a. Import the exported base entities first, for example characteristics, characteristic options, template, and Unit of Measure (UOM).

b. Import the product offering catalog if you're exporting product offerings.

c. Import service specifications, product specifications, and then product offerings.

5. When the file is uploaded, close the Attachments window.
6. Under Related Links, select **Load All Records**.
   The data from the imported file loads, and a Progress window opens showing the imported job.
7. Select **Run Robust Transform**, then select the **Transform** button.
8. In the Progress window under the Next Steps section, select the imported file name to view the results.
   The imported data is loaded into the correct tables.
9. Navigate to the Entity list view of the entity that you imported to check the imported data.

What to do next

- View export job status
- View import job status

View import job status

Check the status of an import job for product catalog or pricing entities.

Before you begin

Role required: product_catalog_admin for catalog entities and sn_csm_pricing_pricelist_administrator for pricing entities

Procedure

1. Navigate to the product catalog or pricing module.
   - To check product catalog entities, navigate to **All** > **Product Catalog Management** > **Catalog Import**.
   - To check pricing entities, navigate to **All** > **Pricing** > **Import**.
2. Select the links under **Related Links** to view import job status:
   - Import sets - View the import sets for this data set.
   - Loaded Data - View the newly imported data for catalog entities in the Catalog Import Data Source table [sn_prd_pm_catalog_import_data_source] or for pricing entities in the Pricing Import Data Source [sn_csm_pricing_import_data_source] or sn_csm_ctxrul_mgt_import_data_source staging tables.
   - Run Robust Transform - Transforms a loaded import set using a robust transform.
   - Import Log - Opens the import log.

Caching in Product Catalog Management

The Product Catalog Management application uses caching to improve user interface performance when agents access product catalogs and product offerings through the product configurator.

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The product offering catalog and configurable product offerings have hierarchical structures that require frequent database retrieval when they're used. To improve performance, these hierarchical structures are cached when you publish these features.

As a product catalog admin or manager, when you make the following changes to a published product offering or product offering catalog, you must update the associated cache so that you can immediately see the changes just made:

- **Unit of Measure** (UOM) in product offerings – Although product offerings cannot be changed after you publish them, you can change the default **Unit of Measure**. After updating the UOM, you must update the product offering cache.
- **Product offering catalog changes** – If you change the hierarchies for catalog to category or category to sub-category hierarchies, you must update the product offering catalog cache.

For details on regenerating these caches, see Update a cache in Product Catalog Management.

Update a cache in Product Catalog Management

Regenerate the cache associated with product offerings or product offering catalogs after changing the **Unit of Measure** in a product offering or category-related hierarchies in a product offering catalog.

Before you begin

Role required: sn_prd_pm.product-catalog_admin, sn_prd_pm.product-catalog_manager, or admin

Procedure

1. Navigate to the record that you updated.

Feature change	Navigate to
Unit of Measure (UOM) for a product offering	**a.** Navigate to **All** > **Product Catalog Management** > **Product Offering**. **b.** Select the product offering record that you just updated.
Product offering catalog changes ○ **Catalog to category** ○ **Category to sub-category**	**a.** Navigate to **All** > **Product Catalog Management** > **Product Offering Catalogs**. **b.** Select the product offering catalog record that you just updated.

2. Right-click the **Additional actions** menu in the record header and select **Regenerate Configuration JSON**.
   The system immediately updates the associated cache for the product offering or product offering catalog. You can then view the changes that you made to the **Unit of Measure** in a product offering or the product offering catalog.

Configuring needs analysis

As a product catalog administrator, you can create needs templates, which are questionnaires that agents use to find product offers to add to a lead or opportunity. Questionnaires function as product selection guides. When agents complete a questionnaire based on customer input, they get product recommendations that they can add to a lead or opportunity.

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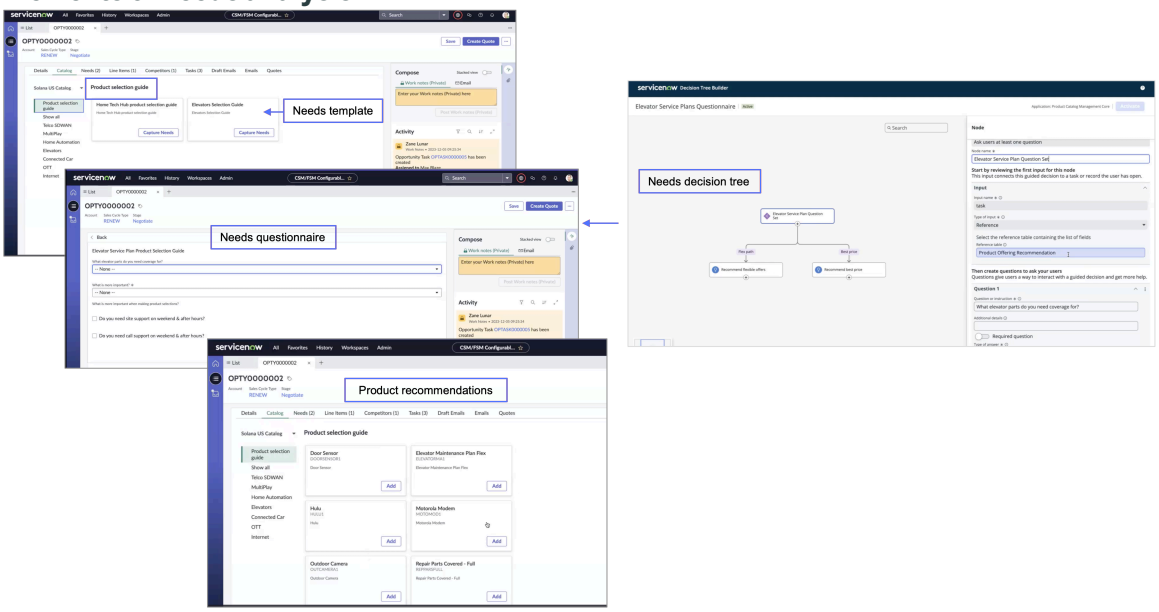
Overview of needs analysis

When agents create a lead in the Lead Management application or an opportunity in the Opportunity Management application, a product selection guide is displayed in the product catalog. The product selection guide lists the needs templates that agents can choose to get product offer recommendations.

Elements of needs analysis



Needs template

Product selection guides associated with the product catalog display one or more needs templates. Each needs template is a questionnaire that has a set of guided questions that agents answer to get product recommendations for a customer. Each template is associated with a needs decision tree.

Needs decision tree

A multi-step, guided decision process that presents a series of questions to the agent. You use Decision Tree Builder to create and build the decision tree.The decision tree defines the question nodes, expected answers, connection points, decision logic, and guidance for decision paths in the questionnaire.

Product recommendations

The product offerings suggested for an opportunity or lead, based on the results of the needs questionnaire.

Working with decision trees

You configure decision trees by adding nodes, defining paths, and attaching guidances in Decision Tree Builder. This tool is a canvas for diagramming the basic elements in a decision tree, such as the question nodes and decision paths. Needs analysis provides a default guidance, the Product Offering Recommendation guidance, which references information from the Needs Based Offering Recommendation [sn_prd_pm_product_offering_recommendation] table as you create the question nodes and guidances in the decision tree.

Before creating decision trees for needs templates, review how decision trees work:

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- Decision trees in Guided decision - Learn the basic elements of a decision tree, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Review an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers to questions, such as Choice, Date, or Integers.

Setting up needs analysis

Follow these steps to configure needs analysis:

1. Create a needs-based product offering recommendation.
2. Create a decision tree for a needs template.
3. Build a needs decision tree.
4. Create a needs template and set the catalog relationship.

Create a needs-based product offering recommendation

Set the product offering to be used as a product recommendation for a needs template.

Before you begin

Product offerings must be defined and published before they can be set as a product recommendation.

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin, admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Based Offering Recommendation** and select **New**.
   On the form, fill in the fields:

Create New Needs Based Offering Recommendation form

Field	Description
Name	Name of the recommended offering displayed to the agent. For example: Recommend Flex or Recommend Quad Play service bundle.
Description	Brief description of the recommendation. For example: Recommending flex offers based on customer needs.
Product Offering	Product offering to be recommended.

3. Select **Save**.
   The selected product offering is available as a product offering recommendation and can be selected as a guidance node in a needs decision tree.

What to do next

Create a decision tree for a needs template.

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Create a decision tree for a needs template

Create a decision tree that defines the questions that agents answer to determine customer needs and get product recommendations.

Before you begin

Before creating decision trees, review the following information:

- Decision trees in Guided decision - Become familiar with the basic elements of a decision tree and how they work, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Walk through an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers, such as Choice, Date, or Integers.

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Decision Tree** and select **New**.
3. Select **New**.
   On the form, fill in the fields.

Create New Decision Tree form

Field	Description
Name	Name of the decision tree.
Action Label	Label of the decision tree displayed on the needs template card in the product selection guide.
Description	Brief description of the decision tree. The description is displayed on the needs template card in the product selection guide.
Title	Name of the decision tree on the needs template card in the product selection guide.
Show a dismiss button	Option that shows or hides the **Dismiss** button that cancels the flow of a decision tree during opportunity or lead creation. This field is enabled by default.

4. Select **Save**
   A decision tree is created with the name specified in the **Name** field.

What to do next

Build a needs decision tree using Decision Tree Builder.

Build a needs decision tree

Define the decision tree question nodes, decision paths, and guidance for each decision path using Decision Tree Builder.

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Before you begin
Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

About this task
As you build your decision tree, for example after adding a decision node or a path, you save and close the decision tree record. To continue working on the tree, navigate to the Decision Trees list, select the decision tree record, and open it in Decision Tree Builder, as described in steps 1 through 3 of this procedure.

Procedure
1. Navigate to **All** > **Product Catalog Management** > **Needs** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, define the start node:
   a. Select **New node**
   b. In the **Node name** field, enter a name for the start node.
   c. In the **Reference table** field, select the Product Offering Recommendation table.
   d. Enter the question for the agent to answer.
   You can make the question mandatory by selecting the **Required question** field and enter more details in the **Additional details** field.
   e. Select the type of answer for your question.
   For a description of the answer types, see Answer types for questions.
   f. **Optional:** Add more questions.
   g. Select **Save and close.**
5. Continue building your decision tree in Decision Tree Builder.

Option	Steps
Determine the next node displayed in a deci	Configure a path to set the conditions for when the next question is displayed in a deci sion tree.
Add a follow-up set of questions or instruc	Configure a question node to add follow-up questions or instructions. An answer to these questions either leads to a guidance or a fur ther set of questions.
Add a guidance node for the product recom mendation questionnaire	Configure a guidance node, which identifies the product recommendation displayed after agents answer the questions. The guidance node is the leaf node of a tree. **a.** Select the Add path icon on a node. **b.** Select **Add node**.

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Option	Steps
	c. In the pop-up, select **Propose a guidance as the outcome** and select **Continue**. **d.** Enter a name for the node. **e.** In the **Guidance** field, select Product Offering Recommendation. **f.** In the **Set field inputs to pass data into this guidance** section, select the product recommendation to be displayed. **g.** Select **Save and close**.
	When your decision tree is complete, select **Activate** in Decision Tree Builder, which validates your tree. If there are no errors, select **Activate now** in the confirmation message dialog box. The decision tree status changes to active.

What to do next

Create a needs template and set the catalog relationship.

Create a needs template and set the catalog relationship

Define a needs template for a decision tree and associate the template with the product catalog to which it belongs.

Before you begin

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Template** and select **New**.
   On the form, fill in the fields.

Create New Needs Template

Field	Description
Number	Unique system-assigned number that identifies the needs template.
Name	Name of the needs template, for example Home Tech Product Selection Guide.
Decision tree	Name of the decision tree that has the questionnaire to determine customer product needs.
Description	Brief description of the needs template.
Start date	Date and time that the needs template becomes effective and is listed in the product selection catalog.

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Field	Description
End date	Date and time that the needs template is no longer effective and not listed in the product selection catalog.
State	Stage of the needs template: ○ Draft: Initial state of the needs template. The template hasn't been published yet. ○ Published: Template has been published. After a template is published, you can update or delete it.

3. Select **Save**.
   The Needs Template Relationship tab opens. The needs template is also listed in the Needs Template list.
4. In the Needs Template Relationship tab, set the catalog relationship.
   a. Select **New**, which opens the Create New Needs Template Relationship form.
   b. In the **Catalog** field, select the published Product Offering Catalog to which this needs template belongs.
   c. Select **Save**.
      The selected catalog name is listed under the **Catalog** field in the Needs Template Relationships section.
5. Select **Publish** to make the specified catalog available in the product selection guide.

Configuring product offering recommendations

As a product catalog admin or manager, you can create product offering recommendations that agents can use to upsell or cross-sell additional products in quotes.

Product offering recommendations provide your sales agents with relevant products to supplement or complement existing items in quotes. The recommendations are displayed as cards in the contextual side panel of the CSM Configurable Workspace when your agents update a draft quote. Product offering recommendations enable your agents to find and add relevant items quickly to their quotes.

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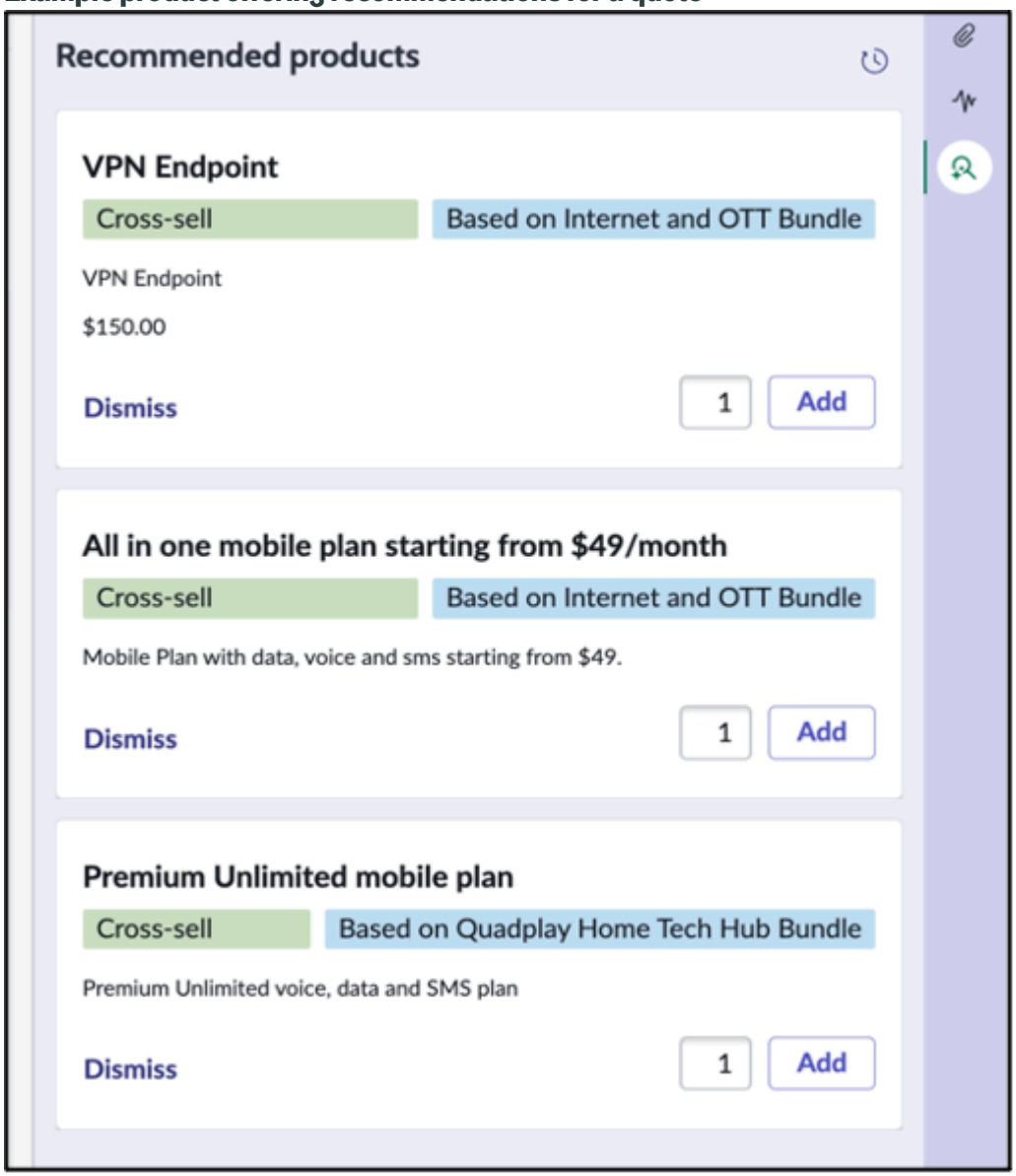
Example product offering recommendations for a quote



As a catalog admin or manager, you configure product recommendations by identifying the source product offerings, the type of recommendation, and the associated recommended product. There are two types of product recommendations:

- Upsell: An upgraded or enhanced version of a product in the quote.
- Cross-sell: A related product that complements a product in the quote.

For details on configuring product recommendations, see Create a product offering recommendation.

Create a product offering recommendation

Create product offering recommendations that can be used by your sales agents to upsell or cross-sell additional products in quotes.

Before you begin

Review the product offerings that your sales agents can add to quotes, then determine the complementary and supplementary products that can be recommended to upsell or cross-sell additional products for those products. The source product offerings and also the recommended product offerings must be published in the product catalog.

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Role required: Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product_catalog_admin, admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Recommendations** > **Product Offering Recommendations** and select **New**. Fill in the form.

Create New Product Offering Recommendation

Field	Description
Source product offering	Product for which a recommended product offering is to be defined. The source product can be a simple or complex product. Select from the list of published product offerings.
Recommended product offering	Product recommended for the source product offering. Select from the list of published product offerings.
Type	Option that indicates the type of recommendation: ○ Upsell: Recommendation for upgrading or enhancing the source product, for example a better or bigger version of a product. ○ Cross sell: Recommendation for buying a product that is related to but different from the source product.
Active	Option that indicates the recommendation is active and displayed to agents when they're adding or updating quotes and quote line items. To deactivate the product offering recommendation, deselect this option.
Order	Number that determines the sequence in which the recommendation is displayed in the contextual side panel of theCSM Configurable Workspace.
Description	Brief description of the offering recommendation.

3. Select **Save**.
   The product recommendation card for the product is displayed to your agents when they're updating a quote that has the source product offering for this recommendation. For more information on how sales agents use product offering recommendations, see Get additional product offering recommendations for quotes.

Configuring AI Search for the product catalog

Configure and manage the implementation of AI Search in the product catalog for Sales Customer Relationship Management.

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How AI Search works in the catalog interface

AI Search in the product catalog for Sales Customer Relationship Management transactions enables agents and customers to use semantic queries combined with keyword queries to find relevant product offerings and service specifications.

AI Search looks across all product offerings and service specifications, including product characteristics, bundled product offerings, and child offerings, to return results in the product catalog interface.

For example, entering the term `sedan` finds any products that contain this characteristic, parent products containing child products with this characteristic, and related products that have semantic similarity to this search term or results. Semantic similarity considers the context behind user queries, such as the user intent, to determine relevant results even if the exact terms or phrases aren't provided.

To enhance the accuracy of semantic results, AI Search uses the AI Search Retrieval Augmented Generation (RAG) application, which matches user queries with indexed records based on both keyword and semantic similarity.

The main elements of AI Search for product catalog include the following:

Indexed source

Defines the table records to be indexed for product catalog search:

- The Product Offering Indexed source uses the Product Offering [sn_prd_pm_product_offering] table as the source. The**Configuration JSON** field in the Product Offering table provides the characteristic options and attributes for products, which are used by AI Search to find catalog items by characteristics and options.
- The Service Specification indexed source uses the Service Specification [sn_prd_pm_service_specification] table as the source.
- Semantic Index Configuration settings define the embedding model, chunking configuration, and the semantic index fields used to control semantic indexing in AI Search. To learn more about semantic indexing, see Semantic index configuration for indexed sources.

For more information on indexed sources, see Indexed sources in AI Search.

Search source

A search source defines the searchable set of indexed records to be used as the search source and the conditions for items that can be searched. For example, the Product Offering Search source has two conditions that a product offering must meet so that it's returned as a search result:

- [State] [is] [published]
- [Sellable] [is] [true]

The Service Specification Search source has one condition, [State] [is] [published], that a specification must meet so that it's returned as a search result.

For more information on search sources, see Search sources in AI Search.

Search profiles

Search profiles (Product Offering Search Profile and Service Specification Search Profile) manage the search experience offered to users and the data to be searched. You can fine tune the synonyms, stop words, typo handling rules used in auto-correction, and result improvement rules that control the product catalog

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search experience. To learn more about the features that can be changed in a search file, see Search profiles in AI Search.

Search application configurations

Search application configurations define the search engine used, the search profile used, and also auto-complete suggestions. For details about these configurations, see Search application configurations.

Product catalog admins inherit the ais_admin role, which allows them to create, read, update, and delete content indexing and search settings for AI Search.

Implementing AI Search for product catalog

Users with the admin role perform the following steps to implement AI Search for the product catalog.

1. Install AI Search for Next Experience only if you upgraded from Tokyo or a previous release.

   Skip this step if you're a new customer using the Australia release or if your instance was zBooted in the Australia release. AI Search for Next Experience is automatically installed.

2. Configure Now Assist for Sales Force Automation (SFA).

   Depending on your entitlements, the Now Assist for Sales Force Automation (SFA) plugin might be automatically installed. If it is not automatically installed but you have the appropriate entitlements, install the Now Assist for Sales Force Automation (SFA) plugin (sn_som_gen_ai). This plugin installs the AI Search RAG plugin (sn_ais_rag) and the AI Search Semantic Controller plugin (com.glide.ais.semantic_search) for the AI Search Retrieval Augmented Generation (RAG) application used by AI Search for product catalog.

   Note: If you do not install Now Assist for Sales Force Automation (SFA) plugin (sn_som_gen_ai), the product catalog interface provides simple keyword search, also known as Zing search.

3. Run scheduled job to populate product offering categories only if you upgraded to the Australia.

   This step adds the product offering categories field to the Product Offering table. Skip this step if you're a new customer using the Australia release or if your instance was zBooted in the Australia release.

4. Run scheduled job to publish stop words dictionary, search profiles, and index tables.

   This scheduled job sets up the indexes and publishes the stop word dictionary and search profiles used in AI Search for product catalogs.

5. Enable AI Search in product catalog.

   Set the *enable_ai_search_in_catalog* property to true, which enables AI Search for the product catalog interface and verifies that the necessary files are configured to run AI Search.

After AI Search has been implemented, product catalog admins can manage and customize various AI Search features if needed. Product catalog admins inherit the ais_admin role, which allows them to create, read, update, and delete content indexing and search settings for AI Search[var.ai-search].

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Run scheduled job to populate product offering categories

After upgrading to the Zurich release and the Now Assist for Sales Force Automation (SFA) plugin is installed, run a scheduled job that generates the product offering categories for pre-existing product offerings in the product catalog with AI Search.

Before you begin
Role required: admin

About this task
Run the scheduled job called *`Scheduled job to populate product_offering_categories glide list for product offerings`* only if you've upgraded from a release before the Australia release. This job adds the product offering categories field to the Product Offering table. If you're a new customer using the Australia release or Zbooted, do not run this job.

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. In the **Search** field, enter *`Scheduled job to populate product_offering_categories glide list for product offerings`*.
3. Select **Execute Now** to run the scheduled job.

What to do next
Run the scheduled job to index the tables, publish the stop word dictionary, and publish search profiles.

Run scheduled job to publish stop words dictionary, search profiles, and index tables

After upgrading to the Australia release and the Now Assist for Sales Force Automation (SFA) plugin has been installed, run a scheduled job that publishes the stop word dictionary, search profiles, and index tables for using AI Search in the product catalog.

Before you begin
Now Assist for Sales Force Automation (SFA) plugin must be installed.

Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. In the **Search** field, enter `Scheduled job to publish stop words dictionary, search profiles and index tables`.
3. Select **Execute Now** to run the scheduled job.

Result
The stop words dictionary, search profiles, and index tables for running AI Search in the product catalog are published.

Enable AI Search in product catalog

Use the *`enable_ai_search_in_catalog`* property to enable AI Search in the product catalog interface for Sales Customer Relationship Management.

Before you begin
Role required: Role required: sn_prd_pm_product_catalog_admin

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About this task

The *enable_ai_search_in_catalog* system property checks that the Product Offering [sn_prd_pm_product_offering] and the Product Specification [sn_prd_pm_product_specification] tables are indexed for use in AI Search. This property also verifies that the AI Search plugin is installed. If you're upgrading from an earlier release, use this property to enable AI Search.

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *enable_ai_search_in_catalog* system property.
3. Set the property value for enabling AI Search in the **Value** field.
   - Enter `true` to enable AI Search.
   - Enter `false` to suppress AI Search if it's currently enabled. If this property is set to `false`, the simple keyword search feature is used in the product catalog interface.
4. Select **Update**.
   If you enable this property, AI Search features are available in the product catalog interface.

Install and configure Lead to Cash Core

Install the Lead to Cash Core application, which enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.

This mapping provides your users with a unified workflow experience across different entities.

Admins and users with various roles complete the following configurations tasks to use lead to cash.

Configuration tasks for Lead to Cash Core

Task	Description
Entity configuration and mapping	Map entities that define a structure and transfers data from the source entity to the target entity.
Create an entity configuration	Use entities to compose a workflow between two entities so that you can update their existing configurations and perform the required **Suspend**, **Resume**, or **Disconnect** actions on a sold product.
Create an entity mapping	Create an entity mapping to perform the declarative actions like **Suspend**, **Resume**, or **Disconnect** actions on a sold product.

Install Lead to Cash Core

If you have the admin role, you can install the Lead to Cash Core application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

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Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Lead to cash core application:

- Plugins
- Store applications
- Roles
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead to Cash Core application (com.snc.l2c_core) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Lead to Cash Core application.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing the Lead to Cash Core application. **a.** Install Lead to Cash Core (com.snc.l2c_ core). **b.** Navigate to the **All** and in the Filter, type `v_ plugin.list`. **c.** In the related Links, select **Install Demo Da ta Only**.

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Entity configuration and mapping

Use the Entity Configuration tables and forms to configure and map an entity that defines a structure and transfers the data from the source entity to the target entity.

Mapping and configuration

Create the configurations and mappings for the entities by using the Entity Configuration tables.

Entity Configuration tables

The entity configuration tables provide you with the information for the fields on the entity configuration form.

Entity Configuration tables

Table	Name	Description
Lead to Cash Entity	sn_l2c_core_entity	Defines and manages the lead-to-cash entities.
Lead to Cash Entity Definition	sn_l2c_core_entity_definition	Defines and manages the definitions that are associated with the lead-to-cash entities.
Lead to Cash Entity Attribute	sn_l2c_core_entity_attribute	Defines and manages the attributes that are associated with the lead-to-cash entities. The lead-to-cash attributes are based on the definitions that are set for the entities.

Each field on the entity configuration form gathers the information from one entity configuration table. The following table has the information about the fields, their descriptions, and the entity tables that the data is populated from.

Note: The Lead to Cash Entity Definition and Lead to Cash Entity Attributes are related lists on the Entity Configuration form.

Entity Configuration form

Table	Field	Description
Lead to Cash Entity	Name	Name of the lead-to-cash entity.
Lead to Cash Entity	Config ID	Unique configuration ID for the entity.
Lead to Cash Entity	Active	Status of the entity, whether active or inactive for the configuration.
Lead to Cash Entity Definition	Entity	Reference to the lead-to-cash entity definition.
Lead to Cash Entity Definition	Type	Type of the entity definition.

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Entity Configuration form (continued)

Table	Field	Description
Lead to Cash Entity Definition	Table	Table that is associated with a lead to cash entity.
Lead to Cash Entity Definition	Label	Label for the entity definition.
Lead to Cash Entity Definition	Parent definition	Parent of the current entity definition.
Lead to Cash Entity Definition	Relationship field	Query field that is associated with the parent entity definition record.
Lead to Cash Entity Definition	Parent field	Query field that is associated with the current entity definition record.
Lead to cash Entity Definition	Inherit parent definition	Parent definition that is also used by the current entity definition. **Note:** To make the current entity definition record follow the same definition that is associated to the parent record, select **Inherit parent definition**.
Lead to Cash Entity Definition	Order	Numerical order to process and visualize the hierarchy of configurations.
Lead to Cash Entity Definition	Filter conditions	Filter conditions specification.
Lead to Cash Entity Definition	Enable post processing	Advanced script for post processing of current record.
Lead to Cash Entity Definition	Post processing script	Script for post processing of current record.
Lead to Cash Entity Attribute	Field	Name of the field.
Lead to Cash Entity Attribute	Entity	Reference to the lead-to-cash entity attribute.
Lead to Cash Entity Attribute	Table	Table that is associated with the lead-to-cash attribute.
Lead to Cash Entity Attribute	Key	Unique key for the entity attribute.
Lead to Cash Entity Attribute	Advanced	Option for advanced configurations.

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Entity Configuration form (continued)

Table	Field	Description
		Note: To modify the script according to your requirements, select **Advanced**.
Lead to Cash Entity Attribute	Script	Script for the advanced attributes.

Entity mappings

With entity mappings, you can map the source and target tables to transfer the data between the entities that depend on the available entity configurations. The entity mapping tables provide the information for the fields on the entity mapping forms.

Entity Mapping table

Table	Name	Description
Lead to Cash Entity Mapping	sn_l2c_core_entity_mapping	Defines and maps the lead-to-cash entity mappings.
Lead to Cash Entity Table Mapping	sn_l2c_core_entity_table_mapping	Defines and manages the mappings for the different tables that are associated with the lead-to-cash entities.
Lead to Cash Entity Attribute Mapping	sn_l2c_core_entity_attribute_mapping	Defines and manages the attributes and their mappings with the corresponding lead-to-cash entity.

The entity mapping form enables you to map the entities with their corresponding tables and attributes.

Note: The Lead to Cash Entity Table Mapping and Lead to Cash Entity Attribute Mapping are related lists on the Entity Mapping form.

Entity Mapping form

Table	Field	Description
Lead to Cash Entity Mapping	Mapping name	Name of the mapping.
Lead to Cash Entity Mapping	Mapping config ID	Unique ID for the mapping.
Lead to Cash Entity Mapping	Source entity	Source entity in the mapping process.
Lead to Cash Entity Mapping	Target entity	Target entity in the mapping process.
Lead to Cash Entity Mapping	Active	State of the target entity, whether active for mapping or not.

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Entity Mapping form (continued)

Table	Field	Description
Lead to Cash Entity Table Mapping	Source entity table	Table that is associated with the source entity.
Lead to Cash Entity Table Mapping	Target entity table	Table that is associated with the target entity.
Lead to Cash Entity Table Mapping	Use condition	Conditions required for mapping. **Note:** To set specific mapping conditions, select **Use condition**.
Lead to Cash Entity Table Mapping	Condition	Conditions for mapping tables from the source entity to the target entity.
Lead to Cash Entity Table Mapping	Active	State of the source entity, whether active for mapping or not.
Lead to Cash Entity Table Mapping	Order	Numerical priority for mapping.
Lead to Cash Entity Attribute Mapping	Entity table mapping	Reference to the Lead-to-Cash entity table mapping.
Lead to Cash Entity Attribute Mapping	Source attribute	Attribute that is associated with the source entity.
Lead to Cash Entity Attribute Mapping	Target attribute	Attribute that is associated with the target entity.
Lead to Cash Entity Attribute Mapping	Advanced	Option for advanced mapping. **Note:** To modify the script according to your requirements, select **Advanced**.
Lead to Cash Entity Attribute Mapping	Script	Script to customize the mappings.

Roles and access

Role	Access
sn_l2c_core.admin	Create, read, update, delete, report_view, report_on
sn_l2c_core_viewer	Read access to all Lead to Cash Core tables
sn_l2c_core.entity_mapping_viewer	View access to Lead to Cash Core entity mapping

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Note: Add a user with the sn_l2c_core.admin role, who is responsible for configuring metadata for all Lead-to-Cash tables, as a Delegated Developer for the application where the configuration is being created. Assign the permission "Manage Update Set" (added under Manage Developers for the respective application). This ensures that all changes are captured in the correct scope and update sets. For details, see Delegated development and deployment.

Create an entity configuration

Create an entity configuration to compose a workflow between two entities so that you can update their existing configurations and perform actions like suspend, resume, or disconnect a sold product.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Lead to Cash** > **Entity Configurations**.
2. On the Lead to Cash Entities form, create an entity by selecting **New**.
3. On the form, in the **Name** field, enter the entity name and in the **Config ID** field, enter the entity ID.

   For a description of the field values, see Entity configuration and mapping.
4. Select **Submit**.
   You've created an entity configuration. You must now create lead-to-cash entity definitions and attributes.
5. On the Lead to Cash Entity form, in the Lead To Cash Entity Definitions related list, create an entity definition by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the Lead to Cash Entity form, in the Lead To Cash Entity Attributes related list, create an entity attribute by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

Result

You've created an entity configuration and defined its definition and attributes. You must now create a custom entity mapping. To learn how to create a mapping, see Create an entity mapping.

Create an entity mapping

Create an entity mapping to compose a workflow between two entities so that you can update their existing configurations and perform a set of declarative actions like suspend, resume, or disconnect a sold product.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Lead To Cash** > **Entity Mappings**.
2. On the Lead to Cash Entity Mappings form, create a mapping by selecting **New**.
3. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
4. Select **Submit**.
   You've created an entity mapping. You must now create an entity table mapping and an entity attribute mapping.
5. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an entity table mapping by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an attribute mapping by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

Sales and Service API Core

Enables seamless tracking and management of Sales Customer Relationship Management workflows through structured inbound and outbound request handling, configurable flow processing, and integration with external systems.

Overview of Sales and Service API Core

The Sales and Service API Core (com.sn_tmt_core) plugin has three key components.

Sales and Service API core components

Table	Description
Inbound Request (sn_tmt_core_inbound_queue)	Tracks the status of both synchronous and asynchronous flows. It enables agents to monitor the progress of requests and also enables sequential processing of dependent records to maintain data accuracy and consistency. It captures detailed status information for each request. For example, when an order is created from a quote, it logs a confirmation message with the order header number. It also supports archival and cleanup policies enabling organizations to cleanup records by

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Sales and Service API core components (continued)

Table	Description
	applying different durations for successful and failed requests to optimize data management.
Inbound Request Configuration (sn_tmt_core_inbound_queue_config)	Defines how each flow is processed and tracked. It's a metadata table that is referenced by the Request Configuration field in the Inbound Request Table. It enables administrators to: • Configure synchronous vs asynchronous processing. • Adapt the Request Tracker across CRM flows. • Set notification types (default, custom, or none).
Outbound Request (sn_tmt_core_outbound_request)	Facilitates outbound interactions with external Service Order Management (SOM). It supports end-to-end order fulfillment via bi-directional REST API integration and requires specific roles.

Roles and access

Role	Access
sn_tmt_core.admin	Create, read, update, delete, report_view, and report_on
sn_tmt_core.viewer	report_view, report_on, and read

Inbound Request

Track the status of Sales CRM workflows and enable agents to track the status of any synchronous and asynchronous flows. It also supports processing dependent records sequentially to make sure that the data stays accurate and consistent.

Inbound request table

Add a record to the modified Inbound Request table [sn_tmt_core_inbound_queue].

The following fields have been added to enhance the Inbound Request table:

- Requested flow
- Account
- Contact
- Consumer

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- Response payload
- Source record ids
- Status
- Run in the background
- Initiated by
- Domain
- Execute after
- Request configuration
- Job id

Inbound Request table fields and descriptions

Fields	Description	Field type
Requested flow	The reference to the Lead to Cash Entity mapping, for example Sold Product to Order mapping.	Reference: sn_l2c_core_entity_mapping
Run in background	Determines whether the flow is synchronous or asynchronous.	True/False Default value: True
Resource	The name of the flow that creates the record in the Inbound Request table.	String
Source record ids	System-generated id of the source records.	List
Source table	Primary Lead to Cash Entity table on which the request is triggered.	Table name
Record id	System-generated id of the target record.	String
Reference table	Name of the target entity table for the request.	Table name
Payload	Request received as input to trigger the flow.	String
Response payload	Response of the request that contains the result of the flow and captures the record-level action and transaction status.	JSON
State	Current state of the transaction.	String (choice) New, In progress, Completed, Error, Pending
Status	The status of completion of the flow, for example success, partial success, failure	String (choice)

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Inbound Request table fields and descriptions (continued)

Fields	Description	Field type
		Success, partial success, failure
Error message	Error message that is returned for an exception.	String
Account	The account associated with the source or target record.	Reference: customer_account
Contact	The contact associated with the source or target record.	Reference: customer_contact
Consumer	The consumer associated with the source or target record.	Reference: csm_consumer
Initiated by	The user id from the current user session.	Reference: sys_user
Domain	The current domain scope of the record, for example global	Domain id
Request Configuration	The reference to the Inbound Request Configuration table. strict_read_only field	Reference: sn_tmt_core_inbound_queue_config
Execute After	Inbound request that must be processed before the current request. strict_read_only field	Reference: Inbound Request
Job id	Reference to Upgrade Inventory Job table. strict_read_only field	Reference: sn_ind_tmt_orm_upgrade_inventory_job

Note: The **requested_flow** and **response_payload** fields aren't visible to agents.

Use the **Requested flow <is not empty>** to filter out records using the Lead to Cash core APIs. The Inbound Request table [sn_tmt_core_inbound_queue] provides the status and other details related to the request. For example, while creating an order through a quote record, a confirmation message with the order header number.

Note: The flow designer **SOM Request Processor** is deprecated. Requests are directed to the flow designer IBQ Request Processor.

Security roles

Security roles and access for the Inbound Request table

Role	Permission
Inbound Queue admin [sn_tmt_core.inbound_queue_admin]	Create, read, delete, and update

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Security roles and access for the Inbound Request table (continued)

Role	Permission
Inbound Queues Create User [sn_tmt_core.inbound_queue_create_user]	Create **Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.
Inbound Queues Write User [sn_tmt_core.inbound_queue_writer]	Write access for non Sales CRM requests Read only access for Sales CRM requests **Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.
Inbound Queue Read User [sn_tmt_core.inbound_queue_read]	Read access to all Sales CRM requests **Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.

Archival policies

Archive the records in the Inbound Request table and determine when to clean up records on the table after a certain number of days. You can implement a different retention period for successful and failed requests.

Archival rule	Time period
Successful requests	10 days
Failed requests	30 days

Related topics

Inbound Request Configuration

Inbound Request Configuration

Enables you to define the configurations to determine how each flow is processed and tracked within an Inbound Request.

Overview of the Inbound Request Configuration table

The Sales and Service Core API (com.sn_tmt_core) plugin is required to use the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

The Inbound Request Configuration table is a metadata table that must be configured to decide how a particular flow is executed, whether synchronous or asynchronous.

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The table can be used to perform the following tasks.

- Enable admins to configure synchronous vs asynchronous processing of requests.
- Adapt the Sales Customer Relationship Management Request Tracker across all CRM flows.
- Enable configuration of notification types, whether default, custom, or no notifications.

The **Request Configuration** field on the existing Inbound Request Table [sn_tmt_core_inbound_queue] is a reference to the new Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

Any workflow that requires the tracking of a completion status, can use the Inbound Request Configuration table and configure whether a flow is synchronous or asynchronous.

Fields on the Inbound Request Configuration Table

An admin creates a record in the table and specifies the configuration using the **run_mode**, **trigger_notification**, and **configuration_api** fields.

Field and descriptions

List of fields on the inbound request configuration table, their descriptions, and the type of fields.

Field	Description	Type
Config ID	Unique configuration ID for the metadata configuration.	String
Label	Unique label name for the metadata configuration.	Translated text
Active	Specifies whether the Inbound request configuration record is active or not.	True/False Default value is **False**
Run Mode	Specifies whether a request runs synchronously or asynchronously.	String (choices): **Sync**, **Async**, **Advanced**. • Synchronous: Synchronous processing. • Asynchronous: Asynchronous processing • Advanced: Use custom script to determine if the flow has to be synchronous or asynchronous
Trigger Notification	Specifies how you want to receive notifications. A notification is triggered in one of the following situations.	String (choices): None, Default, Custom • None: No notifications • Default: Notifications only for asynchronous requests.

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Field and descriptions

List of fields on the inbound request configuration table, their descriptions, and the type of fields.

(continued)

Field	Description	Type
	• **Trigger notification** field is set to **Default**. • State of a request is **Complete** and the status is either **Success** or **Partial success**. The notifications for the record in the Inbound table are only received by whoever has initiated the flow.	• Custom: Custom notification for asynchronous requests based on requirements. Configure custom notifications by using the existing event (sn_tmt_core.ibq.custom.notification) or by handling your own custom event. Default value for the field is **Default**.
Configuration API	Script required to process the inbound request. To learn more about the configuration API, see IBQConfigBase API - Scoped.	Reference: sys_script_include
Domain	The current domain scope of the record, for example global.	Domain ID

Security roles

The security roles for the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config) provide different levels of access to the [sn_tmt_core.inbound_queue_admin] role.

Roles and access

Role	Access
sn_tmt_core.inbound_queue_admin	Create, read, update, delete, report_view, report_on

Note: Add a user with the roles sn_tmt_core.admin or sn_tmt_core.inbound_queue_admin, who is responsible for configuring the Inbound Request Configuration table, as a delegated developer for the application where the configuration is being created. Assign the permission “Manage Update Set” (added under Manage Developers for the respective application). This ensures that all changes are captured in the correct scope and update sets. For details, see Delegated development and deployment.

Related topics

IBQConfigBase API - Scoped

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Outbound Request

Initiate outbound requests to manage service orders by interacting with external Service Order Management (SOM) to facilitate end-to-end order fulfillment. This process requires specific roles and is enabled via bi-directional REST API integration with Order Management for Sales and Service API Core.

Overview of the Outbound Request table

The Sales and Service Core API (com.sn_tmt_core) plugin is required to use the Outbound Request table (sn_tmt_core_outbound_request).

As a provider, you can initiate an outbound request to manage service orders by interacting with external systems such as Service Order Management (SOM). This process supports the end-to-end order fulfillment life cycle, enabling seamless coordination between internal and external platforms.

Fields on the Outbound Request Table

Field and descriptions

List of fields on the Outbound request table, their descriptions, and the type of fields.

Field	Description	Type
Request ID	Outbound request ID that is generated by the Order Management for Telecommunications, Media, and Technology application.	String
State	State of the outbound request.	String (choices): • Not applicable: Created, but not in use yet • Fulfilled: The service order fulfillment is completed • Pending error: The service order has encountered an error and is waiting for a resolution • Failed: The record is discarded and not in use
Table name	Name of the table that is referenced in the source record.	Table
Number	Unique number generated for each record. strict_read_only field	String: auto generated
Source record	Reference field values from different tables.	Document ID

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Security roles

Roles and access

Role	Access
sn_tmt_core.outbound_request_write	Create, read, update, delete, report_view, and report_on
sn_tmt_core.outbound_request_read	report_view, report_on, and read

Configuring the configure, price, quote applications

Learn how to configure the configure, price, quote applications to streamline complex product, pricing, and quote-to-contract workflows.

Set up tools that enable accurate product configuration, pricing, and quoting. This process typically includes configuring the CPQ or the legacy product configurator, enabling quote management, and establishing contract and entitlements and sales agreement workflows to streamline complex sales cycles and improve quoting efficiency.

1. Configuring CPQ Configurator

   Plan and configure the implementation of the advanced configurator in CPQ. The advanced configurator runs in the CSM Configurable Workspace and the Business Portal for customers placing orders.

2. (Optional) Setting up the legacy product configurator

   Control the product options displayed in the product configurator interface by using the Open State Management API framework.

3. Configuring product pricing

   Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

4. Configuring Quote Management

   Install the Quote Management application to enable your sales agents to generate sales quotes for products or services that a customer wants to buy.

5. Configure Customer Contracts and Entitlements

   Configure the Customer Contracts and Entitlements application to configure and display customer service contracts and entitlements.

6. Configure Sales Agreement Management

   Activate the Sales Agreement Management plugin to enable users to create and manage sales agreements. This application enables users to create sales agreements between a buyer and a seller for future transactions.

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Configuring CPQ Configurator

Plan and configure your implementation of the CPQ Configurator. Product catalog admins and agents run CPQ Configurator in the CSM Configurable Workspace, while customers using self-service features use it in the Business Portal.

Configuration overview

1. Install the following applications using the Application Manager:
   - Order Management v15.3.0
   - Product configurator v1.0.1
   - CPQ Integration v2.1.0
   - CPQ Configurator v1.2.5
   - Quote Management v9.1.0
   - Customer Life Cycle Management Workflows v5.1.1
   - Product and Pricing Rules v9.0.0
   - Opportunity Management v8.0.0
   - Sales Cart v2.1.0

   Note: Other applications, such as Product Catalog Management Core v17.1.0, and Pricing Management v15.0.0 are installed automatically with the preceding applications.

2. Set up a ServiceNow instance for CPQ Integration.
3. Provision a Logik.ai instance
4. Set up a ServiceNow instance connection with a Logik.ai instance.
5. Set up an external connection in CPQ.
6. Enable the CPQ Configurator.

   If you're currently using the Sales Customer Relationship Management product configurator and want to use the CPQ Configurator, use the *enable_advanced_configuration* system property to enable the CPQ Configurator.

Install CPQ Integration

You can install the ServiceNow® CPQ Integration application (sn_cpq_intg) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the CPQ Integration application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the CPQ Integration:

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- Scheduled jobs
- Tables

For more information, see Components installed with CPQ Integration.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CPQ Integration application (sn_cpq_intg) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Install the CPQ Configurator

You can install the CPQ Configurator application (sn_cpq_config) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CPQ Configurator application (sn_cpq_config) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Set up a ServiceNow instance for CPQ Integration

Set up a ServiceNow instance, generate a JSON Web Token (JWT), and authenticate API calls to Logik.ai.

Before you begin

Role required: admin

Procedure

1. Validate that the CPQ Integration application is installed on your ServiceNow instance by doing the following

   a. Navigate to: https://<service_instance_url>/oauth_entity.do?sys_id=3b119df83b566210a0c0989e53e45a15

   b. Check that the Logik.AI Admin UI Application Registry exists with a ClientID and secret. This information is used later.

2. In a directory on your local machine, create the private and public certificates using OpenSSL, then use the keytool to convert the certificate from PKCS to JKS format.

   a. Create the private key by entering: `openssl genrsa -out private.key 2048`
   The key is created in a file named private.key.

   b. Create a self-signed certificate that uses the private key by entering: `openssl req -new -x509 -key private.key -out publickey.cer -days 3650`
   You're prompted to enter information that is included in your certificate request. The certificate, named publickey.cer, contains the public key derived from the private key and metadata, such as subject and issuer. The certificate is digitally signed using the private key.

   c. Create a PKCS#12 keystore file (a .p12 file) by entering: `openssl pkcs12 -export -in publickey.cer -inkey private.key -out keystore.p12 -name "<cert_name>"`
   This keystore file bundles the signed certificate and private key together and sets the alias for the key+cert entry in the keystore. The file is encrypted using a password (also called the export password). This password is required to import and export the certificate.

   d. Convert the .p12 (PKCS#12) keystore file to .jks (Java KeyStore) format by entering: `keytool -importkeystore -srckeystore keystore.p12 -srcstoretype pkcs12 -destkeystore keystore.jks`

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- You're prompted for the export password from step 2c to read the private key and certificate from the .p12 file.
- You're prompted to enter a new key store password to protect the JKS keystore file. Record and retain this password for later, since it's required to set up the ServiceNow instance.

3. In the ServiceNow instance, login in as admin and do the following:

a. Set CPQ Integration as the current scope by using the scope selection menu icon in the Unified Navigation menu.

b. In the navigation filter, enter **sys_properties.list** and open the *glide.security.file.mime_type.validation* system property.
Set the **Value** to false, then select **Submit**.

c. Navigate to https://<service_instance_url>/sys_certificate.do?sys_id=90b3439e2beeea1001bff246f291bf4b and do the following:

- Attach the keystore.jks file created in Step 2d to the Certificate record. Enter the key store password from step 2d in the Key store password field.
- Select **Active**.
- Save the certificate.
- (Optional). Validate the certificate using the Related Link for the K509 Certificate.

d. Navigate to https://<service_instance_url>/jwt_keystore_aliases.do?sys_id=3ab40bde2beeea1001bff246f291bfc8.
Enter the Key Store Password from Step 2d as the Signing Key and save the record.

e. In the navigation filter, enter **sys_properties.list** and open the *glide.security.file.mime_type.validation* system property.
Set the **Value** to true, then select **Submit**.

4. Set up API authentication by creating the integration user roles included with the Sales Customer Relationship Management applications:

a. Create an integration user.

- Navigate to **All** > **System Security** > **Users and Groups** > **Users.**
- Create a new user by selecting **New**.
- Enter the UserID, First name, and Last name.
- Select **Submit**
- Open the user record, and in the Role tab, select **Edit**.
- Add the following roles:
  - snc_internal
  - sn_sales_common.sales_agent
  - sn_csm_pricing.pricing_integrator
  - sn_prd_pm_adv.catalog_integrator
  - sn_quote_mgmt_core.quote_integrator
  - sn_ind_tmt_orm.order_integrator

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- sn_opty_mgmt_core.opportunity_integrator
- sn_sales_cart.cart_integrator

b. Navigate to: https://<service_instance_url>/oauth_entity_list.do?sysparm_query=sys_id=99a63a9e2baeea1001bff246f291bf57

5. Personalize the list view to add the **OAuth Application User** column.
Use the **Update Personalized List** icon.

a. From the list view, double click the **OAuth Application User** field to edit it.

b. Set the user created in Step 4a as the one the Logik.ai API record.
If you can't modify this field, verify that you're in the correct scope (CPQ Integration).

c. Open this Logik.ai API record.

d. Select **Active** and save the record.

e. Switch to the global scope.

f. Create a new system property.

- In the navigation filter, enter `sys_properties.list`.
- Select **New**.
- Enter the property name `glide.oauth.inbound.client.credential.grant_type.enabled`.
- Select the edit icons for Read Roles and Write Roles and select admin for each.
- Set the **Value** to true.
- Select **Update**.

Provision a Logik.ai instance

Provision a Logik.ai instance by creating a support ticket.

Before you begin

Role required: admin

Procedure

1. In a web browser, visit `https://support.logik.io`.

2. Click **Logik.io Support Portal**.

3. Click **Need to raise a request? Contact us**.

4. Under **What can we help you with?**, click **New Logik Environment Request**.

5. Complete the **Summary** and other fields on the form.
The **Summary** and **Share with** fields are required.

6. Click **Send**.
You will be contacted by Logik.io support when your instance has been provisioned.

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What to do next

To connect the Logik.io instance with a ServiceNow instance, follow the steps in Set up a ServiceNow instance connection with a Logik.ai instance.

Set up a ServiceNow instance connection with a Logik.ai instance

Set up the connections between the ServiceNow instance and the Logik.ai instance.

Before you begin

Role required: admin

Procedure

1. Set the application scope to CPQ Integration.

   Use the scope selection menu icon in the Unified Navigation menu to select the scope.

2. Navigate to `https://<service_instance_url>/oauth_entity.do?sys_id=3b119df83b566210a0c0989e53e45a15`.

   a. Update the Redirect URL to `https://<logik-tenant-url>/login/oauth2/code/<logik-tenant-name>-login`.

   - The logik-tenant-name is the name of the logik site (for example, logiksite-som). The logik-tenant-url is the full URL of the site (for example, logiksite-som.test.logik.io)
   - Example: `https://logiksite-som.test.logik.io/login/oauth2/code/logiksite-som-login`

   b. Select the **Activate** property.

   c. Select **Update**.

3. In the filter, enter .

   a. Open the *sn_cpq_intg.tenant_url* system property.

   b. Set the **Value** to `https://<logik-tenant-url>.logik.io`

   c. Select **Update**.

4. Validate that the connection to the CPQ site is valid by navigating to **All** > **CPQ Administration** and open the CPQ site (listing no blueprints by default).
   If this fails to open, check the previous steps for typos and trailing slashes.

5. Generate the admin API key in CPQ.

   a. In CPQ, login as admin user and navigate to **Select Utilities** > **Admin API Keys**.

   b. Specify a name and user ID (with the same name: by default, "admin").

   c. Select **Permissions as Admin**.
   This will automatically select Read, Edit, Deploy, and Bulk.

   d. Set an expiration date far in the future.

   e. Select **Save** and copy the token.

   Note: Be sure to do this step. After the confirmation window is closed, the token is no longer accessible.

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6. Populate the connection and credential aliases.

   a. In ServiceNow Sales CRM, navigate to `https://<service_instance_url>/now/workflow-studio/integration/connection`

   b. Select **Advanced Setup of the CPQ – Sync connection**.

   c. Open the CPQ–sync connection.
      - Set the connection URL to `https://<logik-tenant-url>.logik.io`.
      - Ensure that there is no ending slash.
      - Make the connection active, if it is not already.
      - Click **Save**.

   d. From the CPQ–sync connection, select the CPQ–sync token in the Credential column.

   e. Set the API key to `Bearer {admintoken}` and add the value of the token that you copied in step 5e, and then click **Save**.
   Example: `Bearer _53eT_sxJHJ5rcfgXe8-8LDEK3Of1zHpQ`

Related topics

Provision a Logik.ai instance

Set up an external connection in CPQ

Set up an external connection in CPQ by copying the client ID and client xecret of the Logik.ai Auth record.

Before you begin

Role required: admin

Procedure

1. In ServiceNow Sales CRM, navigate to `https://<service_instance_url>/oauth_entity.do?sys_id=99a63a9e2baeea1001bff246f291bf57`.
   We will use the integration we created to set up an external connection in CPQ.
2. Copy the client ID and the client secret.
3. In CPQ, navigate to **Utilities** > **External Connections**.
4. Click **New**.
5. Set the name to `pricing`.
   If you enter a different name, you must update the default enrichment scripts to point to the varname.
6. Under **Integration Type**, select **External**.
7. For **Authentication Type**, select **OAuth - Client Credentials Flow**.
8. Enter the client ID and client secret that you copied in step 2.
   The token URL is `https://<site>.service-now.com/oauth_token.do`.
9. Set the remaining details as follows:
   - Scope: useraccount
   - HTTP method: POST
   - Host: https://<site>.service-now.comstep

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- Path: `"/{{pricingPath}}"step`
- Body: `"{{pricingRequest}}"`

10. Make sure that the content type is `application/json`.
11. Click **Save**.
12. Navigate to **Utilities** > **Settings** and set the pricing connection to the newly created connection.

Enable the CPQ Configurator

Use the *sn_prd_pm.enable_advanced_configuration* system property to turn on the CPQ Configurator, an interface for adding customizable products to Sales Customer Relationship Management transactions.

Before you begin
Role required: admin

About this task
If you have been using the legacy product configurator for Sales Customer Relationship Management, but you want to use the CPQ Configurator instead, set the *sn_prd_pm.enable_advanced_configuration* property to true. The CPQ Configurator is installed with the CPQ Integration application.

Procedure

1. Navigate to **All**, and in the filter, enter `sys_properties.list`.
2. Open the *sn_prd_pm.enable_advanced_configuration* system property.
3. In the **Value** field, enter `true` to turn on the CPQ Configurator.
4. Select **Update**.
   The CPQ Configurator is displayed when:
   - Agents are adding configurable products to opportunities, quotes, orders, sold products, and contracts.
   - Customers are using the Business Portal for self-service features requiring configurable product selections.
   - Product catalog admins are generating or updating blueprints for configurable products.

Related topics

Using the CPQ Configurator

Setting up the legacy product configurator

Control the product options displayed in the legacy product configurator interface by using the Open State Management API framework.

Configuration overview
As an admin, you can manage the configuration states and configurator nodes displayed in the legacy product configurator by using the Open State Management API framework and open state management extension points.

Open state management

The open state model is a programmatic framework in the Configuration State Model API, which lets you program variations in product options that appear in the legacy product configurator in Sales Customer Relationship Management. The API framework provides certain states and

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helper API methods for controlling how nodes in the legacy product configurator user interface are displayed.

As developers, you can use extension points for open state management to set the view-only or editable states on any configurator node, based on events that occur at loading or when product selections change. You can also optionally script information messages along with changing the state of the node. These messages display contextually in the product configurator user interface. Various helper API methods are available for reading and setting states on any node, eliminating the need for extensive JSON scripting.

Note: Check your entitlements to determine if you have access to these features.

Use cases for configuration state management

The following table shows different ways that you can control the product options displayed in the legacy product configurator.

Configuration state model use case examples

Product configurator use case	Example
Hide certain options for a customer	A product attribute selection isn't displayed for customers in California due to state safety regulations.
Set certain default options for a customer	For upgrades, only the Ultimate plan is displayed for existing customers who have a premium plan.
Allow only certain options to be selected based on other attribute options	For certain products such as laptops, display all sizes 13", 15", and 17", but display only 15" and 17" laptops if only the touchscreen feature is required.
Allow quantity to be set for products	Some products might have different default quantity values. Allow agents to configure the quantity as long as the value is within the bounds of a minimum quantity and maximum quantity allowed for that product.
Allow only certain characteristic selections to be made	Certain product selections require a particular characteristic value to be chosen. For example, upon selection of the Ultimate Internet Plan, the connectivity speed that can be chosen is 5G.

You can manage the display of options in the legacy product configurator by using the Configuration State Model API Framework.

Node states

Nodes in the legacy product configurator display product relationship groups, child products, and characteristic options. Nodes can have the following states:

Visible - Yes (make node visible) or No (make node invisible)

Configurations that are visible or not visible to the agent in the legacy product configurator. Options might not be visible if they're incompatible with other selections made by the agent. For example, for a particular car wheel size, incompatible tire options are not visible.

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Editable - Yes (show node and make it selectable) or No (show node but make it unselectable)

Configurations that are editable or not editable by the agent in the legacy product configurator. Agents can personalize certain aspects of the product while maintaining constraints that are necessary for the product. For example, for a specific car model, only compatible exterior colors are editable.

Quantity - Visible (Yes/No), Editable (Yes/No)

Configurations that set quantity on a product, enforce rules related to quantity, and show informational and error messages related to quantity at the appropriate node.

Checked - Yes (show node selections) or No (make node selections invisible)

Configurations that show the configuration options for selection based on the context.

Value - Visible (Yes/No), Editable (Yes/No)

Configurations that set a value for a characteristic, enforce rules related to the characteristic, and show informational or error messages related at the appropriate node.

Note: Agents can choose to set messages at a node level to provide justification for a state change.

Events

Manage node states using the Configuration State Model API Framework. Activate these states by using the following two events in the Events Framework of the Configuration State Model:

- On Load - The state (visibility, editability) of each node is initially set to Yes (true). The open state is invoked on loading.
- On Change - This function is called whenever there's a change in a node's value in the legacy product configurator user interface. However, this state isn't invoked when quantity changes occur in the legacy product configurator. These states can be set programmatically in one of the following ways: on-load, during selections, or just before the instance is synchronized back to the transaction

Helper API methods

You can use the following helper API methods to read and set states on any node.

Apply states

Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options using Getter and Setter methods to read and change the state of the configuration model.

Getter methods

Obtain node paths along with the states on any configuration node:

- `getAllNodes()`: Returns JSON with node path (reference to code) and its respective relative path with all the states.
- `getNode(nodePath)`: Returns javascript object of the node for the specified node path if it exists.
- `getNodeDetails(nodePath`: Return all the states for the specified node path if it exists.

Setter methods

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- Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options.
  - `setVisible`: True/False at all levels
  - `setVisible(True/False)`
  - `setEditable`: True/False at all levels
  - `setEditable(True)`
  - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setVisible(true, “This is a sample
 message for setVisible”);
newHandler.setEditable(false, “This is a sample
 message for setEditable”);
```

- Set the quantity for offers and specifications. The nodePath determines the product, and the value is the quantity to be set.
  - `setQuantity(value);`
  - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setQuantity(value, “This is a sample
 message for setQuantity”);
```

- Set the configuration options to see what is being selected.
  - `setChecked (value); True/False`
  - Implementation example:

```
var nodePath =
 “QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
var newHandler.setChecked(true, “This is a sample
 message for setChecked”)
```

- Set the value for a characteristic node where the input type is a single line of text.
  - `setValue( value);`
  - Implementation example:

```
var nodePath =
“QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
newHandler.setValue(“9TKN332”, “This is a sample
 message for
setValue”);
```

Getter context variable methods

Retrieve context variables inside the legacy product configurator user interface.

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- `getHeaderContextVariables()`: Returns a list of all the header context variables.
- `getHeaderContextVariableValue(contextVariable)`: Returns a value and the display value of a specific context variable in the header.
- `getLineContextVariables()`: Returns a list of all the line context variables.
- `getLineContextVariableValue(nodePath, contextVariable)`: Returns the value of a specific context variable in the line.

Use extension points for open state management

Control the options displayed in the product configurator by using extension points in Open state management.

You can use extension points to call custom scripts for managing the product configurator.

As an admin, access the available open state management extension points, by navigating to **All** > **Scripted Extension Points** and in the Extension Points list, select the appropriate extension point to view it.

State management extension points

Extension points	Description
ConfigInstanceAPIImpl	Fetches open state execution for config instances during change and on load commands.
OpenStateValidation	Returns open state execution on config instances during change and on load.
SetOpenStateResponse	Updates the open state config instance to a config instance.
OpenStateModelExtension	Method used to return to the updated config instance. Customers can customize the process method.

Configuring product pricing

Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

Pricing configuration overview

As a pricing administrator or pricing manager, you complete various configuration tasks and work with your product catalog administrator and product catalog manager to set up the pricing for products and services sold by your organization. The following example workflow shows the pricing configuration tasks and how they fit within product catalog and product offering configuration. You can also work with your administrator to extend certain pricing features, such as setting up pricing extension points to access pricing information from external sources.

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Product catalog and pricing configuration workflow

Starting with the May 2024 release of Sales Customer Relationship Management applications, you can use the CSM Configurable Workspace to configure product pricing.

Note: Check your entitlements to determine if you have access to these features.

Configuration tasks for Pricing Management

Configuration task	Description
Configurable pricing plans	Customize the default pricing plan provided with Pricing Management. You can add, change, or delete the sequence of steps in which pricing calculations and adjustments are run to determine product offering prices.
Create and publish a price list	Define a price list that identifies basic pricing features, such as the currency used or the customer account to which the price list applies.
Create a price list line	Add line items to a price list. A price list line identifies the list price for a product offering.
Copy a price list	Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables.
Control the default price list on transaction header or header line	Specify the conditions that control when a default price list is used for an opportunity, quote, or order by using the Price List Defaulting Matrix.
Create a product attribute-based pricing adjustment	Define pricing adjustments based on certain product characteristics.
Create and publish a cost book	Create a cost book that identifies the currency of the unit costs defined for a set of product offerings.
Create a cost book line	Add line items to a cost book. A cost book line defines the unit cost for a product offering. This feature is used in Quote Management, which uses unit costs to provide cost margins for products in sales quotes.
Copy a cost book	Duplicate a cost book and its cost book lines.

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Configuration tasks for Pricing Management (continued)

Configuration task	Description
Control the default cost book on transaction header or header line	Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.
Create a non-product attribute pricing adjustment	Define pricing adjustments for products based on non-product characteristics such as shipping zip code, location, sales channel, or account segment by using the Standard Price Adjustment Matrix.
Create and publish a cost-based attribute adjustment	Define cost-based attribute adjustments for a cost book line or product offering.
Create pricing adjustments for bundled products	Define the pricing adjustments for child product offerings in a bundled product by using the Configuration Component Price Adjustment Matrix.
Create a matrix version	Create a version of a published price matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix.
Set properties to control pricing processing	Manage the processing of pricing features, such as how certain pricing calculations are made.
Create a custom context variable	Create a custom variable that represents an attribute that can be used in a pricing matrix, for example to create a non-product attribute adjustment.
Map a custom context variable to a transaction entity	Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management.
Use extension points in Pricing Management	Apply pricing extension points to use pricing information from external sources or extend the pricing engine logic on how list prices or adjustments are calculated.
Export and import pricing entities	Export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a production instance.

Install Pricing Management

You can install the Pricing Management application (sn_csm_pricing) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Price Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Pricing Management:

- Roles
- Tables

For more information, see Components installed with Pricing Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Price Management application (sn_csm_pricing) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configurable pricing plans

Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices.

How the pricing plan works

The default pricing plan is an active, published plan that is automatically implemented with Pricing Management. You can use the default plan. Or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. Only one active pricing plan per domain is supported.

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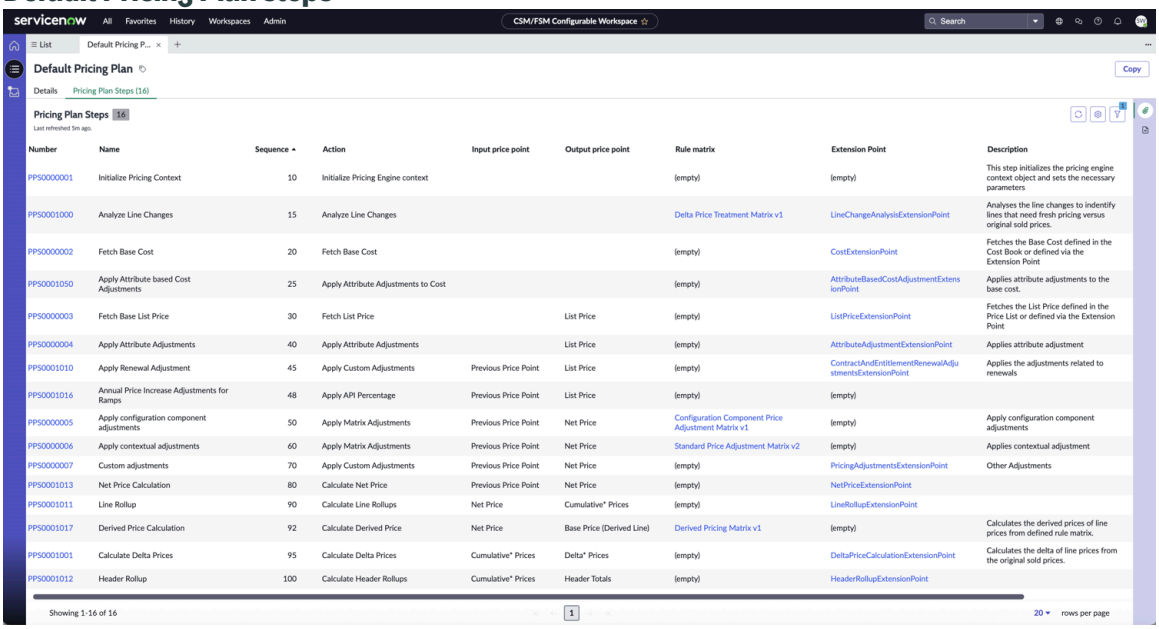
Note: The Pricing Management v15.0.0 release provides a default pricing plan that includes new steps to support pricing strategies introduced in this release. If you're using a custom pricing plan from an earlier release, review the default pricing plan, which is in a Retired state after you upgrade. Determine whether you want to publish the default plan or customize the default pricing plan for your needs. If you're customizing the plan:

- Review the new steps for calculating net pricing in quotes and orders: Net Price Calculation, Line Rollup, and Header Rollup. The rollup steps calculate the roll-up values for configurable products and the header-level values in quotes and orders. This pricing functionality for quotes and orders existed in previous releases, but was not included in the default pricing plan.
- To maintain the net pricing and rollup functionality for quotes and orders, retain the Net Price Calculation, Line Rollup, and Header Rollup steps in your custom pricing plan.

Default Pricing Plan steps



The default plan consists of basic pricing steps in which certain actions are run to calculate product offering prices.

Pricing steps

Step	Action
Initialize Pricing Context	Starts the pricing engine context. The system gathers basic data required for subsequent calculation steps. For example, the system resolves context variable values, initializes the pricing cache, and performs basic validation of request payloads.
Analyze Line Changes	Reviews price line changes to determine whether adjustments to sold products and contracts require new pricing, as defined in the Delta Price Treatment Matrix.
Fetch Base Cost	Get costs from a cost book, if your organization is using cost books in Quote Management.

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Pricing steps (continued)

Step	Action
Apply Attribute based Cost Adjustments	Apply adjustments to the cost based on product offering characteristics.
Fetch Base List Price	Get the list price for all requested products based on the price list, unit of measurement, and data provided to the pricing API.
Apply Attribute Adjustments	Apply attribute adjustments based on product characteristics selected.
Apply Renewal Adjustment	Apply a renewal adjustment for contracts. This step determines whether a markup or markdown value, either a percentage or specific amount, such as a pricing uplift for contract renewals, is to be calculated and applied. **Note:** • Subsequent pricing adjustment steps in the pricing plan aren't applied after this renewal adjustment step. • You can change or remove this step in a custom pricing plan. You can also change the conditions for running subsequent steps after the renewal adjustment step. For details on changing conditions for a particular step, see Add or change a pricing plan step.
Annual Price Increase Adjustments for Ramps	Applies the percentage Annual Price Increase to the list price of products that have price ramps. Sales agents specify the percentage increase when they create price ramps for quote line items.
Apply configuration component adjustments	Apply adjustments as defined in the Configuration Component Price Adjustment Matrix for child product offerings that are bundled under a parent product offering.
Apply contextual adjustments	Apply adjustments as defined in the Standard Price Adjustment Matrix for product offerings based on non-product characteristics, such as billing state or shipping zip code.
Custom adjustments	Apply custom adjustments if implemented using the PricingAdjustmentExtensionPoint to fetch adjustments from another system or for adjustments that can't be supported via a pricing matrix.
Net Price Calculation	Calculates the net price for products using any automatic and manual adjustments made in quotes or orders.

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Pricing steps (continued)

Step	Action
Line Rollup	Calculates the cumulative pricing fields in quote and order lines that are rolled up to the parent line of bundled products.
Derived Price Calculation	Calculates the line prices using the Derived Pricing Matrix, which defines the pricing source and the unit base list price for the price list line.
Calculate Delta Prices	Calculates the difference in net pricing for sold products and contracts after adjustments are made.
Header Rollup	Calculates total pricing values, such as total annual or total monthly amounts, displayed at the header level

Customizing a pricing plan

The default pricing plan is fixed, to preserve the default pricing logic. You can copy the default plan, and add or change steps as needed for your organization. When you finish your changes, you publish the copy so that it becomes the active plan. If needed, you can revert to the default plan at any time by publishing the default plan.

As a pricing admin or manager, follow these steps to define a custom pricing plan:

- Create a configurable pricing plan (copy the default plan).
- Add or change a pricing plan step. In your configurable pricing plan, you can add one or more pricing steps for pricing adjustments, including any conditions for running the step. If needed, you can also change the sequence of the adjustment step.
- Delete a pricing plan step, if needed.

As you add or change pricing steps, the system validates your entries, such as the sequence number, price point, and calculation type. When you finish adding or changing steps, publish the configurable pricing plan to make it active. The former active plan is retired.

Create a configurable pricing plan

Create a configurable pricing plan by copying the default pricing plan provided in Pricing Management.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the default pricing plan and select **Copy**.
   The copy of the default pricing plan opens in a new tab in the Draft state.
4. Provide the pricing plan details:

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a. Enter the **Name** of the pricing plan.

b. If you want price adjustments to be applied after price overrides, select the **Apply adjustments after price override** option.
If you select this option, after the system applies a price override, any remaining pricing steps are run. If you don't select this option, any pricing steps scheduled after the price override is applied are not run.

c. Enter a new **Description** for the custom pricing plan.

5. Select **Save**.
The configurable pricing plan is created with the **Name** that you provided.

What to do next
Add or change a pricing plan step.

Add or change a pricing plan step

Add a pricing plan step to a configurable pricing plan that applies either a pricing matrix or a custom adjustment using the pricing extension point. You can also change certain items in an existing step, such as the sequence or type of matrix used, as well as specify conditions for running the step.

Before you begin
Create a configurable pricing plan.

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

About this task
You can add or change a pricing plan step only when the configurable pricing plan is in the Draft state.

Note: The following steps in all pricing plans are fixed and can't be changed:

- Initialize Pricing Context
- Fetch Base Cost
- Fetch Base List Price
- Apply Attribute Adjustments

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the configurable pricing plan to which steps are being added or changed.
4. In the pricing plan, select the Pricing Plan Steps tab.
   - To add a step, select **New**.
   - To change a step, select the step number to be updated. If you need to delete a pricing adjustment step, see Delete a pricing plan step.
5. Fill in or change certain fields in the form.

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Pricing Plan Step

Field	Description
Number	System assigned number for the pricing plan step.
Name	Name of the step to be added.
Description	Brief description of the step.
Price point	Selling price for a product or service. Select one of the following: ○ List Price: Standard selling price to be applied before any pricing adjustments. ○ Net Price: Final price to customer after predefined or negotiated adjustments have been subtracted.
Calculation type	Option for evaluating the result of the adjustment at each step. Select one of the following: ○ Previous price point: When the Price Point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price. ○ Rolling: When multiple adjustments exist, apply the subsequent adjustment to the price resulting from the previous adjustment to calculate the final net price.
Sequence	Number value indicating the order in which the step is to be applied. For example, if you're adding a step between two existing steps with sequence numbers 40 and 50 respectively, you could enter the sequence number 45 for the step.
Code	System-generated alphanumeric number based on the pricing plan step name.
Action	Option indicating the type of pricing adjustment to be run in the step. Select one of the following: ○ Apply Matrix Adjustments: Run a pricing matrix. ○ Apply Custom Adjustments: Run a custom pricing adjustment using the PricingAdjustmentsExtensionPoint.
Rule matrix	Option that displays if you selected the Apply Matrix Adjustments action. Select the pricing matrix to be applied:

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Field	Description
	○ Configuration Component Price Adjustment Matrix: Use this matrix to set the price adjustments for child product offerings that are bundled under a parent product offering. ○ Standard Price Adjustment Matrix: Use this matrix to set a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. You can select the rule matrix link in the step to define the matrix.
Pricing plan	Name of the configurable pricing plan.
Extension point	Option that displays the PricingAdjustmentsExtensionPoint if you selected the Apply Custom Adjustments action.

6. Specify certain conditions for running the step, if applicable.

   Note: Any conditions that aren't met, are ignored.

Type of condition	Description
Header condition	Use the condition builder to add or change conditions that control when the step is run, based on the transaction header (for exam ple the header for an opportunity, quote, or or der). Specify the condition fields to be used, for example a context variable for transaction headers, product characteristics, or other ob jects such as account or product offering.
Line condition	Use the condition filter to add or change conditions that control when the step is run, based on the transaction line (for example an opportunity, quote, or order line). Specify the condition fields to be use, such as a context variable for transaction lines, product charac teristics, or other objects, such as account or product offering.

7. Select **Save**.
8. To continue adding or changing steps, repeat steps 4 through 7.
   If you need to remove a step, see Delete a pricing plan step.
9. When you're finished adding or changing steps, select **Publish**.
   The configurable plan becomes the active pricing plan, and the former active plan is retired.

Delete a pricing plan step

Remove a pricing step from a configurable pricing plan when the plan is in the Draft state.

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Before you begin
Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the configurable pricing plan to be changed.
4. In the pricing plan, select the Pricing Plan Steps tab and then select the step number to be deleted.
5. In the More actions menu, select **Delete**, and confirm that you want to delete the step. The step is removed from the pricing plan.

Create and publish a price list

Create a price list that defines the pricing for products and services in Sales Customer Relationship Management.

Before you begin
Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task
You can create various types of price lists for your organization, such as price lists that are based on a standard currency or price lists that are based on a particular customer account. The first price list that you create for a specified currency is automatically set as the default price list. When you're creating a default price list, the start date must be either the current date or a date earlier than the current date. If you don't want the price list as the default, deselect the **Default** option.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Prices** > **Price Lists.**
3. Select **New**.
4. In the Details tab, fill in the fields.

Create New Price List

Field	Description
Number	Unique system-assigned number that identifies the price list.
Name	Name of the price list.
Code	System-generated alphanumeric number based on the price list name. Although the code is system-generated, you can edit it to represent any industry-specific product code.
Currency	Currency of the price list, for example USD for US dollars.
Account	Optional. Account of the customer to which this price list applies.
Default	Option for setting this price list as the default price list with the specified Currency or for the specified Account.

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Field	Description
Sales agreement	If you're using the Sales Agreement Management application and a sales agreement was created by an agent, the unique system-assigned number that identifies the sales agreement associated with this price list.
Description	Description of the price list.
State	Stage of the price list: ○ Draft: Initial state of the price list. Information is still being added to the price list and hasn't been published to the catalog yet. ○ Published: Price list has been published to the catalog. After a price list is published, you can update, delete, retire, or archive it. ○ Retired: Price list has been retired and is no longer active. The price list and its price list lines cannot be updated. ○ Archived: Price list has been archived and is no longer available for use. **Note:** A default price list cannot be deleted, retired, or archived.
Start Date	Starting date and time that the price list is effective. Select the Calendar icon to choose the start date and time, then select **OK**. **Note:** If this is a default price list, the start date must be either the current date or a date that is earlier than the current date.
End Date	Ending date and time of the price list. Select the Calendar icon to choose the end date and time, then select **OK**. After the ending time, the price list is no longer active. **Note:** If this is a default price list, the end date is ignored.

5. Select **Save**.
   The price list is in the Draft state.
6. Select **Publish**.
   The price list state changes to Published. The Price List Lines tab opens for creating a price list line.

What to do next

Create a price list line for the price list.

Create a price list line

Create a price list line and associate it to a product offering.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Price Lists** and select the price list to which you're adding the price list line.
3. In the Price List Lines tab, select **New**.
4. On the form, fill in the fields.

Price List Line

Field	Description
Number	Unique system-assigned number for the price list line.
Price List	Name of the price list.
Code	System-generated alphanumeric number based on the price list name.
Product Offering	Product to which this price list is associated.
Unit of Measure	Unit of measure for the product.
Base list price	Price set for the product offering, which is the full price that a product or service is sold for, without any discounts or promotions applied.
Derived price	Option that enables derived pricing (also called related product pricing) for product offerings associated with this price list line. For more information, see Configuring derived pricing.
Start Date	Starting date and time that the price list line is effective. Select the Calendar icon to choose the start date and time, then select **OK**.
End Date	Ending date and time that the price list line is no longer effective. After this time, the price list line is no longer active. Select the Calendar icon to choose the end date and time, then select **OK**.
Pricing Method	Type of pricing selected when the product offering was created: ○ Recurring: Payment fee that occurs over certain intervals. ○ Non Recurring: one-time payment fee.
Periodicity	Frequency of recurring pricing: ○ Monthly ○ Annually

5. Select **Save**.

Copy a price list

Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. You can copy a price list, update the pricing in the copied price list if needed, then publish it.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Price Lists**.
3. Select the published price list to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. You can't edit the price list, price list lines, any attribute adjustments, and related decision tables during the copy process. Each price list line and the other related pricing features are copied asynchronously. During the copy process, you can refresh the page to see the items copied. When the copy process completes, the following occurs:
   - The copied price list is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a price list line didn't get copied, are displayed in a message in the copied price list.
4. Select **Save**.
   When the price list copy is in the Draft state, you can add or change price list lines or delete the price list. When you finish updating the copied price list, you can publish it so that it's available for use.

Control the default price list on transaction header or header line

Define the default price list displayed to your sales and order agents on the transaction header or header line by using the Price List Defaulting Matrix.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

For base systems, the default price list used is based on the transaction header. For example, if a sales agreement is populated on the transaction header, the sales agreement price list is used as the default. If a customer account is populated on a transaction header and a valid account-based price list exists, the header defaults to the account-based price list. If no account-based price list exists, the default currency-based price list is used.

You can change the default price list selection logic by using the Price List Defaulting Matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Price List Defaulting Matrix.
4. Select **Edit Rule**.
   The Decision Table for the Price List Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default price list in the header.
5. In the decision table, set the rule for displaying the default price list:
   a. In the **Header Price List Type** column in the Results section, select the **Edit** icon to add the price lists that can be applied, for example an account-based price list or a currency-based price list.
   b. In the Condition section, select **Add new decision row**.

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c. In the row, select the column for the input to be applied, such as **Account** and select the condition to make it active.

d. In the Results section, select the **Header Price List Type** column and select the price list to be applied, for example an account-based price list or a currency-based price list.

6. Select **Save**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
   The default price list is available to sales or order agents when working on the transaction header for opportunities, quotes, or orders or when working on the transaction line, for example a quote line or order line.

Create and publish a cost book

Create a cost book that defines the unit costs for products and services in Sales Customer Relationship Management.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create cost books that define the unit costs for a set of products and a specified currency. However, only one cost book per given currency is allowed.

You can create multiple cost books for a given currency, but the first cost book that you create for a particular currency is automatically set as the default cost book. If you don't want the first cost book as the default, deselect the **Default** option. When you're creating a default cost book, the start date must be either the current date or a date earlier than the current date.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Prices** > **Cost Books**.
3. In the Prices - Cost Books list, select **New**.
4. In the Details tab, fill in the fields.

Create New Cost Book

Field	Description
Number	Unique system-assigned number that identifies the cost book.
Name	Name of the cost book, for example Standard Cost Book.
Code	System-generated alphanumeric number based on the cost book name. Although the code is system-generated, you can edit it to represent an industry-specific code.
Currency	Currency of the cost book, for example USD for US dollars.

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Field	Description
Default	Option for setting this cost book as the default cost book with the specified **Currency**.
Description	Brief description of the cost book.
State	Stage of the cost book: ○ Draft: Initial state of the cost book. Information is still being added to the cost book and hasn't been published to the catalog yet. ○ Published: Cost book has been published to the catalog. After a cost book is published, you can update, delete, retire, or archive it. ○ Retired: Cost book has been retired and is no longer active. The cost book and its cost book lines can't be updated. ○ Archived: Cost book has been archived and is no longer available for use. **Note:** A default cost book can't be deleted, retired, or archived.
Start date	Starting date and time that the cost book is effective. Select the Calendar icon to choose the start date and time, then select **OK**. **Note:** If this date is for a default cost book, the start date must be either the current date or a date that is earlier than the current date.
End date	Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon to choose the end date and time, then select **OK**. **Note:** If this date is for a default cost book, the end date is ignored.

5. Select **Save**.
   The cost book is in the Draft state.

Note: You can continue by defining cost book lines when the cost book is in Draft state. However, you must publish the cost book to apply the cost book and its cost book lines.

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6. Select **Publish**.
   The state changes to Published. The Cost Book Lines tab opens for creating a cost book list line.

What to do next

Create a cost book line.

Create a cost book line

Create a cost book line that defines the unit cost for a product offering.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

Procedure

1. In the CSM Configurable Workspace, access the cost book to which you're adding a cost book line.
   a. Select the **List** view.
   b. Navigate to **Prices** > **Cost Books** and select the cost book.
2. In the Cost Book Lines tab, select **New**.
3. In the Create New Cost Book Line tab, fill in the form.

Cost Book Line

Field	Description
Number	Unique system-assigned number for the cost book line.
Cost Book	Name of the cost book to which this line is added.
Code	System-generated alphanumeric number based on the cost book name and the line item to be created. Although the code is system-generated, you can edit it to represent any industry-specific code.
Product offering	Product to which this cost book line is associated.
Unit of measure	Unit of measure for the product.
Cost	Unit cost of the product, which is the cost incurred to produce or procure the product.
Start date	Starting date and time that the cost book is effective. Select the Calendar icon to choose the start date and time, then select **OK**.
End date	Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon to

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Field	Description
	choose the end date and time, then select **OK**.
Pricing method	Type of pricing selected when the product offering was created: ○ Recurring: Payment fee that occurs over certain intervals. ○ Non Recurring: one-time payment fee. **Note:** The **Pricing Method** is auto-populated when the product offering is selected.
Periodicity	Frequency of recurring pricing: ○ Monthly ○ Annually **Note:** The **Periodicity** is auto-populated when the product offering is selected.

4. Select **Save**.

Related topics

Copy a cost book

Control the default cost book on transaction header or header line

Copy a cost book

Duplicate a cost book and its cost book lines.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Cost Books**.
3. Select the published cost book to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. Each cost book line is copied asynchronously, but you can refresh the page to see the cost book lines copied. When the copy process completes, the following occurs:
   - The copied cost book is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a cost book line doesn't get copied, are displayed in a message in the copied cost book list.
4. Select **Save**.
   When the cost book is in the Draft state, you can add cost book lines or delete the cost book. When you finish any changes to the copied cost book, you can publish it so that it's available for use and retire the former cost book.

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Control the default cost book on transaction header or header line

Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.

Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

About this task
The transaction header is a record that contains general information about an entity, such as a cost book. A transaction line record contains specific information about a specific item, such as a cost book line for a certain product.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select **Cost Book Defaulting Matrix**.
4. Select **Edit Rule**.
   The Decision Table for the Cost Book Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default cost book in the header.
5. In the decision table, set the rule for displaying the default cost book:
   a. In the **Header Cost Book Type** column in the Results section, select the **Edit** icon to add the cost book that can be applied.
   b. In the Condition section, select **Add new decision row**.
   c. In the row, select the column for the input to be applied, such as **Currency** and set the condition to make it active.
   d. In the Results section, select the **Header Price List Type** column and select the cost book to be applied, for example a specific currency-based cost book.
6. Select **Save**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
   The default cost book is displayed in the transaction header or header line for the application.

Create a product attribute-based pricing adjustment

Create a pricing adjustment for a product offering based on its product characteristics, such as the product size or color. A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override.

Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

About this task
In this task, you specify the product characteristics to which the pricing adjustment applies. Next, you use a decision table to set the attribute adjustment rule, which defines the conditions for applying the pricing adjustment. For more information on using decision tables, see Using decision tables.

Note: Starting with Pricing Matrixes release v10.0.0, a decision rule row can have more than one condition.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Attribute Adjustments**.
3. In the Pricing - Attribute Adjustments list, select **New**.
4. On the Attribute Adjustment form, specify the product characteristics used to determine the adjustment:
   a. Enter the **Name** of the attribute adjustment rule, for example, Make and Model selection.
   b. If you want to change the system-assigned **Code** based on the attribute adjustment name, enter a different alphanumeric value.
   c. Select Price as the **Type** of adjustment.
   d. If you want the adjustment to apply to all price lists, select **Apply to all Price Lists**.
   e. Select the **Product offering** to which this adjustment applies.
   f. If this attribute adjustment applies to a specific price list line and not all price lists, select the **Price list line**.
   g. Select the **Start Date** that this attribute adjustment begins.
   h. Select the **End Date** that this attribute adjustment ends, if applicable.
   i. In the **Product Characteristics** field, select the product characteristics to be used to differentiate the product price.
   j. Select **Save**.
5. In the Attribute Adjustment, select **Create Rule**.
   The Decision Table for the adjustment opens in Workflow Studio and displays the inputs, which are the product characteristics that you selected, and the decision table that contains the columns for setting the attribute adjustment rule conditions.
6. Set the attribute pricing rule:
   a. In the Conditions section, select **Add new decision row**.
   b. In the row, select an attribute column and select the appropriate value.
      For example, if a product has attribute columns labeled **Make** and **Model**, select each column and then select the appropriate value.

      You can enter multiple rules with multiple conditions for a given product offering.
   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
   d. In the **Adjustment Value** column, enter the adjustment amount.
   e. Select **Save**.
      The adjustments are made to the price lists or the price list line, depending on the options selected in step 4f.

      Note: At transaction time, the Attribute Adjustment table does not support rule selection criteria set as single. It supports only multiple evaluations as true.
7. **Optional:** Test your decision table.

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For more information on testing your decision table before publishing it, see Test a decision table in Workflow Studio.

8. In the **Details** tab for the attribute adjustment, select **Publish**.
   When a product offering is added to a transaction, such as a quote or order line, the pricing attribute adjustments are applied after the agent or customer selects the attribute options. For example, when agents or customers use the CPQ Configurator to add a configurable product offering, the base price of the product is displayed initially. After the appropriate attribute options are selected, the price adjustments for the selected attributes are applied to the base price of the product. The resulting price displayed is the list price of the product offering, based on attribute conditions and associated markup or markdown values set in the Attribute Adjustment decision table.

Create and publish a cost-based attribute adjustment

Set different product costs based on product attributes, such as model or size, by applying cost adjustments for a product offering by cost book or specified cost book line. The base cost is the cost at the cost book line. Product cost is the base cost plus attribute adjustments. These adjustments are used to display the profit margins in quotes and quote lines, which can be criteria for triggering quote approval rules.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

About this task

You select the characteristics of a product that affect the base product cost. Next, use a decision table to create an attribute adjustment rule that defines the conditions for applying the adjustments and the markup or markdown value, either a percentage or amount to be applied for specified characteristics. For more information on using decision tables, see Using decision tables.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the List icon.
2. Navigate to **Pricing** > **Attribute Adjustments**.
3. Select **New** and fill in the fields.

Attribute Adjustment

Field	
Name	Name of the cost-based attribute adjustment.
Code	System-generated alphanumeric value based on the attribute name.
Type	Type of adjustment, either Price or Cost. Select Cost.
Apply to all cost books	Option that applies this attribute adjustment to the product offering for all cost books. If this attribute adjustment applies only to a cost book line for a product offering, unselect this option.

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Field	
Product offering	Product to which this adjustment applies. Select the field to display a list of products. The characteristics set for the product offering are displayed in the **Product Characteristics** field.
Number	System-generated alphanumeric value that identifies this cost-based attribute adjustment.
Cost book line	Option for selecting a cost book line to which the adjustment is applied. You can select this option if the **Apply to all cost books** option is unselected.
State	Status of the adjustment: ○ Draft (saved) ○ Published ○ Retired ○ Archived
Start date	Date and time that this attribute adjustment begins. If you want to apply the adjustment to a cost book line, the **Start date** and **End date** must be the within the cost book line start and end dates.
End date	Date and time that this attribute adjustment ends, if applicable.
Product characteristics	Product attributes used to differentiate product costs.

4. Select **Save**.
5. In the Attribute Adjustment page, select **Create Rule**.
   The Decision Table for the adjustment opens in Workflow Studio.
6. Set the attribute pricing rule:

   a. In the Conditions section, select **Add new decision row**.

   b. In the row, select an attribute column and select the appropriate value.
   For example, if an automation hub product has attribute columns labeled **4G** and **5G**, select each column and then select the appropriate value.

   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

   d. In the **Adjustment Value** column, enter the adjustment amount.

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e. Select **Save**.
The adjustments are made to the cost book or the cost book line, depending on the options selected in step 3.

7. **Optional:** Test your decision table.
For information on testing your decision table before publishing it, see Test a decision table in Workflow Studio.
8. If this is a product-based cost attribute adjustment, select **Publish** in the **Details** tab for the attribute adjustment to make the attribute adjustment available.
The cost-based attribute adjustments for the product offering are applied when agents add the product offering to an opportunity, quote, or an order.

Create a non-product attribute pricing adjustment

Create a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. You use the Standard Price Adjustment Matrix to define the pricing adjustment.

Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

About this task
Non-product attributes are represented as context variables, which identify non-product characteristics, such as billing state or shipping zip code. Pricing Management provides a set of default context variables for non-product attributes. You can view the list of context variables for non-product attributes in the **Context variables** field in the Standard Price Adjustment Rule Matrix. You can also review a list of system-defined context variables in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table.

However, if you have a non-product attribute that is not available as a default context variable, such as sales channel, your system administrator can create a custom context variable for that attribute. You can then use the custom context variable as an input in the decision table for the Standard Price Adjustment Matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Standard Price Adjustment Matrix.
4. If you want to remove any of the context variables in the Context variables section In the Rule Matrix Standard Price Adjustment Matrix record, delete the pills that represent context variables for non-product attributes.
5. If you have a large number of rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select one or more context variables that the system uses to filter the pricing decision table rows that are evaluated.
6. Select the option in **Rule selection criteria** that indicates whether single or multiple rules are applied in the Standard Adjustment Matrix.
If multiple rules match and the option is marked true, all applicable pricing rules are applied when evaluating adjustments for product offers. If the option isn't selected, the first rule based on priority is applied for adjustment calculation.
7. Select **Edit Rule**.
The Decision Table for the Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which are the default non-product characteristics available, and

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the decision table section that contains the columns for setting the non-product attribute adjustment rule conditions.

8. If you have a custom context variable to add as an input, select **+Add** and add the custom variable **Label**, **Type**, **Reference** (if applicable), **Mandatory** indicator, and **Add condition column**, which adds the variable to the Conditions section.
9. In the decision table, set the pricing rule for the non-product attribute:
   a. In the Conditions section, select **Add new decision row**.
   b. In the row, select the columns for the non-product attributes to be applied, such as **Shipping State** and **Account**, and select the appropriate values.
   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
   d. In the **Adjustment Value** column, enter the adjustment amount.
   e. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Adjustment for state location.
   f. Select **Save**.
   g. Select **Publish**.
   The adjustments are available to agents when working on Sales Customer Relationship Management transactions, such as quotes or orders and to customers using the Business Portal.

Create pricing adjustments for bundled products

Define price adjustments for a product when it is sold as part of a product bundle. You use the Configuration Component Price Adjustment Matrix to set the price adjustments for child product offerings that are bundled under a parent product offering.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override of the standalone product list price.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Configuration Component Price Adjustment Matrix.
4. Select **Edit Rule**.
   The Decision Table for the Configuration Component Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the parent product offering and its child product offerings that comprise the bundle, and the decision table section that contains the columns for setting the conditions and the pricing adjustments to be applied to the child product offerings in the bundle.
5. In the decision table set the pricing rule for the child product offerings in the bundle:

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a. In the Conditions section, select **Add new decision row**.

b. In the row, select the columns for the product offerings to be applied and select the appropriate values.

c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

d. In the **Adjustment Value** column, enter the adjustment amount.

e. In the **Adjustment Description** column, enter a brief description of the adjustment.
This description is copied to the adjustment record linked to the quote or order line when the product offer is added to the quote or order. Consider creating a description that is formatted with a unique ID followed by a text description. You can use the unique ID to audit the adjustment generated when the quote or order is being configured, and the agent can use the description to understand the reason for the adjustment.

f. Select **Save**.
The adjustments are available to sales or order agents when working on quotes or orders.

Configure volume pricing

Set volume pricing rules by using the Standard Price Adjustment matrix.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the List icon .
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select the Standard Price Adjustment matrix and create a new matrix version.
4. In the Context variables section of the new matrix version, select the Search icon and in the list of Context variables, select the Quantity variable.
The Quantity variable is added to the Context variables section.
5. Select **Create Rule**.
The Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs available and the Decision table for entering the volume pricing conditions to be applied.
6. In the Conditions section of the Decision table, do the following:

   a. Select the item to which the volume pricing adjustment is to be applied, such as **Product Offering**.
   For example, if you're setting volume pricing for door sensors, select the Door Sensor product offering.

   b. Make the condition active by selecting the **Active** field and set it to true.

   c. Select a condition operator in the **Quantity** field and enter the quantity value to be applied.
   The following operators are available:

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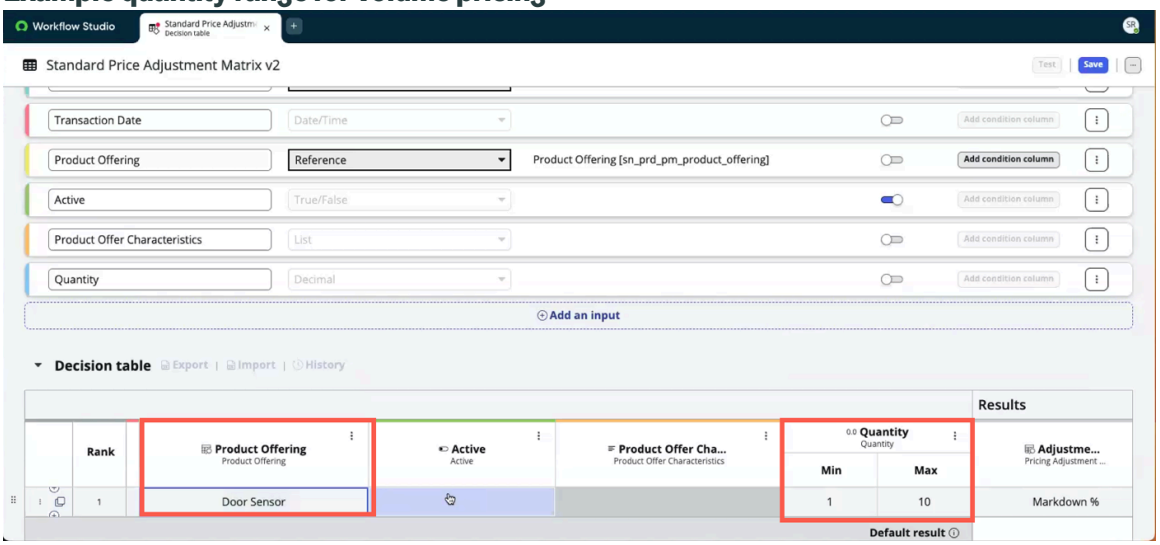
- is
- is not
- is empty
- is not empty
- less than
- greater than
- less than or is
- greater than or is
- between

For example, selecting the operator **greater than or is** and specifying a quantity value 10 indicates that the pricing adjustment applies to a quantity that is equal to or greater than 10.

If you select the operator **between**, you specify a quantity range by entering the **Min value** and **Max value** for the range. You must set both a minimum and maximum value so that the quantity pricing adjustment applies only to the quantity of product offerings in the specified range.

Example quantity range for volume pricing



For example, the door sensor pricing adjustment applies only to quantities ranging from 1 through 10. The pricing adjustments are not applicable to other quantity values for door sensors.

7. In the Results section, do the following:
   a. Select the **Adjustment Type** field and choose the type of adjustment, for example Markdown % or Markdown amount.
   b. In the **Adjustment Value** column, enter the adjustment amount.
   c. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Quantity adjustment for door sensors.
   d. Select **Save**.
8. Return to the version of the Standard Price Adjustment Matrix that you created and select **Save** and then **Publish** to make the matrix version active.

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The volume pricing adjustment is available to sales or order agents as they work on quotes or orders. For example, a pricing adjustment has a quantity range for a particular product, such as 1 through 10 door sensors. When a sales agent adds five door sensors to a quote, the pricing adjustment is applied. The pricing adjustment doesn't apply to quantities outside this range.

Blended pricing for contract consolidation of subscription renewals

When selected contract lines are consolidated into a renewal line for renewal purposes, the pricing engine uses blended pricing to calculate the renewal line pricing.

Overview of renewal pricing in contract consolidation

Over the life of a subscription, contract quantities can change due to the following:

- **Upsells**: Changes to a customer contract that increase its value by adding more quantity, licenses, or new products or services. These changes can result in one or more new contract lines or an amendment, while the original contract remains in effect.
- **Downsells**: Changes to a customer contract that reduce the quantity of a product or service and supersedes an earlier contract line.

In renewal pricing for contract consolidation, the pricing engine does the following:

- Finds which contract lines are included in the renewal.
- Aggregates the quantities for the contract lines in the renewal.
- Blends prices and uplift increases to determine pricing for the single quote renewal line.

How contract line changes are handled

Agents indicate which contract lines are to be consolidated by setting the **Renewable** option on a contract line. At renewal, active upsell lines and the latest downsell lines that represent the current base quantity are combined to calculate renewal pricing. The context variable **Consolidated From Contract Lines** identifies a consolidated quote renewal line. Within those consolidated lines, if the **Include quantity for renew** field is selected, the quantity is used in the price blending.

How renewal quantity and prices are calculated

The pricing engine calculates prices on the quote renewal line using weighted averages, based on the quantities of the contributing contract lines. The following values are blended:

- Base price
- Unit price
- List price (after price increases, such as uplifts)

How contract lines with uplifts are calculated

An uplift is a price increase applied at contract renewal, typically expressed as a percentage, which raises the list price above the base price for a given term or period.

If contributing contract lines have different uplift percentages:

1. Each contract line's uplifted price is calculated first.
2. A weighted average of the uplifted prices is computed based on the current active contract lines.
3. The resulting value is set as the list price on the renewal line.

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Uplifts in contracts are handled as list price adjustments, where:

- During blending, the renewal base price is the weighted average of the unit price of the consolidated contract lines.
- The uplift is reflected in the list price.

Controlling uplift values in contracts and renewals

You can configure the following uplift features:

- Uplift amounts: To control uplift amounts that are applied, use the Price Increase Defaulting Matrix. For details, see Create a price increase adjustment.
- Uplift renewal multiplier: To set the uplift renewal multiplier, use the *renewal_uplift_term* system property. For more information, see Set term multiplier for contract renewal uplift.

Set term multiplier for contract renewal uplift

Use the *renewal_uplift_term* system property to select the contract duration basis used to calculate the renewal uplift term, either per year or per term.

Before you begin

Role required: admin or pricing admin

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *renewal_uplift_term* system property.
   The default value is per term, which means the term is for a specific period of time based on the contract.
3. Do one of the following in the **Value** field:
   - To use a yearly basis for the uplift term multiplier, enter `per year` in the **Value** field.
   - To change the uplift term multiplier to per term, enter `per term` in the **Value** field.
4. Select **Update**.
   Uplift calculations use the specified multiplier to calculate the contract duration basis.

Create a price increase adjustment

Create a price increase adjustment such as an renewal uplift. Use the Price Increase Defaulting Matrix to define conditions that control the price increase applied.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing. pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. In the Rule Matrices list, select Price Increase Defaulting Matrix.
   The matrix details are displayed.
4. Select **Edit Rule** to define conditions for the price increase.
   The Decision Table for the adjustment opens in Workflow Studio and displays the inputs for the price increase, and the decision table that contains the columns for setting the price increase conditions.

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5. Set the default price increase rule.

   a. In the Conditions section, select **Add new decision row**.

   b. In the row, select the input column and set the value for the condition.
   For example, if the input is **Account**, choose the customer account to which the adjustment applies.

   c. In the **Price Increase Type** column, select the type of price increase, such as Renewal Uplift.

   d. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

   e. In the **Adjustment Value** column, enter the adjustment amount.

   f. Select **Save**.

6. Select **Publish**.

Result
The pricing increases, for example uplifts for contract renewals, are applied based on the conditions set in the Price Increase Defaulting Matrix.

Price and quantity ramps

Price and quantity ramps enable sales agents to set incremental increases in product pricing and quantity deals over the duration of a customer contract or subscription period.

How ramps work

Different product adoption scenarios by customers can affect product pricing and quantities for subscription products or products under contract. For example, customers might want to scale their purchases over time, based on product use that increases annually as the company grows. Changes to products in subscriptions or contracts, such as changes to product characteristics or quantity, can cause pricing or quantity increases that must be applied.

Ramps provide a flexible pricing structure for sales agents to schedule pricing and quantity increases over specific time periods, called ramp segments. During the quote process, sales agents can create ramps for configurable products.

Note: Products that can have ramps must have the **Price method** set to Recurring and the **Enable ramps** option selected. Your product catalog admin sets those options when creating a product offering.

Ramps can be defined using yearly, quarterly, or custom structures. Yearly and quarterly ramps generate ramp segments automatically based on the selected term and frequency. Custom ramps allow agents to define ramp segments with flexible durations, rather than relying on automatically generated segments.

The following example shows the ramp settings used to create ramps for a configurable product offering. The Price ramp details section displays the ramp segments that are generated automatically for the configurable product and its child lines.

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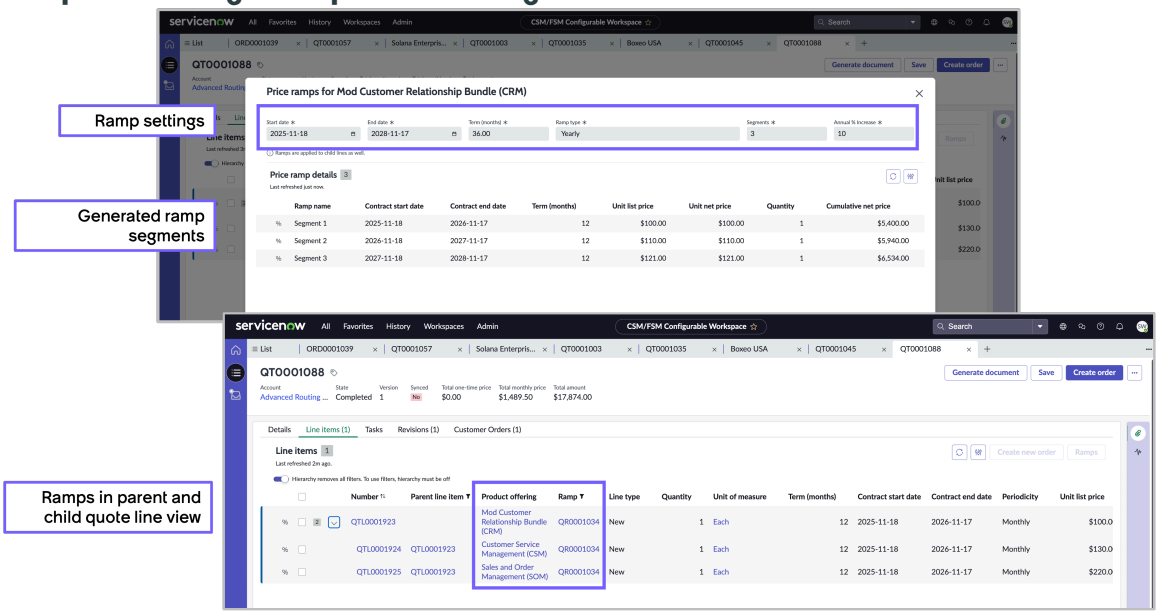
Ramps for a configurable product offering



Sales agents provide the following items to generate the ramps for a quote line:

- **Start date** and **End date**. The default dates come from the quote line. The agent can enter a different start or end date, which the system uses to update the settings accordingly. These dates are used with the **Term** to calculate the ramp segments. The start date is used as the starting date for the first ramp segment.
- **Ramp type**: Yearly, quarterly, or custom. Yearly and quarterly ramps generate segments automatically based on the selected frequency and term. Custom ramps allow agents to define and manage ramp segments manually.
- **Term**: Length of time, in months, for the ramps. The maximum term is 60 months. The Term is used with the Ramp type (Start date and End date) to determine the segments created.
- **Annual % increase**: The percentage increase to be applied annually. The annual percentage increase is applied after the completion of the first year and is cascaded to all quote lines.
- **Segment**: The number of time periods in the ramp to be created. Segments are determined as follows:
  - Yearly ramp type: If the **Term** is a multiple of 12, the number of segments created is equal to the term/12. Each segment term is 12 months. If the **Term** isn't a multiple of 12, the number of segments is term/12 +1, where the first segment is less than 12 months, but the other segments are 12 months each. Also, the first segment can be partial months.
  - Quarterly ramp type: If the **Term** is a multiple of 3, the number of segments isn't equal to term/3. Each individual segment term is 3 months. If the term is not a multiple of 3, the number of segments is equal to (Term/3+1) with the first segment less than 3 months while the rest of the segments are 3 months each. The first segment can be partial months, such as 8 months, 5 days based on the **Start date** and **End date**.

Ramp generation and validation

For bundled products, the ramps generated for the parent line and its child lines have segments with the same ramp type (yearly or quarterly) and term.

- If the parent line has a ramp, ramps are created automatically for all the child lines.
- If the parent line is not ramped, all the child offers can be ramped independently.

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Ramp benefits

Ramps provide the following benefits:

- Flexible pricing structures for customers, to align with their product adoption phases. For example, you can start with lower product pricing in the first ramp segment, to reduce initial costs and overcome buyer hesitancy.
- Scaled revenue optimized over time as product usage grows.
- Automatic calculations of ramp segments and pricing, minimizing errors in manual calculations made by sales agents.

Ramp limitations

Ramps have certain limitations.

- Ramps aren't supported for these features:
  - Quotes of types sale agreement
  - Multiple configurations
  - Product inventory (not applicable)
- Ramps for order lines are displayed, but order changes to ramps by order agents aren't supported. Order Management supports viewing price and quantity ramps on order line items to provide visibility into planned pricing and quantity changes over time. All ramp creation and management is performed in Quote Management.
- Ramps for sold products (SP) are displayed just like any other line, but Modify, Add, Change, Delete (MACD) operations aren't supported for sold products.

Setting up ramps

Configuring ramps involves the following tasks:

Ramp configuration tasks

Task	Description	Role
Enable ramps in product offerings	When creating a configurable product offering: • Set the **Pricing method** to Recurring, which makes the **Enable ramps** option available. • Select the **Enable ramps** option, which lets sales agents create ramps for the offering in a quote line.	Product catalog admin
Add price ramps on a quote line item	Define the ramp settings for the quote line and generate the ramps. After creating the ramps, agents can update the settings, such as the **Ramp type** or **Annual % increase** to recalculate the ramp segments automatically.	Sales agent

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Renewal pricing for products with price and quantity ramps

You can control how renewal uplift pricing for product offerings with price and quantity ramps is calculated by the pricing engine. A renewal uplift is a price increase applied to a product when a contract is renewed.

Overview of renewal pricing for products with ramps

When a product offering with ramps is up for renewal, determining the renewal unit price for the offering can be complex because a ramp may have multiple segments with different prices and quantities.

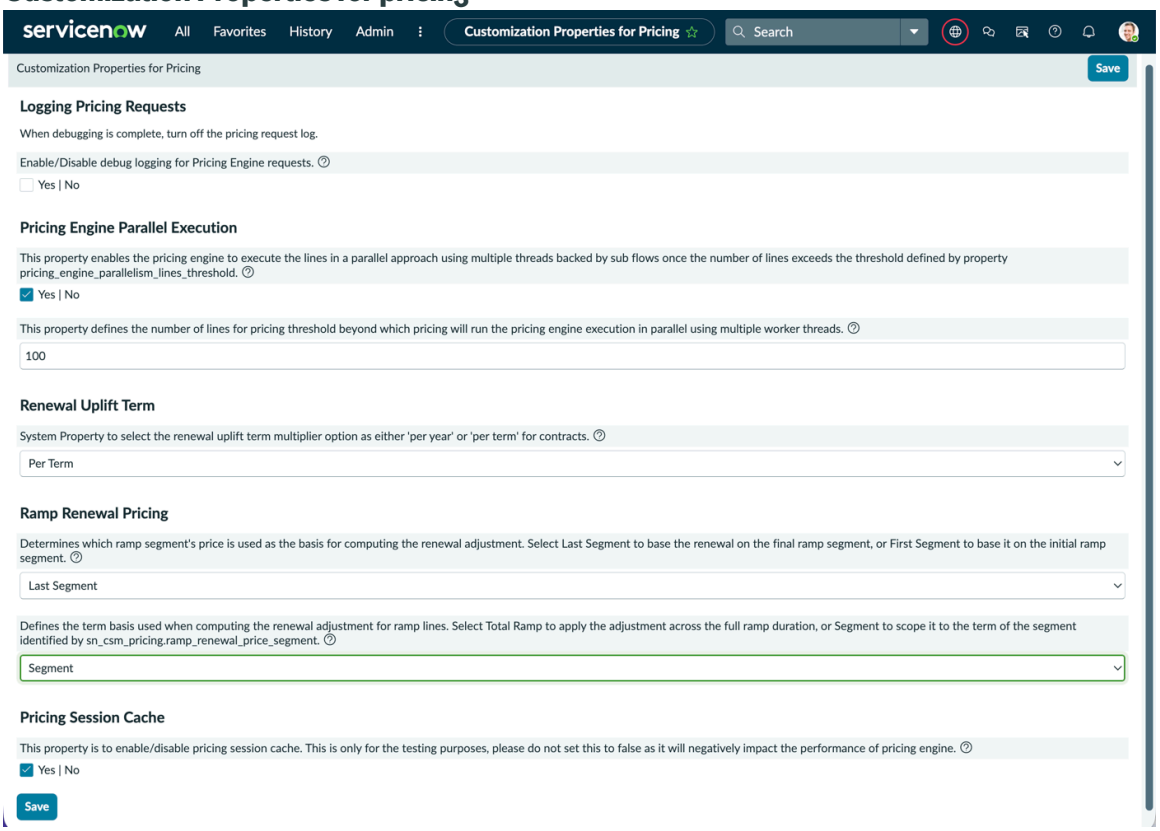
Ramp deals may also have standard (yearly or quarterly) and custom segment durations, making it difficult to choose which segment price to use as the price basis and the term for determining the renewal unit price used in uplift calculations. For non-ramped products, the uplift is calculated by taking the unit price and applying the uplift percentage over the renewal term.

Price basis for calculating renewal unit prices

The renewal unit price is the starting price for a contract renewal line. The pricing engine supports two ways to calculate the renewal unit price using the segment and term. By default, the pricing engine uses the unit price basis from the last segment and the duration of the last segment for the term.

However, the pricing engine can use the first segment as the price basis and apply the uplift across the entire ramp term (total ramp duration). You can set the first segment as the price basis and entire ramp term by using the pricing system properties *sn_csm_pricing.ramp_renewal_price_segment* and *sn_csm_pricing.ramp_renewal_term_basis*. You set these properties by using the Customization Properties for Pricing form (navigate to **All** > **Pricing** > **Administration** > **Properties**).

Customization Properties for pricing



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The following table shows the price basis and terms that you can control.

Price basis for renewal unit pricing of ramped product offerings

Basis option	Price	Term
Last segment (Default used by pricing engine)	Unit price from the last ramp segment	Duration of the last segment only.
First segment	Unit price from the first ramp segment	Total ramp duration (all segments combined; apply the uplift across the entire ramp term)

Example of uplift calculations

The following example shows how the pricing engine uses the different price basis and term values to calculate the unit price:

Uplift calculation example

Price basis and term	Calculation
Last segment + Segment term	Last segment price: $220. Last segment = 1 year. Effective uplift = 10%. Renewal price = $220 + $22 = $242
First segment + Full term	First segment price: $240. Full ramp = 3 years. Effective uplift = 10% x 3 = 30%. Renewal price = $240 + $72 = $312

Note: Quantity is always sourced from the last segment regardless of which price basis method is selected. The price basis configuration affects only the unit price and term for the uplift calculation.

Non-standard segment durations

When a ramp has non-standard segment lengths (for example, a segment that spans 18 months rather than 12), the pricing engine rounds up the segment duration to the nearest full year before computing the renewal price. This provides consistent year-over-year uplift behavior even when segment lengths do not align with calendar years.

Overriding default renewal uplift calculations

You can override the default renewal uplift calculations for ramped products made by the pricing engine by using the `sn_csm_pricing.RampRenewalUpliftCalculationExtensionPoint`. You can use this extension point to customize the logic for calculating renewal uplift pricing. Your inputs can include segment data, unit price, and term for each ramp segment.

For example, you might want the pricing engine to calculater the price basis and term for both the last and first segments to determine which price basis provides the maximum uplift amount. You could have the pricing engine choose the higher value of the two calculated renewal prices to use as the renewal price.

Using the uplift calculation example from the previous section, the pricing engine determines that the first segment price and full ramp term amount ($312) is higher than the last segment and segment term price ($242).

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Maximum uplift calculation example

Price basis and term	Calculation
Last segment + Segment term	Last segment price: $220. Last segment = 1 year. Effective uplift = 10%. Renewal price = $220 + $22 = $242
First segment + Full term	First segment price: $240. Full ramp = 3 years. Effective uplift = 10% x 3 = 30%. Renewal price = $240 + $72 = $312
Value selected by pricing engine	Max ($312, $242) = $312. The pricing engine uses the First segment price basis and Segment term to calculate the renewal price.

Controlling renewal uplift pricing for ramped products

Manage how the pricing engine calculates renewal uplift pricing for ramped products by using the following properties and extension point:

- Uplift renewal multiplier: To set the uplift renewal multiplier, use the `renewal_uplift_term` system property. For more information, see Set properties to control pricing processing.
- Segment basis and term used by the pricing engine: Use the system properties `sn_csm_pricing.ramp_renewal_price_segment` and `sn_csm_pricing.ramp_renewal_term_basis`. To learn more, see Set properties to control pricing processing.
- Override the default renewal uplift calculations for ramped products: Use the `RampRenewalUpliftCalculationExtensionPoint` to customize the uplift calculation logic. Access the extension point by navigating to **All** > **Pricing** > **Administration** > **Scripted Extension Points** and in the Extension Points list, select `sn_csm_pricing.RampRenewalUpliftCalculationExtensionPoint`. Your inputs can include data such as the unit price and term for each ramp segment.

Configuring derived pricing

Automatically set the pricing for a product by deriving its pricing from other products or pricing sources such as transactional values in quotes or orders.

Derived pricing overview

As a pricing admin or manager, you can define rules for deriving product pricing dynamically, relative to other products or transactional values such as the total contract value (TCV) or annual contract value (ACV). When products with derived pricing are added to a transaction, such as a quote or order, the derived pricing is applied automatically. Derived pricing can be used in various scenarios. Example use cases include the following:

Use cases for derived pricing

Pricing scenario	Industry use case
Price accessories relative to related base equipment	Manufacturing: Sell an extended warranty that is 10% of the price of a high-end industrial machine.

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Use cases for derived pricing (continued)

Pricing scenario	Industry use case
Price add-ons that are based on Product X and Y total	Telecom: Sell 24x7 support as an add-on that is 10% of all the subscription products in a quote.
Price add-ons based on a percentage of all products purchased	SaaS: Sell product support service as an add-on that is 15% of subscription fees for all software products purchased.

Derived pricing for a product involves the following items, which you manage through the Derived Pricing Matrix:

Elements in derived pricing

Item	Description
Target product offering	Product offering for which pricing is derived.
Source product offering	One or more product offerings whose pricing is the basis for the target offering.
Transaction header value (context variable)	Field from the header for a transaction, such as quote, that is used as the pricing basis to calculate the derived price, such as the annual contract value (ACV).
Scope	Level from which the context variable is used: • Bundle • Cart • Account
Formula calculation	Percentage used to calculate the derived pricing
Price point	Price at which the product is sold: • Unit list price • Unit net price • Cumulative net price • Monthly recurring price • Annual recurring price
Aggregate	Formulas (SUM, MIN, MAX, AVG) used to determine a single derived product price when pricing is derived from more than one source product. Percentages and price floor and ceiling amounts are then applied as pricing adjustments to calculate the final derived product price.

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Limitations for derived pricing

Derived pricing is not supported for quotes of type sales agreements.

Setting up derived pricing

To implement derived pricing, follow these tasks:

Derived pricing configuration tasks

Task	Description	Role
Enable related (derived) pricing for a price list line	When creating a price list line, select the *Derive price* option. You can also set the **Floor price** and **Ceiling price** for a price list line.	Pricing admin or manager
Create rules for derived product pricing	Use the Derived Pricing Matrix to define the product relationships and calculations used when deriving product pricing.	Pricing admin or manager

Enable the Account scope option for derived pricing

Enable the **Account** option so that it is available for selection in the **Scope** column of the Derived Pricing Matrix. By default, this option in the Choice List table is not enabled.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definitions** > **Choices**.
2. Do the following:
   - In the **Table** column, search for: var__m_sys_decision_multi_result_element_5d8794f9ff923610998fffffffffff16
   - In the **Element** column, search for **scope**.
3. Open the Account choice record.
4. Deselect the **Inactive** option.
5. Select **Save**.
   The **Account** option is displayed as a selectable option in the **Scope** column of the Derived Pricing Matrix.

Create rules for derived product pricing

Define product pricing rules for deriving the price of a product dynamically based on the pricing of related products or a pricing source.

Before you begin

Activate the **Account** option for the **Scope** field in the Derived Price Matrix. To activate the option, see Enable the Account scope option for derived pricing.

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

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About this task

Use the Derived Price Matrix to define the rules for deriving the pricing of a product offering relative to other product offerings or a price source based on a transactional header, such as items from quote headers.

Note: Only one rule set for a derived product is supported.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Pricing** > **Pricing Matrices**.
4. In the Pricing Matrices list, select the **Derived Pricing Matrix**.
5. If you have many rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select the search icon and one or more context variables that the system uses to filter the derived pricing decision rows that are evaluated.
6. In **Rule selection criteria**, select the option that indicates whether single or multiple rules are applied in the Derived Pricing Matrix.
   If multiple rules are applied, all applicable pricing rules are applied when evaluating relationships for derived pricing. If the option is Single, the first rule based on rank is applied for the relationship.
7. Select **Edit Rule**.
   The Decision Table for the Derived Pricing Matrix opens in Workflow Studio and displays the following:
   - Inputs: Lists the default inputs (**Target Product Offering**,**Product Offering** (the source product offering), **Transaction Date**, and **Active**).

     Note: If you have a custom context variable that represents a pricing value to be used as a pricing source, you can add a custom context variable as an input. Context variables are a reference to the Context Variable [sn_csm_ctxrul_mgt_context_variable] table.

   - Decision table: The conditions that you specify to derive the pricing for a target product from one or more source products, and the items used to generate the results.
8. In the Decision table, enter the derived pricing conditions:
   a. In the Conditions section, select **Add new decision row**.
   b. In the **Target Product Offering** column, enter the conditions for the target offering and the source **Product Offerings** if applicable.
   c. Set other mandatory inputs as needed.
9. In the results section, do the following:
   a. In the **Scope** column, select one of the following:
      - Bundle: The target product offering can be added only inside a bundle. The derived price is based on all the source offerings in the bundle. All instances of the source product offerings in the bundle hierarchy are considered and their prices are totaled.
      - Cart: All instances of the source product offerings in the transaction are considered and their prices are totaled.
      - Account: All instances of the source product offerings for a customer account are considered and their prices are totaled.

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b. In the **Percentage Price** column, enter the percentage of the source product price to be applied.

c. Select the **Price Point** used to calculate the derived price:

- Unit List Price: Product price that is based on a single unit of measure.
- Unit Net Price: Product price after all adjustments such as discounts or reductions are applied.
- Cumulative Net Price: Product price over a specific period, which considers discounts or price adjustments applied on the total quantity purchased.
- Monthly Recurring Price: Product price that is paid monthly for monthly subscriptions or contract fees.
- Annual Recurring Price: Product price that is paid yearly for annual subscriptions or contract fees.

d. In the **Header Variable** column, enter the header variable for a quote or order to be used as the pricing source, for example Total annual recurring price.

e. In the **Aggregate** column, select the formula that determines how multiple product source values are calculated and applied to determine a single product price for the derived product.
Any adjustments, such as percentages or floor and ceiling values, are then applied to determine the final derived product price.

- Sum: Use the sum of all the source product prices to calculate a single value for the derived product price. If the result is less than the floor price, the price is adjusted up to the floor price. If the result exceeds the ceiling price, the price is capped at the ceiling price.
- Max: Use the maximum price of the source products. For example, if Product A price is greater than Product B price, use the Product A price.
- Min: Use the minimum price of the source products. For example, if Product B price is less than Product A price, use the Product B price. The price is then adjusted to the floor price and capped at the ceiling price.

  Note: Floor and ceiling prices are applied after the aggregate formula is evaluated. The final derived price is within the floor-to-ceiling range defined on the price list line.

- Average: The average price between the source products (sum of all the source product prices divided by the number of products). If the Average is less than the floor price for the derived product, the Average is rounded up to meet the floor price.

f. Review the **Validation Status** and **Validation Message** columns to verify that the results are valid.

g. Select **Save**.

10. In the Details tab for the matrix, select **Publish**.

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The derived pricing for the target product is available when the product is used in a transaction line.

Note: Once a matrix is published, you can't make further changes to it. If you have changes, create another version of the matrix with your updates and publish the new version. However, your admin can allow changes to a published matrix by using the *allow_edit_on_published_matrices* system property. To learn more, see Allow changes to published pricing and product eligiblity matrices.

Result
When sales or order agents add a product with derived pricing, the derived pricing for the product is automatically applied based on the conditions and the values set in the Derived Pricing Matrix. Agents can review the line item for the target product and see how the derived price was calculated, for example, by checking the scope values, such as Unit list price, Unit net price, Cumulative net price, Recurring monthly price, or Recurring annual price.

Using the DerivedProductPriceExtensionPoint for derived pricing

The *sn_csm_pricing.DerivedProductPriceExtensionPoint* provides an interface with specific methods that call certain business logic for using valid source products in source and target product pairs in derived pricing.

The extension point has three methods:

- `canHandleRequest(pricingEngineContext)`: Determines whether the pricing engine can handle this extension point request.
- `getAccountLevelDerivedPricedProductsEncodedQuery(pricingEngineContext)`: Custom query for account-level sold product lookup.
- `getQualifiedSourceTargetPairs(pricingEngineContext, sourceTargetPairs)`: Filter source-target pairs in derived pricing. This method receives an array of pair objects after rule matrix evaluation. Each pair contains:
  - `sourceLineDetail` - The PricingEngineContextLineDetail of the source line
  - `targetLineDetail` - The PricingEngineContextLineDetail of the target (derived) line
  - `isPair` - Boolean, true by default

  To exclude a pair from calculation of the derived (target) product, set `pair.isPair = false` and return the modified array. If `isPair = true`, the source line price is included in the price calculation of the derived (target) product.

To access the extension point, navigate to **All** > **Pricing** > **Administration** > **Pricing Extension Points** and select the `sn_csm_pricing.DerivedProductPriceExtensionPoint`.

Managing the price basis for MACD products

As a pricing admin or manager, you can control how prices are calculated for sold products after negotiating changes during quoting or when contract modifications occur to quote lines.

With the Delta Price Treatment Matrix, you can specify how pricing is to be handled after changes occur that affect the pricing basis. For example, you can specify the following types of pricing treatments:

- Apply Fresh Prices: Use current list pricing as the basis.
- Use Original Prices: Use original list price as basis for calculation.
- Retain Original Attribute Adjustments: Original attribute adjustments calculated from original list price.

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- Set Net Prices to Zero; Zero out pricing for the line item.
- Honor Renewal Adjustments: Renew line items at prices specified in renewal adjustments.

Create rules for calculating pricing of sold products with MACD changes

Set different price points for calculating the pricing of sold products that undergo MACD changes.

Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

About this task

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Delta Price Treatment Matrix.
4. In **Rule selection criteria**, select the option that indicates whether single or multiple rules are applied in the Delta Price Treatment Matrix.
   If multiple rules are applied, all applicable pricing rules are applied when determining the pricing for sold products. If the option is Single, the first rule based on rank is applied.
5. Select **Edit Rule**.
   The Decision Table for the Delta Price Treatment Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the Line Type and Action for MACD operations. These inputs are the fields (columns) for setting the conditions in the decision table.
   - Inputs: Lists the default inputs **Line Type**,**Action**.
   - Decision table: The conditions that you specify for the line types or MACD action, such as disconnect or suspend.
6. In the Conditions section, select **Add new decision row**.

Configuring matrix validation rules

As a product catalog admin or pricing admin, you can manage the system-defined matrix validation rules that automatically check the mandatory rule inputs or outputs in matrix decision tables. You can also define your own custom validations.

The product eligibility and pricing matrices included with the Product and Pricing Rules application have system-defined matrix validation rules, which are identified in the Details tab for each matrix. Each validation rule has a validation definition, which is a script that identifies the context variables to be validated in the matrix decision table and the corresponding error or warning messages to be displayed. The validations are run when you save your matrix decision row changes. The **Validation Status** field indicates whether the change is valid. If the change is not valid, error or warning messages are displayed in the **Validation Message** columns of the decision table.

Some system-defined validation rules are applicable to all decision tables, while others apply to only certain types of matrices:

- DuplicateCondition: Checks for duplicate conditions in decision rules.
- MissingMandatoryInputs: Checks for missing required inputs.
- MissingMandatoryOutputs: Checks for missing required outputs.
- EligibilityResultValidation: Checks the product eligibility results.

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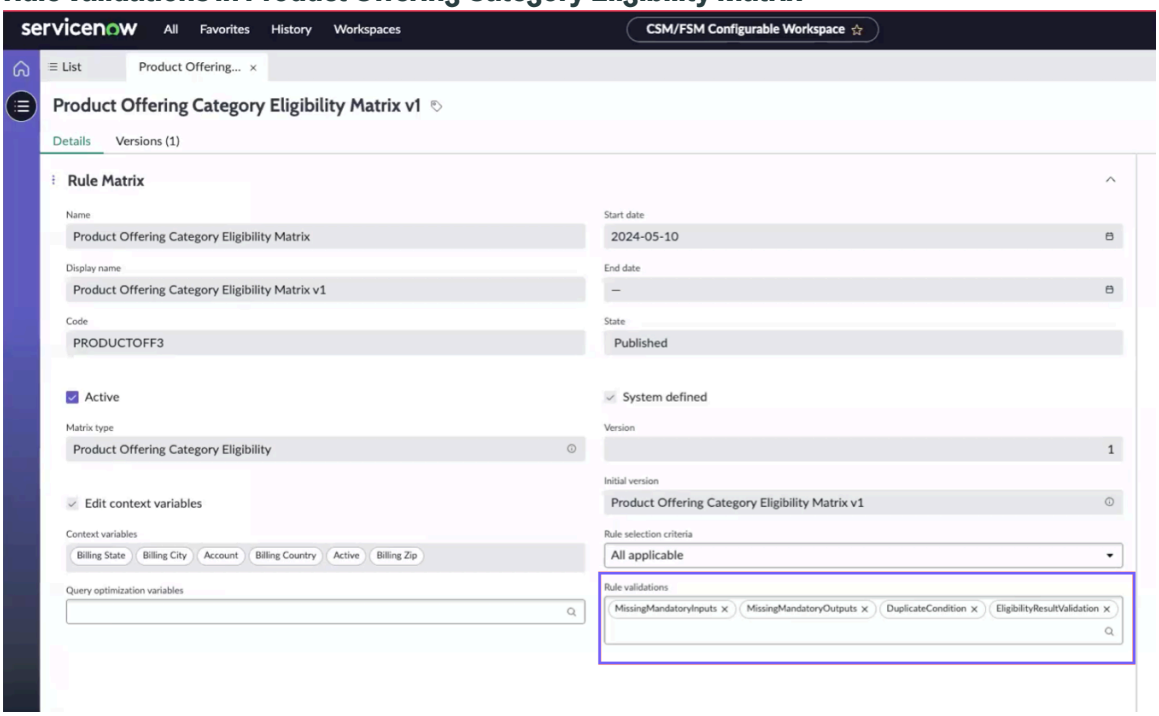
- MandatoryCostBookForTypeExistingCostBook: Checks the cost book type.
- MandatoryPriceListForTypeExistingPriceList: Checks the price list type.
- ProductOfferCharsWithoutProdOffer: Checks for product offer characteristics without product offering.

Rule validations in Product Offering Category Eligibility Matrix



From the Details tab for a matrix, you can also run rule validations for the entire matrix by selecting the **More actions** icon and selecting **Validate rule**.

Update validation settings in a matrix

Change the rule validation checks for a matrix. These checks run automatically when you save changes made to the matrix decision table.

Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. Select the matrix to update.
4. In the **Rule validations** field, change the rule validation.
   - To add a validation rule, select the Search icon and select the rule validation.
   - To delete a validation, select the X in the validation pill.
5. Select **Save**.

Create a custom validation definition

Provide a script that validates a context rule input or output in the decision table for a pricing or product eligibility matrix.

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Before you begin

Role required: admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Validation Definitions**.
3. Select **New**.
4. In the **Script** field, enter the custom script that defines the error check, warning messages, and error messages for the validation.
5. If the decision condition won't be active by default, select **Inactivate decision condition**.
6. Enter the **Name** of the validation definition.
7. Select **Save**.
8. Associate the custom definition to a rule matrix.
   a. Navigate to **Context Rule Management** > **Matrix Validations**.
   b. Select **New**.
   c. In the **Matrix type** field, select the rule matrix to which this custom validation definition applies.
9. Select **Save**.

Subscription revenue metrics

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, usually at regular intervals such as monthly or annually. In Sales Customer Relationship Management, various subscription revenue amounts are calculated automatically for opportunities and quotes.

Subscription revenue amounts are metrics that help sales agents and sales managers track and analyze the revenue impact of sales deals. Sales agents and managers can view these system-calculated revenue amounts in the pricing details for opportunities and quotes, both at the header and line levels. These revenue amounts, such as monthly recurring revenue (MRR) or annual recurring revenue (ARR), are useful for monitoring sales performance, forecasting subscription revenue, and providing relevant subscription amounts when agents engage with customers.

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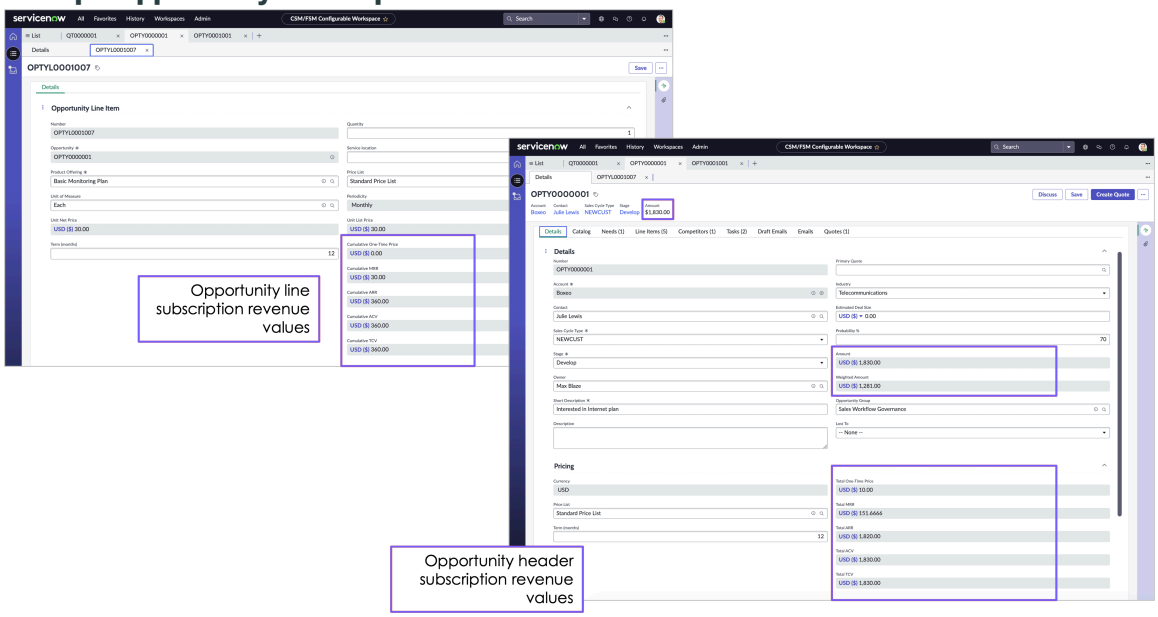
Example opportunity subscription revenue details



Subscription pricing metrics

In subscription pricing, common metrics for assessing subscription-based revenue include the following values and items:

Monthly Recurring Revenue (MRR)

The total revenue generated from recurring subscriptions or contracts on a monthly basis. It helps sales agents and managers assess the stability and growth of subscription-based revenue streams.

Annual Recurring Revenue (ARR)

The annual revenue generated from recurring subscriptions or contracts. It provides insights into the predictable revenue stream that can be expected from existing customers over a year.

Annual Contract Value (ACV)

The total value of a contract on an annual basis. It highlights the annual revenue impact of a deal and facilitates comparison with other contracts or revenue streams.

Total Contract Value (TCV)

The total value of a contract over its entire duration, including recurring and one-time charges. It provides visibility into the overall value of a deal and its impact on the organization's financial performance.

Term

The duration or period of a subscription or contract, in months, such as 10 months or 24 months. In Opportunity Management, agents can enter a Term value before adding line items. In Quote Management, when agents enter a Term value and the contract start date, the system uses the term value and start date to auto-calculate the contract end date. If an agent changes the contract end date, the system recalculates the Term value.

For products with monthly periodicity, the per-day price (pro-rate multiplier) is based on the Unit list price/number of days in the month. For a product with annual periodicity, the per-day price (prp-rate multiplier) that is multiplied against the decimal fields is the Unit price/365 days or 366 days if the year is a leap year.

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How subscription pricing revenues are calculated

Product offers for products and services contain basic pricing information, such as list price and pricing method (either one-time or recurring periodicity). When agents add product lines to opportunities and quotes, the system uses basic pricing information and product line details to auto-calculate the various revenue subscription values. These values are calculated and displayed in both the header pricing details and line pricing details.

For example, when an agent adds an opportunity line, the system calculates the Cumulative Monthly Recurring Revenue (MRR) amount using the unit net price and quantity of the product. The system then sums up the cumulative revenue to the parent line in the opportunity and displays the cumulative MRR in the pricing details of the opportunity header.

When agents use the configuration UI to add customizable products to quotes, the configurator interface displays the calculated subtotal values such as the Cumulative Monthly Recurring price for the root product offer of the line item.

The following tables describe the subscription pricing revenue amounts for opportunities and quotes and how they're calculated.

Opportunity line subscription revenue metrics

Opportunity line subscription metric	Description	Calculation
Unit net price	Price of a single unit.	Unit list price - pre adjustments
Cumulative one-time price	One-time price of the opportunity line and any child lines.	Unit net price * Quantity
Cumulative MRR	Cumulative monthly recurring revenue of the opportunity line and any child lines. Not calculated for one-time products.	• If the periodicity is monthly: Cumulative MRR = Unit net price * Quantity • If the periodicity is annual: Cumulative MMR = (Unit net price/12 months) * Quantity
Cumulative ARR	Cumulative annual recurring revenue of the opportunity line and any child lines. Not calculated for one-time products.	Cumulative MRR * 12 months
Cumulative ACV	Cumulative annual contract value of the opportunity and any child lines.	Cumulative One-time price + Cumulative ARR
Cumulative TCV	Cumulative total contract value of the opportunity and any child lines.	Cumulative One-time price + (Cumulative MRR * Term months)

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Opportunity header subscription revenue metrics

Opportunity header subscription metric	Description	Calculation
Amount	The total contract value.	Total contract value if there are opportunity line items. If no line items exist, this amount is copied from the Estimated Deal Size.
Weighted amount	Value that represents the potential size of a deal.	Amount * Probability
Total One-Time Price	Sum of all the cumulative one-time prices of the opportunity line items.	Cumulative one-time price of the top-level parent
Total MRR	Total monthly recurring revenue.	Sum of the Cumulative MRR values of the top-level parent.
Total ARR	Total annual recurring revenue.	Sum of the Cumulative ARR of the top-level parent.
Total ACV	Total annual contract value.	Sum of the Cumulative ACV of the top-level parent.
Total TCV	Total contract value.	Sum of the Cumulative TCV of the top-level parent.

Quote line subscription revenues

Quote line subscription metric	Calculation
Monthly recurring price	• If periodicity is monthly: Monthly recurring price = Unit net price * Quantity • If periodicity is annual: Monthly recurring price = (Unit net price/12) * Quantity
Annual recurring price	Monthly recurring price * 12 months
Cumulative net price	Unit List Price - Total adjustment
Cumulative one time price	One-time price for the line item + (if parent line item) One-time price for all child line items
One-time price	One-time price for the line item.

Quote line cost and margin

Quote line subscription metric	Calculation
One-time cost	Unit cost * quantity
Monthly recurring cost	• If periodicity is monthly: Monthly recurring cost = Unit cost * Quantity • If periodicity is annual: Monthly recurring cost = (Unit cost/12) * Quantity

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Quote line cost and margin (continued)

Quote line subscription metric	Calculation
Cumulative one-time cost	One-time cost for the line item + (if parent line item) sum of all One-time Cost for all child line items
Cumulative monthly recurring cost	Monthly recurring cost + (if parent line item) sum of all Cumulative Monthly Cost for immediate child lines
Cumulative Net Cost	Cumulative Net Cost = [One time cost + (Monthly Recurring cost * Term)] +(if parent line item) sum of all Cumulative net cost for immediate child lines
Cumulative margin %	(Cumulative net price – Cumulative net cost)/ Cumulative net price * 100

Quote header subscription pricing

Quote header subscription metric	Calculation
Term	The duration in months for subscription or contract. If an opportunity exists, the value comes from the opportunity. Otherwise, the default term is 12 months.
Total one-time price	Sum of all parent lines.
Total monthly recurring price	Sum of the Cumulative monthly recurring price of all root parent lines.
Total annual recurring price	Sum of the Cumulative annual recurring price of all root parent lines.
Total amount	Sum of the Cumulative net price of root parent lines.

Quote header cost and margin

Quote header subscription metric	Calculation
Total one-time cost	Sum of Cumulative one-time cost of all parent lines.
Total monthly cost	Sum of Cumulative Monthly recurring cost of all root parent lines.
Total cost	Sum of Cumulative Net Cost of root parent lines.
Total one-time margin	(Total one-time price) - (Total one-time cost).
Total monthly margin	(Total monthly price) - (Total monthly cost)
Total margin amount	(Total amount) - (Total cost)
Total one-time margin %	(Total one-time margin/Total one-time price) × 100

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Quote header cost and margin (continued)

Quote header subscription metric	Calculation
Total monthly margin %	(Total monthly margin/Total monthly price) × 100
Total margin %	(Total Margin Amount/Total amount) × 100

To learn more about the revenue metrics in opportunity details, see Add and view the details of an opportunity and Add line items to an opportunity.

To learn more about the revenue metrics in quote details, see Add and view details of a quote.

Create a matrix version

Create a version of a published price or product eligibility matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create a version of a published pricing matrix (Standard Price Adjustment Matrix, Price List Defaulting Matrix, Cost Book Defaulting Matrix, or Configuration Component Price Adjustment Matrix) and a product eligibility matrix. When you create a matrix version, the new version becomes the active version. After creating the version, you update the decision table for the matrix, then save and publish the matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select the matrix to be updated.
4. In the Details tab for the matrix, select **Create new version**.
   The following changes occur:
   - The new version of the matrix opens in another tab.
   - In the former matrix, the **State** changes from Published to Retired and the System **System defined** value changes to false.
5. Change the matrix as needed.
   For example, if you're updating context variables used in the Standard Price Adjustment Matrix, you can add or delete context variables in the **Context variables** section of the matrix.
6. Select **Save**.
7. Update the decision table for the matrix by selecting **Create rule**.
   Add the decision rows in the decision table for the matrix. You can use the decision table export feature to edit the decision table for the previous matrix version in Excel, update the Excel file, then import the updated Excel table to populate the decision table for the new version. For details, see Manage decision tables in Excel.
8. Select **Save** and then **Publish**.
   You can refresh the list of matrices to see the new matrix version.

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Allow changes to published pricing and product eligiblity matrices

Use the *allow_edit_on_published_matrices* system property to allow changes to published pricing and product eligibility matrices.

Before you begin
Role required: admin

About this task
If your pricing admin or product catalog admins want to change a published pricing or product eligibility matrix, they must create a new version of the matrix. However, as an admin, you can allow changes to published matrices by using the allow_edit_on_published_matrices system property.

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *allow_edit_on_published_matrices* system property.
3. Set the property value in the **Value** field.
   - Enter `true` to allow edits to published matrices.
   - Enter `false` so that published matrices can't be edited. You must generate a new version of the matrix to make changes.
4. Select **Update**.
   If you enable this property, published matrixes can be updated by pricing and product catalog admins.

Set properties to control pricing processing

Activate or deactivate system properties that control how pricing features are processed in Sales Customer Relationship Management applications.

Before you begin
Role required: admin

About this task
You can control the following pricing features using pricing system properties:

- Logging of pricing engine requests for debugging.
- Parallel processing of a large set of pricing engine requests, typically 100 transaction lines or more, to optimize performance. You can also set the threshold, which is the number of transaction lines that triggers parallel processing.
- Multiplier term used when calculating uplifts for contract renewals.
- Ramp segment and term basis used when calculating renewal adjustments for products with ramps.

Procedure

1. Navigate to **All** > **Pricing** > **Administration** > **Properties**.
2. Set the following properties:

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Customization properties for pricing

Property	Description
Logging Pricing Requests (sn_csm_pricing.log_pricingengine_request)	Control the logging of pricing engine requests for debugging. Select **Yes** to activate logging or **No** to turn off the pricing request log.
Pricing Engine Parallel Execution ○ Enable the pricing engine to perform parallel processing of transaction lines when a transaction threshold is met. (sn_csm_pricing.enable_pricing_engine_parallel_execution) ○ Set the number of transactions that must be met before the pricing engine can run parallel processing. (sn_csm_pricing.pricing_engine_parallelism_lines_threshold)	Set properties that optimize the processing time for pricing transactions. ○ The parallel execution property is set to **Yes** by default. Select **No** to turn off parallel execution and process the transaction lines serially. If you select **No**, the system ignores the threshold value. ○ The default threshold value is 100. You can enter a different number that represents the minimum number of transaction lines that must be met before the pricing engine can perform parallel processing using multiple threads. **Note:** Parallel processing isn't performed by the pricing engine for calls to the product configurator pricing integrations, even if the number of transaction lines meets the parallelism threshold.
Renewal Uplift Term (sn_csm_pricing.renewal_uplift_term)	Set the multiplier term for contract renewal uplifts, either per year or per term.
Ramp Renewal Pricing ○ Set the ramp segment used as the price basis for calculating a renewal adjustment. (sn_csm_pricing.ramp_renewal_price_segment) ○ Set the term basis used when calculating renewal adjustments for ramp lines. (sn_csm_pricing.ramp_renewal_term_basis)	Set properties to control how pricing for ramp renewals is calculated. ○ The ramp renewal price segment property is set to **Last Segment** by default, which uses the price from the final ramp segment as the price basis. Select **First Segment** to use the price from the initial ramp segment as the price basis. ○ The ramp renewal term basis property is set to **Segment** by default, to apply the adjustment to the term of the segment identified in the ramp renewal price segment property (sn_csm_pricing.ramp_renewal_price_segment). Select **Total Ramp** to apply the renewal adjustment across the full ramp duration.

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Property	Description
Pricing Session Cache (sn_csm_pricing.enable_pricing_session_cache)	For testing purposes only. Turn on (select **Yes**) or turn off (select **No**) the cache for pricing sessions. **Note:** Do not set this to **No** except for testing, as it may negatively impact pricing engine performance.

3. Select **Save**.

Create a custom context variable

Create custom context variables to represent product or non-product characteristics that can be used by pricing admins to apply different pricing features, such as pricing adjustments, or product catalog admins to set product offering eligibility rules.

Before you begin

Before creating a custom variable, review the context variables available in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table to verify whether you need a new one. This table identifies the system-defined variables provided with Product Catalog Management and Pricing Management and also any custom variables that have been created.

For example, the system-defined context variables provided for non-product attributes include: Account, Shipping Country, Shipping City, Shipping State, Shipping Zip, Billing Country, Billing City, Billing State, Billing Zip, and Transaction Date.

Role required: admin

About this task

As an administrator, you can create custom context variables for items such as non-product characteristics, that your pricing and product catalog administrators can use in rule matrices to control pricing features or product offering eligibility. For example, your pricing administrator might want to define pricing adjustments based on sales segment, but sales segment isn't a system-defined context variable.

You create the variable name and define the variable type, so that the variable can be used in a decision rule for a rule matrix. After you create the variable, you must also map the context variable to the transaction entity, such as quote or order, from which the system retrieves the context.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Context Variables**.
3. In the Context Variables list, select **New**.
4. On the form, fill in the fields.

Context Variable form

Field	Description
Type	Context variable type. Choose the type of field for the variable. For example, the choice

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Field	Description
	list field type lets your user select from a pre-defined list of choices. For more information on the different field types, see Field types reference. **Note:** Depending on the **Type** selected, other fields and sections in the form are displayed.
Label	Name of the context variable to be displayed in the user interface, such as sales segment.
Column name	ID of the context variable for which the context variable type is created. The system assigns this name automatically based on the **Label** name entered, for example sales_segment.
Code	System-generated alphanumeric number based on the label name. You can enter your own code to replace the system-generated code.
Context type	Option that indicates from where the context is retrieved. For example you could select one of the following types: ○ Transaction Header: Context is fetched from the header record for a transaction, such as an opportunity, quote, or sales order. ○ Transaction Line: Context is fetched from the line record for an opportunity, quote, or sales order transaction.
Application	Name of the application scope. The default scope is Global.
Parameters	
Pricing api key field	The reference field for a context variable that defines an external ID used in the Sales CRM Pricing API.
Active	Option that indicates the context variable is available for use in rule matrices.

5. In the Reference Specification section, select the reference table for the context variable that defines an external ID used in the Sales CRM pricing API.
6. Select **Save**.
   The tab (related list) for the **Type** that you selected in Step 4 and the **Variable Mapping** tab are displayed.
7. Depending on the **Type** you selected, create the values for the type, then select **Save**.
   For example, in Step 4, if you selected the Choice type, select **New** in the **Choices** tab and define the choices.

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What to do next
Map the custom context variable to a transaction entity.

Map a custom context variable to a transaction entity

Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management.

Before you begin
Verify that you're in the appropriate application scope for the transaction type. For example, if you're mapping a context variable for orders, the application scope is Order Management. Use the Globe icon in the navigation bar to change the application scope.

Role required: admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Variable Mappings**.
3. Select **New**.
4. In the form, fill in the fields.

Lead to Cash Entity Attribute form

Field	Description
Entity	The Sales Customer Relationship Management entity for which the variable will be used. Select the entity, for example Opportunity or Order.
Table	Name of the application table for the transaction.
Field	Field from the application table that is related to the custom context variable. Select the field.
Key	Custom context variable. Select the variable from the list of pricing context variables.
Advanced	

5. Select **Save**.

Result
The custom context variable is available for use in pricing matrices.

Use extension points in Pricing Management

Use extension points to call custom scripts from external sources that control pricing logic used in the Pricing Management feature of the Sales Customer Relationship Management (Sales CRM) applications.

To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

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Pricing Management extension points

Extension point	Description
sn_csm_pricing.DefaultCostBookExtensionPoint	Customize the logic for determining the default cost book used by the calling application, such as Quote Management. This extension point changes the default cost book logic for both the header and line of the calling application.
sn_csm_pricing.DefaultPriceListExtensionPoint	Customize the default price list logic used by the calling Sales CRM applications such as Quote Management or Order Management. This extension point changes the default logic for both the header and line of the calling application. **Note:** If you want to create additional context variables, use the Price List defaulting matrix to manage the price list default at the header level. Use this extension point only for use cases that can't use the Price List defaulting matrix. In this case, the request contains values for all the context variables, in addition to the default context variables.
sn_csm_pricing.ListPriceExtensionPoint	Customize the logic for determining a base list price. Enables you to extend the pricing engine logic and not rely on a price list and price list line to fetch the base list price.
sn_csm_pricing.AttributeAdjustmentExtensionPoint	Customize the logic that determines the attribute adjustments for a product offering. You can extend the pricing engine logic without using the Attribute Adjustment table to fetch the adjustment values.
sn_csm_pricing.PricingAdjustmentsExtensionPoint	Customize the logic that determines price adjustments for a product offering. Enables administrators (partner implementers) to extend the pricing engine logic by not relying on the Standard and Component Configuration Rule matrix to fetch the adjustment values.

External ID support in Sales CRM Pricing API

The Sales CRM Pricing API supports external IDs in pricing requests. You can use your own custom identifiers or codes for selected reference fields instead of a ServiceNow sys_id.

For example, a pricing call can originate from other CRM or ERP systems that may have different identifiers for certain objects. You can map these unique identifiers to ServiceNow reference fields using an external ID, code, or other custom field. A pricing call can then be made using these unique identifiers available on the external system.

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You can use external codes for the following reference fields (objects), including but not limited to:

- Product offering
- Top-level product offering
- Unit of measure
- Price list
- Cost book
- Characteristics and characteristic options
- Pricing adjustment type
- Account

Note: External IDs apply to REST API pricing requests and do not affect UI#based flows. Pricing execution can use internal system IDs, external IDs, or a combination of both IDs in pricing requests. For more information on the pricing API, see Sales CRM Pricing API.

How external IDs work in pricing requests

External IDs map to reference fields in ServiceNow reference tables. As an admin, before submitting a pricing request, create the context variables that define the reference fields for external IDs or codes that map to a column in a specified reference table. For more information, see Configure context variables for external IDs.

Processing of a pricing request with external IDs involves the following phases:

Request intake

The caller sends a Pricing REST API request that can include:

- External IDs or codes
- sys_ids
- A combination of both external IDs and sys_ids

In your request, you set a request flag (`"use_external_code:true"`) that enables external ID support.

Resolution

For each configured reference field, the system attempts to resolve the external value to an internal sys_id.

- Resolution is driven by context variable configuration.
- If resolution fails and no sys_id is provided, the request fails.

Account resolution using external identifiers

Accounts are resolved using context variables rather than request payload fields.

- External account identifiers are resolved before pricing execution.
- Resolved account sys_ids are used internally for pricing execution.
- Original external identifiers are retained for response construction.

Pricing execution

All downstream pricing logic runs only on resolved sys_ids. Pricing logic is unaware of whether the original value was an external code or a sys_id.

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Response construction

The response reflects the identifiers provided in the request (external codes or sys_ids). Resolved sys_ids are not exposed to the caller.

Error handling

The system validates all reference identifiers during request processing. Common errors include the following scenarios:

- External identifier does not exist in the reference table.
- External code usage is enabled but no context variable mapping exists for an enabled field.
- Neither a sys_id nor external code is provided.
- Identifier value is not valid.

Errors are reported at the line level and identify the failed line item. Error messages may vary depending on the configuration and validation context.

If errors occur, verify the following items:

- Context variable mappings
- External identifier values
- Request flag usage

Context variable configuration and mapping

As an admin, before submitting a REST API pricing request that uses external IDs, create the context variables that map to columns in selected ServiceNow reference tables. For more information, see Configure context variables for external IDs.

Configure context variables for external IDs

Set up a context variable for each external ID to be used in pricing requests and map the variable to a reference field in a ServiceNow reference table.

Before you begin

Role required: admin

About this task

The Sales CRM Pricing API supports external IDs in pricing requests. For each external ID, define a context variable that maps to the following:

- Source reference table
- Reference field name

For information on the pricing API, see Sales CRM Pricing API.

Note: Only a single reference field for an external ID is supported as a key to resolve an external ID with a sys_id. To get an accurate and valid response, the external ID or code sent in a reference field must map to a unique record in the source reference table.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Set the application scope to Context Rule Management.

   Use the scope selection menu icon in the header bar to select the scope.

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3. Select the List icon ☰.
4. Navigate to **Context Rule Management** > **Context Variables**.
5. Do one of the following:
   - If creating a context variable, select **New**.
   - If updating a context variable, select the variable to be updated.
6. Define or update the context variable for the external ID:

   a. In the **Type** field, select Reference.

   b. In the **Label** field, enter the name of the context variable to be displayed in the user interface.

   The **Column name** and **Code** fields are automatically generated based on the **Label name** entered. The default value for the **Type of mapping** field is set to Field mapping.

   Note: You can enter your own **Code** value to replace the system-generated code.

   c. In the **Context type** field, select the context that indicates where the variable is retrieved from, for example the Transaction Header or Transaction Line for an opportunity or quote.

   d. In the **Reference** field in the Reference Specification section, select the source reference table for the variable.

   e. In the **Pricing api key field**, select the reference field to be used from the source reference table specified in Step d.

7. Select **Save**.
   The external ID defined by the context variable can be used in pricing requests.

Exporting and importing pricing entities

As a pricing admin, you can both export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a target production instance. Each process involves a separate set of steps.

Before exporting and importing pricing entities

Before you export your pricing entities to a target instance, note the following prerequisites:

Import product-related entities to your target instance

Verify that your product catalog admin has first imported the product catalog base entities, product offering catalog, and product offerings to your target instance. Your pricing entities are associated with product offerings and catalogs, so the offering and catalog information must exist before you import pricing entities. For more information on the product entities that must be imported to your target instance, see Exporting and importing product catalog entities.

Export the update set for decision table changes to your target instance before exporting the associated pricing matrix

If you have a new version of a pricing matrix that has decision table changes, such as a reference to a new product offering, ask your admin to export the system-generated update set that includes the decision table changes to your target

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instance. Next, you export the new pricing matrix, then import the pricing matrix to your target instance. For more information, see Export pricing entities and Import pricing entities.

Export and import process for pricing entities

Follow these steps to export and import pricing entities.

Export and import steps for pricing entities

Step	Description
Export pricing entities	Export pricing entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory.
View export job status	Check the state of the export job.
Import pricing entities	Import pricing entities exported as JSON files to another instance.
View import job status	Check the state of the import job.

Export pricing entities

Export pricing entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

Before you begin

Before you export a new version of a pricing matrix that has an updated decision table, ask your admin to export the system-generated update set that includes the updated decision table, to the target instance.

Role required: sn_csm_pricing_pricelist_administrator

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Export** > **Export Entities**.
   The Export Entities list shows the previous export jobs.
3. Start an export job by selecting **Export Hierarchy**.
   The **Export Entities** form opens in the **Export-UI** tab.
4. In **Entity Type**, select the pricing entity to be exported from your source instance.
   The pricing entities include: Rule Matrix, Price List, Price List Line, Attribute Adjustment, Cost Book, and Cost Book Line.
5. Select the items that you want to export and then select **Export**.

Note:

- Entities such as pricing matrices may have specific versions. Be sure to select a specific version of the entity to be exported and import that version to the target instance.
- If you have new versions of pricing matrices with updated decision tables that reference new product offerings, ask your admin to export the system-generated update set that includes the updated decision tables.

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6. Give the export job a file name and description and select **Submit**.
   The export process begins and a message displays the catalog export ID.
7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

   The exported file appears in the **Attachments** pane.
8. Select the attachment to download the exported file.
   The file is downloaded as a JSON file and saved to your local download directory.

What to do next

Import pricing entities.

Import pricing entities

Import pricing entities to a target instance by using the ServiceNow Platform import function.

Before you begin

Before you start, check your target instance and verify that certain required entities have been imported. For example, the product offerings and product offering catalogs associated with your pricing entities must have been previously imported to your target instance. Similarly, if you're importing price list lines or cost book lines, the price list or cost book for those lines must have been previously imported to your target instance. And if you're importing a new price list matrix, your admin must have imported the associated decision table to your target instance in a system-generated update set.

Role required: sn_csm_pricing_pricelist_administrator

Procedure

1. Go to the target instance where you want to import the pricing data.
2. Start the import process.
   - To import pricing entities, navigate to **All** > **Pricing** > **Export/Import** > **Import**.
   - To import context rules, navigate to **All** > **Context Rule Management** > **Import**.

   The record for the import data source opens.
3. Attach the JSON file by selecting the **Attachments** icon in the header bar.
   The Import Data Source pop-up opens.
4. Select **Choose file** and select the JSON file you want to import.
5. When the file is uploaded, close the Attachments pop-up.
6. Under Related Links, select **Load All Records**.
   The data from the imported file loads, and a Progress bar opens showing the imported job. The imported data is loaded into the import set temporary table sn_csm_pricing_import_data_source or sn_csm_ctxrul_mgt_import_data_source if you're importing context rules.

   Note: During the import of a pricing matrix on the target instance, an import post script associates the reference entities in the decision table that was imported in an update set to the appropriate pricing matrix.
7. In the Next steps section, select **Run Robust Transform**, then select **Transform**.
   The progress bar shows the transform status. When the transform is complete, the imported data is loaded into the appropriate pricing tables.
8. In the Next steps section, select the import set link to view the resulting import set.

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The imported data is available in the appropriate tables.

9. In the Import Set record, open the **Import Log** tab to check for any errors and verify that the transform was completed successfully.

What to do next

Certain imported pricing entities, such as price lists or cost books, are in the draft state in the target instance. To make the imported price list or cost book active in the instance, publish them.

Configuring Quote Management

Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.

Admins and Quote Management administrators complete the following configuration tasks to set up Quote Management.

Configuration tasks for Quote Management

Task	Description	Role
#unique_374	Install Quote Management from the ServiceNow® Store Store. It provides these key features for your agents: • Build quotes with products and pricing, then present them to customers. • Use the product configurator to select simple and configurable product offerings. • Add pricing adjustments to products. • Convert quotes to product orders once customers have approved.	Admin
Assign user roles in Sales Customer Relationship Management applications	Set the roles for Quote Management users and your product catalog and pricing administrators.	Admin
Configuring product offerings and catalogs	Create the product offerings and catalogs, unless they've been previously defined.	Product catalog admin
Configuring product pricing	Define the price lists, pricing strategies, and other pricing features that you want to use, unless they've been previously defined. • Set the price lists and pricing strategies that control how pricing is applied to quotes.	Pricing admin

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Configuration tasks for Quote Management (continued)

Task	Description	Role
	• If you're using cost books, create the cost books that define the unit costs for product offerings.	
Activate cost books and cost margins	Use the *sn_quote_mgmt_core.enable_cost_margin_calculation* system property to activate the cost book and cost margin features in Quote Management. These features enable sales agents to view product unit costs and cost margins when creating sales quotes.	Quote Management admin
Activate location-based transactions	Use the *sn_sales_common.enable_location_based_transactions* system property to activate location-based transactions in Quote Management.	Admin
Configure quote PDF documents	Set up PDF template, signers, and Docusign. • Create PDF templates • Configure DocuSign • Set up PDF document signers	sales_operations_specialists

What to do next

After completing the configuration tasks, you can start using Quote Management to build and manage customer quotes. See Using Quote Management.

Optionally, configure Configuring Advanced Approval Management to build automated approval workflows for customer quotes and other Sales Customer Relationship Management entities.

Related topics

- Quote Management
- Using Quote Management
- Approving or rejecting quotes
- Using product offering recommendations in quotes
- Sync quote and opportunity

Integrate with Contract Management Pro

With the integration of Quote Management and Contract Management Pro, sales agents can initiate contract requests while finalizing a deal and formalizing agreements between you and your customers.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Contract Management for Sales and Order Management (Quote Management with Contract Management Pro) plugin (com.sn_som_clm).

   Note: To activate this plugin, there's a dependency on the Contracts core plugin (com.sn_cm_core). Verify that it's installed to use the contract creation workflow from a quote.

3. Select **Activate**.
4. Complete the initial configuration steps to set up this integration.
   For more information on setting up Contract Management Pro, see Configuring Contract Management Pro.

Related topics

Configuring Contract Management Pro

Initiate a contract request

Run fix scripts to update Contract Management Pro

Manually run fix scripts after you have installed the demo data.

Before you begin
Role required: admin

About this task
If the demo data was installed, the Request Type field in the demo data will remain blank. Consequently, the field may not display the correct value to distinguish between new contracts and amendments. To fix this, run the Populate Request Type script in CMR to ensure the request type is set correctly.

Procedure

1. Navigate to **All** > **Fix Script**.
2. Search for Populate Request type in Contract document revision (CMR) and open the record.
3. Click **Run Fix Script** at the top of record, in the modal that opened up select **Proceed/Proceed in background** to run the script.

Configure quote PDF documents

As a sales operation specialist, you can generate professional-looking PDF templates that present quotes in a standardized format that reflects company branding and logos. You can also set up Docusign to enable signers to sign quotes electronically and send them through email.

Create quote PDF document templates

Add customized templates to quote PDF documents using the ServiceNow document template function.

A standard template is included with the base installation of Quote Management.

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See Set up PDF document templates to learn more about PDF document templates and how they work.

Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign PDF documents electronically.

See Configure DocuSign for PDF documents for more information about how to set up Docusign.

Set up quote PDF document signers

Sales operation specialist can set up PDF document signers in Quote Management. Signers can be emailed PDF documents for review and electronic signatures. There are two types of signers, external and internal signers.

- Contacts listed in an account linked to the quote can be external signers.
- Internal signers are all the users that have either sales_agent or sales_ops_specialist roles in Quote Management.

See Set up PDF document signers for more information.

Set up PDF document signers

Sales operations specialists can set up signers in Quote Management so that PDF quotes can be sent to either internal and external signers for review and signatures.

Before you begin

Role required: sales_operations_specialists

About this task

Contacts listed in the account for a quote can be external signers. The email listed with the contact is used to send the PDF.

Internal signers are all the users that have either sales_agent or sales_ops_specialist roles.

To assign roles for internal users, see Assign user roles in Sales Customer Relationship Management applications.

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts** and select **New** to create an account or select an existing account to add contacts.
2. For a new account, fill in the account information and select **Save**.
3. Add a contact to an existing account by selecting the account and opening the **Contact** tab.
4. Select **New**.
5. Fill in the information for the new contact.
6. Select **Save**.
   When the quote is created and the account selected, the contacts in the account are available as signers for the PDF documents. The email associated with the contact is used to send the PDF document.

Set up PDF document templates

Sales operation specialists can set up templates for PDF documents in Quote Management.

Before you begin

Role required: sales_operation_specialist

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Procedure

1. Navigate to **All** > **Quote** > **Quote templates**.
2. Select **New**.
3. Choose **HTML template**.
4. Use the following links to build customer PDF templates:

Links to create PDF templates

Link	Description
Document Templates	Explanation of document templates and how the work in ServiceNow.
Configuring Document Templates	Steps to configure documents templates.
Reference for Document Templates	Additional information about document templates.
Using Document Templates	How to use document templates.

Configure DocuSign for PDF documents

Quote operations specialists can configure PDF documents to work with Docusign to enable customers to sign PDF documents electronically.

Role required: quote_operations_specialist

Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign documents electronically. The following links explain how to link PDF documents to Docusign:

- Docusign eSignature Spoke
- Set up Docusign eSignature spoke using authorization code grant
- Set up Docusign eSignature spoke using JWT grant
- Create child aliases for additional Docusign accounts
- Set up a bi-directional webhook for the Docusign eSignature spoke
- Synchronize Docusign with ServiceNow
- Activate catalog items
- Change the Docusign API version
- How to automate signing requests using templates
- How to automate signing requests using templates
- How to separate Docusign account data

Configuring Advanced Approval Management

Install the Advanced Approval Management application to build workflows that automate the approval process for Sales Customer Relationship Management entities such as customer quotes.

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Advanced Approval Management configuration overview

1. Install Advanced Approval Management.

   You can install the Advanced Approval Management application (sn_adv_appr_mgmt) if you have the admin role.

   Note: The plugin for the Sales Customer Relationship Management application for which you are creating workflows, such as Quote Management, must also be installed.

2. Create an approval configuration

   Create an approval configuration for a Sales Customer Relationship Management entity, such as quotes. An approval configuration contains the approval elements that you define to automate approval workflows: conditions that trigger approval workflows, approval rules, approval chains, and approval users and groups. Starting with the 1.0.1 release, you can enable certain features for the configuration, namely approval request consolidation, escalations, and email reminder features.

3. Create conditions that trigger approval workflows.

   Define one or more conditions that apply company policies, such as legal or pricing guidelines, to trigger an approval workflow. Also enable the smart reapprovals feature, which allows previous approvals to be used for a resubmitted approval.

4. Create approval rules.

   Create approval rules that define the approval criteria and approvers for an approval step.

5. Create approval chains.

   Optionally create approval chains that control the sequence in which two or more approvals are run.

6. Define an approval user.

   Define the approver and the associated approval rule that they review during the approval process.

   Define an approval group.

   Define the group that can approve requests for a specified approval rule.

Note: System notifications are used to deliver approval status to requesters and inform approvers of approval rejections. You can use these notifications and customize them if needed. For more information, see Notifications in Advanced Approval Management.

Install Advanced Approval Management

You can install the Advanced Approval Management application (sn_adv_appr_mgmt) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Advanced Approval Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Advanced Approval Management:

- Roles
- Tables
- Scheduled jobs

For more information, see Components installed with Advanced Approval Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Advanced Approval Management application (sn_adv_appr_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create an approval configuration

Create an approval configuration for a Sales Customer Relationship Management entity, such as quotes.

Before you begin

Role required: sn_adv_appr_mgmt.approval_rule_admin or sn_adv_appr_mgmt.approval_rule_writer

About this task

An approval configuration is a container for the workflow elements that you define for a specified entity, such as the conditions that trigger approval workflows for related approval rules. You can also enable certain features for the configuration:

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- **Allow email consolidation**: Option that consolidates multiple, separate approval request emails for the same approver (or group) into a single approval request email, instead of sending multiple individual approval request emails. Consolidated email approval requests are held until the final relevant approval sequence for that approver is ready. The approval engine then routes the consolidated request to the approver (or group).
- **Escalations**: Enable escalations, which is a mechanism for reassigning an approval request to another approver when the original approver does not take action within a defined time. If you enable this feature, you also define the escalation details in approval rules, such as the escalation assignee and length of time allowed for approval completion before the request is reassigned.
- **Auto reminders for approval tasks**: Option that enables approval reminder notifications to be sent automatically to approvers, based on a reminder schedule that you set.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Advanced Approvals** > **All Approval Configurations**.
4. Select **New**.
   On the Approval Configuration form, fill in the fields to create a configuration for an entity, such as quotes. For field descriptions, see the Approval Configuration form.
5. Select **Save**.
   The approval configuration for the specified entity is created.

> **Note:** A Sales Customer Relationship Management entity can have only one approval configuration.

What to do next

Create conditions that trigger approval workflows

Create conditions that trigger approval workflows

Define one or more conditions that apply company policies, such as legal guidelines or pricing rules, to trigger an approval workflow. Also enable the smart reapprovals feature, which allows previous approvals to be used for a resubmitted approval.

Before you begin

Before creating conditions, consider the business thresholds that determine when an approval is required, such as a certain discount percentage for quote line items or a minimum deal size amount.

Verify that you have the associated items (fields) that represent the business thresholds in the entity table for the approval configuration, such as the Quote [sn_quote_mgmt_core_quote] table or through dynamic attributes defined in a Dynamic Schema. For more information on dynamic attributes, see Dynamic Schema .

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

> **Note:** If you have the admin role, you can use scripts to specify approval conditions if the **Advanced condition** option is turned on. Only users with the admin role can enter scripted conditions.

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About this task

Use conditions to define company policies or guidelines for certain functional areas such as finance or legal departments. The advanced approval engine evaluates these conditions and if applicable, triggers the appropriate approval workflow.

Conditions are based on attributes for a Sales Customer Relationship Management entity or dynamic attributes defined in a Dynamic Schema. For example, quote attributes are derived from the Quote [sn_quote_mgmt_core_quote] table and can include items such as discount percentage, total quote value (ACV or ARR), total margin, payment terms, contract term length, country or geographic location, currency, product SKUs, customer risk flags, ramp pricing indicators, and custom fields.

Note: If you have the admin role, you can turn on the **Advanced condition** option to specify trigger conditions using scripts. If you use the advanced condition feature, you can't enter conditions using the condition builder.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Advanced Approvals** > **Approval Trigger Conditions**.
4. In the **Name** field, enter the name for the conditions that trigger an approval.
   For example, if you want to trigger approvals for quotes that have low margins, you might name the condition `Low Margin Quote`.
5. In **Approval configuration**, select the configuration for the Sales and Order Management entity, such as Quote.
   The Condition section opens for adding trigger conditions.
6. If you don't want the trigger condition to be active, unselect the **Active** field.
   By default, the trigger condition is Active.
7. In the Condition section, add one or more conditions that must be met to trigger approvals.
   Specify a condition by selecting the **Field** and **Operator**, and entering a value for the operator.
   For example, you can specify a condition that requires approvals when the discount for a quote line item is 20% or higher: *`[Discount percentage] [greater than or is] [20]`*

   For basic information on setting conditions, see Condition builder. For more information on the available operators, see Operators available for filters and queries.
8. If you have the admin role and want to specify trigger conditions using scripts, turn on the **Advanced condition** field.
   The Condition section is replaced by the following fields for entering scripted conditions:
   - **Description**: Enter the name of the scripted condition.
   - **Scripted condition**: Use the JavaScript Syntax Editor to enter the script with the trigger conditions.
9. For approval resubmissions, indicate whether approvals granted previously for an approval request can be used by selecting **Smart re-approval**.
   The Smart condition section opens for specifying any conditions that must be met for previous approvals to be reused for resubmitted approval requests.
10. In the Smart condition section, add one or more conditions for Smart approval resubmissions that must be met to control whether previous approvals can be reused for the approval request.

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For example, you could specify a condition that reapproval is required only if the discount increases by more than 2% from the last approved value.

11. If you have the admin role and want to specify trigger smart conditions using scripts instead of using the condition builder, turn on the **Advanced condition** field.
    The Smart condition section is replaced by the following fields for entering scripted conditions:
    - **Description**: Enter the name of the scripted condition for Smart re-approvals.
    - **Scripted condition**: Use the JavaScript Syntax Editor to enter the script with the conditions for the re-approvals.
12. Select **Save**.

What to do next
Create approval rules.

Create approval rules

Define rules for approval workflows. An approval rule identifies the functional approver for the workflow, such as a Finance Manager or Operations Manager. The rule also associates approvers with the appropriate approval trigger conditions, and defines escalation details for reassiging an approvals to another approver for the rule, when the original approver can't action on the approval step for this rule.

Before you begin
Role required: sn_adv_appr_mgmt.approval_rule_admin or sn_adv_appr_mgmt.approval_rule_writer

Note: To use the **Advanced rule** option to define the functional approver using a script, you must have the admin role.

About this task
Approval rules define the approvers for the rule, associate the trigger conditions to the rule, and provide escalation rules for the rule if escalations are enabled in your configuration. The escalation feature enables you to reassign an approval request to another approver when the original approver does not approve or reject a request within a timeframe that you define.

Note: If you have the admin role, you can use a script to identify the functional approver for the rule. For details, see the Create Approval Rule form.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Advanced Approvals** > **Approval Rules**.
4. Select **New**.
5. On the Create New Approval Rule form, fill in the fields.
   For field descriptions, see Create Approval Rule form.
6. Select **Save**.

Result
The approval rule, when used in an approval workflow, is depicted as a step (card) in the workflow interface. The card provides details of the rule and approvers in the approval step. You can also review the steps in an approval configuration by navigating to **Advanced Approvals** > **Approval Steps** in the workspace.

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What to do next
Create approval chains (optional).

Create approval chains

Optionally create approval chains that control the sequence in which two or more approval rules (steps) are run.

Before you begin
Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

About this task
Use chains to control the execution of approval steps that are run based on the approval rule order:

- Within a chain, steps run sequentially.
- Across chains, chains can run sequentially or in parallel, based on the chain order value. Chains with the same order value run in parallel.
- If you don't define chains, approval rules run in parallel.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Advanced Approvals** > **Approval Chain**.
4. Select **New**.
5. Enter the **Name** of the approval chain.
6. Enter the **Order** in which the approval chain is to be run.
   For example, entering 1 as the **Order** indicates that this chain is run first in the approval workflow sequence.
7. Select the **Approval configuration** that identifies the Sales Customer Relationship Management entity for the approval workflows, such as Quote.

Define an approval user

Define an approver in Advanced Approval Management and the associated approval rule that they review during the approval process.

Before you begin
Create the approval rule to be associated with the approver.

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

About this task
An approval user is a user of your instance as defined in the User [sys_user] table. An approval user can be a dynamic approver, who can approve requests based on certain conditions that you set. For example, a dynamic user could be a user tied to a particular territory or a manager based on your organization's hierarchy.

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Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Advanced Approvals** > **Approval Users**.
4. Select **New**.
5. In the **Approval rule** field, select the approval rule associated with the approver user.
6. In the **User** field, select the user who is the approver for the specified approval rule.

   Note: Approval users must have the sn_adv_appr_mgmt.approval_request_approver role assigned to them.

7. Select **Save**.

What to do next

Define an approval group.

Define an approval group

Define the approval group, such as a contract or finance group, and the associated approval rule that they review during the approval process.

Before you begin

Define the approval rule associated with this approval group.

Groups are set up in the Group [sys_user] table. For more information on creating groups, see Create a user group.

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Advanced Approvals** > **Approval Groups**.
4. Select **New**.
5. In the **Approval rule** field, select the approval rule associated with the approver.
6. In the **Group** field, select the group who approves the approval step controlled by the selected approval rule.

   Note: The members of the group must have the sn_adv_appr_mgmt.approval_request_approver role assigned to them.

7. Select **Save**.

Override an approver

Override the approver in an approval step if the approval is no longer required, to help prevent the approval workflow from being blocked.

Before you begin

Role required: approval_admin (platform role) and sn_adv_appr_mgmt.approval_request_writer

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About this task

As an approval admin with the approval request writer role, use this procedure to bypass or override the approver in an approval step that is no longer needed. The approval step must be in the Requested state.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to the approval request.
   Access the request by navigating to the transaction entity and selecting the Approvals tab for the transaction. For example, navigate to **Quotes** > **All**, select the quote, and select the Approvals tab to open the approval workflow.
4. In the approval step card, select the More options menu and select **Override**.
5. In the Override approval dialog box, select **Approve** or **Reject** in the **Approval decision** field.

   a. If you select **Approve**, enter a comment and select **Submit**.
   The step record is updated and the workflow advances to the next step, which is in a requested state.

   b. If you select **Reject**, enter a comment explaining the reason for rejection and select **Submit**.
   The step record is updated and the step state changes to Canceled, and the workflow stops. A rejection notification is sent to the requester, to change the approval request as needed and resubmit.

Notifications in Advanced Approval Management

In Advanced Approval Management, as an approval request moves through the approval process, notifications about the status of the approval request are sent automatically to approval requesters and approvers.

Overview of approval notifications

The notification framework handles various approval scenarios in the approval process, including approvals for simple or consolidated approval requests, approval reminders, escalations, and approval overrides. The following system notifications are automatically activated with Advanced Approval Management:

- Advanced Approval Request
- Approval Reminder
- Approval Escalation
- Approval Request for Override
- Notify approval req requester
- Notify approval req approvers

Advanced Approval Request notifications

The Advanced Approval Request notification informs approvers when an approval request has been submitted by a sales agent (requester). There are two types of approval request notifications:

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- Simple approvals: A notification is sent to each approver when an approval request is submitted, as shown in the following example. The approver can approve or reject the approval request from the notification.

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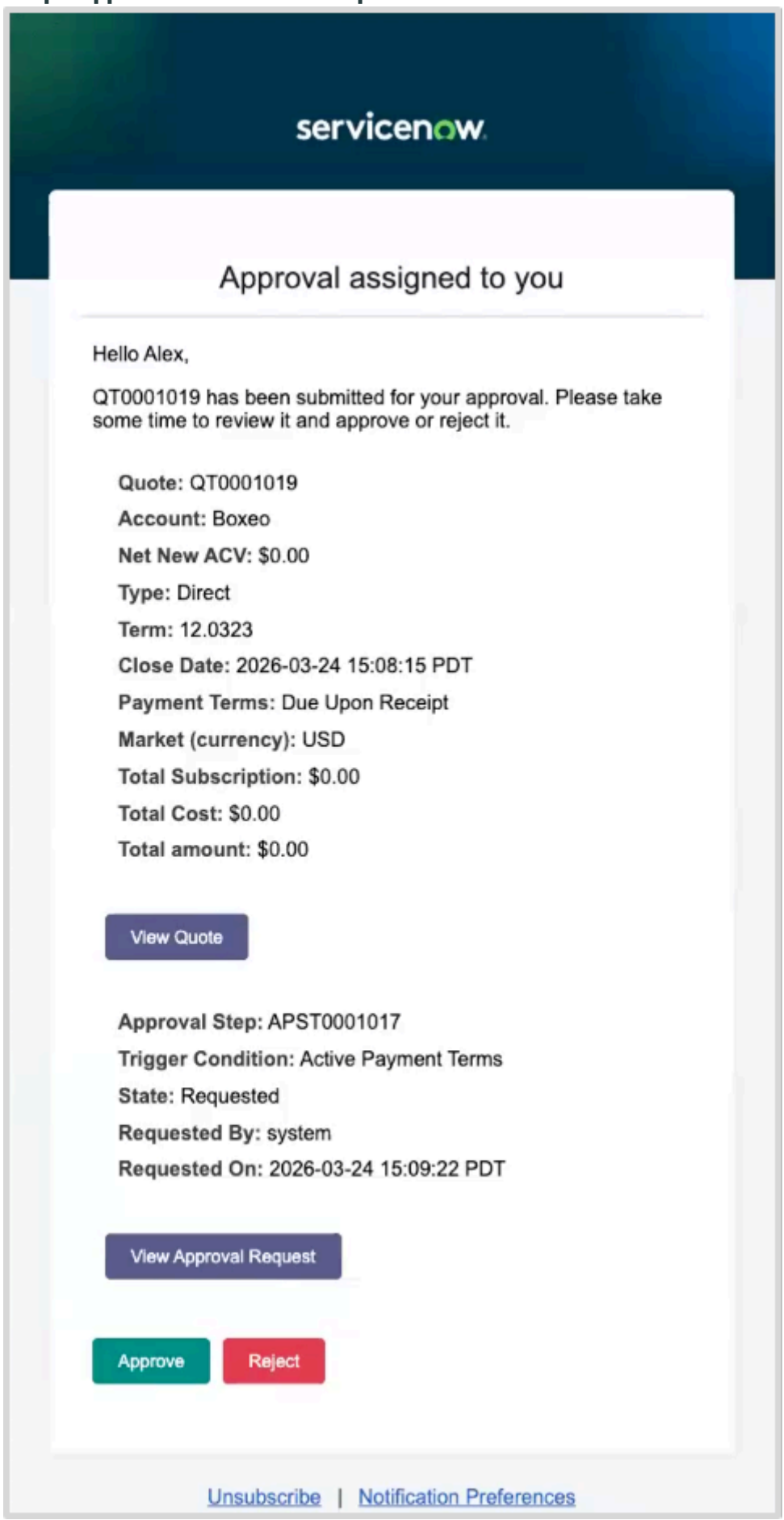
Simple approval notification example



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- Consolidated approvals: When an approver receives multiple approval requests for approvals within the same approval chain, the system can consolidate those requests into a single notification email, if your approval rules admin has turned on the email consolidation feature in your approval configuration.

  An approver can use links in the notification to go to an approval step and approve or reject from the step. Or the approver can go to the workflow entity, for

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example a quote, and use the approval workflow interface to accept or reject the quote.

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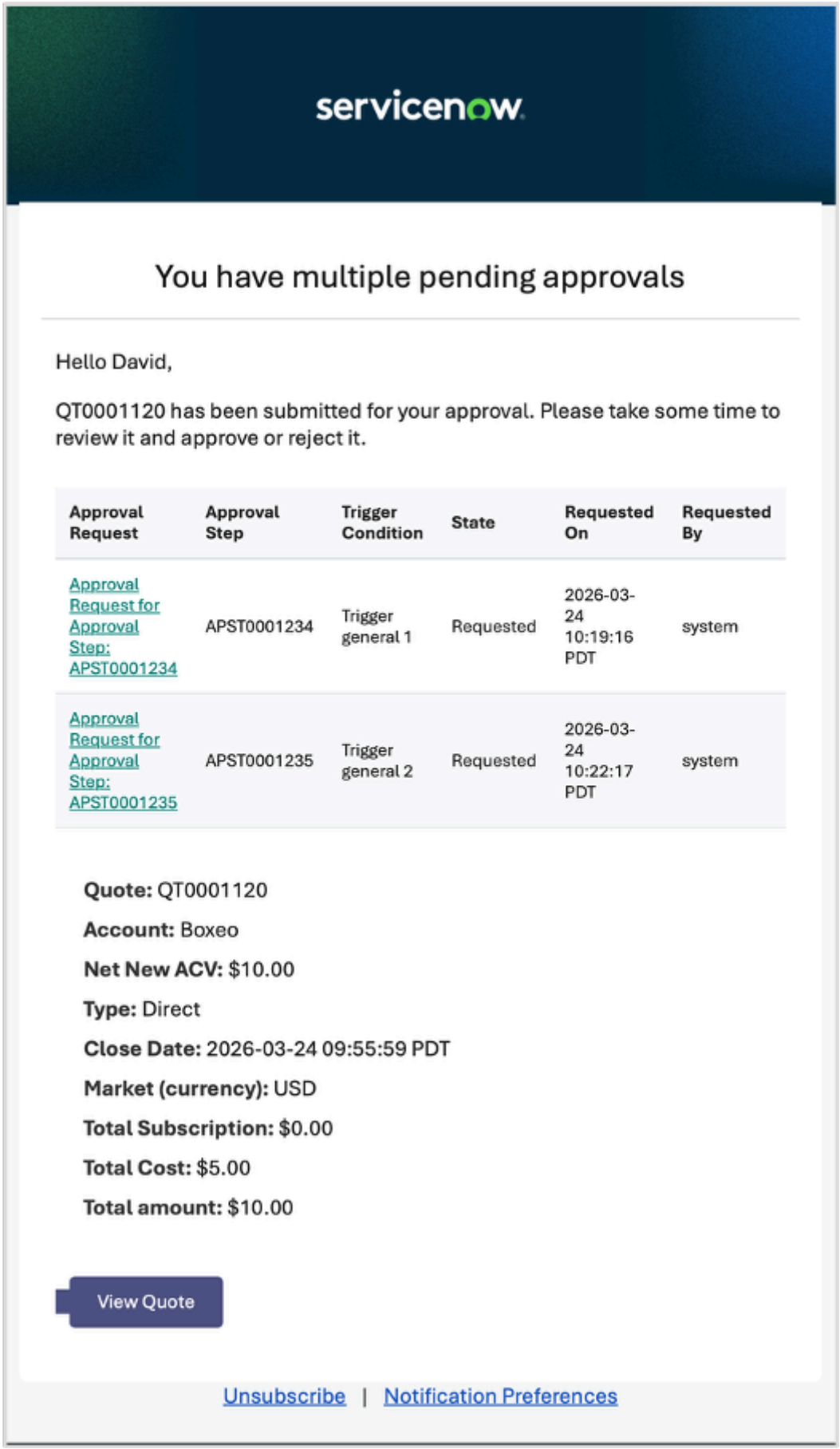
Consolidated approval notification example



servicenow

You have multiple pending approvals

Hello David,

QT0001120 has been submitted for your approval. Please take some time to review it and approve or reject it.

Approval Request	Approval Step	Trigger Condition	State	Requested On	Requested By
Approval Request for Approval Step: APST0001234	APST0001234	Trigger general 1	Requested	2026-03-24 10:19:16 PDT	system
Approval Request for Approval Step: APST0001235	APST0001235	Trigger general 2	Requested	2026-03-24 10:22:17 PDT	system

Quote: QT0001120

Account: Boxeo

Net New ACV: $10.00

Type: Direct

Close Date: 2026-03-24 09:55:59 PDT

Market (currency): USD

Total Subscription: $0.00

Total Cost: $5.00

Total amount: $10.00

View Quote

Unsubscribe | Notification Preferences

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Both simple and consolidated approval emails are handled through a single notification definition, with different rendering logic used to generate the appropriate message format. These approval request emails can be delivered as mobile push notifications, if approvers are using the ServiceNow Mobile app, and Advanced Approval push notifications is set as a push notification channel in the notification preferences.

Note: Ad-hoc approvers receive a simple approval notification. Or they can approve or reject a request from a step in the General chain in the approval workflow interface. For more information on ad-hoc approvers, see Add approvers to an approval request.

Approval Reminder

Approval Reminder notifications are sent to approvers automatically when the **Send auto reminders** and **Reminder schedule** features are set in the approval configuration by your approval rule admin. Each reminder is a separate email and is sent at the time specified in the reminder schedule, which is triggered by a scheduled job.

The system generates the first reminder, subsequent reminders, and a final reminder that could lead to escalation, if the escalation feature is set for the approval configuration. For details on setting approval reminders, see Create an approval configuration.

Approval Request for Overrides

With overrides, an approval admin for the ServiceNowAI platform who also has the requester role can approve or reject an approval request on behalf of other approvers. For example, the approval admin might need to unblock an approval step when the step is no longer needed. The approval admin uses the **Override** option in the step card in the approval workflow interface.

When an override occurs, original approvers receive a notification stating that their action is no longer required because the approval was overridden. For more information on overrides, see Override an approver.

Notify approval request approvers

When changes in the state of an approval request occur, the Notify approval request notification informs approvers of changes in the approval request state, such as rejections

Notify approval request requester

When changes in the state of an approval request occur, the Notify approval request notification informs requesters of changes in the approval request status.

Notification prerequisites

For successful delivery of advanced approval notifications to approvers and requesters, verify that certain notification properties and notification preferences are set.

- As an admin, do the following:
  - Enable the email sending (Outbound Email Configuration) and email receiving (Inbound Email Configuration) properties. For information on setting these properties, see Email properties.
  - Consider reviewing the default notifications for Advanced Approval Management by navigating to **All** > **Notifications** > **System Notifications** and filter the list by Advanced Approval Management.

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For example, if you want to control conditions for sending a notification, review the conditions in the When to send related list for a notification. If you want to change content in a notification, review the associated email template for the notification. To learn more, see Email and SMS notifications.

- As approvers and requesters, verify that you're receiving the default system notifications in the Advanced Approvals notification category and that the notifications are being delivered using your preferred channels.

  For example, if you're an approver and you want Advanced Approval Request notifications to be delivered as push notifications on the ServiceNow Mobile application, verify that push notifications are set up as a channel preference for the Advanced Approval Request notification.

  To learn more about managing notification categories and setting notification preferences and channels, see Exploring preferences.

Configure Customer Contracts and Entitlements

Use the Customer Contracts and Entitlements application to configure and display customer contracts and entitlements.

Activate Customer Contracts and Entitlements

As an admin, you can activate the following plugins to enable users to create and manage Customer Contracts and Entitlements. For more information, see Activate a plugin.

Customer Contracts and Entitlements plugins

Plugin	Description	Dependency
Customer Contracts and Entitlements [com.sn_pss_core]	Provides foundational objects to manage Customer Contracts and Entitlements and APIs for integration.	• Customer Service Install Base Management [com.snc.install_base] • Product Catalog Management Core [com.sn.prd_pm]
Entitlements Verification [com.sn_ent_verify]	Provides APIs to verify entitlement.	Customer Contracts and Entitlements [com.sn_pss_core]
Contracts and Entitlement Workflows [com.sn_contract_ent_wf]	Provides workflows to manage changes on Customer Contracts and Entitlements.	• Customer Contracts and Entitlements Foundation [com.sn_pss_core] • Lead to Cash Primitives [com.sn_l2c_core]

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Customer Contracts and Entitlements plugins (continued)

Plugin	Description	Dependency
		• Customer Life Cycle Management Workflows [com.sn_l2c_cust_flows]

With the activation of Customer Contracts and Entitlements, the existing contracts are available for viewing only.

For more information on the installed roles and tables, see Components installed with Customer Contracts and Entitlements.

Request apps from the ServiceNow Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Components installed with Customer Contracts and Entitlements

Several types of components are installed with the Customer Contracts and Entitlements application, including tables and roles.

The following roles are added with the activation of the Customer Contracts and Entitlements plugins.

Roles installed

Role	Description	Contains role	Targeted per
sn_pss_core.service_contract_viewer Service contract viewer	Performs read operation on: • customer contracts • Contract lines • Entitlements • Characteristics • Entitlement usages	• sn_prd_pm.characteristics_viewer Characteristic viewer • sn_prd_pm.product_catalog_viewer Product catalog viewer	• sn_custor Consume • sn_custor Customer • sn_custor Customer
sn_pss_core.service_contract_manager Service contract manager	Performs create/read/update operations on: • Customer contracts • Contract lines • Entitlements	sn_pss_core.service_contract_viewer Service contract viewer	sn_custome CSM Manag

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Roles installed (continued)

Role	Description	Contains role	Targeted per
	• Characteristics • Entitlement usages		
sn_pss_core.pss_integrator Integration user	Performs create/ read operations by using rest endpoints on customer contracts and entitlements.	sn_customerservice.manager CSM Manager	sn_pss_core Integration U

The following tables are added with the activation of the Customer Contracts and Entitlements application.

Tables installed

Table name	Description
Characteristics [sn_pss_core_entitlement_characteristic]	Stores the characteristic values for entitlements or customer contract lines.
Entitlement Usage [sn_pss_core_contract_entitlement_usage]	Stores the values used by end customers for entitlement characteristics.
Service Contract [sn_pss_core_service_contract]	Stores runtime contracts.
Service Contract Line [sn_pss_core_service_contract_line]	Stores the runtime contract lines like a service plan.

You can assign roles to users and groups using the ServiceNow AI Platform user administration features. For more information, see:

- Assign a role to a user
- Assign a role to a group

The default view on customer contracts and entitlements in Customer Service Management workspace is Service Contract Workspace view. It can be changed by an administrator.

Configuring Contracts and Entitlement Workflows

Configure the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf) to generate and modify contracts using order management.

As an admin, you can activate the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf). For more information, see Activate a plugin.

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The following plugins are prerequisites for activating the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf):

Required plugins

Plugin	Description
Product Configuration UI (com.sn_prd_config_ui)	Graphical interface that enables to configure complex products or services according to specific needs and requirements.
Order Management (com.sn_ind_tmt_orm)	Captures, enhances, and oversees the complete life cycle of the product and customer orders. With this plugin, you can efficiently handle the order orchestration, data enrichment, and composition to ensure an accurate and timely fulfillment.

After installing the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf), the following plugins are automatically installed:

Dependent plugins

Plugin	Description
Customer Contracts and Entitlements (com.sn_pss_core)	Provides foundational objects to manage customer contracts and entitlements.
Lead to Cash Core (com.snc.l2c_core)	Enables customers to compose Sales CRM flows.
Customer Life Cycle Management Workflows (com.snc.l2c_cust_flows)	Provides workflows to manage the life cycles of sold products and install base items.

Creating contracts and entitlements using workflows

After a product offer is selected by the customer and the product is sold to the customer, this workflow creates contracts and entitlements based on the services associated with that sold product and the extra services that the customer has purchased.

There are the product offering scenarios and their configurations.

Offering types and workflows

Offering types	Description
Offers for entitlements	The workflow creates entitlement records for such offerings. These entitlements can be associated with existing sold products, install base items, product inventory records, or the customer.
Offers for services (contract lines)	The workflow enables automatic creation of a customer contract, customer contract lines, and the entitlements for those contract lines.
Implicit offerings	Implicit entitlements and customer contract lines are not shown on order lines. These offers can be marked as implicit when they do not need to be configured while capturing the order and are available as part of a package. These entitlements and customer contract lines are automatically created as a part of this workflow.

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Creating a contract from an order

For every order with multiple product offerings, a single contract with multiple contract lines is created. As part of the order processing, a sold product is generated for every order line.

Creating contracts from product inventory records

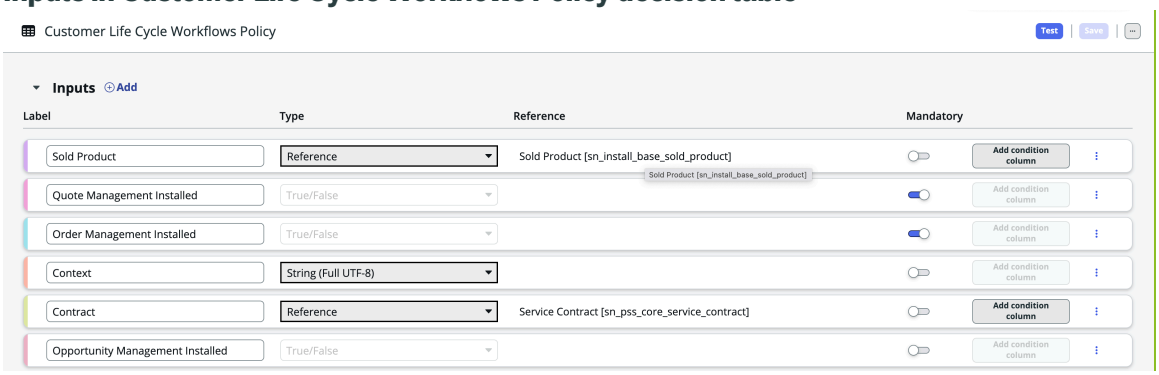
If the system property sn_ind_tmt_orm.enable_prod_invt_for_order_management is set to true, order fulfillment workflows create product inventories based on customer orders, product offerings and specifications. On creation of a product inventory, contract lines and entitlements will be created. When a product inventory undergoes a state change, the associated contract lines and entitlements are synced. For more information, see Product inventory configurations. Product inventory records trigger updates to contracts and entitlements under the following conditions:

- Process Telecom Order Line flow: The ADD flow creates contract and entitlement records from the product inventory. The MODIFY flow updates the states of the contract line items and entitlements.
- Post Process Telecom Top Domain Order flow: The MODIFY flow updates the states, fields, and characteristics for contract line items and entitlements.
- Product Inventory Operations record: Depending on the scheduled date and time, the DISCONNECT, RESUME, and SUSPEND flows cancels, activates, or suspends the contract line items and entitlements.

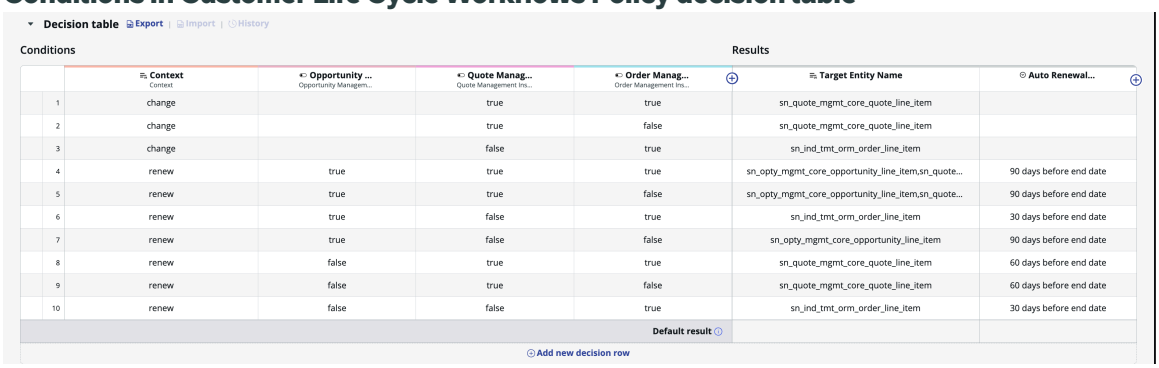
Configuring Customer Life Cycle Workflows Policy decision table

Customer Life Cycle Workflows Policy decision table decides the target entity while renewing and modifying customer contracts, customer contract lines, and entitlements. Based on this decision table, you can create a quote, an order, an opportunity, or an opportunity and a quote together while renewing or modifying a customer contract. For a target entity, you can also select when you want to initiate the renewal of the customer contract.

Inputs in Customer Life Cycle Workflows Policy decision table



Conditions in Customer Life Cycle Workflows Policy decision table



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You can configure rules based on the six available input parameters to a required target entity while renewing and modifying contracts. Select the following values in the Target Entity Name column to create the corresponding target entities.

https://player.vimeo.com/video/1143586505?h=0a306a1773&badge=0&autopause=0&player_id=0&app_id=58479

Values of target entities

Value	Target Entity
`sn_ind_tmt_orm_order_line_item`	Order
`sn_quote_mgmt_core_quote_line_item`	Quote
`sn_opty_mgmt_core_opportunity_line_item`	Opportunity **Note:** You cannot create opportunities for modifying process.
`sn_quote_mgmt_core_quote_line_item,sn_opty_mgmt_core_opportunity_line_item`	Opportunity and quote together **Note:** You cannot create opportunities and quotes for modifying process.

Note: To create an opportunity or opportunity and quote together during renewal, the admin needs to set up the following records:

- Sales Cycle Type: In the Code field, enter **RENEW** and set the Active option to **True**. For more info, see Create a sales cycle for an opportunity.
- Opportunity Stage: In the Name field, enter **Develop** and set the Active option to **True**. For more info, see Create opportunity stages.

If the user selects an opportunity and a quote as target entities, a renewal opportunity and a quote is created. The opportunity and the quote are associated to each other.

For any target entity, select one of the following options in the Auto Renewal Initiation column to indicate when you want to automatically renew the contract: 90, 60, 30 days before contract end date or on the contract creation date. For target entity as opportunity and quote together, you can also select the following options to create the renewed opportunity and quote on separate dates:

- With contract, 12 months before end date respectively: Opportunity is auto renewed on the contract creation date and the quote is renewed 12 months before the contract expiry date.
- 90, 90 days before end date respectively: Opportunity and quote both are renewed 90 days before the contract expiry date.

Setting up the Customer Contracts and Entitlements application

Configure the features and components of Customer Contracts and Entitlements to enable a seamless, end-to-end service experience including after sales services for your customers.

As a user with the admin role, you can set up the Customer Contracts and Entitlements application to enable users to create entitlements and customer contracts for users.

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Task	Description
Create a characteristic	Create a characteristic to add to an entitlement. A characteristic refers to the specific attributes or properties that define the entitlement.
Create a user	Add a user to your instance to enable them to log in and use designated application features. After adding the user, you make them approver to review customer contracts.
Assign a role to a user	Assign roles to users. Use this feature to grant the sn_customerservice_manager (CSM manager) role to a newly added user and authorize them to make an informed judgment to review a customer contract.
Create customer accounts **Note:** On the Accounts form, to view the customer contracts, remove the contract-related lists and configure the customer contracts related list.	Create an account and associate it to a customer contract.
Create a consumer record	Create a consumer record in Customer Service Management. A consumer can be associated with a customer contract in the Customer Contracts and Entitlements application.
Create a sold product	Create a record for a product that is sold to an account or a consumer. A sold product can be associated with multiple contracts.
Create an install base item	Create a record for an install base item that is sold to an account or a consumer. An install base item can be associated with multiple contracts.

Create a characteristic

Create a characteristic that can be associated with an entitlement or customer contract line.

Before you begin

Role required: sn_customerservice_manager

About this task

A characteristic is used for defining the service coverage that is provided to customers. These characteristics might include the scope of the service, the time period, and any limitations or exclusions such as geographical location and other attributes.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Characteristics** > **Characteristics**.
2. Select **New**.
3. On the form, fill in the fields.

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Characteristic form

Field	Description
Name	The name of the characteristic for the entitlement.
Input type	The type of input for the coverage value related to this characteristic. For example, Choice and CheckBox.
Description	The short overview of the entitlement characteristic.

4. Select **Submit**.

Configure Sales Agreement Management

Use the Sales Agreement Management application to create sales agreements between a buyer and a seller for future transactions.

Activate Sales Agreement Management

As an admin, you can activate the following plugins to enable users to create and manage sales agreements. For more information, see Activate a plugin.

Sales Agreement Management plugins

Plugin	Description	Dependency
Sales Agreement Data Model [com.sn_sales_agmt_core]	This plugin provides foundational objects to manage sales agreements.	• Product Catalog Management Core[com.sn_prd_pm] • Price Management [com.sn_csm_pricing]
Sales Agreement Management [com.sn_sales_agmt_wf]	This plugin provides workflow to create and manage sales agreements.	• Sales Agreement Data Model [com.sn_sales_agmt_core] • Lead to Cash Core [com.sn_l2c_core] • Quote Management Application [com.sn_l2c_quote_mgmt] **Note:** You need to install the Quote Management Application plugin separately.

For more information on the installed roles and tables, see Components installed with Sales Agreement Management. To view sales agreements from an account, you must manually configure the sales agreement related list on the Account form.

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Request apps from the ServiceNow Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Single sign-on (SSO) integration

If you intend to use CPQ for a headless use case (such as exposing CPQ on a website or eCommerce platform), please fill out and submit an SSO Setup Request Form that details the identity provider (IdP) you are using for single sign-on (SSO).

This process involves:

- Creating an app for CPQ in your IdP tool of choice. See the steps and links below.
- Sharing parameters and users from the app with the CPQ team. The team will complete the provisioning process using the parameters that you send.
- Testing and confirming that the SSO redirect works as expected.

Note the following considerations:

- CPQ can now support SSO with any IdP that supports OAuth2 with OpenID Connect (OIDC).
- CPQ is not compatible with SAML.
- Your IdP client must be up to date.
- Users who have been added to CPQ before SSO was implemented may need to be added again.
- These steps are not required if you are using CPQ with Salesforce.

Configuring Google SSO

CPQ supports Google for both personal and business single sign-on. If you use Google IdP for identity verification, all we need are the names and email addresses of your users.

Configuring Okta SSO

To set up an application that supports the Authorization code flow for CPQ, start by following the Okta Developer instructions: Implement authorization by grant type: set up your app

For the redirect URL, specify your CPQ URL, append `/login/oauth2/code/`, and then append your `-okta` subdomain. So if your URL is `example.test.logik.io`, your redirect URL would be `https://example.test.logik.io/login/oauth2/code/example-okta`.

Note your client ID, client secret, redirect URL, and Okta domain.

Note: To confirm that your Okta domain is accurate, you can confirm that the OpenID connection metadata is visible by visiting `https://{oktaDomain}/.well-known/openid-configuration`. You should see a JSON file with information about the authorization server endpoints.

Provide these values together with any user details, such as name and email, for users that you want to test with. The CPQ team will schedule a brief call with you to obtain your client secret. The team will complete the provisioning process from there.

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Note: Users' email addresses will be used for authentication. These are case sensitive, so make sure that the email addresses you provide are accurate.

When your CPQ point of contact has confirmed that setup is complete, try to visit your tenant-specific CPQ URL. You should see a redirect flow that brings you to an Okta consent screen to allow access to your CPQ app.

Configuring Entra ID SSO

Register an app by following the instructions on the following Microsoft Entra documentation website:

Register an application in Microsoft Entra ID

In the **Redirect URI** section of the Microsoft Entra registration page, in the **Select a platform** menu, select **Web**. For the redirect URI, enter your tenant-specific URL, append `/login/oauth2/code/`, and then append `<your subdomain>-entra`. For example, if your URL is `example.test.logik.io`, your redirect URI is `https://example.test.logik.io/login/oauth2/code/example-entra`.

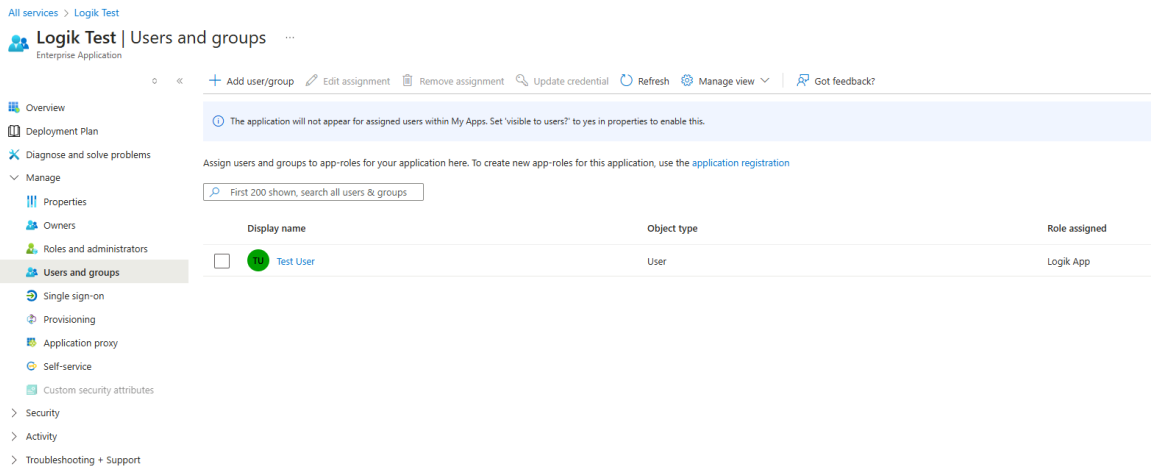
Make sure to select **ID tokens** on the Authentication tab of your app. For more information about OIDC, see the following Microsoft Entra documentation website: OpenID Connect on the Microsoft identity platform.

Note your client ID, client secret, and your Authority URL.

Note: Make sure you note the client secret at this time. It won't be available to you later.

For information about how to validate your Authority URL, see "Find your app's OpenID configuration document URI" at the Microsoft Entra documentation website: OpenID Connect on the Microsoft identity platform. To get the correct issuer in the metadata, make sure to include `/v2.0` at the end. You should be able to see the metadata and validate your issuer URL by visiting it in a browser with `/.well-known/openid-configuration` appended to it. For example: `https://login.microsoftonline.com/c7dd9346-1cfc-4bd8-a34c-a066c8bc0477/v2.0/.well-known/openid-configuration`.

Note: It may be possible to directly associate your users with the application via the **Manager** > **Users and groups** > **Add user/group** option in your application.



Optionally, add an app role for the users whom you wish to test with. For more information, see "Add a user account to your directory, and add that account to an appRole" on the following

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Microsoft Entra documentation website: Add sign-in with Microsoft Entra account to a Spring web app

On the SSO Setup Request Form, provide the client ID, Authority URL, and redirect URI together with user details (email, name) for the users you wish to test with. The CPQ team will schedule a brief call with you to obtain your client secret.

By default, each user's emails will act as their identifiers, but it may be possible to use a different identifier in a user profile. The fields that can be used as identifiers are limited by what's available at the `user_info` endpoint defined in the well-known/openid-configuration URL described above. For more information about the `user_info` endpoint, see the following Microsoft Entra documentation website: Microsoft identity platform UserInfo endpoint.

Once your CPQ point of contact has confirmed that setup is complete, try to visit your tenant-specific CPQ URL. You should see a redirect flow that brings you to an Entra ID consent screen to allow access to your CPQ app.

Troubleshooting

Issue	Resolution
The issuer does not match the expected value. For example, the issue is `sts.microsoft.net` instead of `login.microsoftonline.com`.	• Make sure that your issuer URL includes `/v2.0` after the tenant ID. • Update the application manifest to set the *`accessTokenAcceptedVersion`* to *2*.
Admin is redirected to http://logik.ai, despite being set up correctly.	In your manifest, set the *`acceptMappedClaims`* parameter to *`true`* in your manifest.

Configuring another IdP

CPQ can now support SSO with any IdP that supports OAuth2 with OpenID Connect (OIDC). In the SSO Setup Request Form, provide details about your preferred IdP tool and our team will connect with you to ensure it is properly integrated with CPQ.

Configuring CPQ with basic and advanced features

Learn how to set up products, rules, pricing, and layouts in ServiceNow CPQ using configuration engine. You can define how users select, customize, and validate products during the quoting process.

Setting up configurable products

A configurable product links a blueprint to the configuration experience for the product. Learn how to set up a configurable product in a headless or Salesforce-integrated environment.

Salesforce setup

In Salesforce-integrated use cases, the configurable product is the link between the CPQ blueprint and a Salesforce Product2 record. In the context of Salesforce CPQ, a configurable product is the entry point to a CPQ configuration experience. After the configurable product is defined, the end user will be shown the appropriate CPQ configuration experience when the user selects the Product2 record from the Product Selection step in Salesforce CPQ.

Multiple Salesforce Product2 records can be linked to one blueprint, but a configurable product cannot be associated to more than one blueprint.

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Related topics

- Set up a configurable product in a headless environment
- Set up a configurable product in a Salesforce-integrated environment
- Set up blueprints

Set up a configurable product in a headless environment

A configurable product links a blueprint to the configuration experience for the product. Learn how to set up a configurable product in a headless environment.

Before you begin

Role required: Admin

About this task

In headless use cases, the configurable product is the link between the blueprint that you have created in CPQ and the configuration that launches for end users when they select the product. A Products tab appears in the Utilities section of the CPQ navigation pane.

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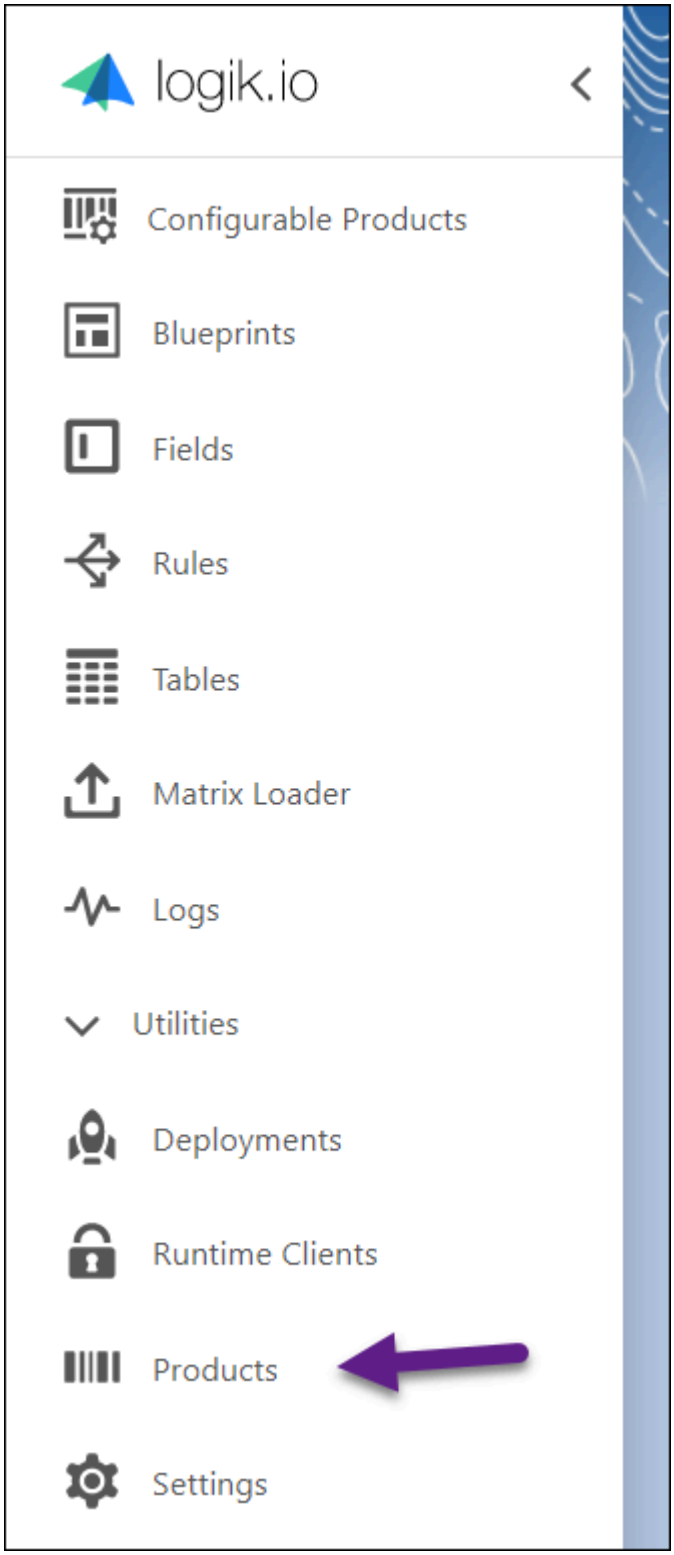

Procedure

1. Click the tab for the product that you want to configure.
2. Upload a CSV file with the following headers and the appropriate information for your product.

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	A	B	C	D	E	F
1	name	description	productCode	partnerId	unitPrice	configurable
2	Test Product	Product for Testi	testProduct	testProduct1	0	TRUE

If "configurable" is set to TRUE, the configurable product is automatically created in the CPQ environment.

Set up a configurable product in a Salesforce-integrated environment

A configurable product links a blueprint to the configuration experience for the product. Learn how to set up a configurable product in an environment that is integrated with Salesforce. This procedure is valid for users whose Salesforce Managed Package was installed in June 2022 or later.

Before you begin
Role required: Admin

About this task
If your CPQ SF Managed Package was installed in June 2022 or later, follow these steps to associate a configurable product with a blueprint.

Note: If your CPQ SF Managed Package was installed before June 2022, see Set up a configurable product in a Salesforce-integrated environment (older managed package).

Procedure
1. On the Salesforce Products tab, find the Product2 record to connect to a CPQ configuration experience (blueprint).
2. Associate the Product with a Price Book entry.
   The amount can be $0.00, but a value must be entered.
3. Set the product to **Active** and **Enabled**, and then click **Save**.
4. On the SFDC Products tab, select the list view to CPQ View.
5. Find the Product Name of the Product2 record created in step 3, and click the **Click Here** link under View CPQ Setup column.
6. Click **Associate Blueprint**.
7. Select the desired blueprint, and then click **Save**.

Related topics
Set up a configurable product in a headless environment

Set up blueprints

Set up a configurable product in a Salesforce-integrated environment (older managed package)

A configurable product links a Blueprint to the configuration experience for the product. Learn how to set up a configurable product in an environment that is integrated with Salesforce. This procedure is valid for users whose Salesforce Managed Package was installed before June 2022.

Before you begin
Role required: Admin

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About this task

If your SF Managed Package was installed before June 2022, follow these steps to associate a configurable product with a Blueprint.

Procedure

1. On the Salesforce Configurable Products tab, click **Enable/Disable external configuration**.
2. Find the Product2 record to connect to a CPQ configuration experience (blueprint), and set the corresponding Enable/Disable Externally Configurable checkbox to true, and save.
3. Click **Save**.
4. On the Configurable Products page, click the **View Setup** link associated with the product name of the Product2 record created in step 1.
5. Click **Add Blueprint**.
6. Select a Blueprint, and then click **Save**.

Related topics

Set up a configurable product in a Salesforce-integrated environment

Set up a configurable product in a headless environment

Set up blueprints

Set up blueprints

Blueprints define the structure of a configuration experience in CPQ. They act as containers that bring together fields, rules, layouts, and configurable products, enabling administrators to design, deploy, and manage complete configuration workflows across environments.

The blueprint defines the configuration experience. It acts as a container for all the parts necessary to be plugged in for the end- user interface. Because CPQ rules and fields are global, they can be used to facilitate any number of configuration experiences. The blueprint record allows the administrator to associate the subset of the fields and rules that are relevant to the configuration experience it represents. Further, the blueprint defines layouts and configurable products.

Unlike fields and rules, layouts can only be associated with one blueprint. A layout is defined and built in the context of, and to explicitly support, one blueprint — one configuration experience. However, a blueprint may have multiple layouts.

For Salesforce-integrated organizations, the configurable product element determines the SFDC Product2 record that, when quoted in Salesforce, launches the configuration experience defined by a blueprint. Multiple configurable products can launch the same blueprint. However, each configurable product can only be associated with one blueprint.

For a step-by-step guide to creating a blueprint, see Create a new blueprint.

The blueprint definition page

The blueprint definition page holds all of the different elements that are associated with the blueprint. Each tab indicates the number of elements associated if relevant. Clicking each shows specific metadata and lets you search by name or variable name, or edit each element in the blueprint.

The Associated Fields tab

This tab shows all of the fields that have been associated with the blueprint. The name, type, variable name, description, and last modified date of the fields are shown to the admin on this

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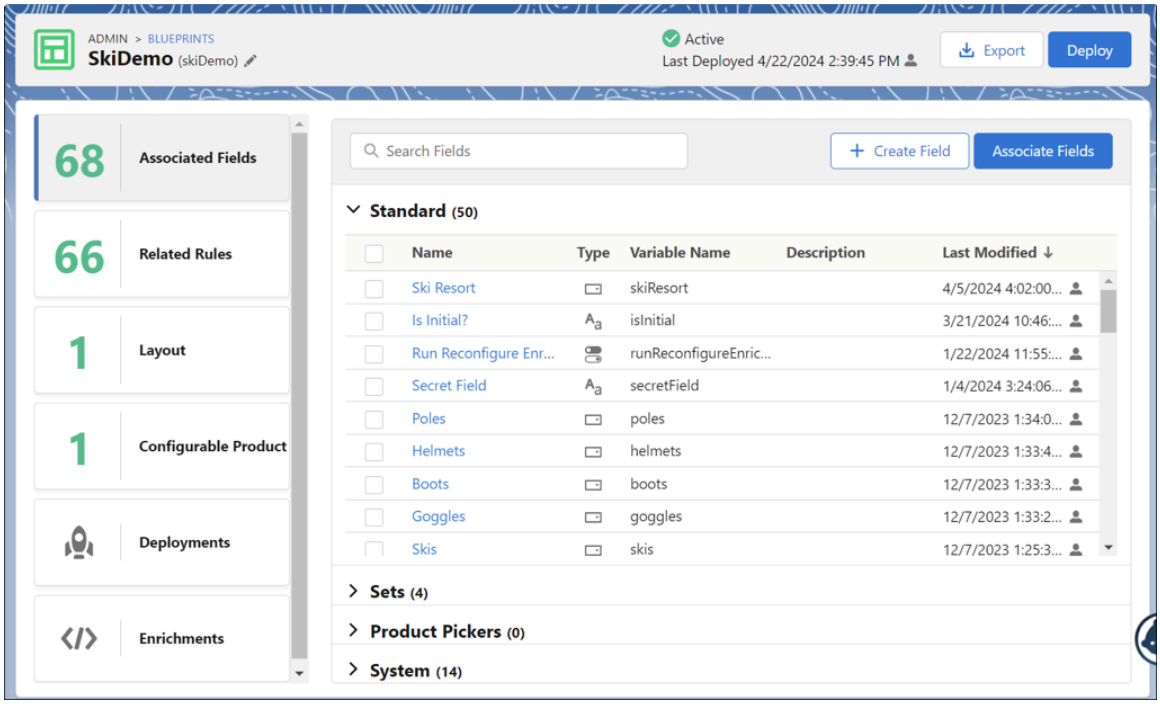
page, as well as the username of the user that last modified the field. You can also drill down to specific field types associated to the blueprint, such as sets, product pickers, and system fields.



- Standard: Shows global fields associated with the blueprint.
- Sets: Shows the sets and set subfields associated with the blueprint. Once a set is associated, each subfield added is automatically associated with the blueprint.
- Product Pickers: Shows the product pickers and product picker subfields associated with the blueprint.
- System: Automatically associated with each blueprint. If integrated with Salesforce, these fields pull data automatically upon initialization without the need to specify it in an external connection.

To learn more about fields and how to associate them with blueprints, see Configure fields.

The Related Rules tab

This tab shows all of the rules that are related to the blueprint. Unlike fields, rules connect to a blueprint automatically as long as every field referenced by the rule is associated with the blueprint. The name, variable name, description, action types, and last modified date of the rules are shown to the admin on this page, as well as the username of the user that last modified the rule.

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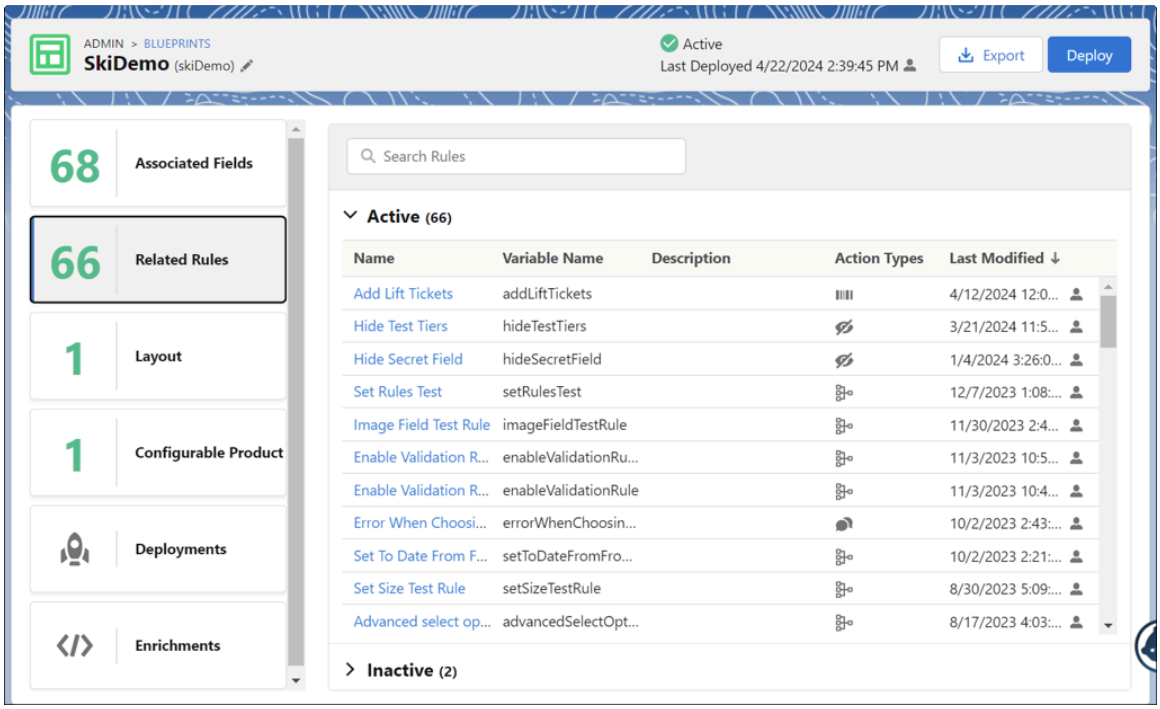

Active: Shows what rules are currently set to active in their definition. When a rule is active, it is included as a valid rule during deployment and enacts its Actions when its Conditions are fulfilled during runtime.

Inactive: Shows what rules are currently set to inactive in their definition. They are still related to the blueprint and is included if the blueprint is exported, but they are not valid when deployed and do not enact their actions during runtime.

Layout

This tab hows all of the layouts that have been created for the blueprint. The most recently modified layout is the layout generated unless otherwise specified. The name, variable name, last modified date, and the username of the user that last modified the layout are located on this page.

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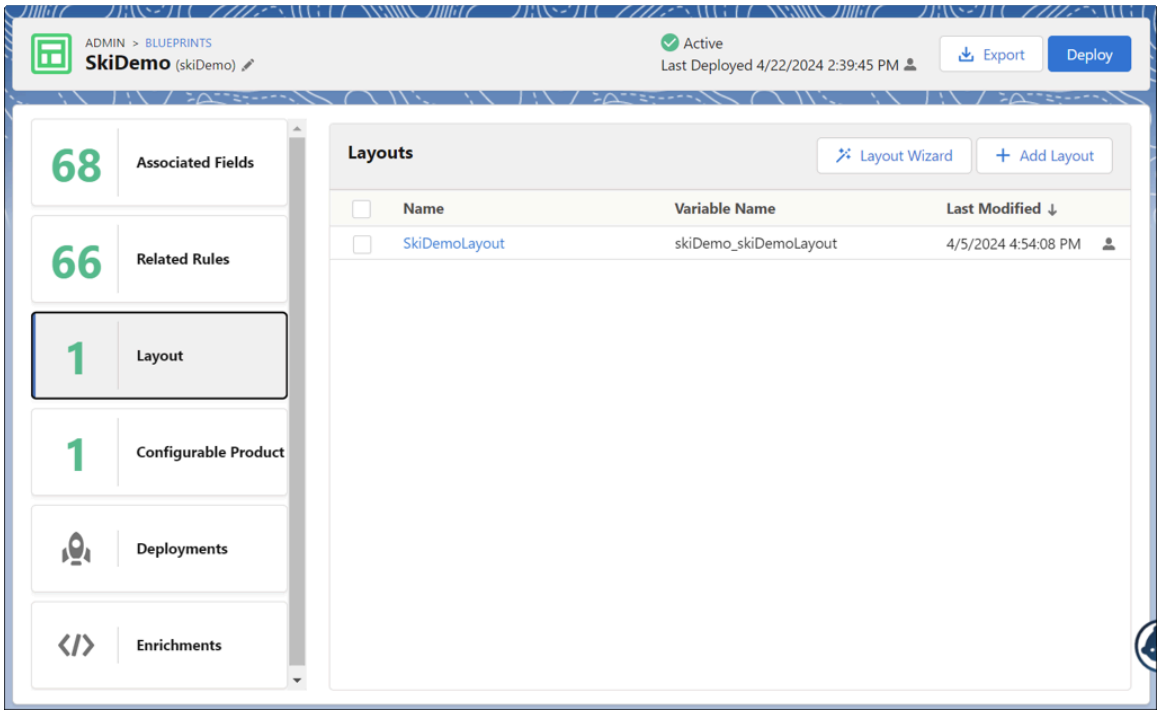
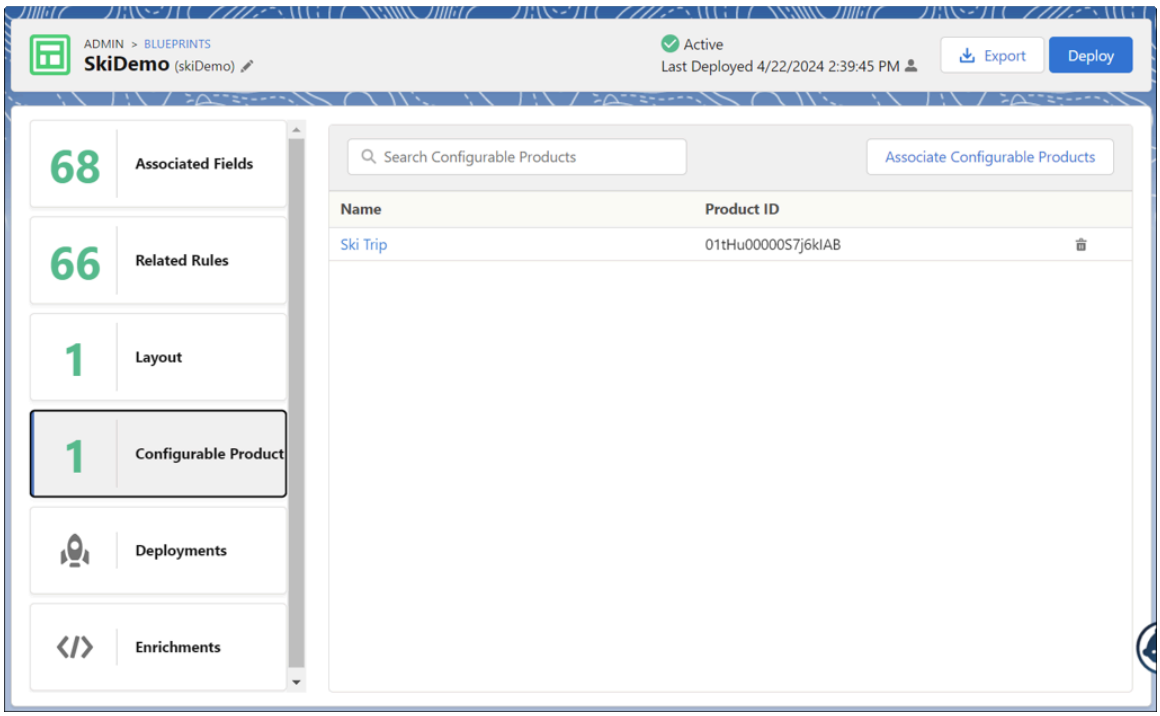


The Configurable Product tab

This tab shows the configurable products that are linked to the blueprint. Calling a runtime API with any of the associated configurable products with the blueprint, or configuring from the product through a third-party such as Salesforce, immediately launches the blueprint. The name and product ID are present, and an admin can delete a product by clicking the Trash icon on the left.



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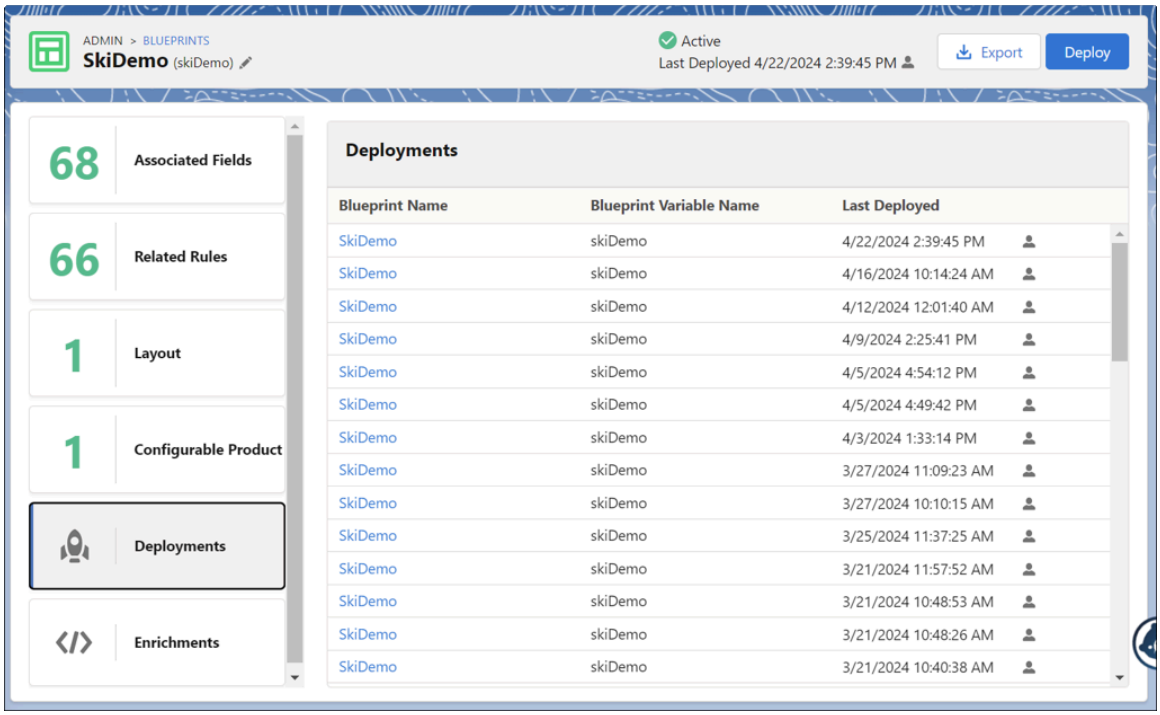
The Deployments tab

This tab shows the fifty most recent deployments for the blueprint. The blueprint name, variable name, and last deployment date and time are visible here, along with the username of the user that last deployed the blueprint.



You can also see a list of the environment's most recent deployments in the Utilities menu on the Deployment page. See Viewing blueprint deployments.

The Enrichments tab

This tab shows the enrichment scripts that have been created for the blueprint. These scripts run outside of the rules engine and enact their functions on their own areas, such as on initialization, BOM response, validation, or picklist extension pricing. An admin can edit these scripts or delete them using the Trash icon on the far left. For more information about enrichment scripts, see Using external connections with OAuth support.

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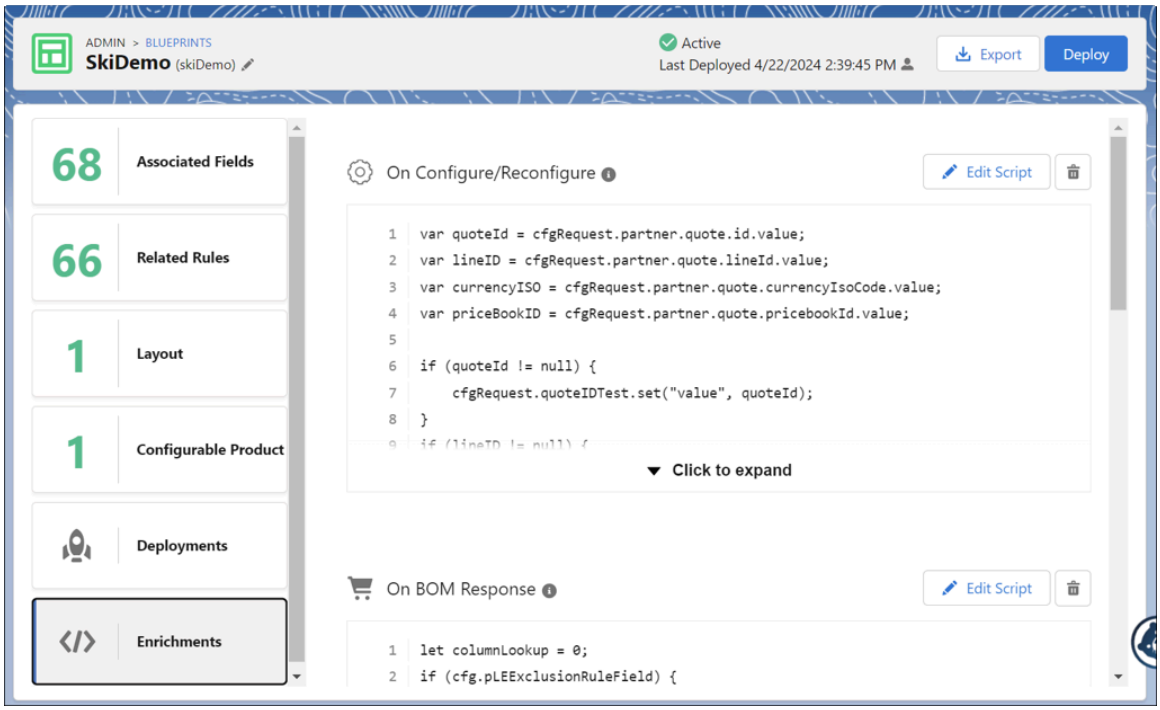
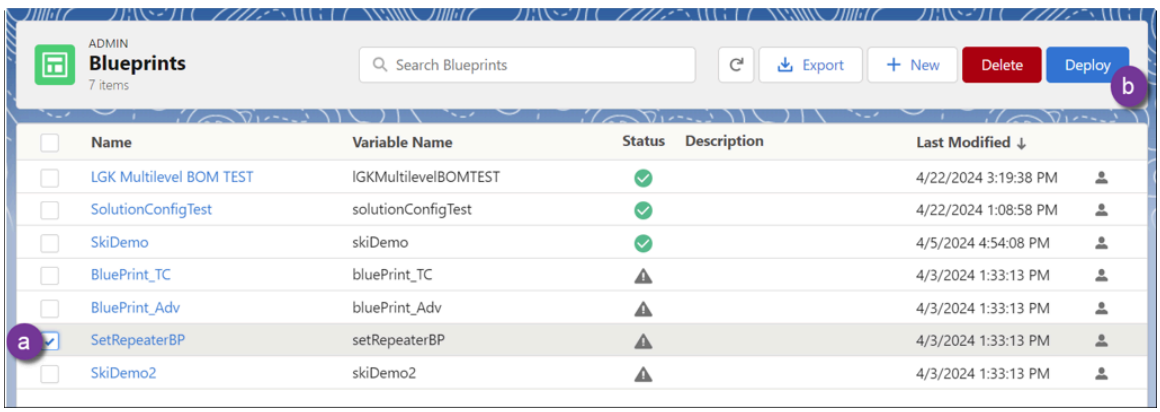


Deploying a blueprint

CPQ configuration experiences are deployed (made available to application end users) at the blueprint level. Administrator edits to fields, rules, layouts, and configurable products are not visible to the end user until deployed.

To deploy a blueprint, in the Blueprints list administration page, check the box to the left of the blueprint to deploy, and then click **Deploy**. (You can also click **Deploy** in the blueprint itself.)



The blueprint administration list page shows the deployment status of each blueprint. Icon key:

Deployed

Not deployed

Expiring Soon

In production sector environments provided to CPQ customers, once a blueprint is deployed, it remains deployed, no matter its end-user activity.

In test sector environments provided to CPQ partners, blueprints are automatically un-deployed after a period of thirty days with no end-user engagement. Redeploying the blueprint or

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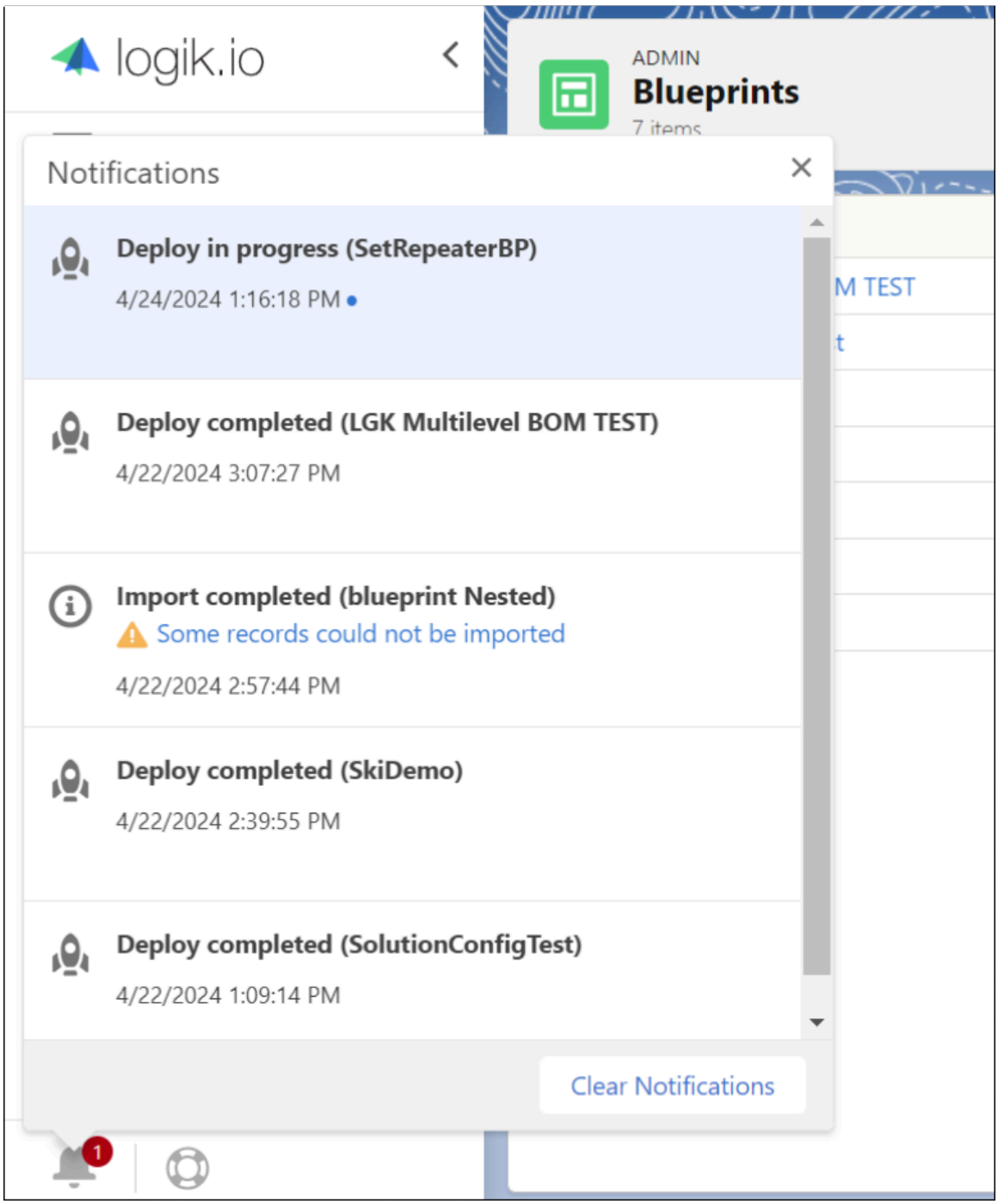
launching a configuration of the blueprint resets the thirty-day period after ServiceNow's database syncs each evening.

In demo sector environments, blueprints are automatically un-deployed every weekend.

After a blueprint is deployed, a notification alerts you to the status of the deployment process (either In Progress or Completed).



Related topics

- Create a new blueprint
- Testing in non-production environments before migration
- CPQ fields, system fields, and partner fields

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Configure fields

Boundaries and limits

Create a new blueprint

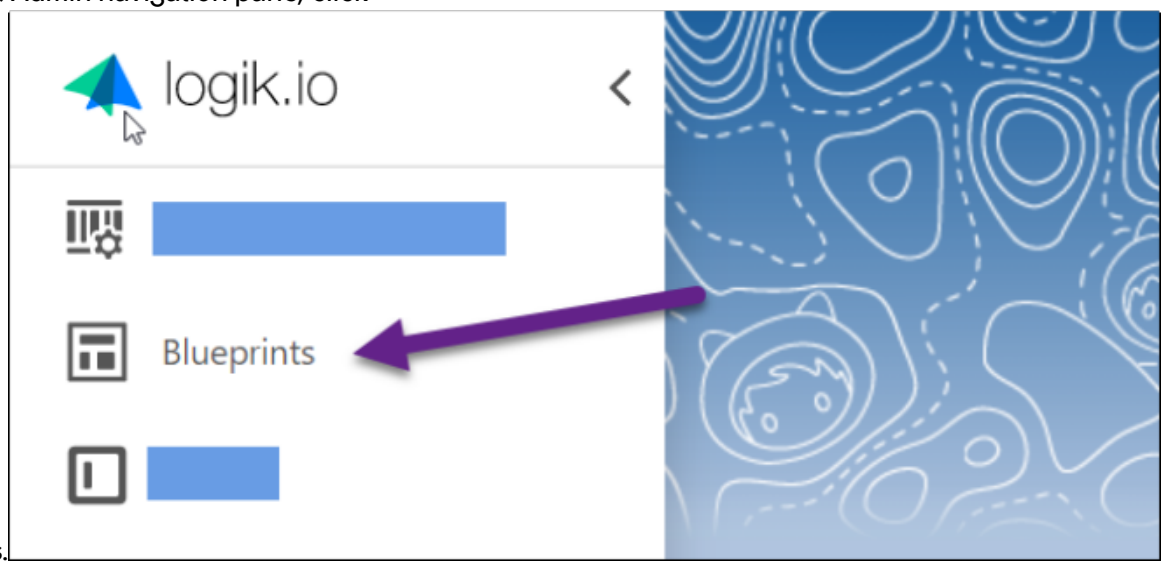
Create a new blueprint to define the structure, behavior, and configuration experience for your product model.

Before you begin

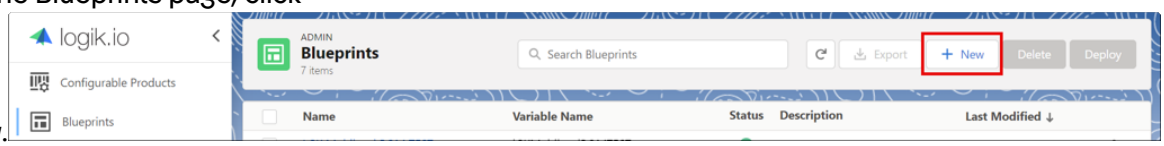
Role required: Admin

Procedure

1. In the CPQ Admin navigation pane, click **Blueprints**.



2. On the Blueprints page, click **New**.



Related topics

Export a blueprint

Import a blueprint

Export a blueprint

Export a blueprint by downloading it as a ZIP file.

Before you begin

Role required: Admin

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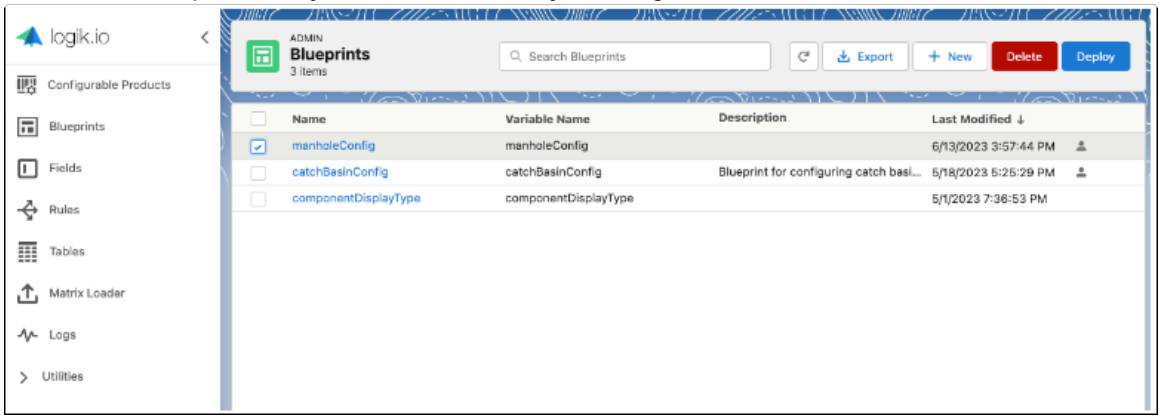
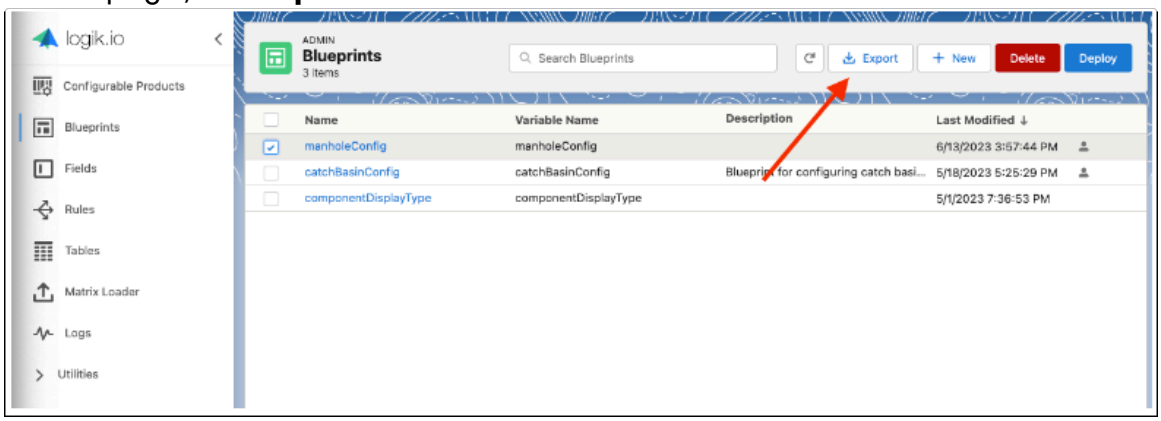
Procedure

1. Select the blueprint that you want to move by clicking the check box next to its name.

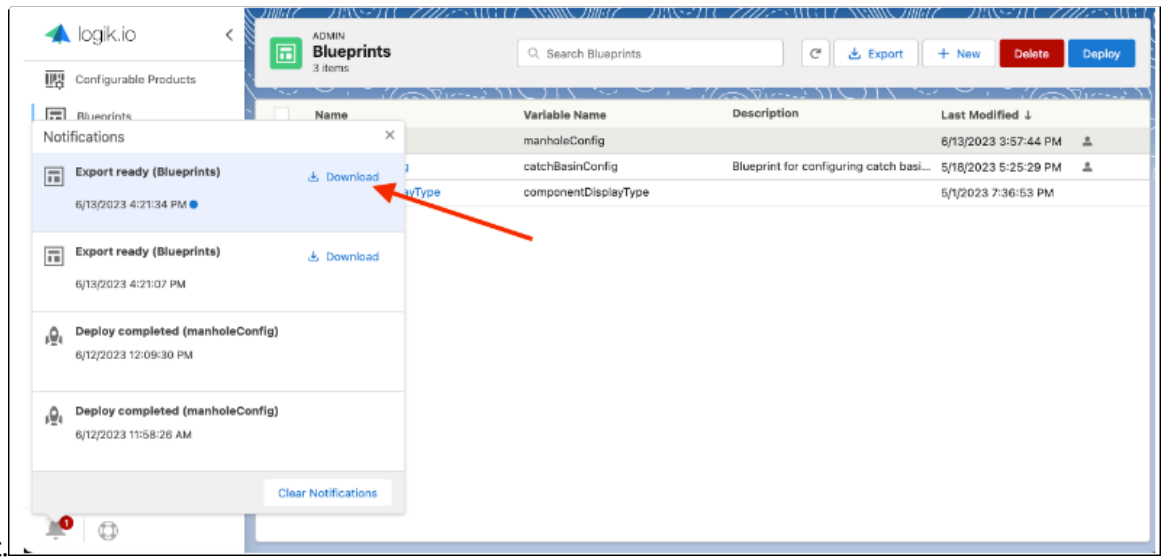


2. In the top right, click **Export**.



Keep an eye on the bell icon in the lower-left corner. Notifications appear there. The first notification indicates that the export process has started. When the export is complete, a second notification indicates that the blueprint is ready for download.

3. In the Notifications menu, click **Download** to download the blueprint.



What to do next

Import a blueprint

Related topics

Testing in non-production environments before migration

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Import a blueprint

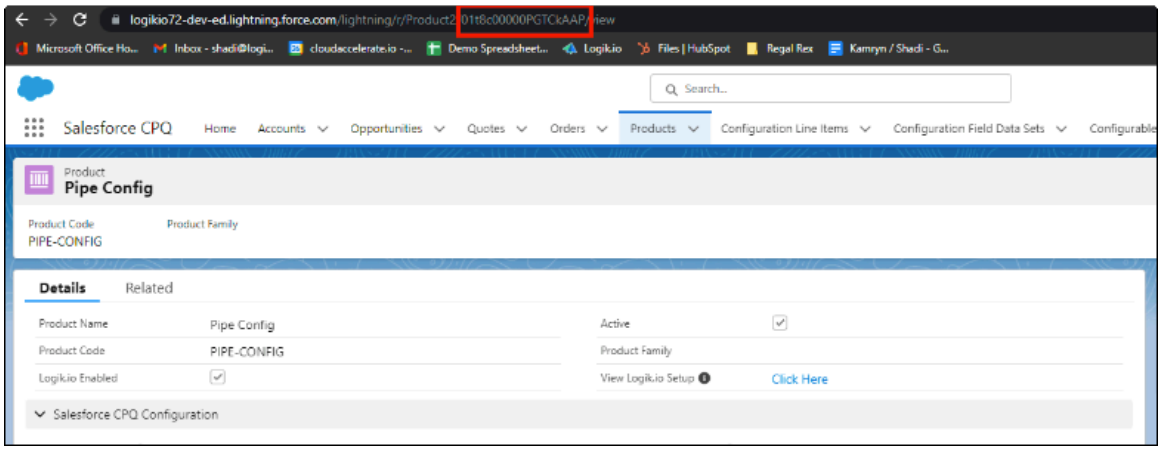
Import a blueprint by uploading it as a ZIP file.

Before you begin

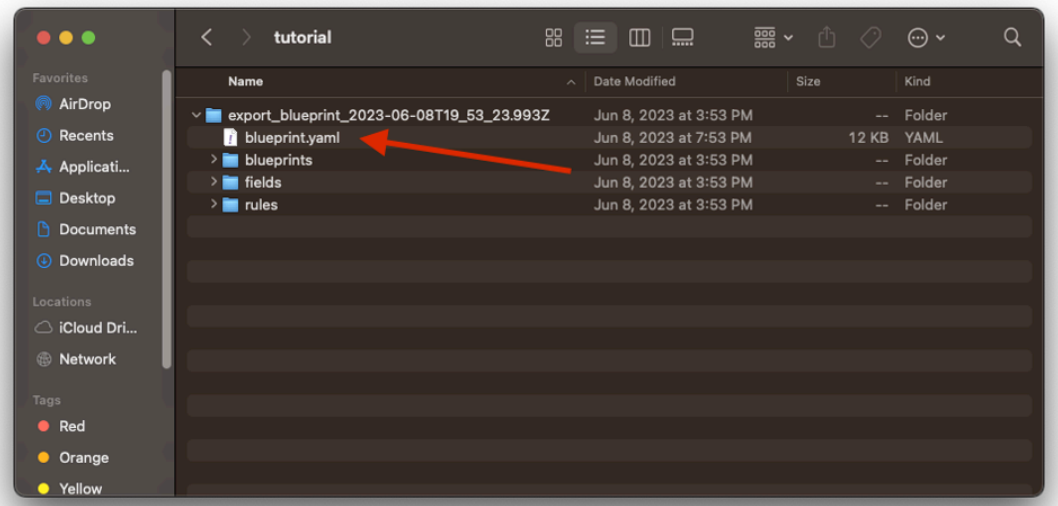
Role required: Admin

Procedure

1. In your SFDC org, create the configurable product that you want to migrate the configuration to.
2. Note the Product2 ID of the product in the org.
   You can find the Product2 ID by selecting the product in Salesforce and checking the URL.



3. Unzip the blueprint ZIP file you downloaded.
4. In the unzipped blueprint folder, open the blueprint.yaml file for editing.



Near the end, a line reads `-id: <oldProduct2Id>`.

5. In the line just mentioned, replace the Product2 ID from the old org with the new one you just created, and save the blueprint.yaml file.



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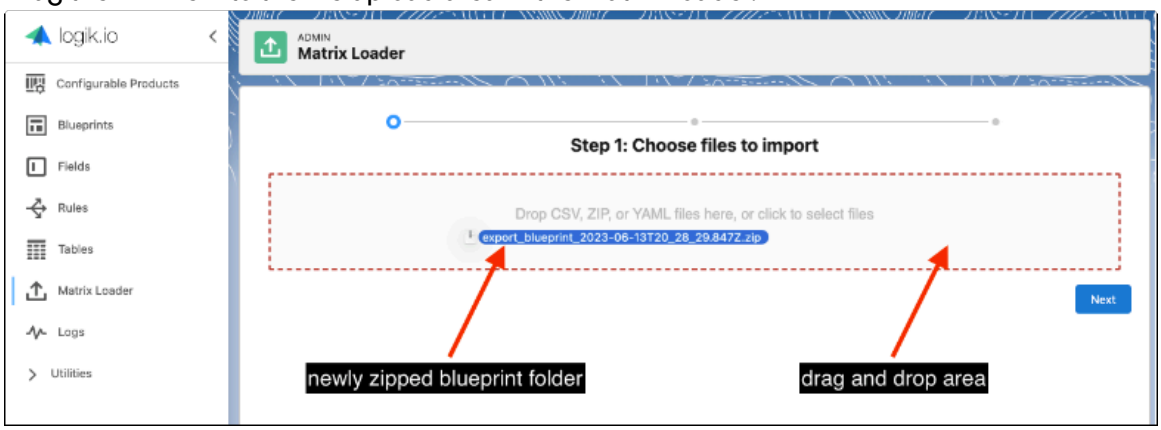
6. Rezip your exported blueprint with the updated blueprints.yaml file, blueprints folder, fields folder, and rules folder included together, then drag the ZIP file into the designated area for file upload in the Matrix Loader.
7. Open the Matrix Loader from the Admin area of the environment you are migrating the blueprint into.
8. Drag the ZIP file into the file upload area in the Matrix Loader.



9. In the new org, click to open the **Utilities** menu, and then click **Settings**.

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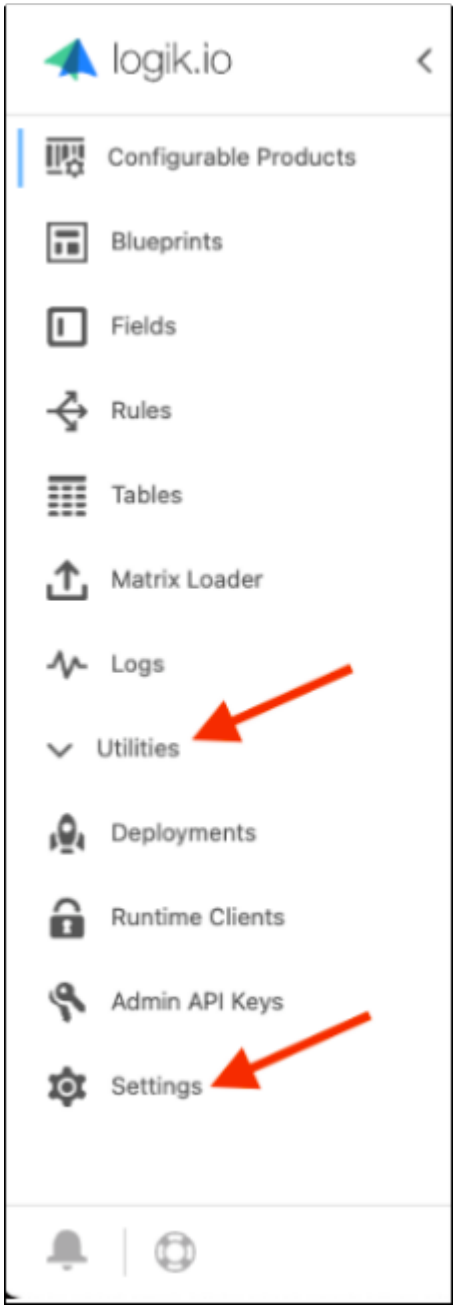
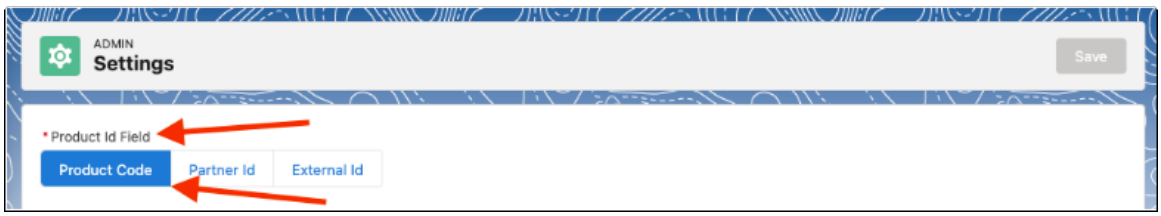


10. Check the value of the Product ID field.
If it#s set to “Product Code,” the process is complete.



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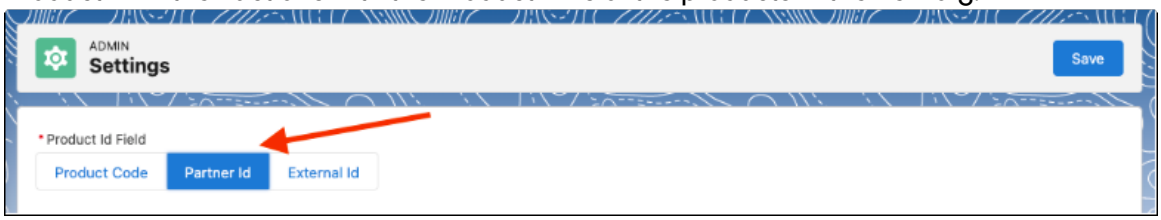
11. If the Product ID field is set to Partner Id, for all the product rules in your blueprint, replace the Product ID in their actions with the Product2 IDs of the products in the new org.



What to do next

Keep the following notes in mind:

- After the import, configurable product IDs will not be the same as in the original blueprint—they are unique across organizations. To keep the references in rules accurate, if the setting for the Product Id field is set to Product Code, you can create new configurable products as needed and assign them the same product code.
- Importing a blueprint does not replace the current blueprint if it already exists in the target environment. Any items removed in the older environment, such as rules, also need to be manually removed in the target environment unless they are specified in the YAML file.

Related topics

Migrate a blueprint from environment to environment

Export a blueprint

Testing in non-production environments before migration

Test configurators in a non-production environment before migrating them to production. The configurators support revenue-critical processes, validate all changes outside production and promote them using controlled environment-to-environment migrations.

CPQ configurators should be tested in non-production environments before they are migrated to a production environment and made available to end users.

CPQ configurators are key to organizations' revenue production processes. Therefore, you must take care to ensure all configurators work as expected before they are introduced to sales users, partners, and customers. All CPQ implementations have at least one non-production environment for this purpose. Some customer IT organizations have development processes that require a larger development stack.

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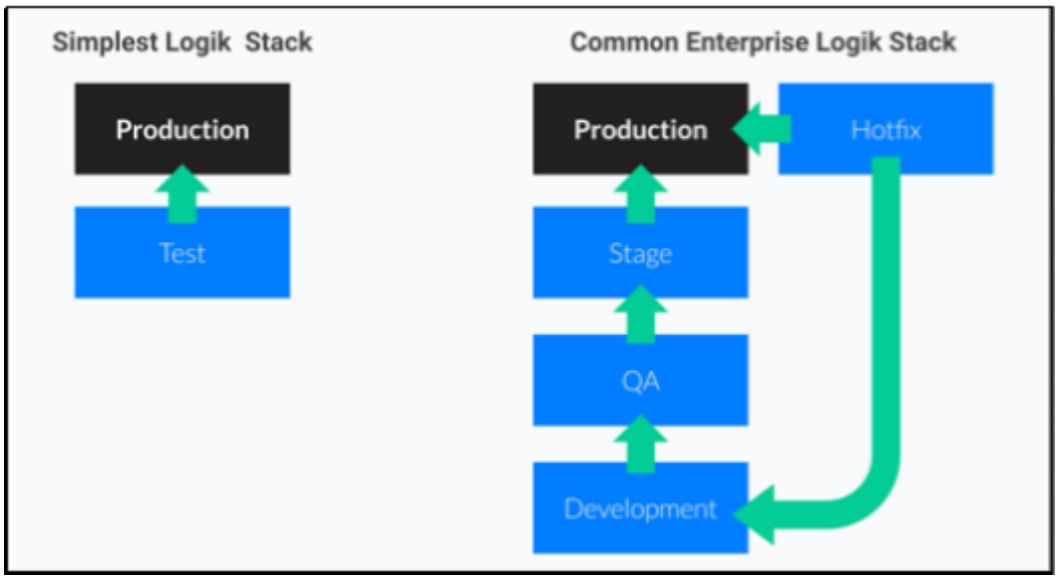

Because all maintenance and development must be tested in a non-production environment before promotion, this also means that:

- Migrations must take place only in the production environment. No manual work ever occurs there.
- Environment-to-environment migration is an essential element of any administration project.

Related topics

Migrate a blueprint from environment to environment

Migrate a blueprint to an SFDC-integrated destination

The fullBlueprintMigration parameter

Migrate a blueprint from environment to environment

Migrate blueprints between CPQ environments to ensure consistent configuration management. Export, update, and import blueprint packages safely using the Matrix Loader to promote tested configurations from development to production.

Before you begin

Understand CPQ upgrade windows, described in CPQ Upgrade Schedule. Schedule your migration to avoid published upgrade windows. If you have questions regarding this topic, reach out to your Customer Success Manager.

The following terms are used in this task:

Source

The environment from which functionality is migrated.

Destination

The environment to which functionality is migrated.

Migration package

The file or files exported from the source environment to be imported to the destination environment.

This task assumes that migration is performed on one or more blueprints at a time.

Role required: (unknown)

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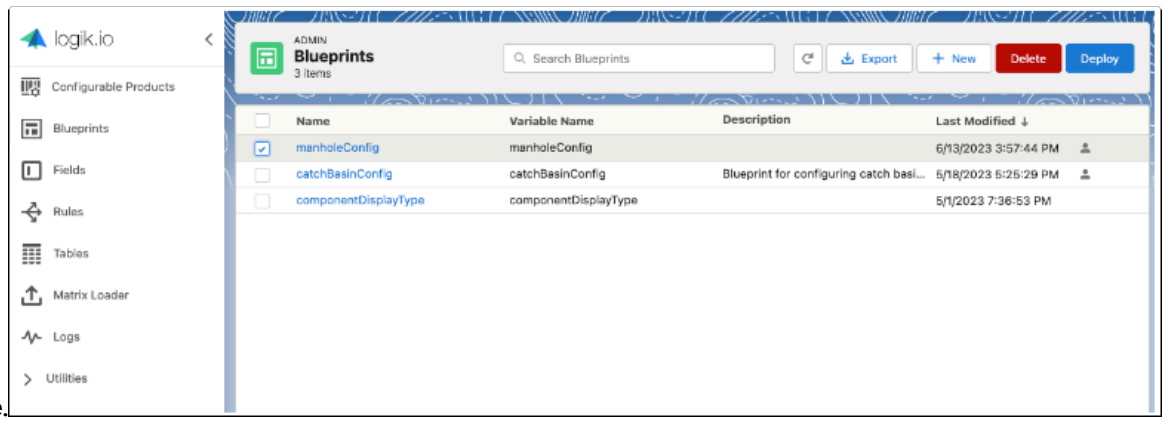
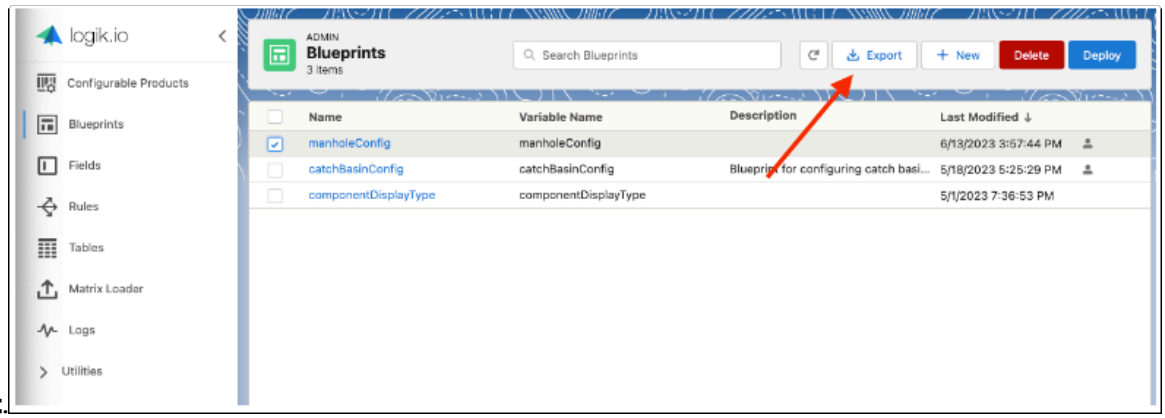
Procedure

1. Export the blueprint from the source.

   a. In the source environment, select the blueprint you want to move by clicking the check box next to its name.

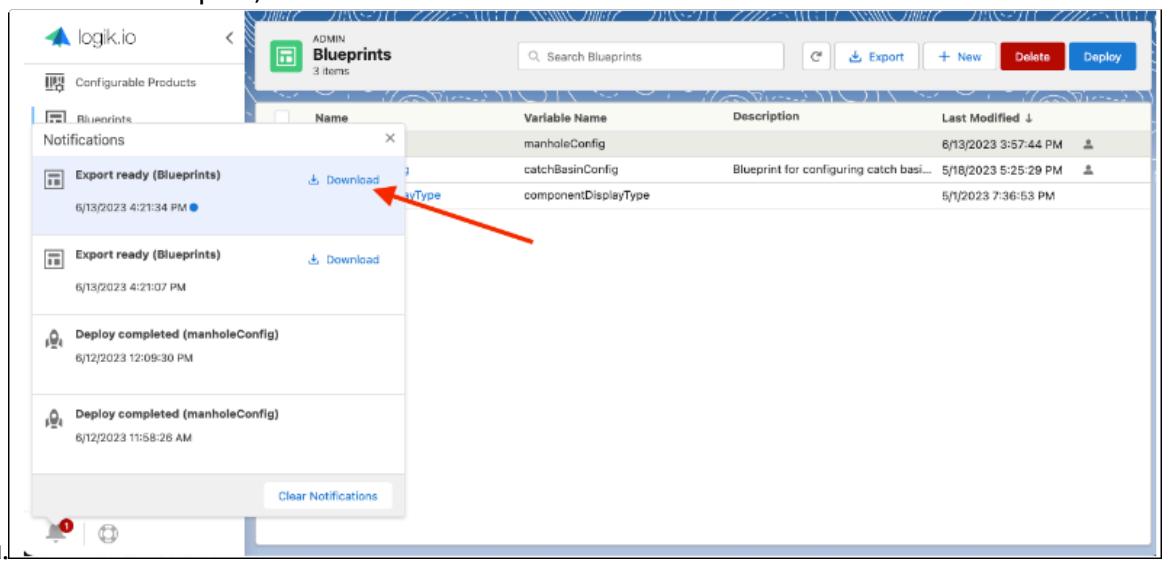


   b. Click **Export**.



   Watch for notifications on the bell icon located in the lower-left corner. The first notification indicates that the export process has started. After the export is complete, a second notification indicates that the blueprint is ready for download.

   c. To download the blueprint, click the **Download** link in the bell icon menu.



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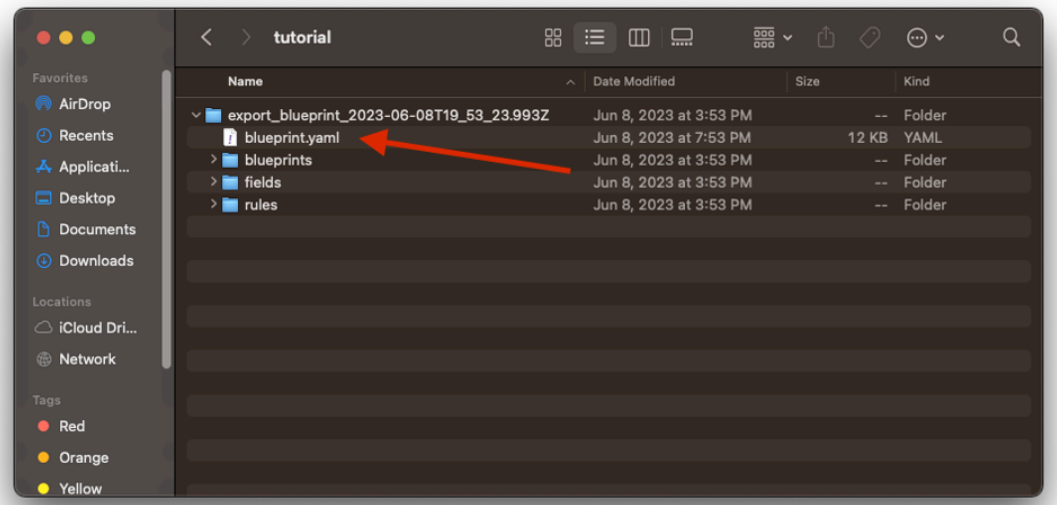
d. Save the blueprint to your local machine or a central repository such as Git.

e. If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, confirm the prerequisites and perform step 1 in Migrate a blueprint to an SFDC-integrated destination.

2. Modify the migration package.

a. Unzip the blueprint ZIP file you downloaded in step 1.
The file unzips to a blueprint.yaml file.



b. Open the blueprint.yaml file in a text editor.

When migrating a blueprint to a destination in which an earlier version of the blueprint resides, we recommend adding the following line to the bottom of the file:

```
fullBlueprintMigration: true
```

Sample edited blueprint.yaml file:

```
---
blueprints:
- variableName: someBlueprint
  related Fields:
  - field1
  - field2
  - field3
  lastModifiedBy: dev5@dev.logik.io
  name: someBlueprintName
  description: BP description goes here
  relatedSets: null
  scripts: null
  layouts: null
  products: null
productPickers: /fields/productPickers.yaml
sets: null
```

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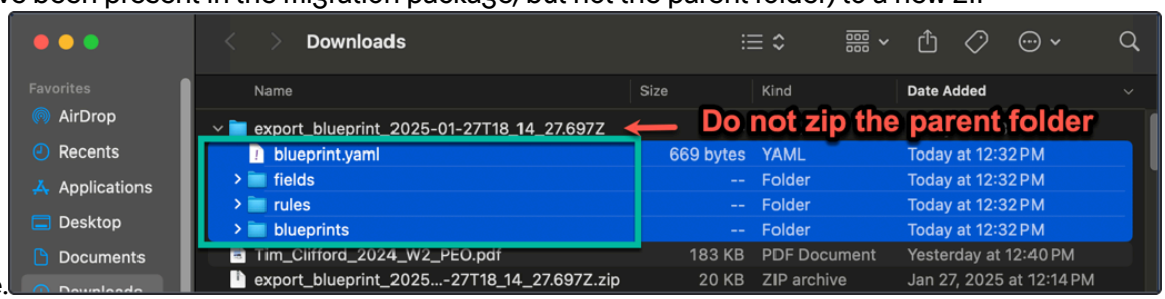
```
fieldOptions: /fields/fieldOptions.csv
rules: /rules/rules.csv
fields: /fields/fields.csv
fullBlueprintMigration: true
```

For a description of how this parameter affects the blueprint migration, see The fullBlueprintMigration parameter.

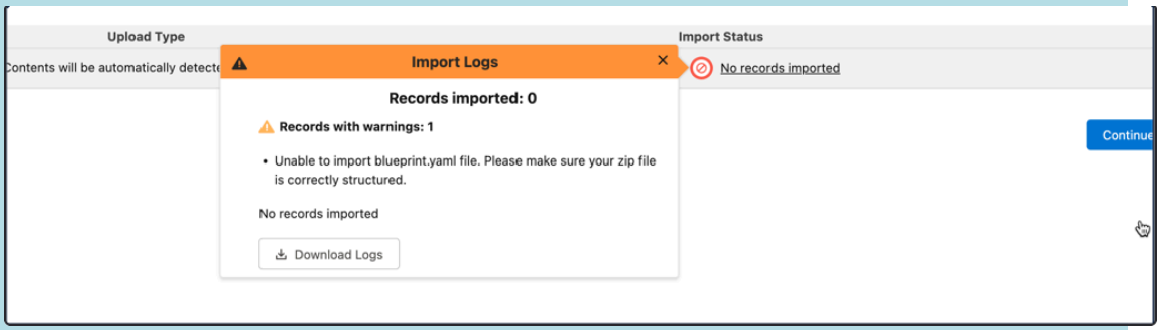
c. If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, perform step 2 in Migrate a blueprint to an SFDC-integrated destination.

d. Save your edits and close the blueprint.yaml file.

3. Compress all components of the migration package (including blueprint.yaml, the blueprints folder, the fields folder, the rules folder, and any other artifacts that may have been present in the migration package, but not the parent folder) to a new ZIP file.



Important: When compressing, make sure to select only the contents of the unzipped blueprint export, and not the parent folder itself. If the parent folder is selected, you will receive an error when you upload it to the CPQ Admin.



4. Migrate components related to the blueprint you are migrating (for example, managed tables and external connections used by the blueprint) to the production tenant.

5. Import the blueprint to the destination.

a. Log into the administration area of the CPQ destination environment.

b. Open the Matrix Loader.

c. Drag the edited migration package ZIP file into the Matrix Loader drop area.

d. Click **Next**, and then click **Import**.
If you encounter errors after the import, follow the on-screen instructions to review the error logs.

6. Test the migration.

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a. If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, perform steps 3 and 4 in Migrate a blueprint to an SFDC-integrated destination.

b. Review your migrated blueprint from the end-user UI in the destination CPQ environment.

Related topics

CPQ Upgrade Schedule

Migrate a blueprint to an SFDC-integrated destination

Migrate a blueprint to an SFDC-integrated destination

Learn how to migrate a CPQ blueprint to a Salesforce-integrated CPQ environment. Recreate configurable products, update Product2 IDs, and verify connections to ensure accurate data mapping and seamless integration between Salesforce and CPQ.

Before you begin

If necessary, perform the steps in Migrate a blueprint from environment to environment.

If necessary, install the CPQ Managed Package for Salesforce in the destination. For installation instructions, see Installation and setup guide for environments linked to Salesforce orgs.

Ensure that the appropriate Salesforce users have access to CPQ.

Role required: (unknown)

Procedure

1. In your destination SFDC org, recreate the configurable product that is associated with the blueprint on the source SFDC org.

   a. Note the Product2 ID of this product in the new org.
   To view the Product2 ID, select the product in Salesforce and view the value in the URL.

   b. In the migration package, open the blueprint.yaml file.

   c. In the blueprint.yaml file, locate the line that reads `-id: <oldProduct2Id`.

   d. Replace the Product2 ID from the old org with the the new one that you just created, and save the blueprint.yaml file.

2. Add all other products from the old org that were referenced in any product rules.
   Don't forget to create pricebook entries for all your products! These records will be auto-replicated in our CPQ product cache every fifteen minutes. Wait at least fifteen minutes before continuing with the tests described below.
3. Test the destination by walking through quote creation and configuration, and investigate and resolve any errors that you encounter.
4. Verify that external or SFDC API calls complete successfully and point to the right external system endpoints.
   See External Connections setup in CPQ Admin.

What to do next

After the import, configurable product IDs will not be the same as in the original blueprint—they are unique across organizations. To keep the references in rules accurate, if the setting for the ProductId field is set to Product Code, you can create new configurable products as needed and assign them the same product code.

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Related topics

- Testing in non-production environments before migration
- Migrate a blueprint from environment to environment
- Installation and setup guide for environments linked to Salesforce orgs

Migrating a blueprint from test to production

You can migrate a blueprint from a test environment to a production environment by using the Matrix Loader or by automating the migration using REST API calls.

CPQ Administrators have two ways to migrate a blueprint from test to production migration: by using the Matrix Loader, and by using REST API automation.

- Matrix Loader migration: From CPQ Admin, an admin can export a blueprint or blueprints to a ZIP file. The admin can then import these artifacts into the production environment. A new configurable product must be created and associated with the blueprint in the production environment. This can be done afterward or by creating the product and editing the blueprint yaml file with the new SFDC product2 id, product code, or partner id before deployment.
- REST API automation: Robust REST API capabilities let implementers and customers automate test-to-production migration in a CI/CD process.

Related topics

- Testing in non-production environments before migration

The fullBlueprintMigration parameter

Learn the effects of enabling or disabling the fullBlueprintMigration parameter on sources in various configurations. The fullBlueprintMigration parameter controls how thoroughly a blueprint is updated during migration.

The fullBlueprintMigration parameter

When migrating an edited blueprint from a source environment to a destination environment where an earlier version of the same blueprint exists, `fullBlueprintMigration: true` instructs the destination environment to perform the migration more aggressively than it otherwise would. In the matrix below, common scenarios performed on the source environment blueprint are noted in the first column. The destination environment performs the corresponding migration task according to the true or false setting of fullBlueprintMigration, corresponding to the rightmost columns.

Effects of the fullBlueprintMigration parameter

The effect of the fullBlueprintMigration parameter when set to true or false

Activity on source before migration	Parameter = false	Parameter = true
Picklist option deleted	Picklist option retained on destination	Picklist option deleted on destination
Rule removed from blueprint [see Note below]	The rule remains associated to	Rule removed from blueprint on destination

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Effects of the fullBlueprintMigration parameter

The effect of the fullBlueprintMigration parameter when set to true or false

(continued)

Activity on source before migration	Parameter = false	Parameter = true
	blueprint on destination	**Note:** If the rule is not associated with any other blueprint on the destination, the rule is removed from the global rule list on the destination,
Rule action removed from rule	Rule Action retained on destination	Rule Action deleted on destination
Product is removed from ProductList on Simple Product Action	Product remains in ProductList on destination	Product is removed from ProductList on destination

Notes

CPQ administrators do not directly associate or remove rules to or from blueprints. Instead, a rule is associated with a blueprint only if all its referenced fields are associated with the blueprint. Therefore, the admin manipulates a rule's association with a blueprint by associating or removing (deassociating) its fields. A rule will be removed from a blueprint in several circumstances, including:

- A field referenced by the rule is removed from the blueprint.
- In the rule, the admin adds a reference to a field that is not associated with the blueprint.
- A new rule action that references a field not associated with the blueprint, is added to the rule.
- The rule condition is modified to include a reference to a field that is not associated with the blueprint.

Related topics

Testing in non-production environments before migration

Viewing blueprint deployments

The Deployments page shows the fifty most recently deployed blueprints together with their timestamps and associated users.

In CPQ Admin's Utilities menu, the first visible page is the Deployments page.

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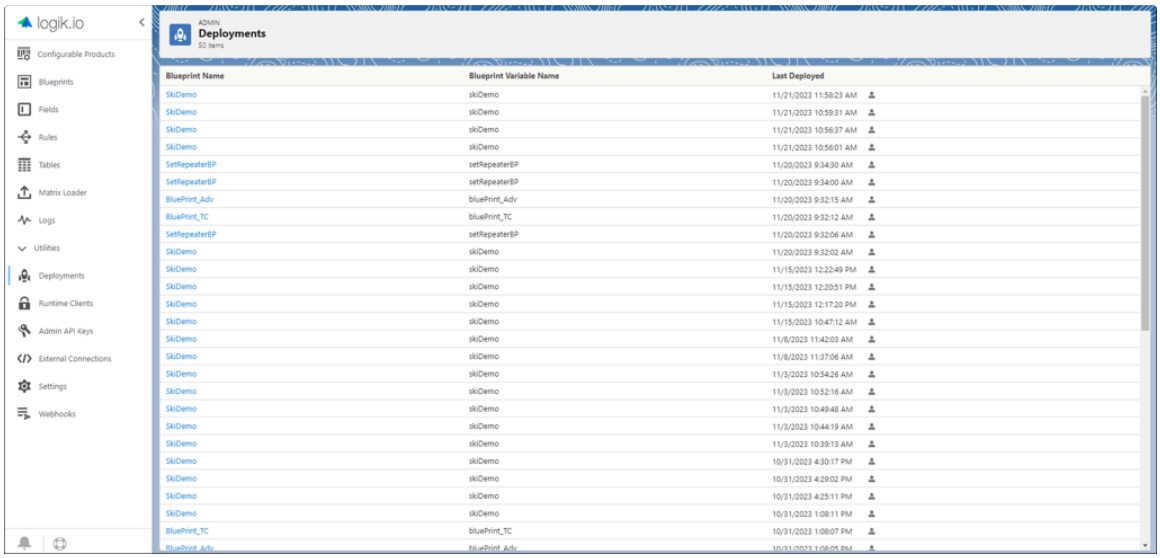
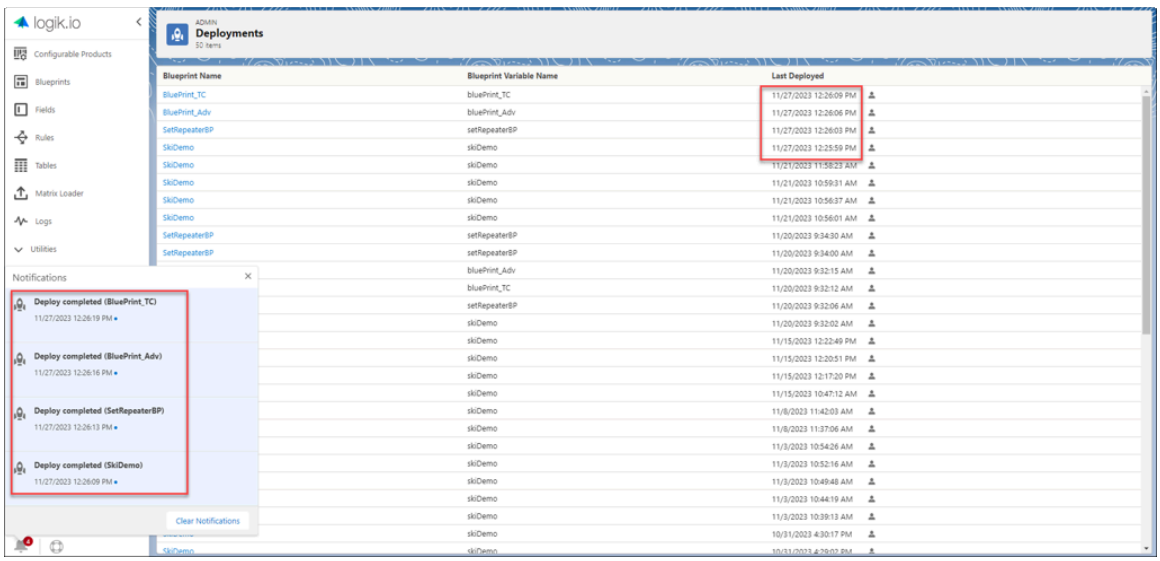


This page shows the fifty most recent blueprints by the date and time of the deployment, together with the user responsible.

Because the configuration's behavior can change depending on the rules, fields, and enrichments that have changed since the last deployment, this page is useful for troubleshooting. Noting the last time that a deployment behaved as intended is useful for both the admin implementing CPQ and for our support team when helping solve an issue.

Note that the Last Deployed column's date and time will differ from the completion date and time as viewed from the notification bell. This is because the Last Deployed column shows the last time a blueprint was submitted for deployment, not when the deployment was completed. This is helpful in determining how long a deployment takes to complete, especially for large blueprints with hundreds or thousands of fields and rules.



If your blueprints take longer than thirty minutes to complete, create a support ticket.

Related topics

Tracking a blueprint's deployment history

Tracking a blueprint's deployment history

Track the deployment history of blueprints in CPQ Admin. View details like deployment date, time, and user for troubleshooting and reference.

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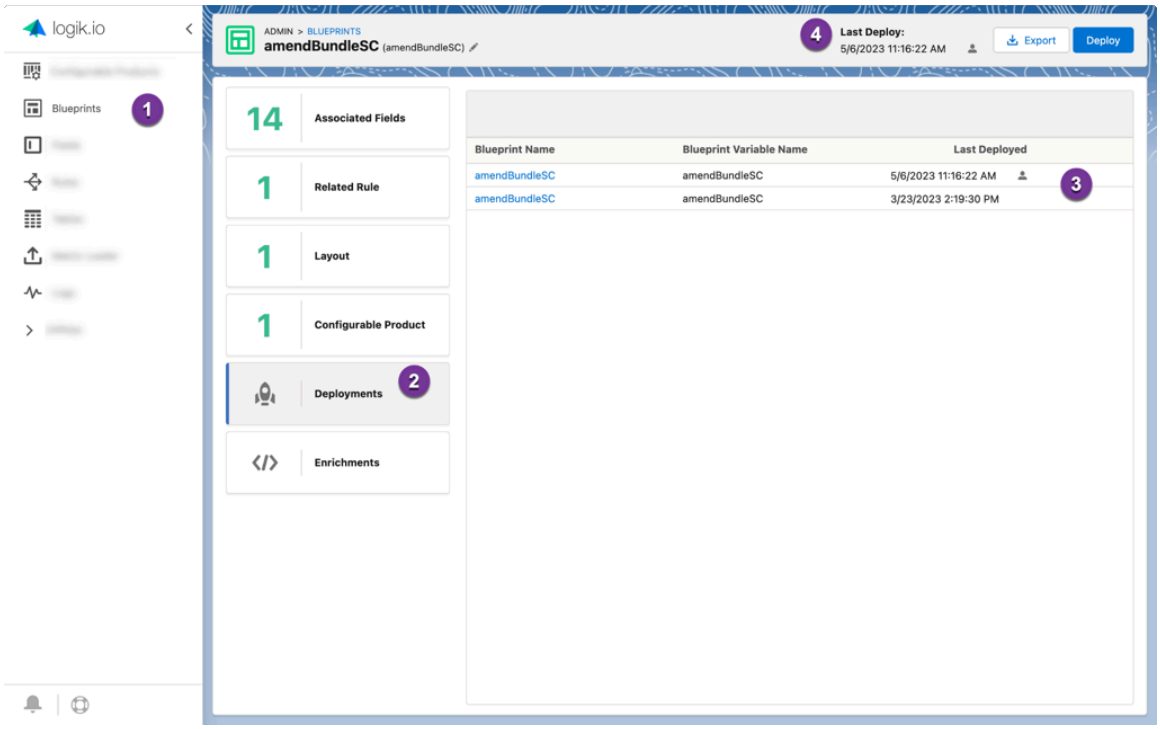

1. To access the blueprint deployment history, click Blueprints in CPQ Admin.
2. On the Blueprints tab, the Deployments tile lets you view the deployment history for a selected blueprint.
3. The Deployments tile shows the most recent fifty deployments with the name, the blueprint variable name, and the date and time of last deployment. To see the user that initiated the deployment, hover the mouse cursor over the avatar icon.
4. The most recent deployment details also appear in the header section of the blueprint.

Related topics

Viewing blueprint deployments

Associate multiple fields to a blueprint

You can associate any number of fields to a blueprint by using the Blueprint Import function in the Matrix Loader.

Before you begin

Role required: Admin

Procedure

1. Create or edit a blueprint.yaml file and define the blueprint variable name and name in the following format (removing the angle brackets around the variable names).

```
blueprints:
-variableName: <variableNameOfBlueprint>
 relatedFields:
 -<fieldVariableName1>
 -<fieldVariableName2>
 -<fieldVariableName3>
 -<etc...>
name: <Name of Blueprint>
```

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2. Add the variable names of the desired fields.
3. Import the YAML file into the Matrix Loader.
   Choose Blueprint as the upload type.

> **Note:** Any existing fields or configurable products in the blueprint will be disassociated from it unless they are also defined in the YAML file.

Related topics

Enable Markdown in text fields

Circular references in rules and fields

Circular references in a blueprint may result in an error.

CPQ Admin allows administrators to define a blueprint whose rules and fields result in a circular reference. If the end user enters configuration inputs that initiate an endless loop, an error state occurs.

For example, suppose rule 1 consists of a condition on field A and a determination action that sets field B, while rule 2 has a condition on field B and a determination action that sets field B. These interacting rules would create an endless loop.

Loops may also be composed of many fields and rules. In more complex use cases, it is common for testers and end users to successfully operate the configuration blueprint without encountering the error state. The CPQ Rule Cycle Report identifies potential loops so that the administrator can understand their risk and correct them.

To identify endless loops in a blueprint, use the Rule Cycle Report. See Identify endless loops in blueprint rules.

Related topics

Identify endless loops in blueprint rules

Configure fields

Learn about how fields in CPQ help structure data collection efficiently and about the various types of field. Associate fields with blueprints for consistent use across configurations, layouts, and rules.

A field is a designated space where users can enter specific information. Imagine fields as sections in a questionnaire, each awaiting a particular piece of data.

The usefulness of fields lies in their ability to structure data collection, making it easier for both users to enter values and admins to set them up efficiently and effectively. Without fields, the process of gathering information would be a chaotic jumble of function parameters, lacking the coherence necessary for meaningful data storage or the ability to enact rules.

In CPQ, fields are global. This means a field may be reused in any blueprint, rule, or layout without having to create a unique field for each.

- Layouts
  - Fields are the most granular component that make up a layout. A layout consists of many fields arranged into a navigational flow or page.
  - Tabs, expandable sections, column sets, field grids, and headings provide additional organization to the fields in a configuration experience.
- Rules

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- Rules leverage fields as inputs to conditions, calculations, and logic.
- Rules act on fields. A rule may determine the value of a field, display a message associated with a field, hide a field, control the options available in a field, and send the information in a field to the Product List, all in the same rule.

- Blueprints
  - Because fields are global across an environment, the only way for them to be a part of a specific configuration is to be associated with a blueprint.
  - When all of the fields referenced by a rule are associated with a blueprint, the rule is associated with the blueprint without the need to specify it.
  - When a field is associated with a blueprint, the field can be added to the layouts of the blueprint.

When you associate a field to a blueprint, the application automatically associates all rules that leverage the field to the same blueprint. Fields and rules may be reused on any number of blueprints.

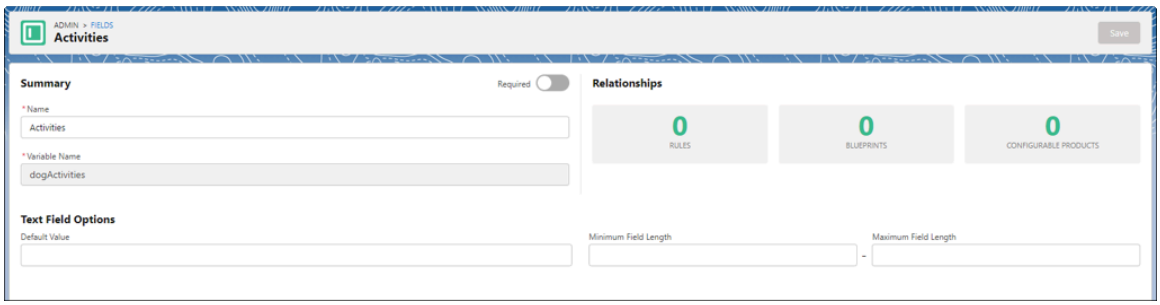
Field types

Many field types are available, each with constraints and rules for entered values. For example, a number field is more suitable than a text field as a quantity field, since the only inputs it accepts are numbers.

Similarly, if there are only a few options that a user should be allowed to enter, a picklist field should be used to limit the options for the end user.

Because fields are global across an environment, all fields need a unique variable name when they are created. They can also be set as required during configuration, so that if the field is associated with a blueprint, it must be filled out before the configuration can be saved.

Text fields accept any characters entered into the field up to 2000 characters. The field definition allows the admin to specify minimum and maximum field lengths and a static default value.



Numbers fields accept only numeric characters in their fields. The field definition requires the admin to specify whether the field will be used as a number, currency, or percentage. Optional settings include minimum and maximum values and a default value. The unit label setting is not currently used in the application.

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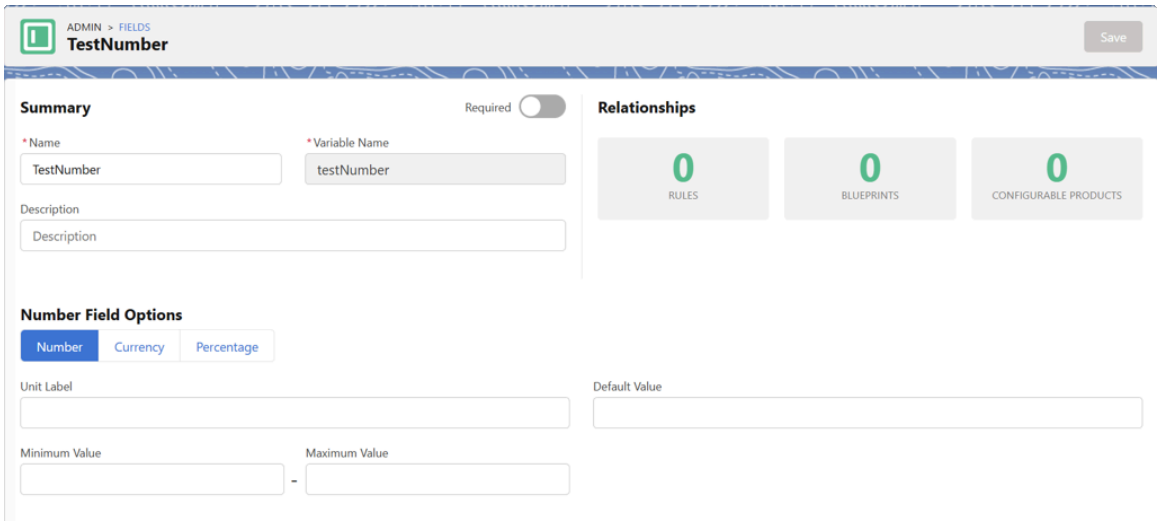
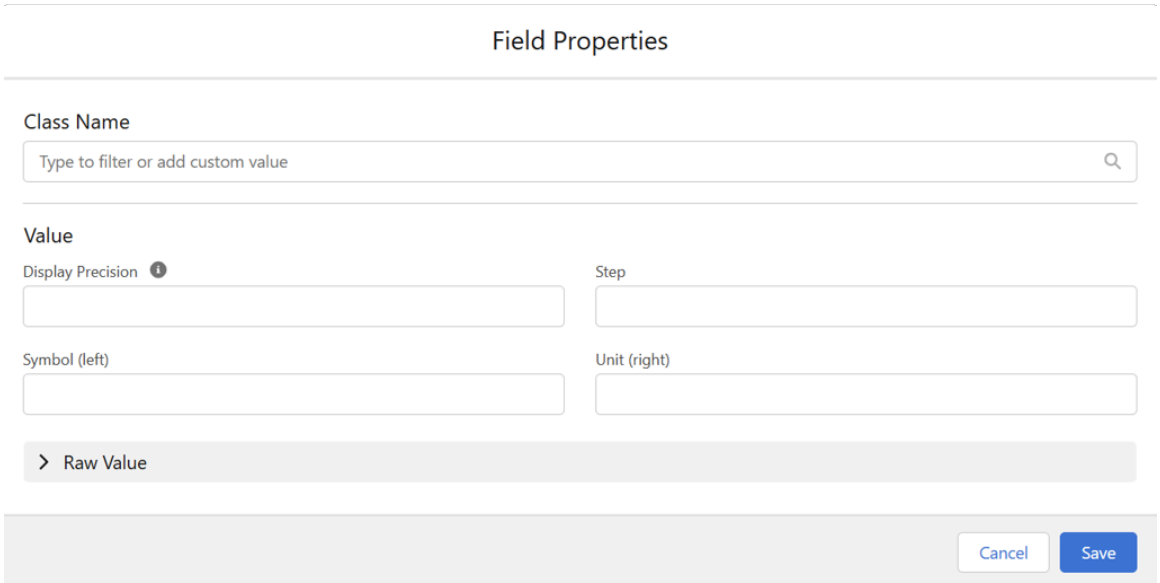
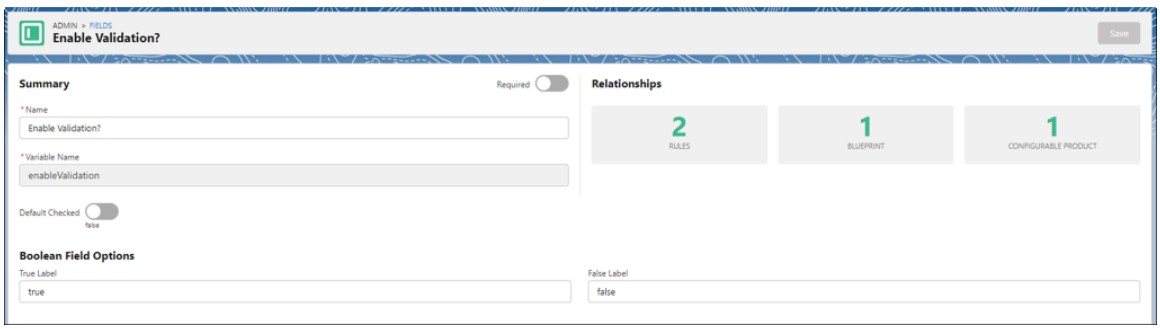


To specify the display precision of a numeric value, in the CPQ layout, click the gear icon in the number field. Then, set the precision in the Display Precision field.



Boolean fields accept only two values: true and false. The field definition allows the admin to specify a true label, a false label, and a default value. Unless specified, the default true label is Enabled and the default false label is Disabled. The default state is false.



Picklists are fields that only allow specified options to be selected, such as catalog items. When defining the field, the admin must specify whether the field is single-select, where the user must select one value, or multi-select, where the user can select as many values as desired. If the field is single-select, the admin must also specify whether the option values should be evaluated as a

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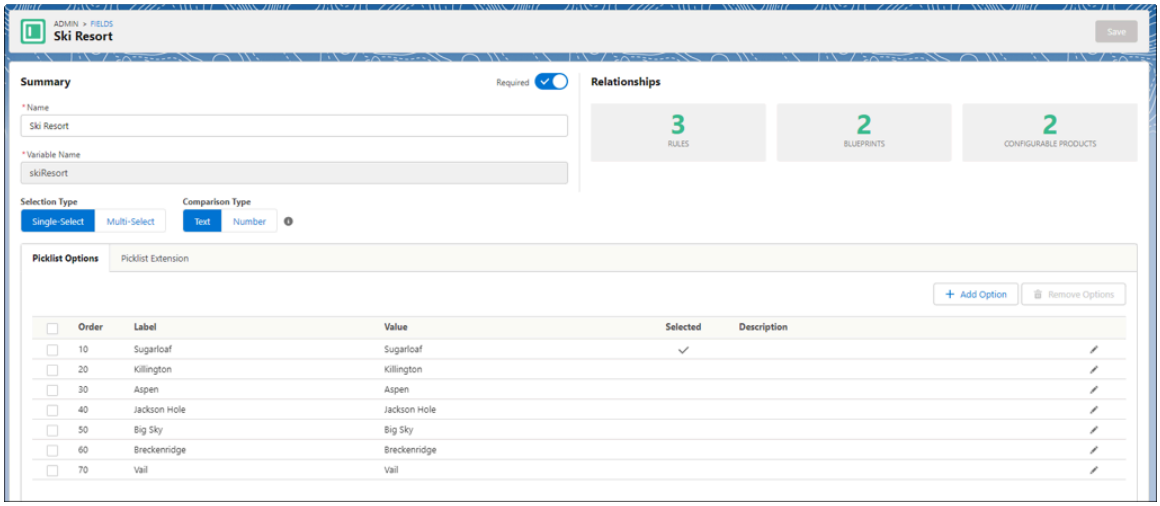
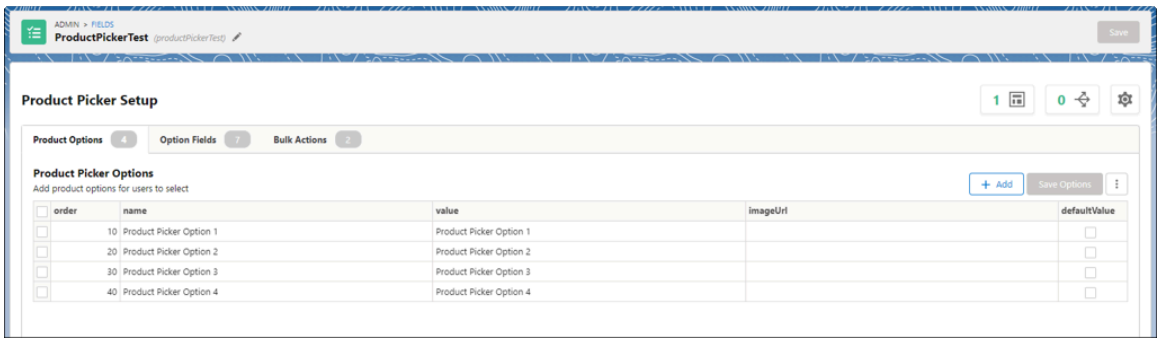
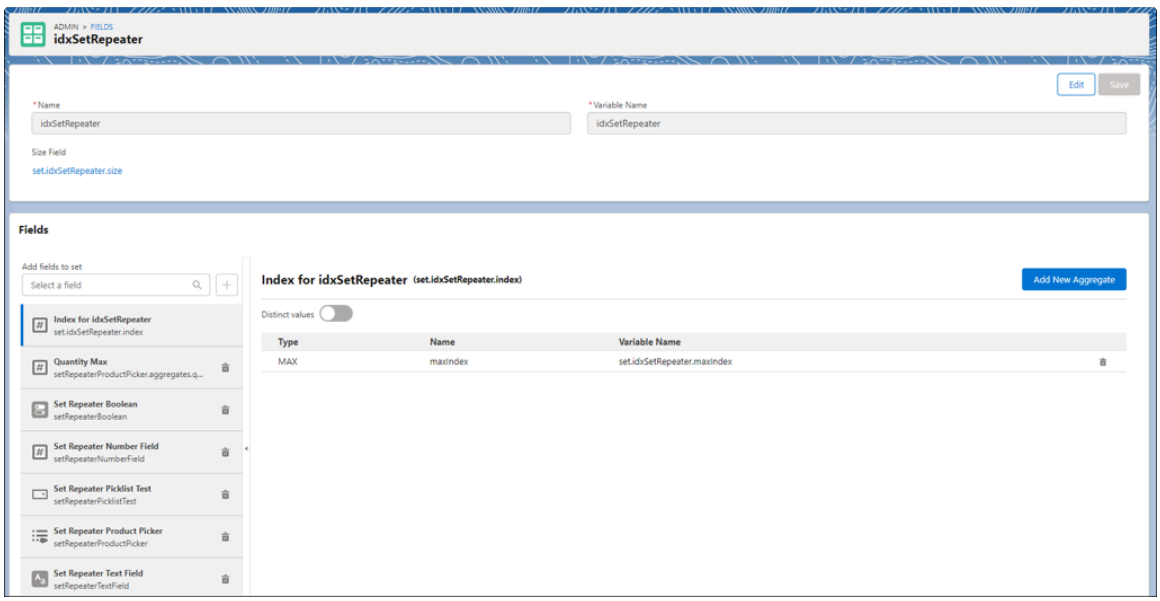
text field or a number field. The admin can also add field options, set an order, or a default value or values, and add picklist extension data if necessary.



A product picker is like a picklist with extended data. product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules.



A set is a collection of fields that interacts only with the fields in their own row and column.



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Sample blueprint showing field options and display variations

The following blueprint includes all the different field options and display variations. This ZIP file contains the layout CSV files that show how to set the component display types for each option.

Component Display type blueprint

Related topics

- CPQ fields, system fields, and partner fields
- Field type display options
- Grid-style fields and field collections
- Boundaries and limits

Create a field using the Administration UI

Learn how to create a field in the CPQ UI for use in Blueprint.

Before you begin

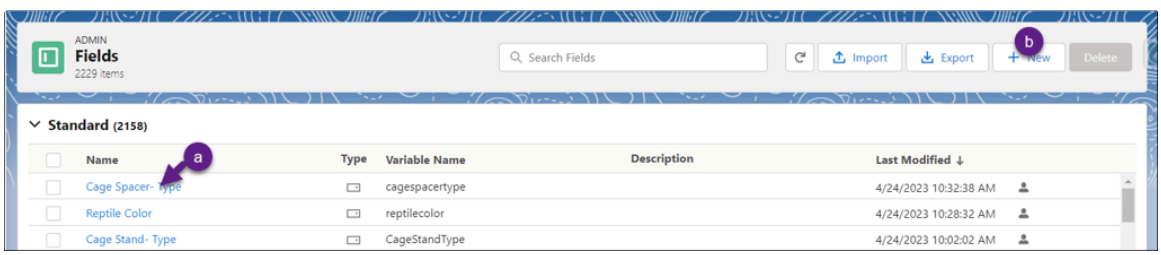
Role required: Admin

Procedure

1. In the CPQ navigation pane, click **Fields**.



The Fields administration page opens, listing the fields in the current environment.



To edit a field, click its name (a). To create a new field, click **+ New** (b).

2. Click **+ New**.
3. In the New Field window, name the field and select a field type.

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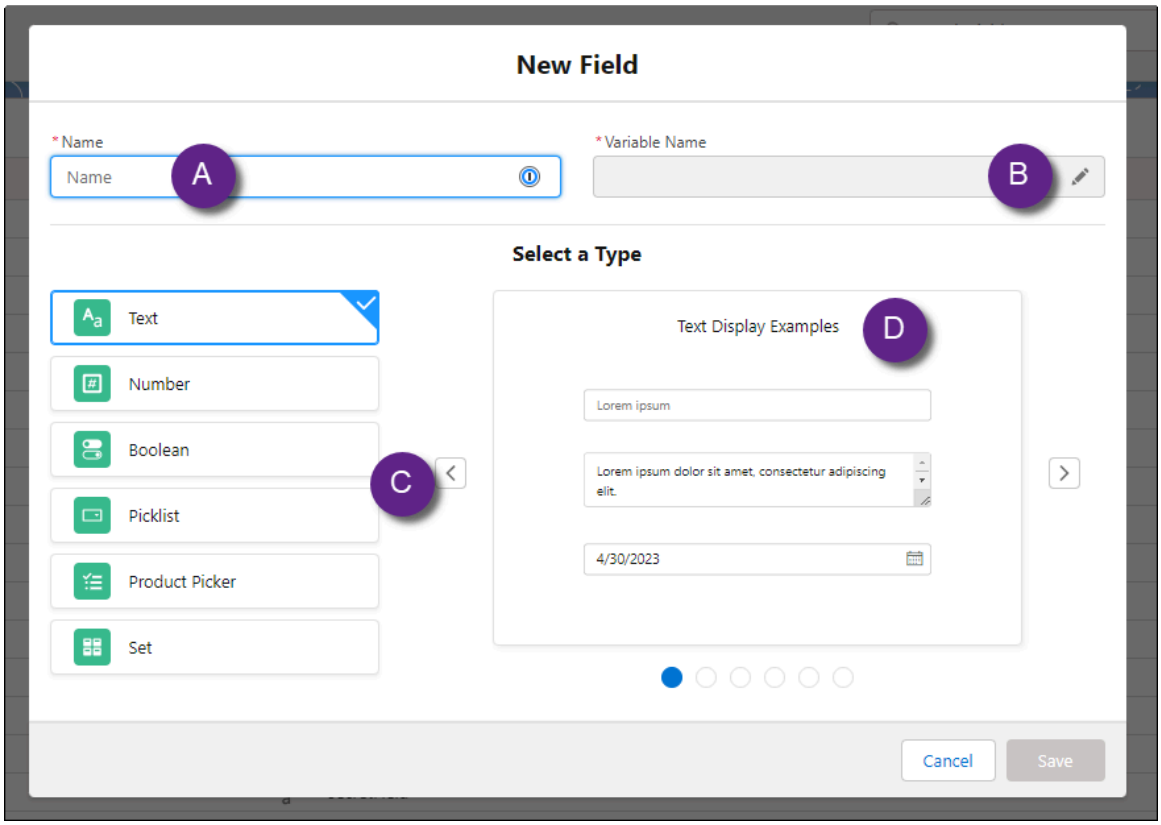

- (A) Valid field names can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # " !
- (B) The variable name is automatically populated. To set a different variable name, click the pencil icon. (You cannot edit the variable name later.) Valid field variable names consist of letters, numbers, and underscores. The first and last character must be a letter or number.
- (C) Fill in the type-specific details, as necessary.
- (D) The New Field window shows the Component Display Types available for the field type.

4. Click **Save**.
   If you need to create a large number of fields or field options, use the Matrix Loader.

   When you create a field, it becomes available to any layout or rule in the environment. However, you must associate a field with a blueprint so that the field can be used in a configuration experience.

What to do next

Associate a field with a blueprint

Related topics

Configure the Matrix Loader

Associate a field with a blueprint

Associate a field with a blueprint so that the field can be used in a configuration experience.

Before you begin

Role required: Admin

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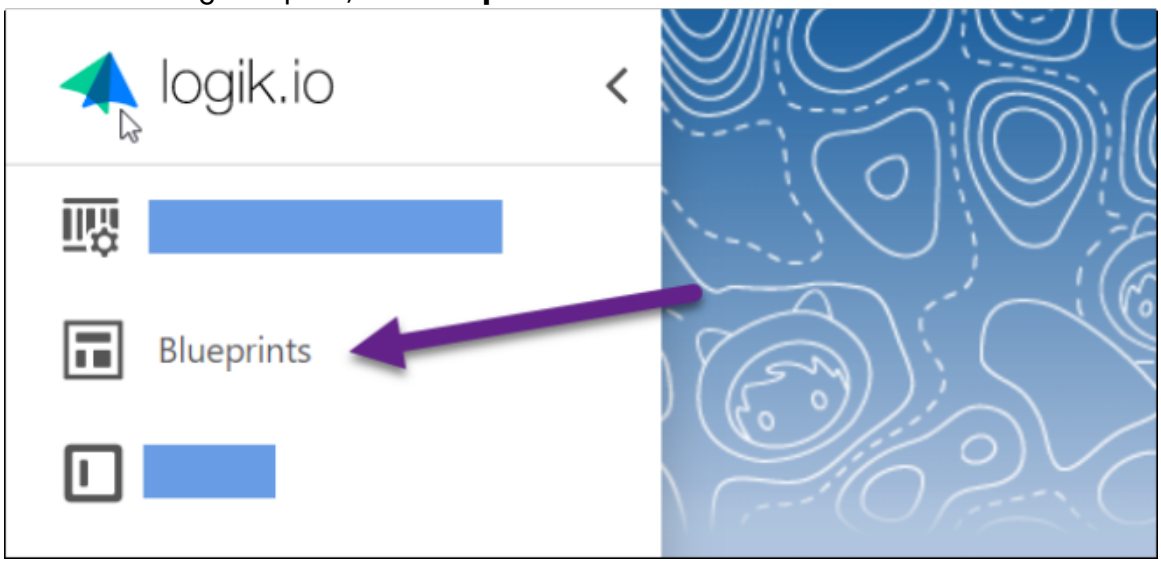
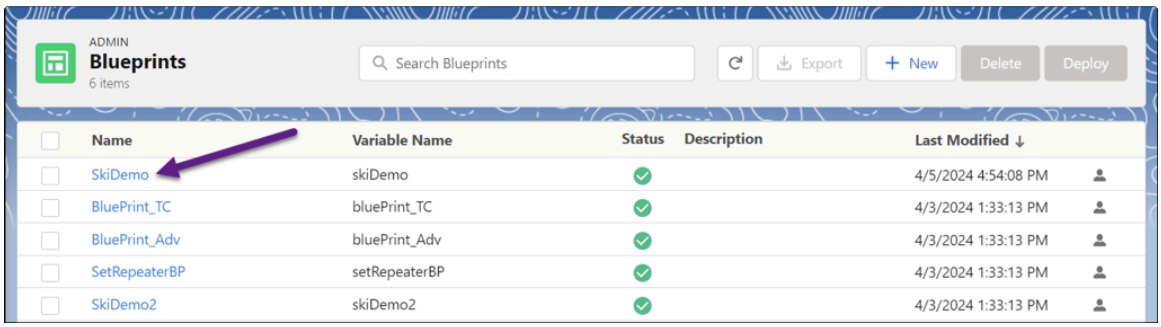
Procedure

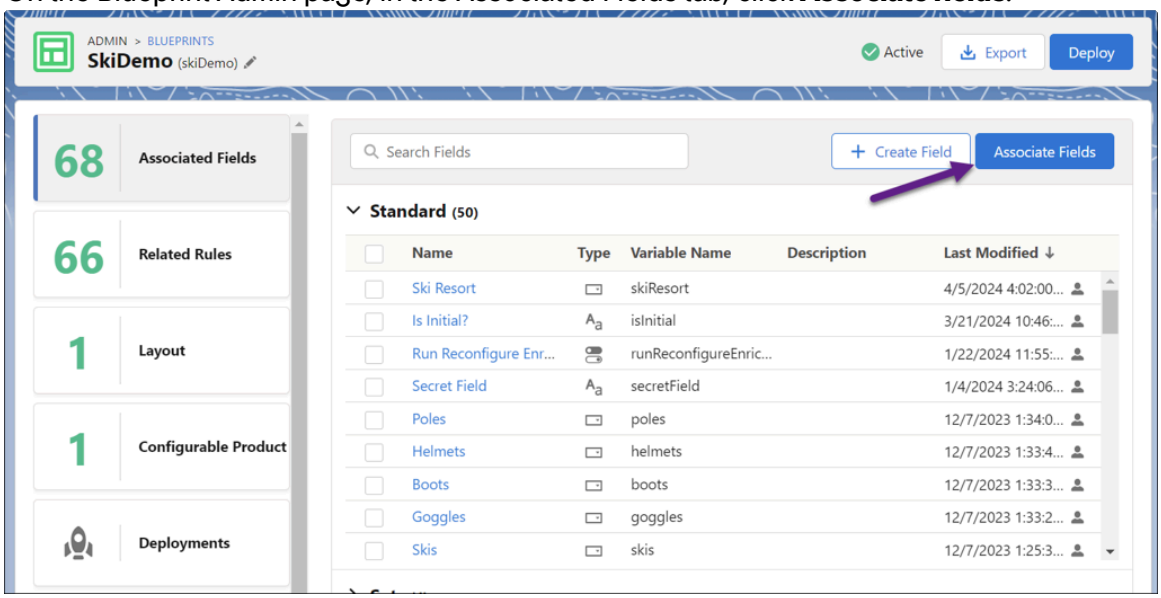
1. In the CPQ navigation pane, click **Blueprints**.



2. On the Blueprints page, click the name of the blueprint with which you intend to associate your field.



3. On the Blueprint Admin page, in the Associated Fields tab, click **Associate fields**.



4. In the Associate Additional fields window, select the fields to associate with the blueprint, and then click **Done**.

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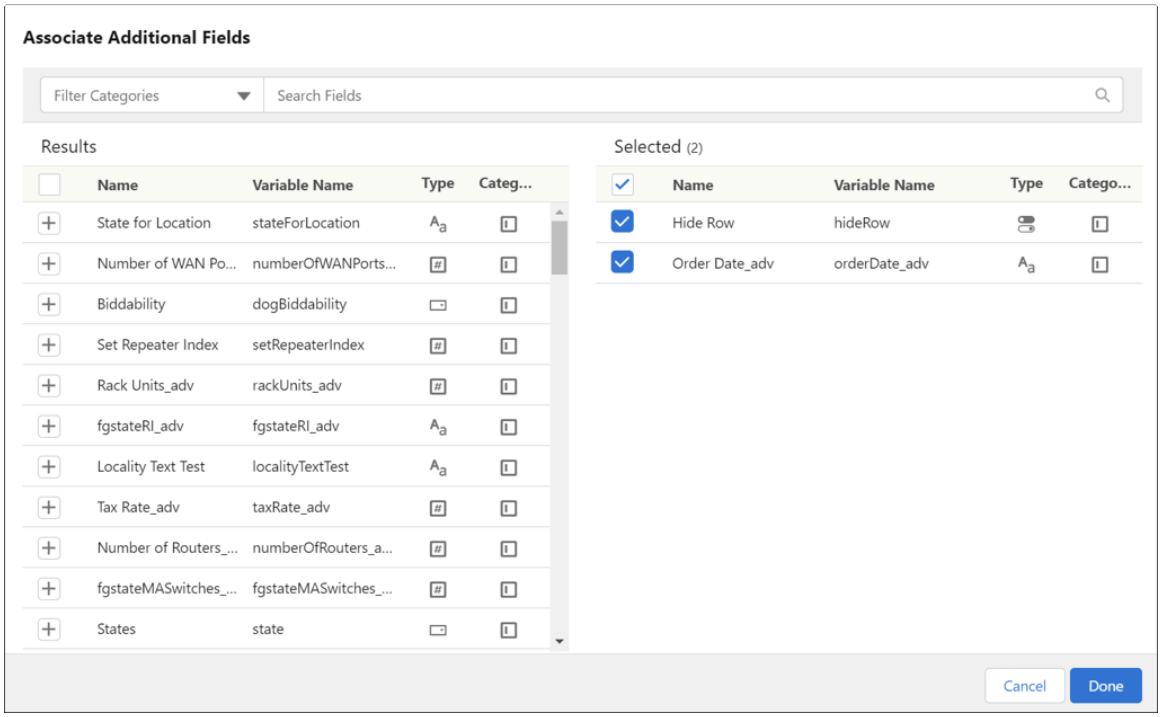
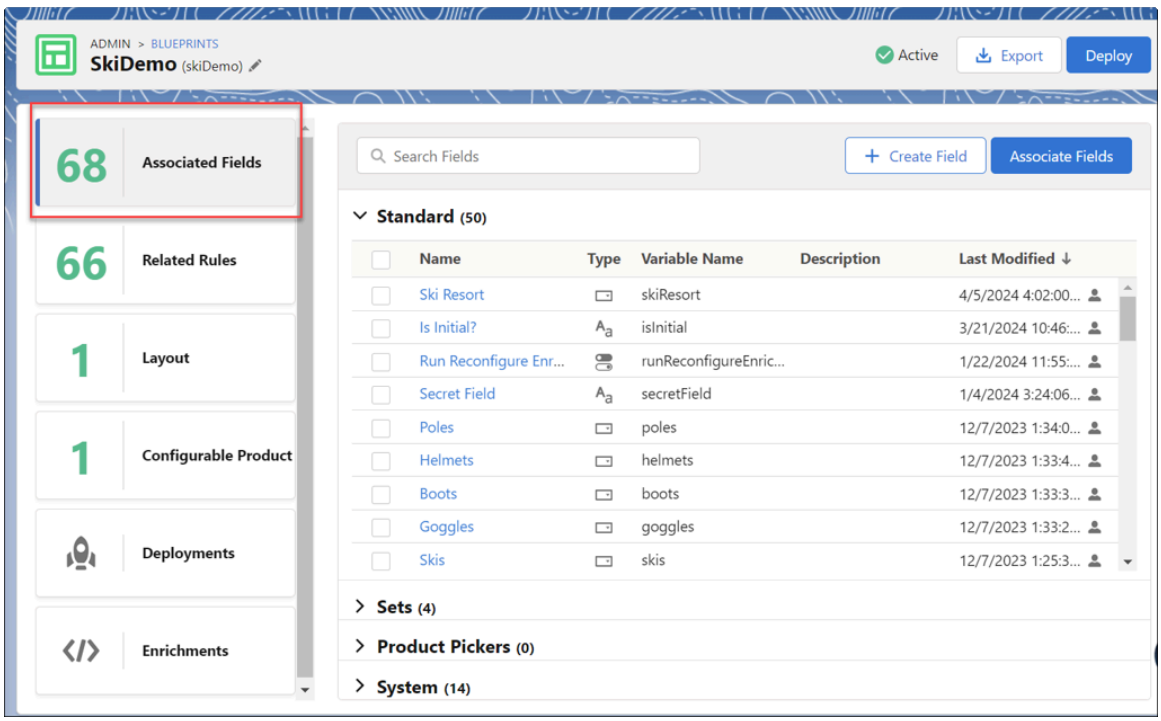


The fields associated with the blueprint are listed on the Fields tab of the blueprint administration page.



Related topics

Create a field using the Administration UI

Enable Markdown in text fields

Markdown lets you format rich text using an easy-to-remember plain text syntax.

Before you begin

Role required: Admin

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About this task

CPQ text fields support Markdown, a widely used, lightweight markup language for formatting text using plain-text syntax.

Procedure

1. In the layout editor, click the gear icon.
2. Enter the following JSON text as the raw value for the field properties:

```
{
  "enableMarkdown": true
}
```

3. Click **Edit Field Info**.
4. Select ReadOnlyText as the display type for the field that will accept Markdown text.

Related topics

Markdown syntax

Markdown options for read-only text

Markdown syntax

Markdown provides a simple way to format content using plain text syntax. Use Markdown to apply basic text styling, insert links, and add images by using a small set of intuitive symbols that render consistently across supported CPQ experiences.

Text formatting

Add asterisks or underscores around the text to bold or italicize.

- A single layer of marks italicizes: *italic* or _italic_
- A double layer of marks emboldens: **bold** or __bold__
- A triple layer both italicizes and emboldens: ***bold and italic*** or ___bold and italic___

Links

The following syntax creates a clickable URL:

`[link text](URL)`

[The ServiceNow home page](https://www.servicenow.com/)

Images

The following syntax inserts images via a URL:

`![alt text](image URL)`

Related topics

Enable Markdown in text fields

Markdown options for read-only text

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Markdown options for read-only text

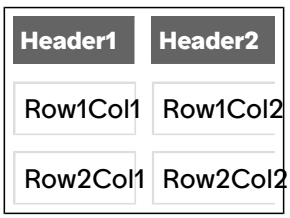
Enable markdown formatting for ReadOnlyText components in CPQ layouts to enhance text presentation. Use syntax for bold, italics, lists, links, images, and dynamic field values to create clear, engaging, and context-aware display text in configurations.

This article describes the markdown syntax and behaviors available to administrators when a text field is defined on a native CPQ UI layout with component display type ReadOnlyText. For a broader discussion of layout options, see CSV layout upload.

To apply markdown formatting to a ReadOnlyText component:

1. In the layout editor, open the field properties (button with cog icon)
2. Add the following as the raw value: `{ "enableMarkdown": true }`
3. Use the following markdown syntax in the text field value.

Markdown formatting options

Formatting Option	Syntax	Output	Notes
Bold	**this will be bold**	**bold text**	A double underscore instead of the double * will also work
Italics	*this will be italic* _this will be italic_	italic text	A single underscore instead of the single * will also work
Unordered List	Item\r- Item\r- Item	• Item • Item • Item	
Ordered List	1.Item\r2. Item\r3. Item	1. Item 2. Item 3. Item	
Newline	\n		
Link	[link display text] (https://www.example.com)	link display text	Any JavaScript entered will be sanitized
Image	![alt text](image url, "title text")	N/A	
Table	| Header1 | Header2 | \n|---|---|\n| Row1Col1 | Row1Col2 |\n| Row2Col1 | Row2Col2 |		By default, columns are left-aligned. To right-align, use `- - - :`. To center, use `: - - - :`. By default, table borders are off. To add borders, add

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Markdown formatting options (continued)

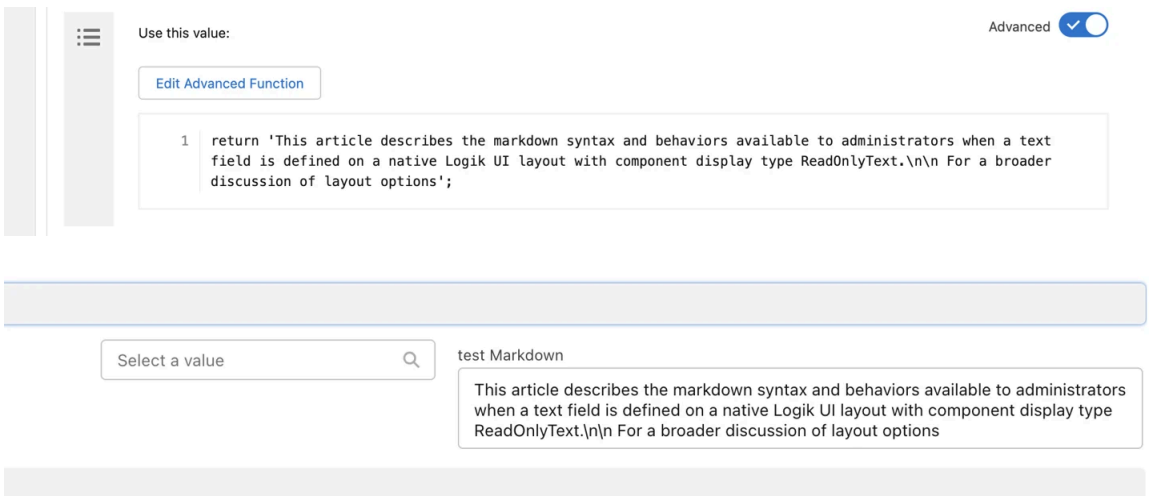
Formatting Option	Syntax	Output	Notes
			theme property `Markdown-table-borderWidth: 1px`.
Dynamic Text	{{fieldVariableName}}		Outputs the value of the selected field in the text
Dynamic Non- Field Text	{{txn#rowNumber}}		Outputs the value of the dynamic text based on context Currently, only rowNumber in a txn line is supported

This markdown syntax is the same as that available for field help popups.

Returning strings with Markdown

When you return a string with Markdown, enclose the string in double quotes, especially when using escaped characters such as `\n` for line breaks. Using single quotes may prevent Markdown from rendering properly and can lead to unexpected results.

For example, when the following return function is entered, it leads to the escaped characters appearing in the output:



When the return function encloses the same text in double quotes, the output appears as intended:



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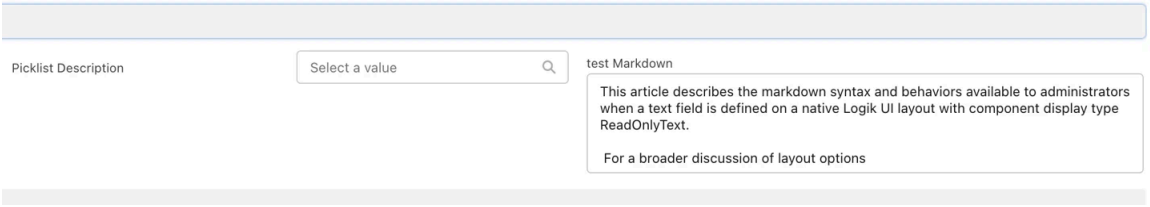


CPQ fields, system fields, and partner fields

Learn about the three types of fields in CPQ—CPQ, system fields, and partner fields. Understand how each type stores, retrieves, and displays data in configurations, and how they interact with Salesforce and partner systems for seamless data integration.

There are three categories of fields in the CPQ environment: CPQ fields, system fields, and partner fields.

CPQ fields

A CPQ field is a user-defined field that is custom to the CPQ environment. Its type can be number, text, picklist, set, or product picker. When users create fields in CPQ, they can manually assign default values in the field definition, or they can set values through determination actions.

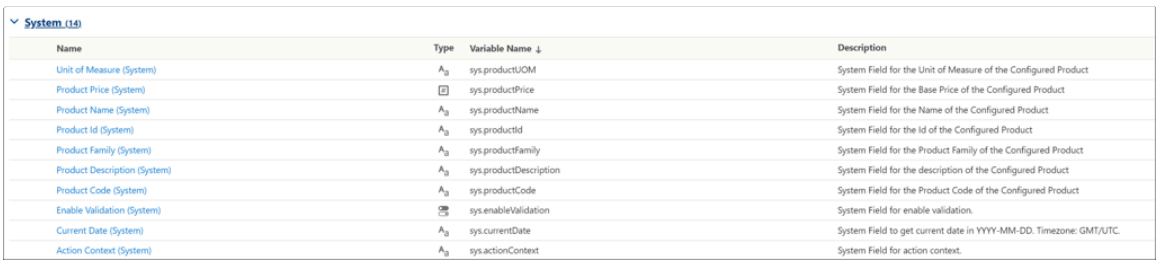
The following example shows how a user would set a CPQ field in an On Configure/Reconfigure enrichment:

```
cfgRequest.testField.set("value", "Hello World");
```

For a more complete description of CPQ fields, see Configure fields.

Note: In organizations that do not use Salesforce for their launch-point into CPQ, all fields must be initialized in their API call.

System fields



System (14)

Name	Type	Variable Name	Description
Unit of Measure (System)		sys.productUOM	System Field for the Unit of Measure of the Configured Product
Product Price (System)		sys.productPrice	System Field for the Base Price of the Configured Product
Product Name (System)		sys.productName	System Field for the Name of the Configured Product
Product Id (System)		sys.productId	System Field for the Id of the Configured Product
Product Family (System)		sys.productFamily	System Field for the Product Family of the Configured Product
Product Description (System)		sys.productDescription	System Field for the description of the Configured Product
Product Code (System)		sys.productCode	System Field for the Product Code of the Configured Product
Enable Validation (System)		sys.enableValidation	System Field for enable validation.
Current Date (System)		sys.currentDate	System Field to get current date in YYYY-MM-DD. Timezone: GMT/UTC.
Action Context (System)		sys.actionContext	System Field for action context.

System fields are predefined. System fields cannot be assigned a default value because they leverage the SFDC product cache (or the current date and time) to generate their values.

The following example shows how a user would call a system field in an On Configure/ Reconfigure enrichment:

```
let pC = {"input2":cfgRequest.sys.productCode.value};
```

System fields can be added directly to any layout. There are no issues with displaying them regardless of whether they contain predefined data.

In the layout editor:

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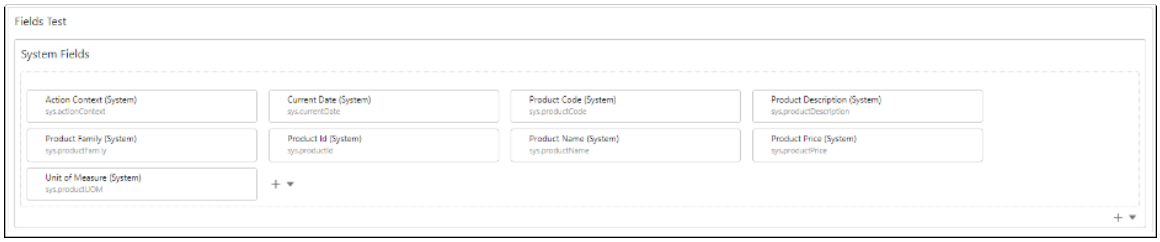


In the Configurator UI:

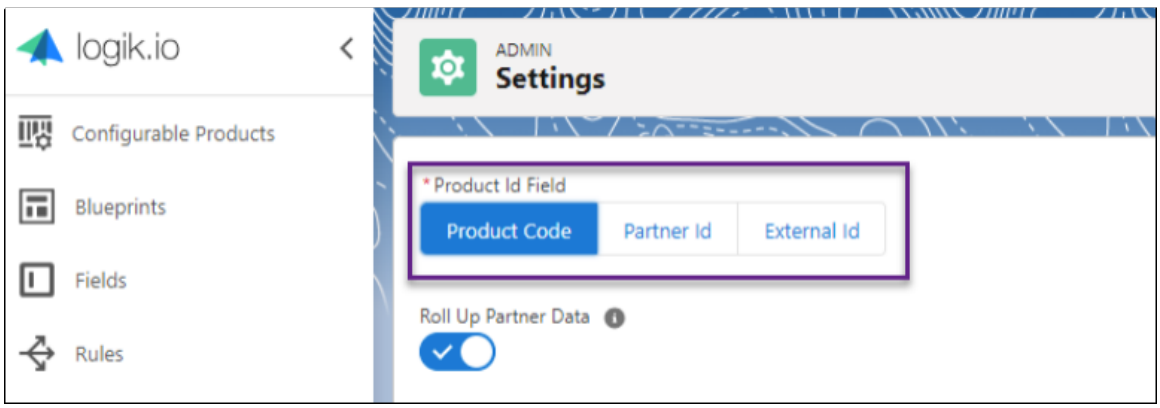


Unit of Measure is blank because in this example, it has not been defined in SFDC.

The mapping of each of these system fields to their respective SFDC object is as follows. The field API name is in parentheses.

- sys.productUOM > Product: Quantity Unit Of Measure (QuantityUnitOfMeasure)
- sys.productName > Product: Product Name (Name)
- sys.productFamily > Product: Product Family (Family)
- sys.productDescription > Product: Product Description (Description)
- sys.productCode > Product: Product Code (ProductCode)
- sys.enableValidation: value defaults to true
- sys.currentDate: Simple time API call, returns date of UTC
- sys.actionContext > Quote Line: Action Context (LGK ActionContext c)
- sys.productPrice > Price Book Entry: List Price (UnitPrice)
- sys.productId: value depends on Admin Settings

  sys.productId changes to whatever is defined in your CPQ environment settings. For instance, if the Product Id field was set to Product Code, the resulting data would be Product Code, making it identical to the sys.productCode field.



If the Product Id field was instead set to Partner Id, the data would be pulled from the SFDC field Product2 Id (ID as the field API name):

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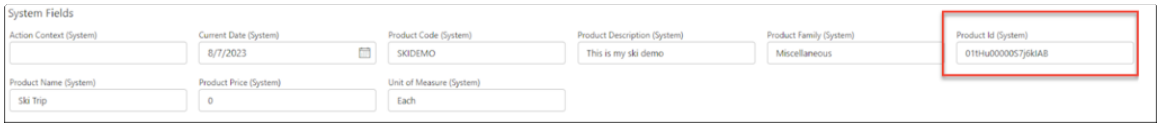
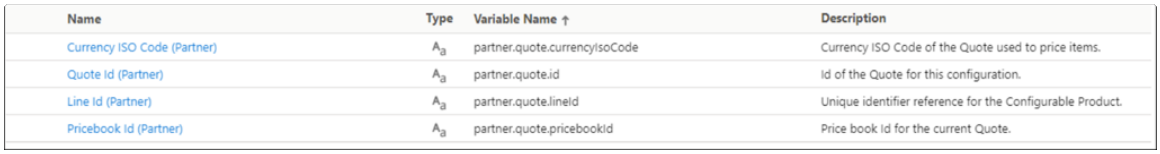


Partner fields



Name	Type	Variable Name ↑	Description
Currency ISO Code (Partner)	Aa	partner.quote.currencyIsoCode	Currency ISO Code of the Quote used to price items.
Quote Id (Partner)	Aa	partner.quote.id	Id of the Quote for this configuration.
Line Id (Partner)	Aa	partner.quote.lineId	Unique identifier reference for the Configurable Product.
Pricebook Id (Partner)	Aa	partner.quote.pricebookId	Price book Id for the current Quote.

Partner fields are fields that use a POST call to initialize a configuration via API. Partner fields leverage the partner's data set to generate field values.

The mapping of each of these partner fields to their respective SFDC object is as follows. The field API name is in parentheses.

- partner.quote.id Quote > Record ID (Id)
- partner.quote.lineId Quote Line > Record ID (Id)
- partner.quote.pricebookId Quote > Pricebook ID (SBQQPricebookIdc)
- partner.quote.currencyIsoCode Quote > CurrencyIsoCode

  partner.quote.currencyIsoCode defaults to USD if your organization does not have multi-currency enabled in their Salesforce Org. To enable multi-currency, follow the steps in this Salesforce article: Enable Multiple Currencies.

When using these fields, it's important to note that some of the data may not have any value (null) when the product is first configured. To make sure that there are no initialization errors, include null checks in any rules or scripts that utilize partner fields.

These fields cannot be directly added to a layout like system fields can. Instead, you can use CPQ fields to populate the data in partner fields via an initialization enrichment.

The following example initialization enrichment populates the values of the partner fields into the configurator:

```
let quoteId = cfgRequest.partner.quote.id.value;
let lineID = cfgRequest.partner.quote.lineId.value;
let currencyISO =
 cfgRequest.partner.quote.currencyIsoCode.value;
let priceBookID = cfgRequest.partner.quote.pricebookId.value;

if (quoteId != null) {
 cfgRequest.quoteIDTest.set("value", quoteId);
}
if (lineID != null) {
 cfgRequest.lineIDTest.set("value", lineID);
}
if (currencyISO != null) {
 cfgRequest.currencyISOCodeTest.set("value", currencyISO);
}
if (priceBookID != null) {
 cfgRequest.pricebookIDTest.set("value", priceBookID);
}
return cfgRequest;
```

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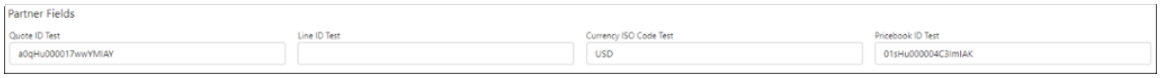
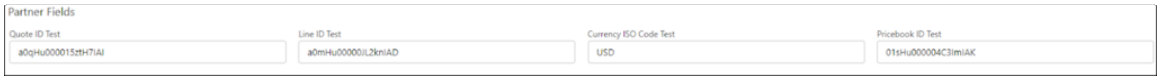
Initial configuration:



Reconfiguration:



Line ID is now populated.

How you use partner and system fields is up to you. Some organizations find it helpful to display this information in the configurator to the end user, while others use it in the background in rules to drive pricing conditions.

Related topics

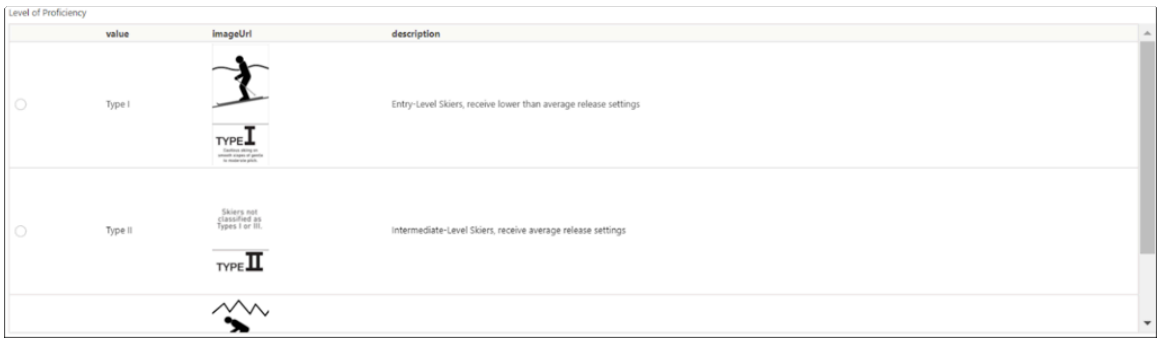
- Grid-style fields and field collections
- Configure fields

Grid-style fields and field collections

Learn about the various types of grid-style fields: the picklist extension, the field grid, the indexed set, the associated picklist set, and the product picker. Learn how best to choose a field type for your data.

In CPQ, although many grid-style fields and field collections look similar to an end user, they have different behaviors and uses for admins. This article explains the basic capabilities of each and their intended use cases. It also provides the necessary resources for those who want to explore each option's setup at a deeper level.

Picklist extension



A picklist extension is a field type that displays extended information. It may be used to show more option details or to show dynamic pricing options with the Picklist Extension Pricing enrichment. A picklist extension can include images and supports multi-select and single-select actions. It can send product information directly to the bill of materials (BOM).

A picklist extension uses exclusion rules and option filters to populate what end users see. Only one field is editable out of the grid (the selection).

For an overview of the picklist extension feature, see Picklist extensions.

For a deeper understanding of the back end and how to display picklist extensions, see Displaying a picklist extension on a layout.

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For an overview of the Picklist Extension Pricing enrichment feature, see The Picklist Extension Pricing enrichment.

For information about using picklist extensions in rules, see Picklists and picklist extensions in rules.

Field grid

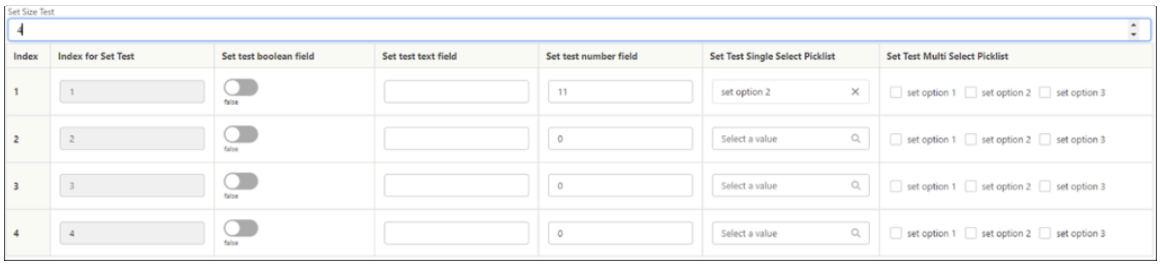


A field grid is a grid of independent fields in a format of rows and columns. It may be used to display similar and codependent fields in an easy-to-format pattern, when the number of fields to display is static, or when each field needs to be referenced outside of its own row and column.

Each field can be referenced and manipulated by any rule and must be independently defined. For example, a 3 x 3 row requires 9 fields.

For information about how to set up a field grid using the Matrix Loader, see Layouts: Field grid setup.

Indexed set



An indexed set is a dynamic set of repeating identical fields. It can be used to display options for a component that can be changed per component, or to aggregate costs and quantities for simple product rules. It tends to require little setup and maintenance.

Each field can be cloned and edited separately depending on an outside number field. You only need to create the fields in each row, not one field per cell.

Each set field can only affect the fields in its row.

Each column can be aggregated into a field that can be referenced outside the set. It can be configured to display across tiers.

For more information about sets, set aggregates (collections of sets) and about how to use sets in layouts, see:

- Configure sets
- Creating set aggregates
- Using sets in layouts

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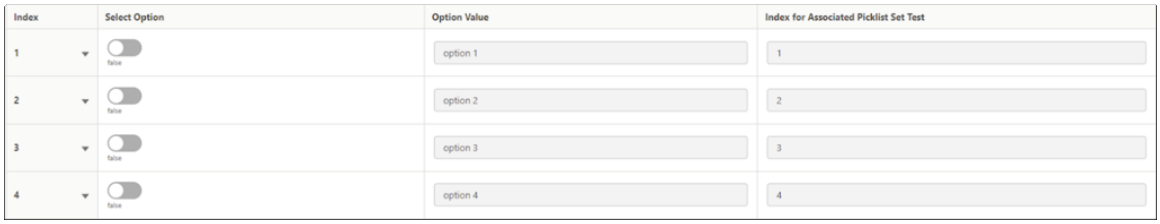
Associated Picklist set



An Associated Picklist set is a dynamic set of repeating fields based on the options of a picklist. It may be used to aggregate costs and work hours for distinct services, to limit the options of a configurable component, or to expand and use more field options for a picklist than a picklist extension.

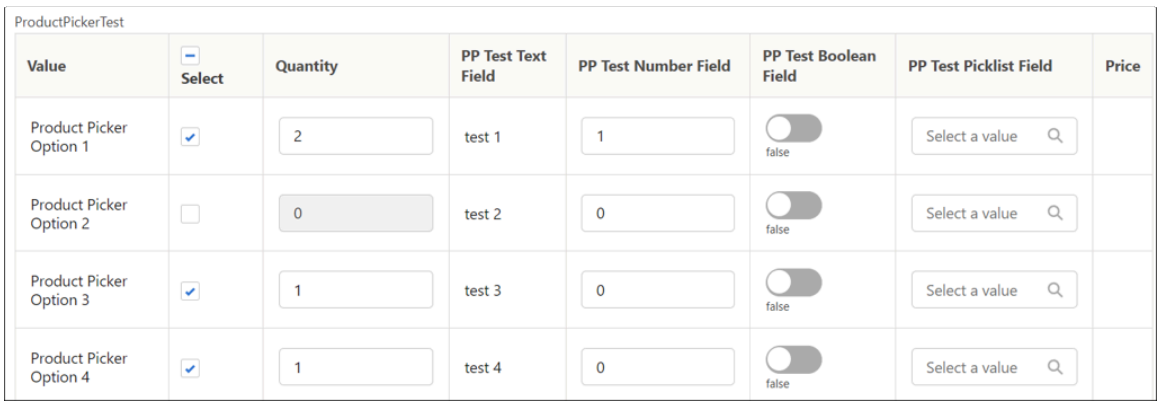
Each field can be cloned and edited separately depending on an outside picklist's selections. You only need to create the fields in each row, not one field per cell.

Each set field can only affect the fields in its row.

Each column can be aggregated into a field that can be referenced outside the set. It can be configured to display across tiers.

For more information, see Creating an associated picklist set.

Product Picker



The product picker field type is a product-based table of distinct options and qualities similar to the Associated Picklist set, but with built-in product rules. It may be used when product options need further information from the end user before being added to the BOM.

Each option is defined like a picklist, but every cell contains an editable field. You only need to define the options and fields, as shown in the row and column headers.

Value, Select, and Quantity are automatically added, and will automatically send end-user selections to the BOM. Field behavior in a product picker is determined by product picker bulk actions.

This field can affect fields outside the product picker by means of rules.

For more information, see:

- Product pickers
- Product picker bulk actions

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Related topics

- CPQ fields, system fields, and partner fields
- Configure fields

Field type display options

Field type display options

Users have many display options for the different field types. These are defined in the layout CSV in the Component Display Type column using the values in the parentheses for each type.

The admin uses the Component Display Type column to define how a field will display on a layout. The following types are available.

Available display types

Field type	Component display types
Text	ReadOnlyText Text TextArea Date LocationLookup
Boolean	Boolean Radio RadioButtons Checkbox
Number	Number NumberWithSubmit Slider ReadOnlyText ReadOnlyCurrency FormattedNumber
Picklist (single-select)	Picklist ReadOnlyPicklist ExtendedPicklist ExtendedPicklistDisplayOnly Radio

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Available display types (continued)

Field type	Component display types
	RadioButtons VerticalRadio SingleSelectPicklistGrid VisualPicker
Picklist (multi-select)	MultiSelectPicklist MultiSelectExtendedPicklist MultiSelectExtendedPicklistDisplayOnly MultiSelectPicklistGrid MultiSelectVisualPicker Checkbox VerticalCheckbox
Product picker	ProductPickerGrid VisualProductPicker

Text component display type

Text fields accept a maximum of 2000 entered characters. Administrators can specify minimum and maximum field lengths and a static default value. Text fields can have the following component display types.

Text: A single-line input. Examples demonstrate unpopulated and populated text fields because they are displayed on to the end user.



TextArea: A multi-line input field. The example shows a text area with force-set values populated.



ReadOnlyText: A display-only option. The example shows a text area with a heading and the displayed field details.

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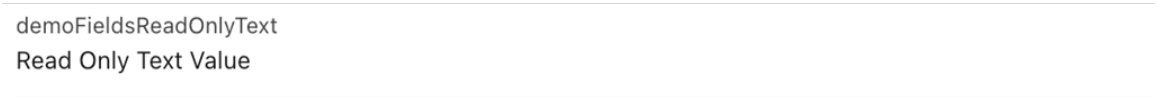
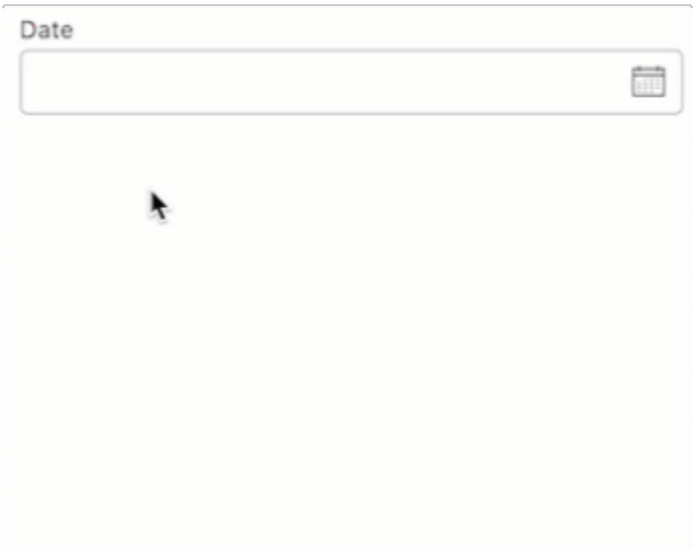
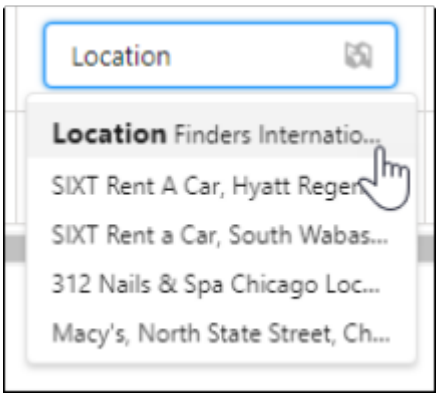


Date: A single-line input and searchable calendar option. Users can enter a date or search by using the calendar icon.



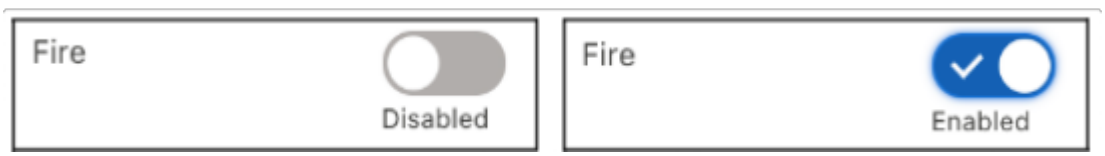
LocationLookup: uses the Google Places API to pull address data that can be used for unique location configuration and pricing.



Boolean component display type

Boolean fields only accept two values: True and False. False is the default state. Administrators can specify labels for each state. Unless specified, the default label for True is Enabled, and the default label for False is Disabled.

Boolean: Displays as a switch.



Radio: Displays as square radio buttons.

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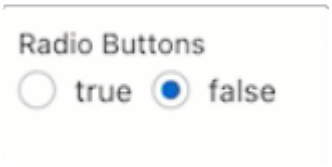
RadioButtons: Displays as circular radio buttons.



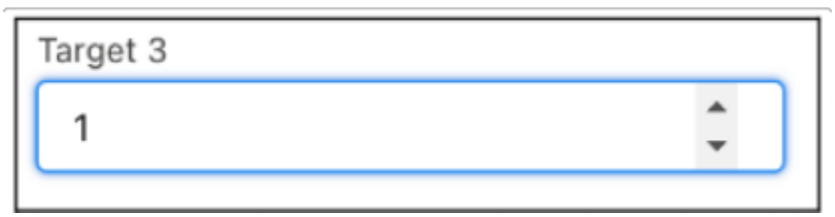
Checkbox: Displays either checked or unchecked.



Number component display type

Numbers fields accept only numeric characters. Administrator must specify whether the field will be used as a number, as currency, or as a percentage. Optional settings include minimum, maximum, and default values. The unit label setting is not used in the application.

Number: Users can enter a number using the keyboard or modify it by using the up and down buttons.



NumberWithSubmit: Users enter the number by using the keyboard and must click the "Apply" button before their input is accepted.



Slider: Users slide through range of available numbers. This field appears only if the field definition has a maximum value.



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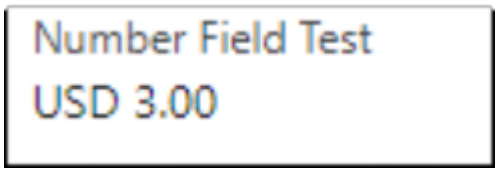
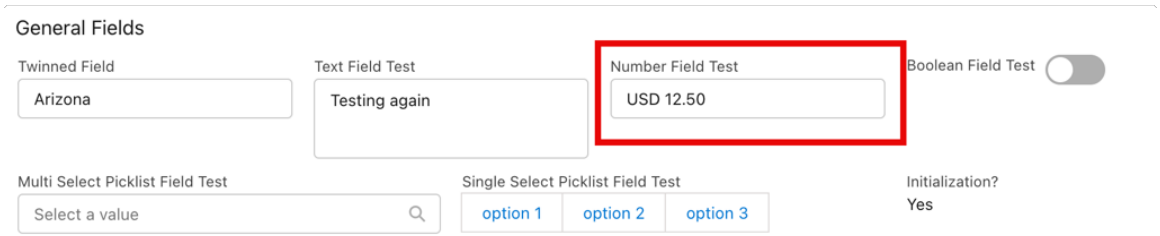
ReadOnlyText and ReadOnlyCurrency: Display-only options, similar to ReadOnlyText for text fields. ReadOnlyCurrency is a display-only option with currency formatting.



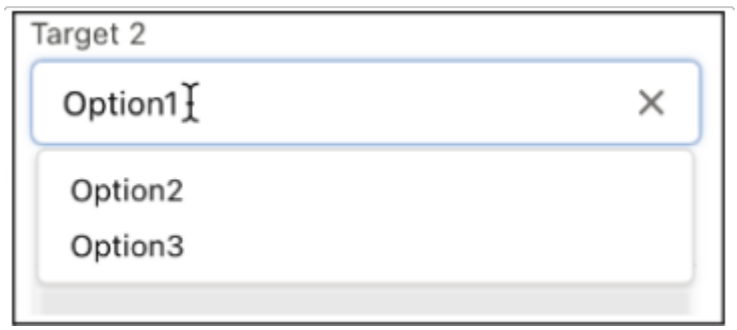
FormattedNumber: Users can enter a number by using the keyboard or modify it by using the up and down buttons. When the field loses focus, it displays in the format defined in the layout CSV.



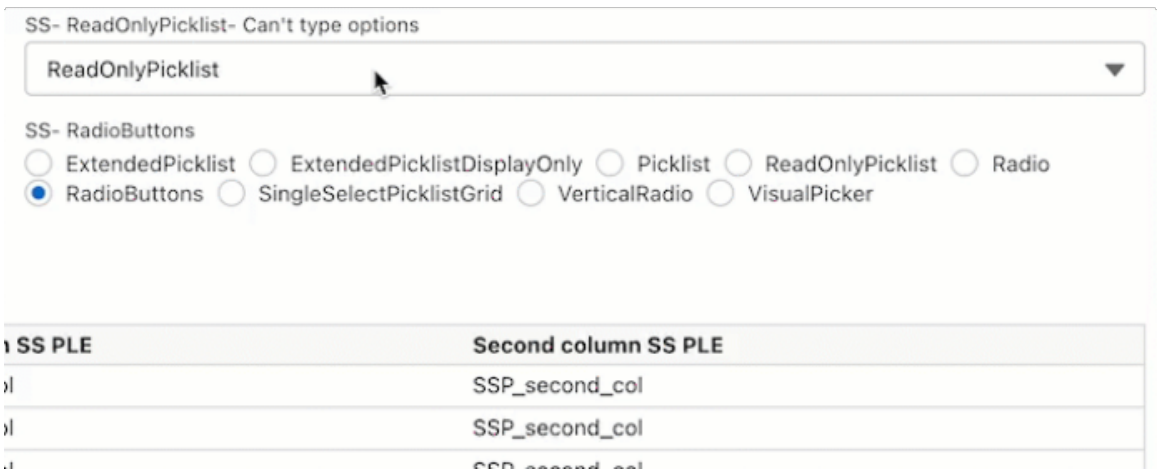
Picklist component display type (single-select)

Picklists allow only specified options to be selected. Administrator must specify whether the field is single-select or multi-select, and if it is single-select, whether the values should be evaluated as a text fields or a number fields. The administrator can also add field options, set the order, specify a default value, and add picklist extension data.

Picklist:



ReadOnlyPicklist: selection only: the user cannot type and filter options.



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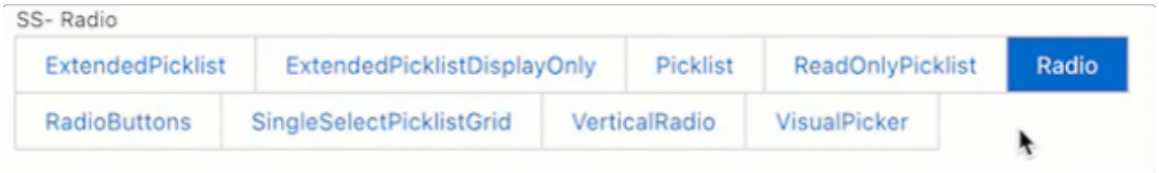
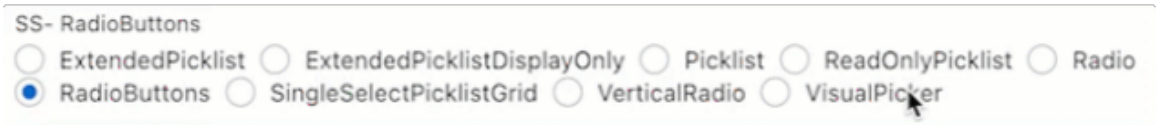
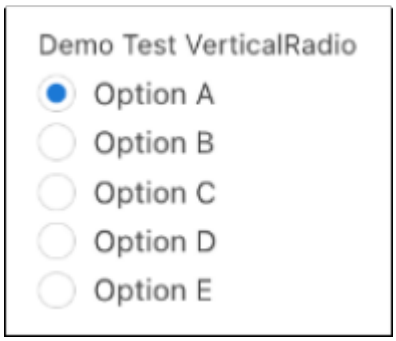
Radio: Displays all options in a square label display, making all options visible without the use of a menu.



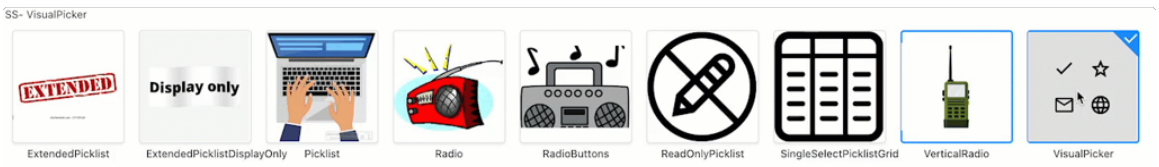
RadioButtons:



VerticalRadio: Options appear as vertical radio buttons.



Visual Picker: Displays the field's options using an associated image with a label below the image. Currently selected options are highlighted with a checkmark.



Picklist component display type (multi-select)

Checkbox: Displays options in row format with checkbox selection. multi-select picklists only.



Vertical Checkbox: displays checkbox selection in vertical alignment. multi-select picklists only.

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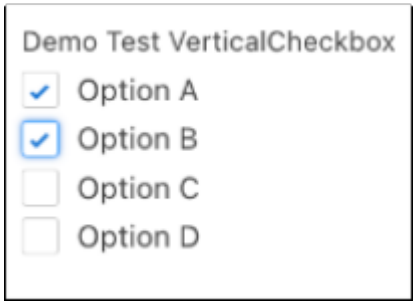
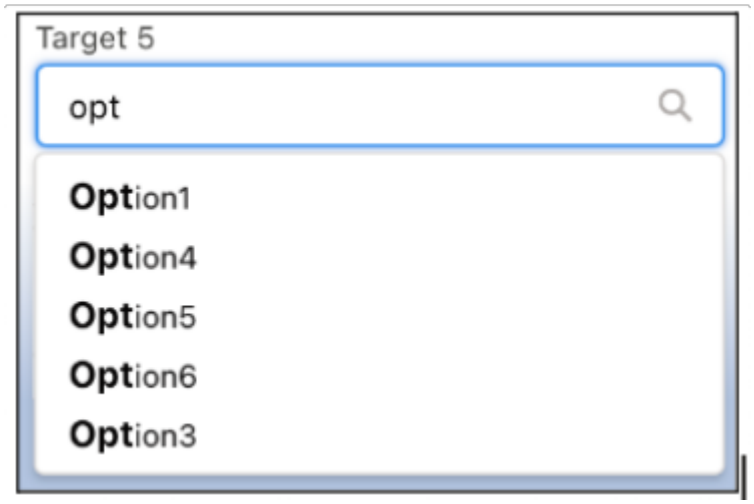
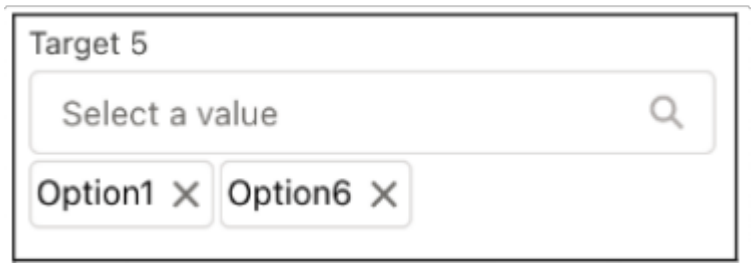


ReadOnlyPicklist: (same as single-select)

MultiSelectPicklist:





Picklist extension (PLE)

ExtendedPicklist and MultiSelectExtendedPicklist: Includes additional details from the PLE and lets users choose from a menu. The example shows that this single-select extended picklist displays details from two columns from the associated PLE. Images can be added to field options.

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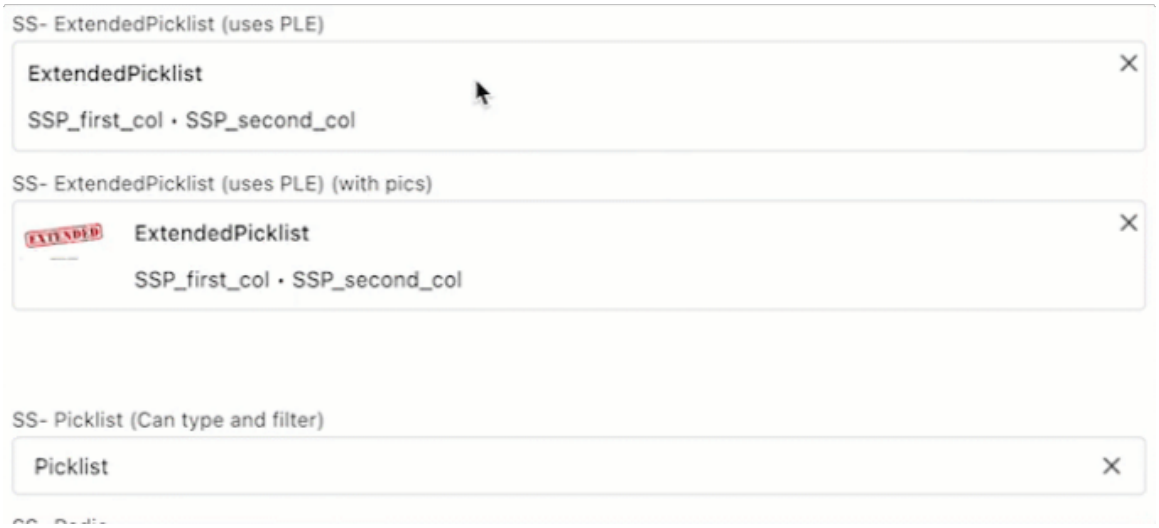
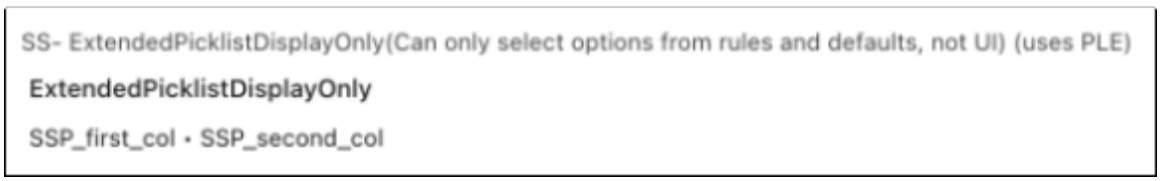
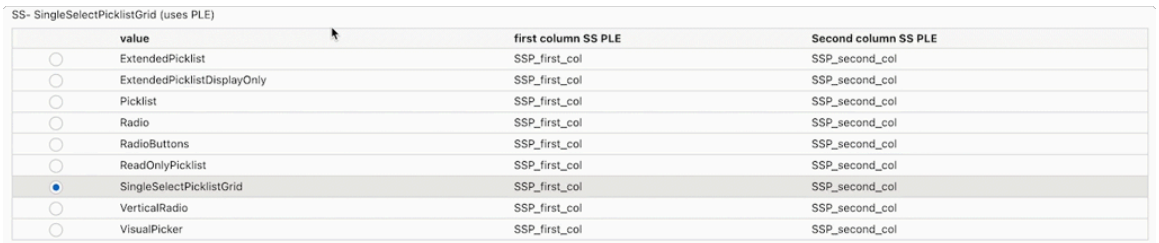


ExtendedPicklistDisplayOnly, MultiSelectExtendedPicklistDisplayOnly: Includes additional details from the PLE and displays the selection. Options are determined by rule and default options. Not user editable.



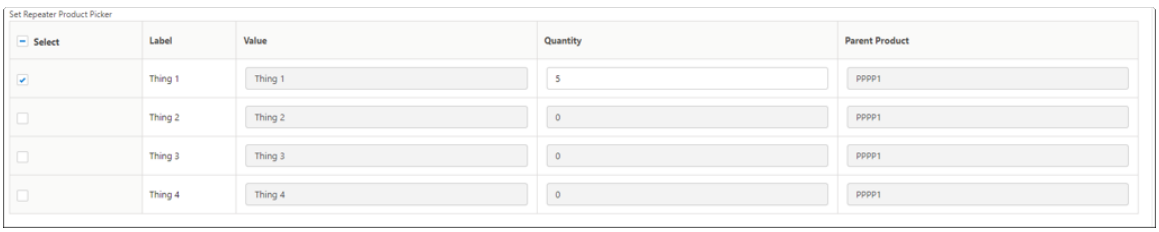
SingleSelectPicklistGrid, MultiSelectPicklistGrid, andSingleSelectPicklistGridCheckbox: Includes additional details from the PLE and displays field options in a grid. The Checkbox version lets the end user deselect their option.



Product picker component display type

Product pickers are similar to a picklists with extended data. Product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules.

ProductPickerGrid: Shows the product picker and its subfields in a grid format, much like a picklist extension.



VisualProductPicker: Shows the product picker and its subfields as a Visual Picker.

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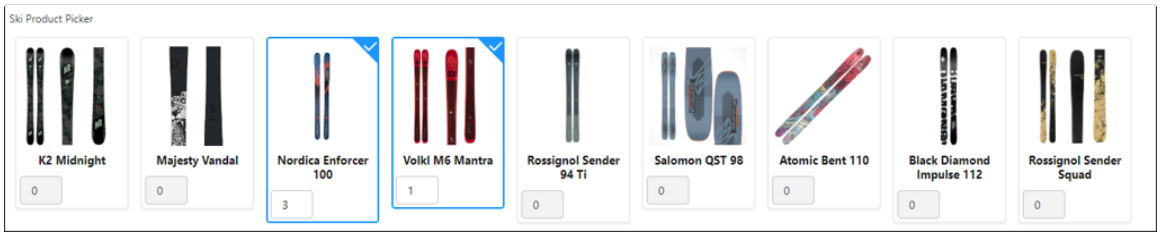


Related topics

Configure fields

Blueprint, configurable product, and field UI

View a list of updates and changes made in April 202(3)

Improvements in Admin usability and readability. No changes in functionality.

Revamped field, configurable product, and blueprint UIs.

Improved navigation. Breadcrumb links are used more extensively in the UI and dialogs.

Enhanced field association experience from the Blueprint page.

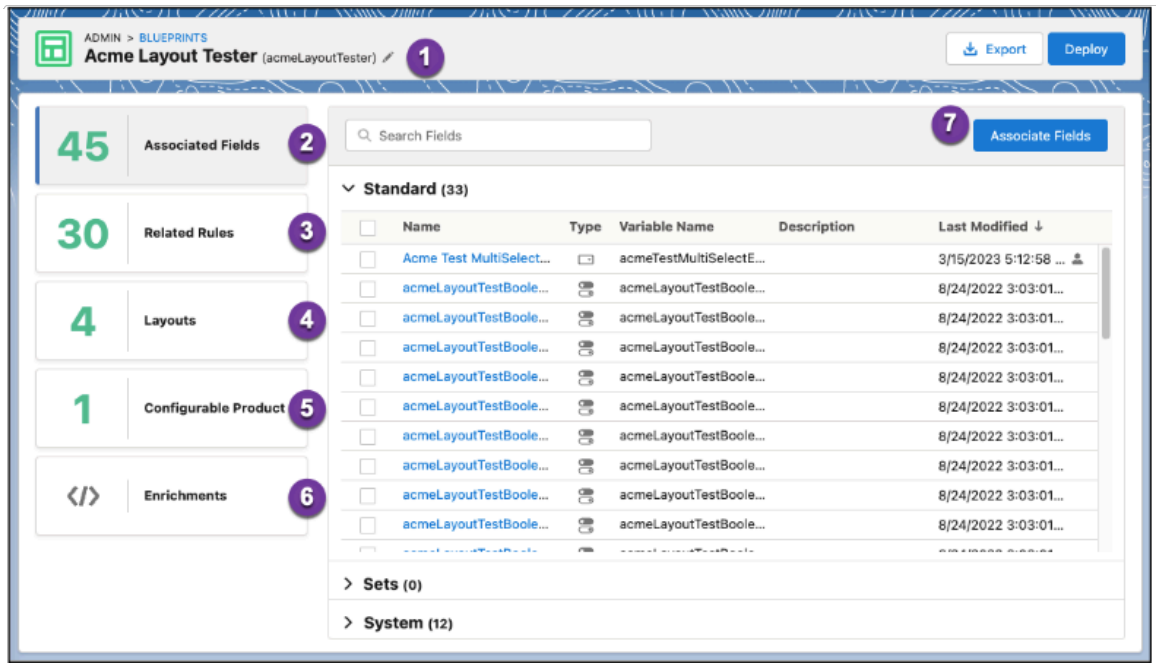
Field and set pages are consolidated into a single view.

Support for creating sets in the New Field dialog.

Updated blueprint UI

The relationship between the CPQ items and the blueprint can now be easily accessed via the tiles in the left column and the number of associated items is visible at a glance.

Each tile displays the appropriate UI for its object on the right of the screen.



(1) Edit: The blueprint variable name is displayed in parentheses. The blueprint name and description can be edited by clicking the pencil icon.

(2) Associated Fields: Fields for blueprint use the updated field UI with grouping.

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(3) Related Rules: Rules that are related to the blueprint.

(4) Layouts: Layouts for this blueprint.

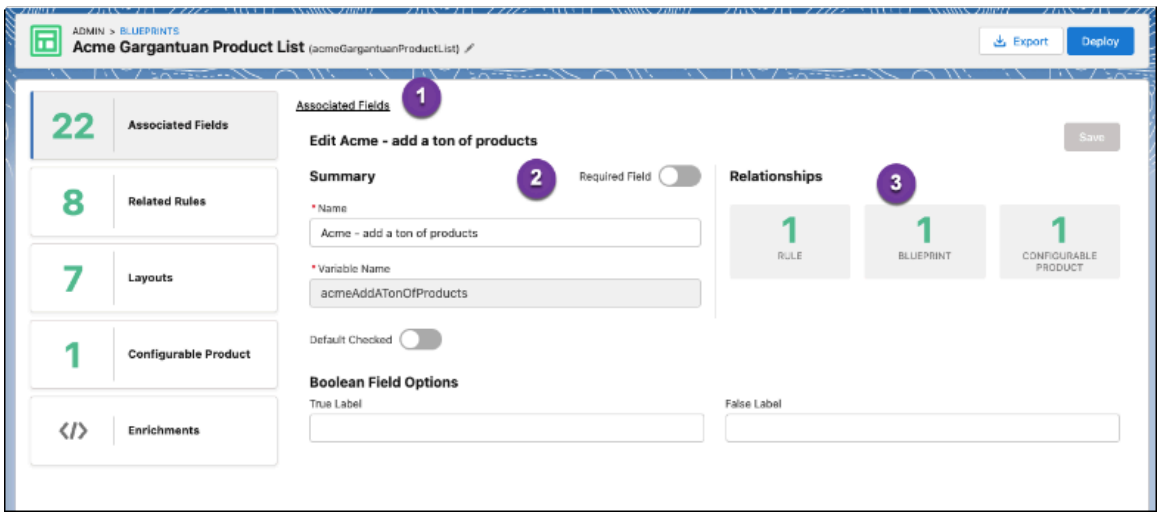
(5) Configurable Product: Configurable products that use this blueprint.

(6) Enrichments: The enrichment scripts for the blueprint.

(7) Associate Fields: Opens field association for the blueprint.

Updated navigation

In the updated UI for blueprints and configurable products, the navigation and editing experience has changed. When clicking a field or a rule, an editing page slides into the page instead of a dialog appearing. Additionally, there are now breadcrumbs for navigation and context.



(1) Navigation breadcrumb: Breadcrumb links are placed on the header to help maintain context and provide navigation.

(2) Edit page: The editing page replaces the table view of items in context, instead of the dialog view used previously.

(3) Relationship links: Maintaining consistency with editing a field through the main fields tab, the page layout and relationship links are shown.

Updated field association in blueprints

Field association to blueprints has also received a makeover. From the blueprint UI, with the Associated Fields tile selected, click the **Associate Fields** button to launch the new panel experience.

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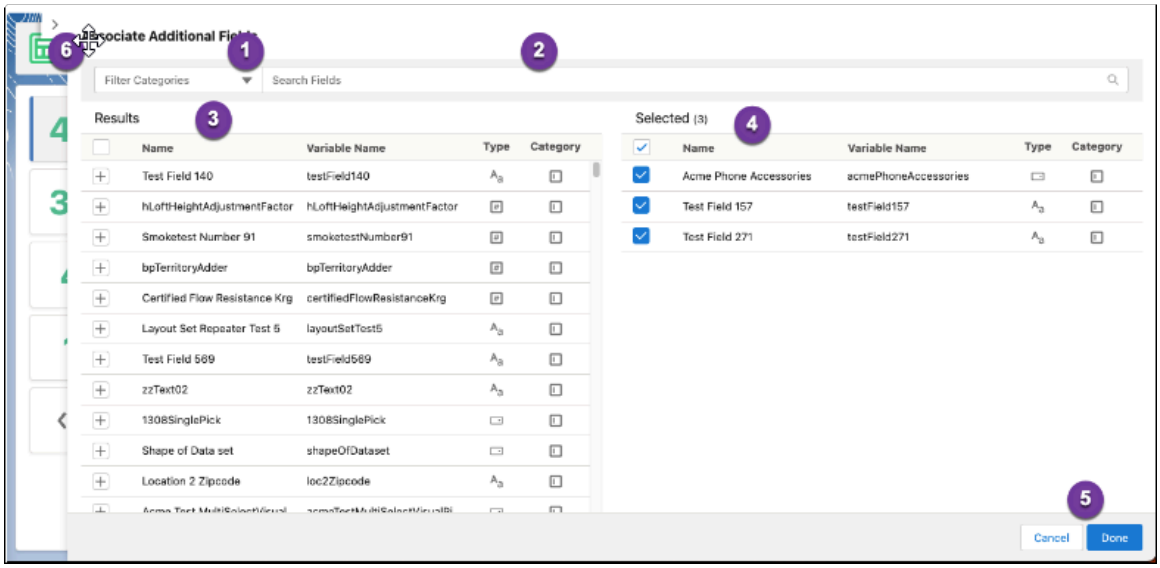

(1) Filter Categories: Fields can be filtered to “Standard” or “Sets” using the drop-down menu. The filter applies to both the results list and the selected list.

(2) Search: Fields can be searched and filtered using the search bar.

(3) Results: Field results appear on the left. Fields can be added by clicking the **+** icon. Selecting a field removes it from the results column and add it to the selected column.

(4) Selected: Selected fields and their details are displayed on the right. Click the check mark icon removes the field from the selected list.

(5) Actions: Two actions are available at the bottom of the panel, Cancel and Done. To save the changes and associate the fields to the blueprint, click Done. To close the panel without adding any fields, click Cancel. The panel can also be closed without adding fields by clicking the arrow at the top left of the panel (6).

Depending on the size of the browser window, you may see a stacked view of the Results (1, below) and Selected (2) field lists. The functionality remains the same.

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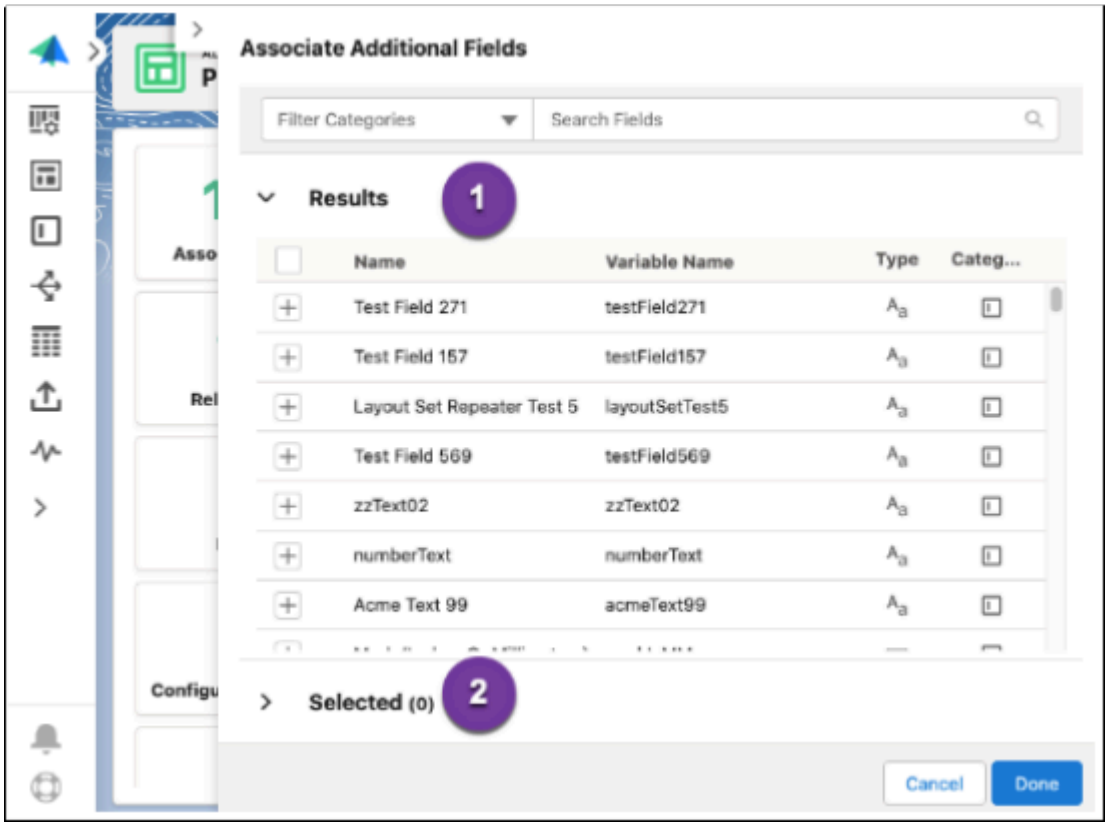
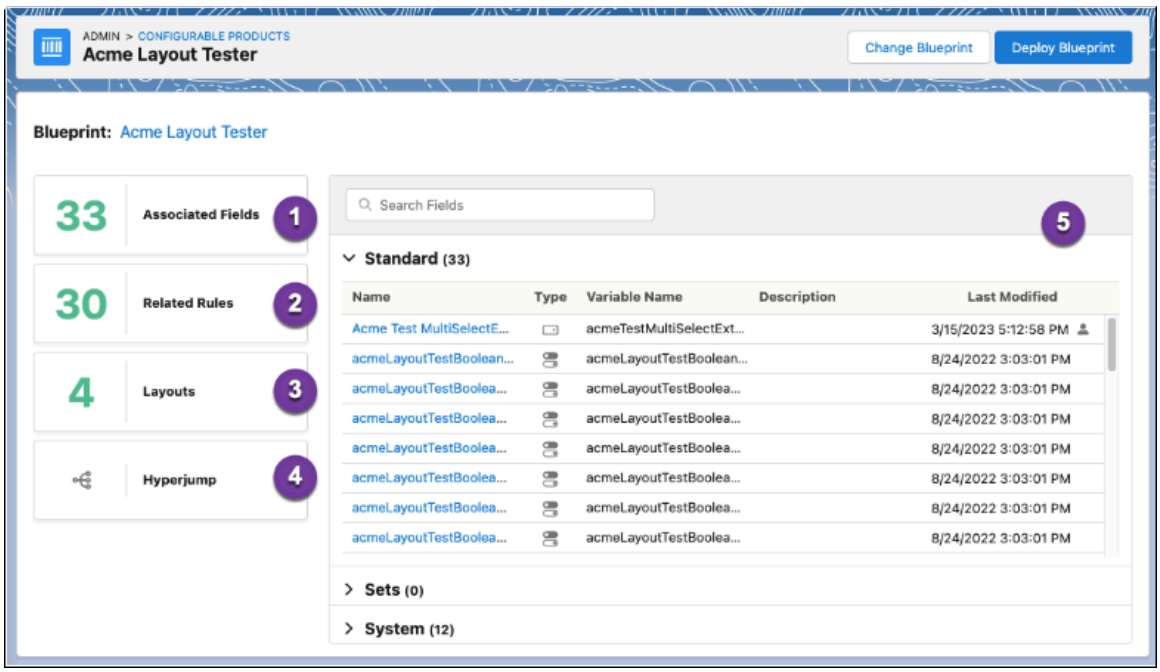


Updated configurable product UI

The configurable product UI has also received an update, to align with the blueprint UI and utilize the updated field UI.



Similar to the blueprint UI, tiles on the left control what is displayed on the right.

(1) Associated Fields: fields for configurable product.

(2) Related Rules: Rules that are related to the configurable product.

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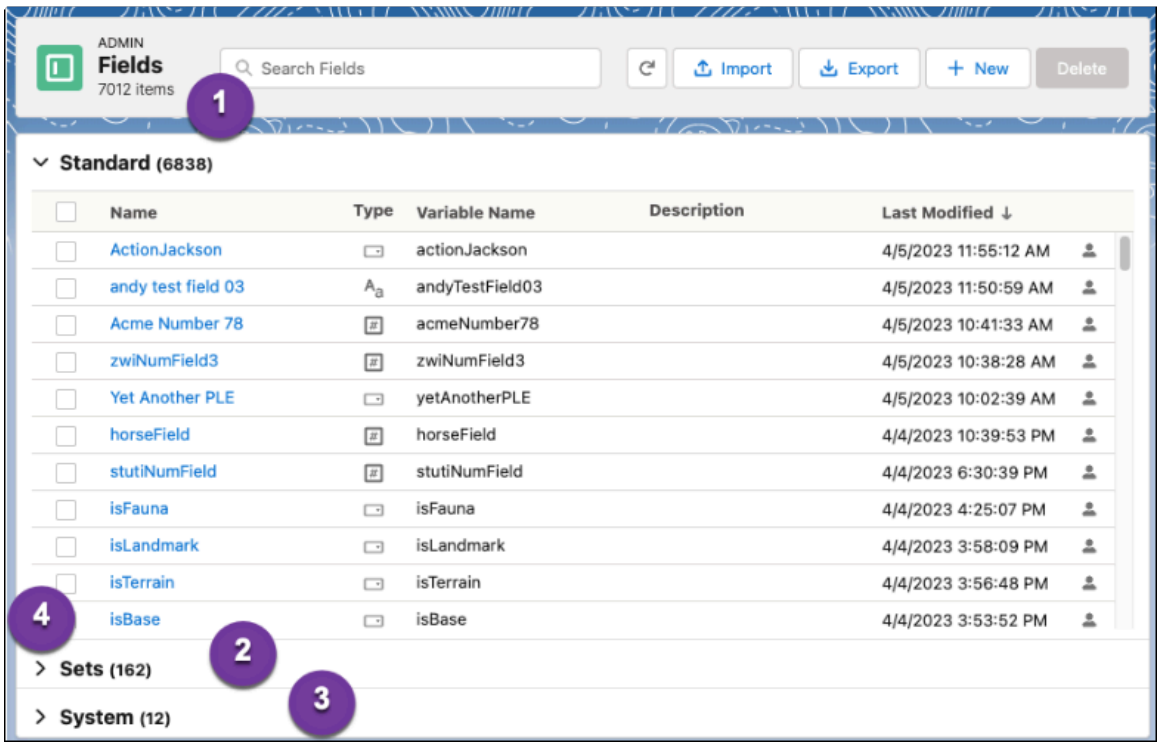
(3) Layouts: Layouts for this configurable product.

(4) Hyperjump: Launches Hyperjump for this configurable product.

5. UI Content: Displays content from whichever tile is currently selected.

Updated field UI

The updated field UI provides a unified view of fields and sets and is also used in the update blueprint and configurable products UI.



Fields are now grouped into three types: Standard, Sets, and System. By default the “Standard” section is open.

(1) Standard section: Displays standard field types (Text, Number, Picklist, Boolean)

(2) Sets section: Displays all Sets (See more below)

(3) System section: Displays system fields.

(4) Open/Close section: Each section can be expanded using the arrow icon to the left of the grouping name. Only one section is open at a time.

With the inclusion of sets in the field UI, the display of sets has also been updated.

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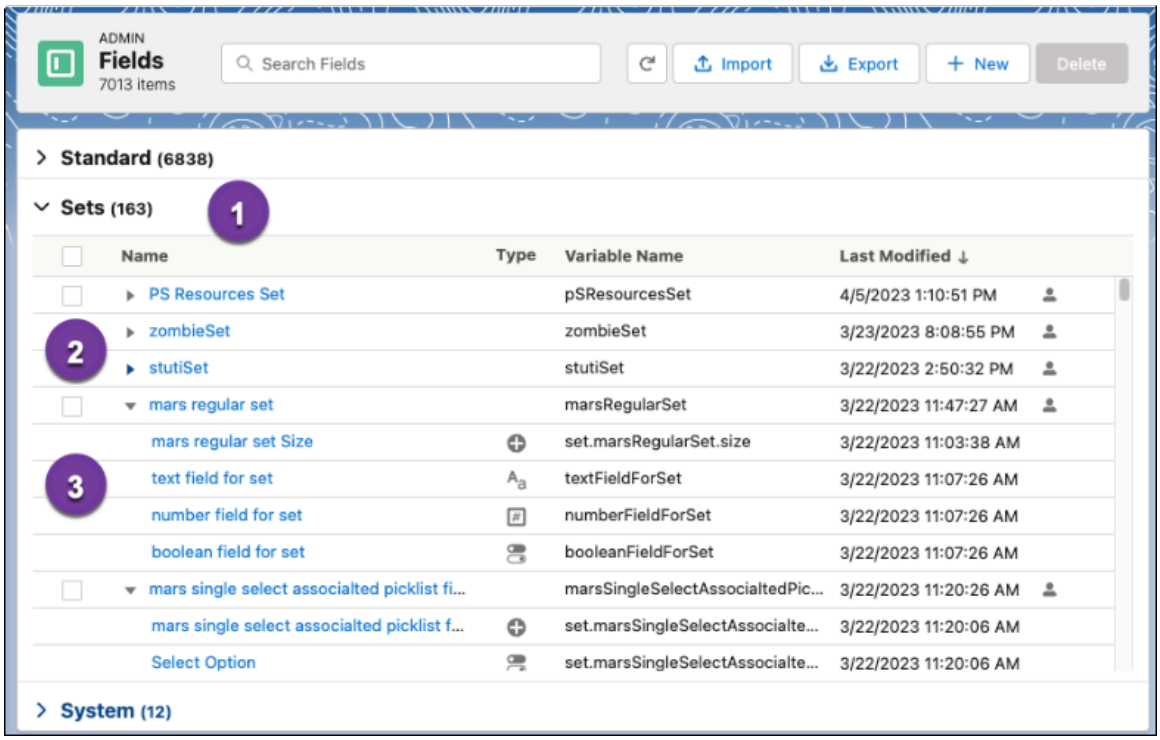
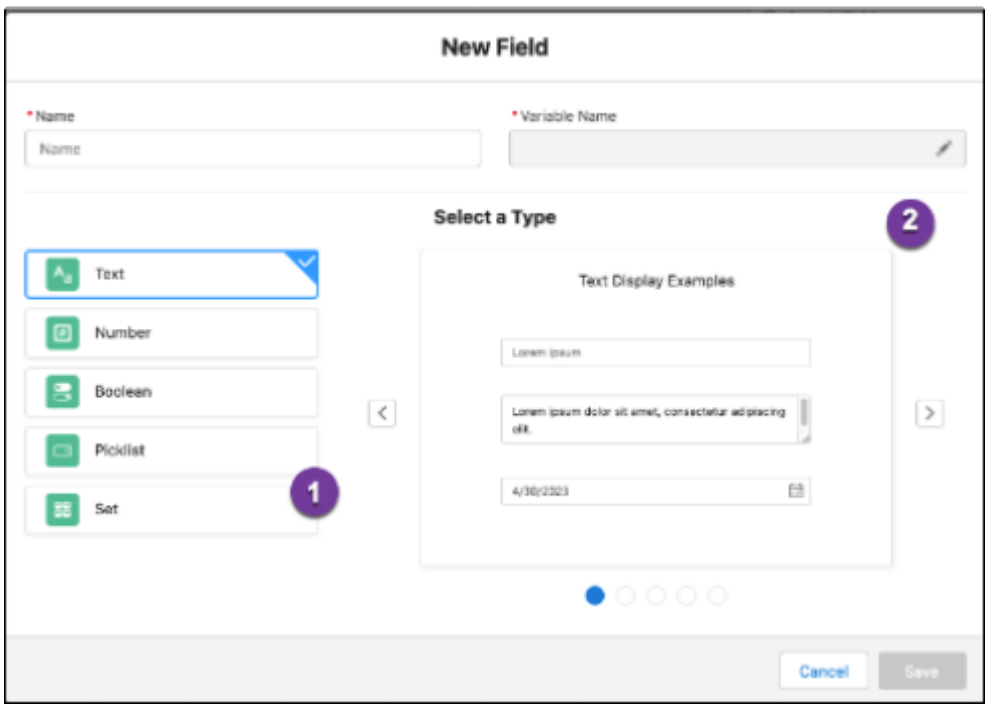


(1) Set grouping section: an expanded view of all sets.

(2) Individual sets can be expanded or collapsed in the table using the arrow icon on the left. By default, the view is expanded. Multiple sets can be expanded at once.

(3) When a set is expanded, the fields and details are also displayed.

The New Field window provides a unified way to create both standard field types and sets.



Field types can be selected by either picking the appropriate tile or by using the arrows to scroll through the display examples.

(1) Sets are available in addition to the four standard field types.

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(2) Each field type has a display example showing different ways that the field can appear on a layout. The example is not exhaustive.

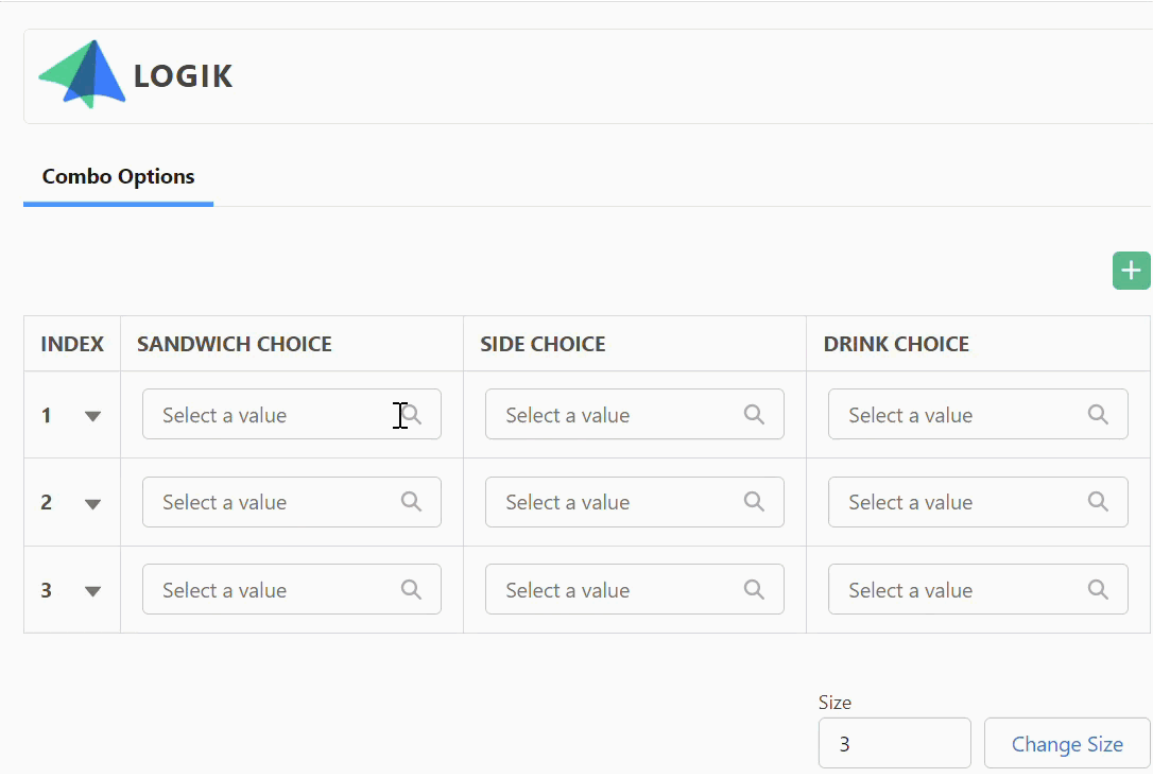
Configure sets

Sets group related fields into repeatable collections, allowing administrators to streamline configurations and reduce redundancy. They enable dynamic, table-like data entry, support aggregates, and simplify managing repeated questionnaires or configurable options in CPQ.

Sets introduction

Sets allow the administrator to identify a number of fields in a group. Once associated with a set, the fields may then be replicated an indefinite number of times on the end-user UI in a matrix format. Sets reduce the number of fields and rules that must be defined for use cases that repeat fields and rules. The maximum number of set records (the number of times a group of fields can be repeated) is 2000.

In this set, three fields (Sandwich Choice, Side Choice, and Drink Choice) are defined in a set; the set is repeated three times:



Display types

Sets can be displayed in several ways.

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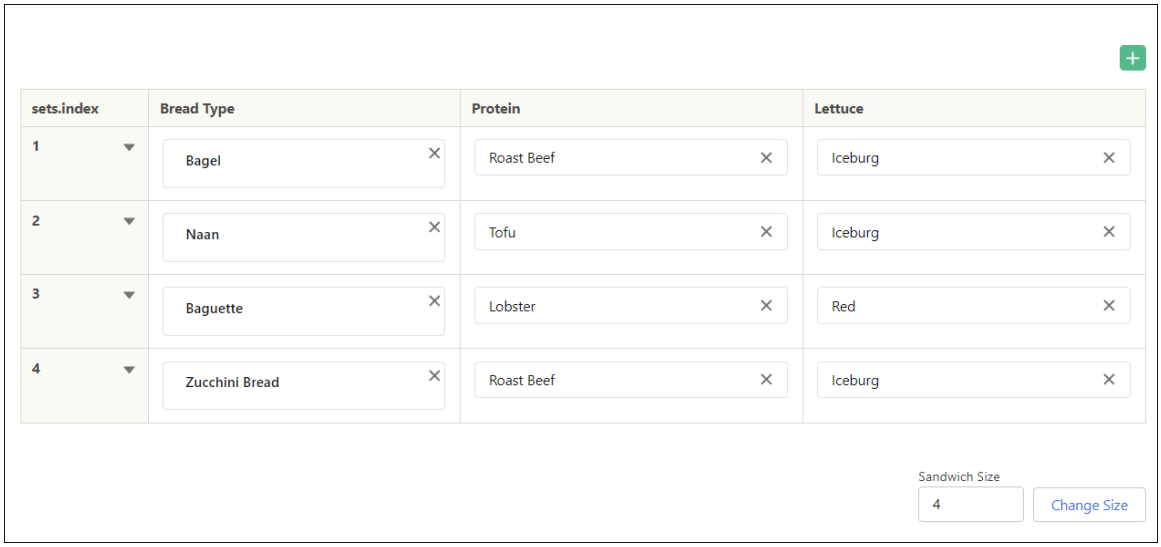
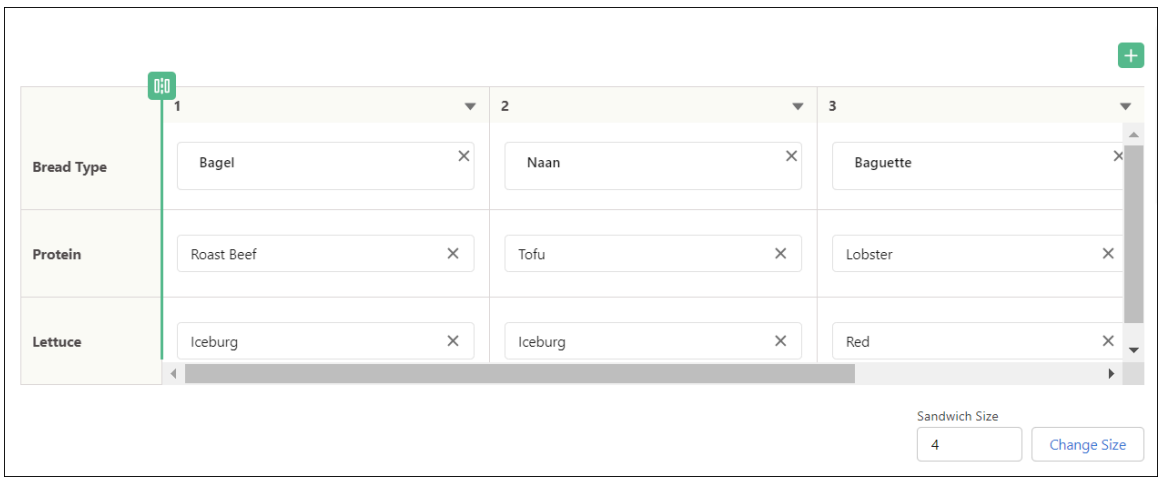
- As table rows:



- As table columns:



- As list rows:

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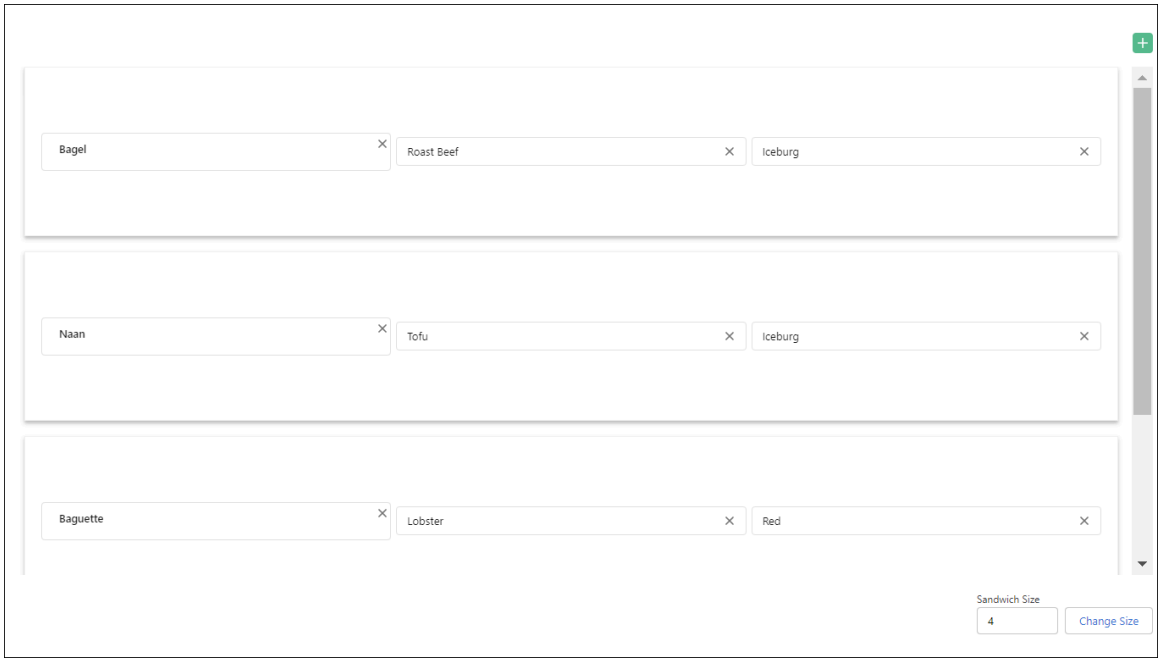
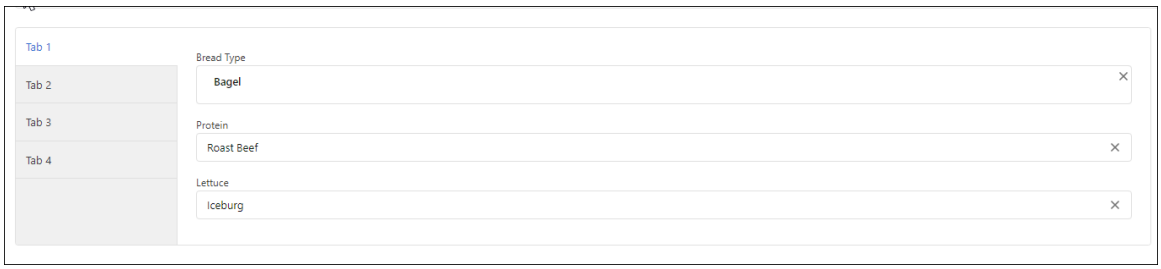


- As a set repeater:

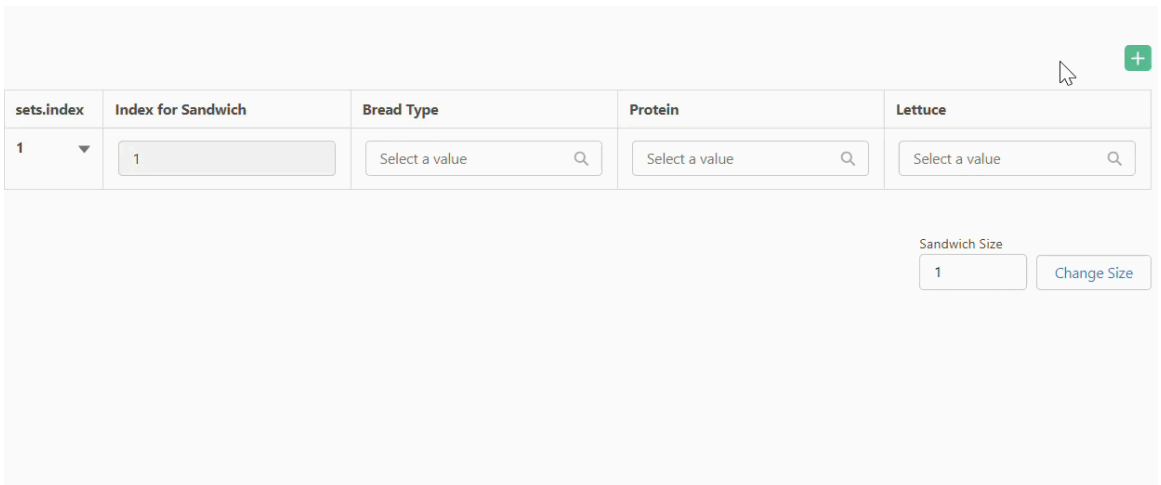


You can manage sets by using the Layout Wizard. For more information about sets and layouts, see Using sets in layouts.

Adding and removing set rows

In the end-user UI, the user has four ways to increment or decrement set records:

- To add a record to the bottom of the set, click the green plus in the upper right corner.



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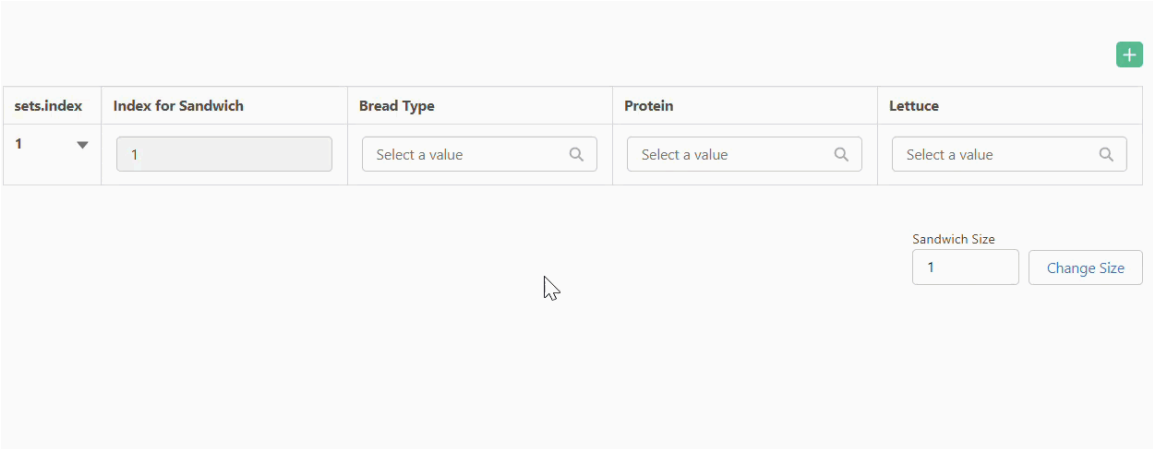
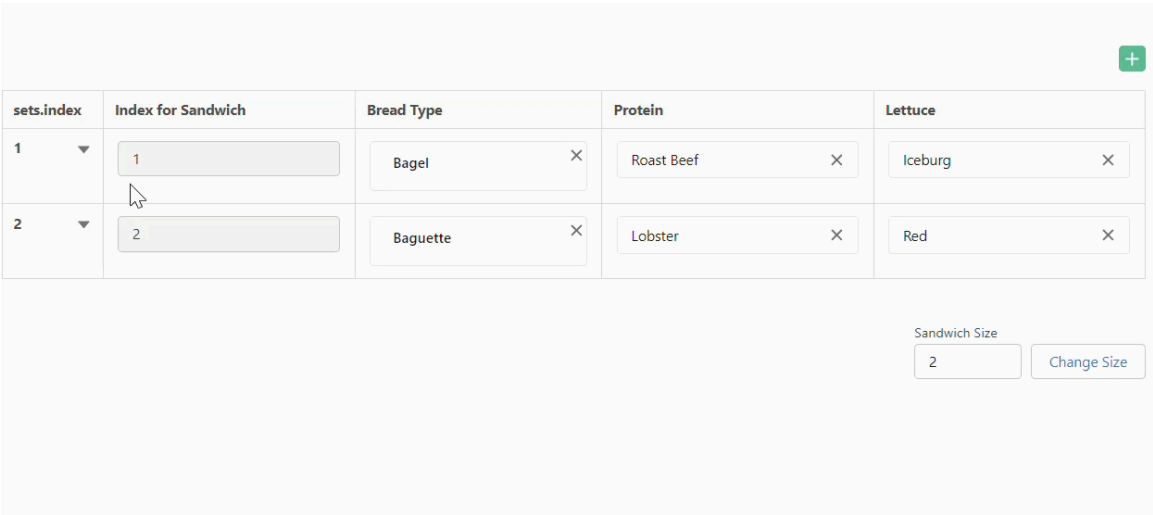
- To add or remove records from the bottom of the set, edit the Size field and click **Change Size**.



- To insert a record between two existing records, hold the cursor between them in the Index column.



- To add records relative to the current record or to delete a record, use the menu in the Index column.



For more information about managing sets, see Using sets in layouts and How sets interact with the rest of a blueprint.

Creating a set

Sets can be added in the same two areas you would create fields: the blueprint to which to add the set, and the fields administration tab.

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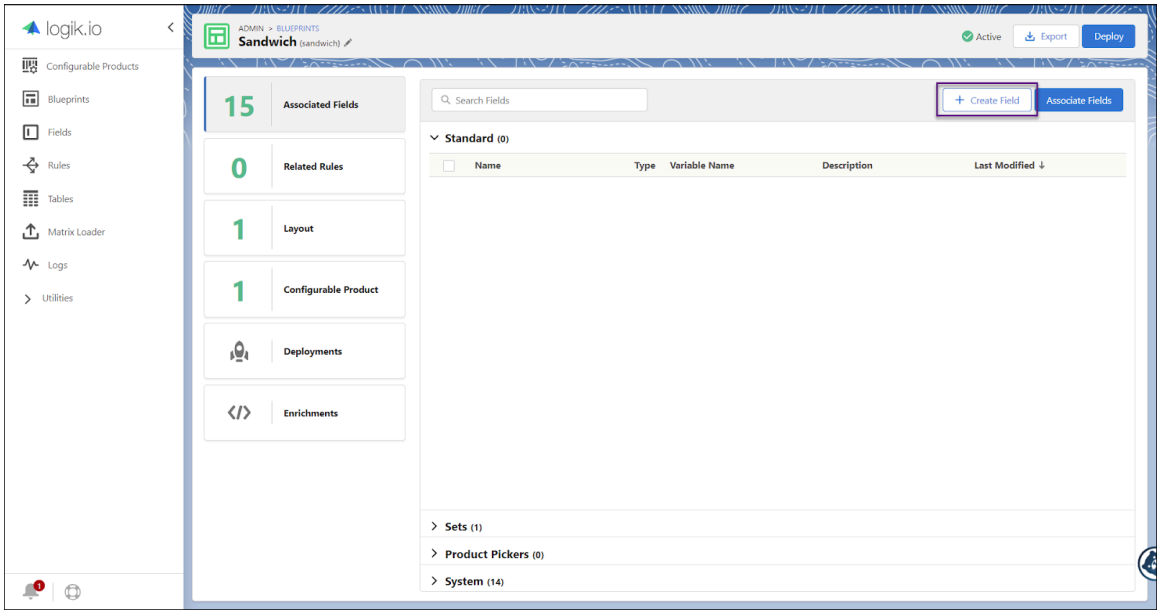

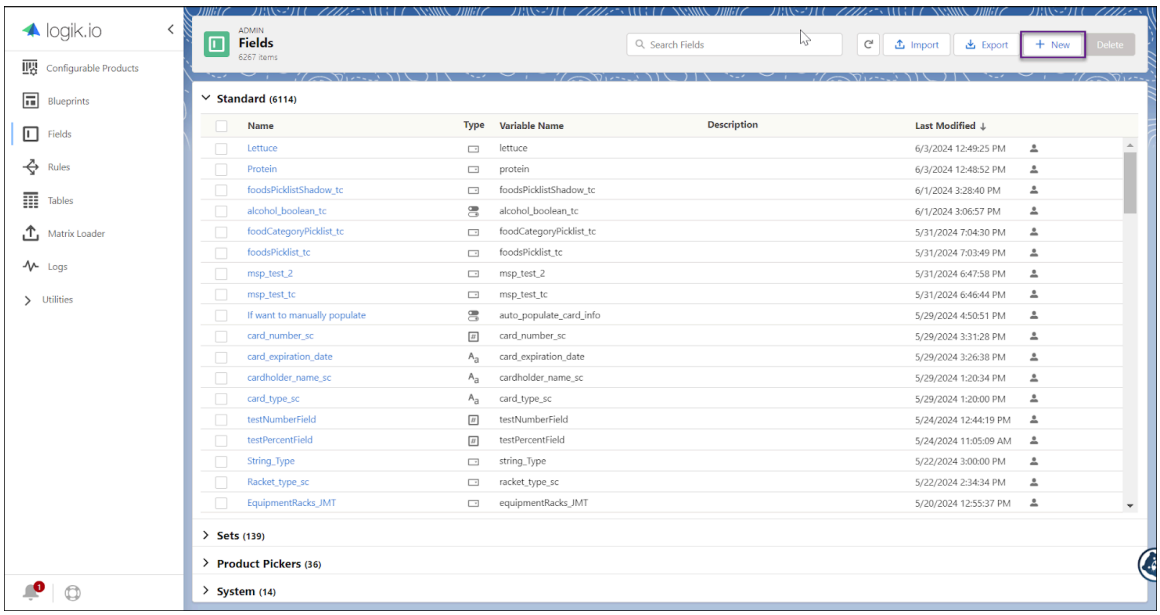

Select the set field type from among the list of options:

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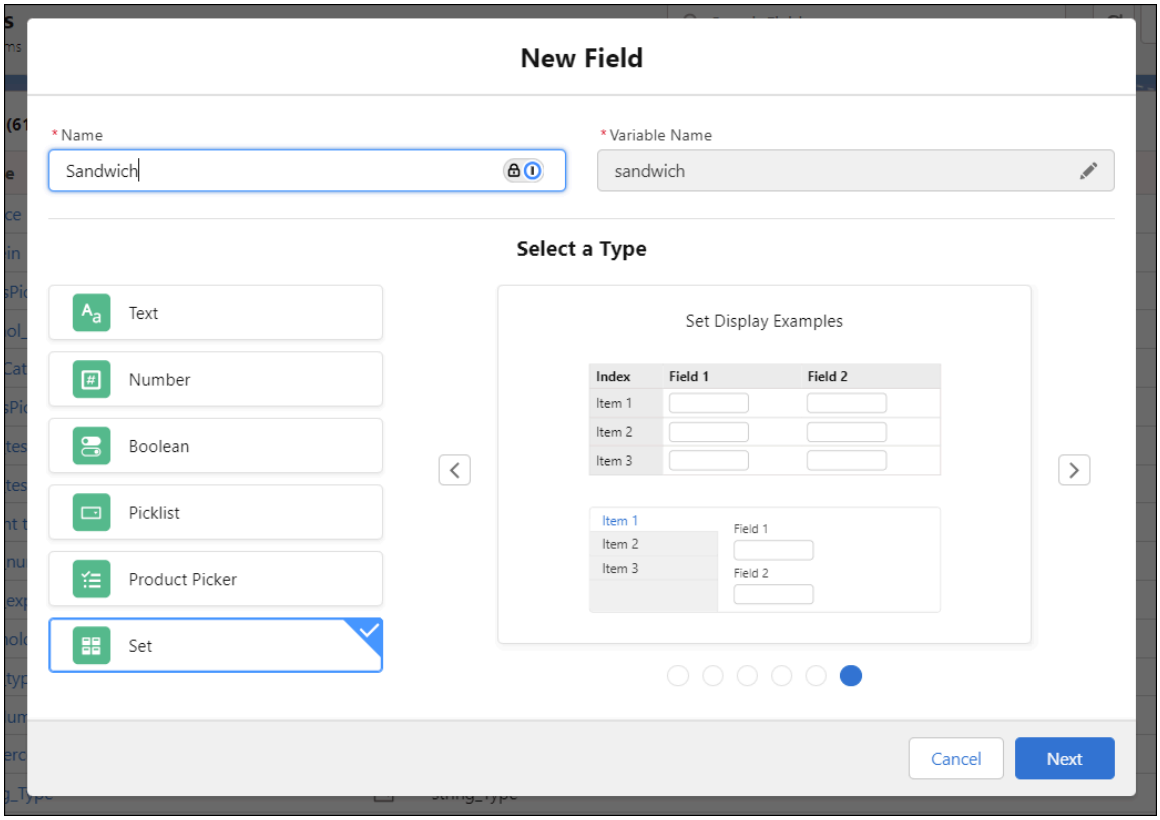
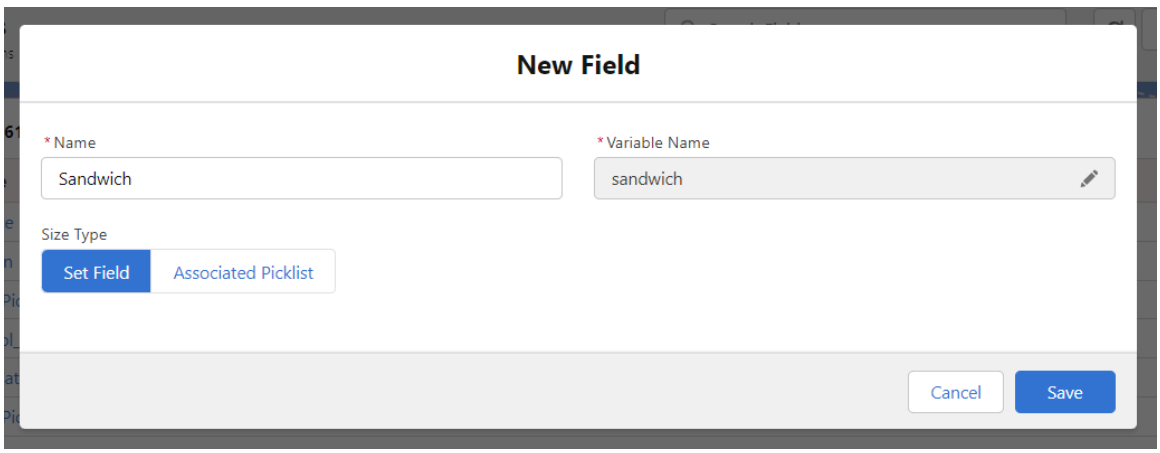


Give your new set a name and choose from the size types.



The size type cannot be changed after the set is saved. Therefore, keep the following in mind:

- The set field determines the number of records that will be displayed in the set. This numeric field can be visible and edited by a user or set by determination action, as the case requires.
- The associated picklist leverages a picklist field to determine how many records to show in the set. When this option is selected, the admin must identify the field that will drive the set size. When the set type is Associated Picklist, CPQ creates two additional fields in the set:
  - Option Value: The value of each option in the set, represented as a read-only text field.
  - Select Option: Tracks whether each option of the picklist is selected.
  -

For more information, see Creating an associated picklist set.

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The next screen is the set screen, where the admin can add fields to the set, enforce distinct values, and create aggregates.

To add a field to the set, search for the name of the field to be added to the set, and then click **+**.

Any field in the set can have the "Distinct Values" option enabled. When this is true, each index of the set must have a unique value for the field. This setting only applies to non-empty fields.

When you create an aggregate for a field in the set, options include Average, Count, Maximum, Minimum, and Sum. For example, a sum aggregate on a number field called Quantity might store the sum of all Quantity field values in the set. Aggregates function as a field external to the set and can be used in global rules.

For more information on set aggregates, see Creating set aggregates.

When using sets in a configuration, it's important to understand the scope of fields in the set and what can and cannot be accomplished when creating rules. See How sets interact with the rest of a blueprint.

Related topics

Using sets in layouts

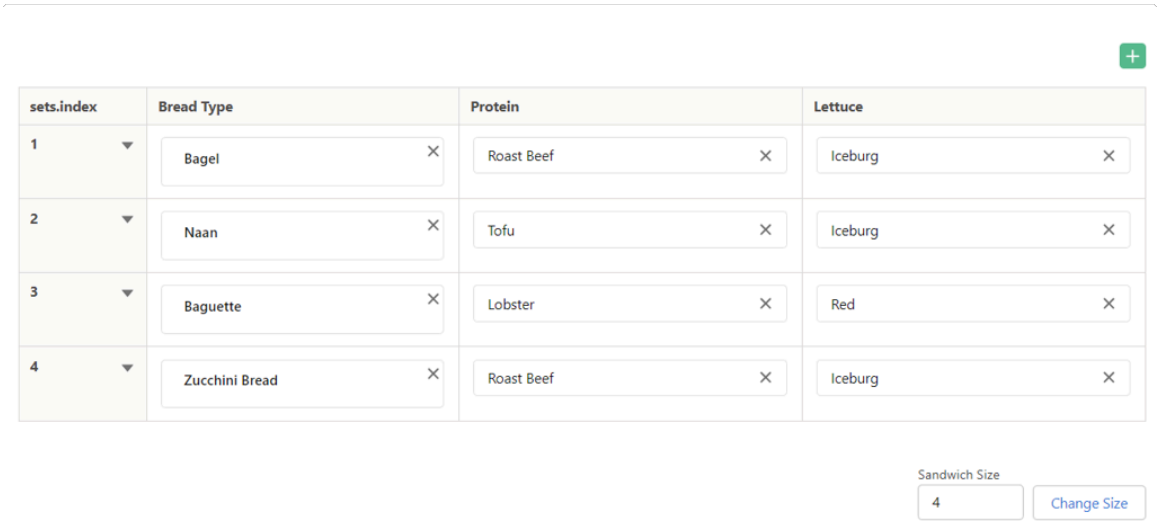
Using sets in layouts

Learn about the various ways sets can be displayed and about their settings.

Display types

Sets can be displayed in several ways:

- As table rows where each index is displayed horizontally:



- As table columns where each index is displayed vertically:

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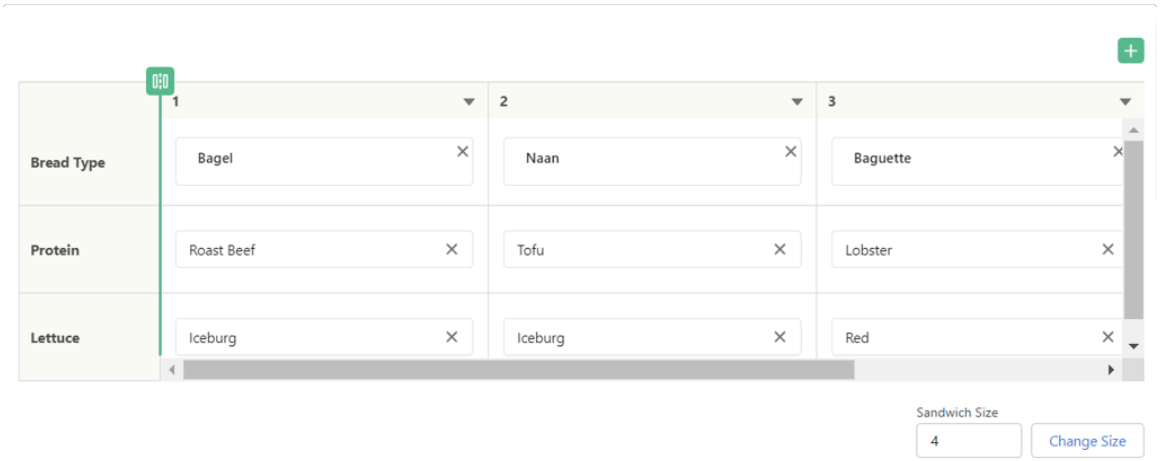
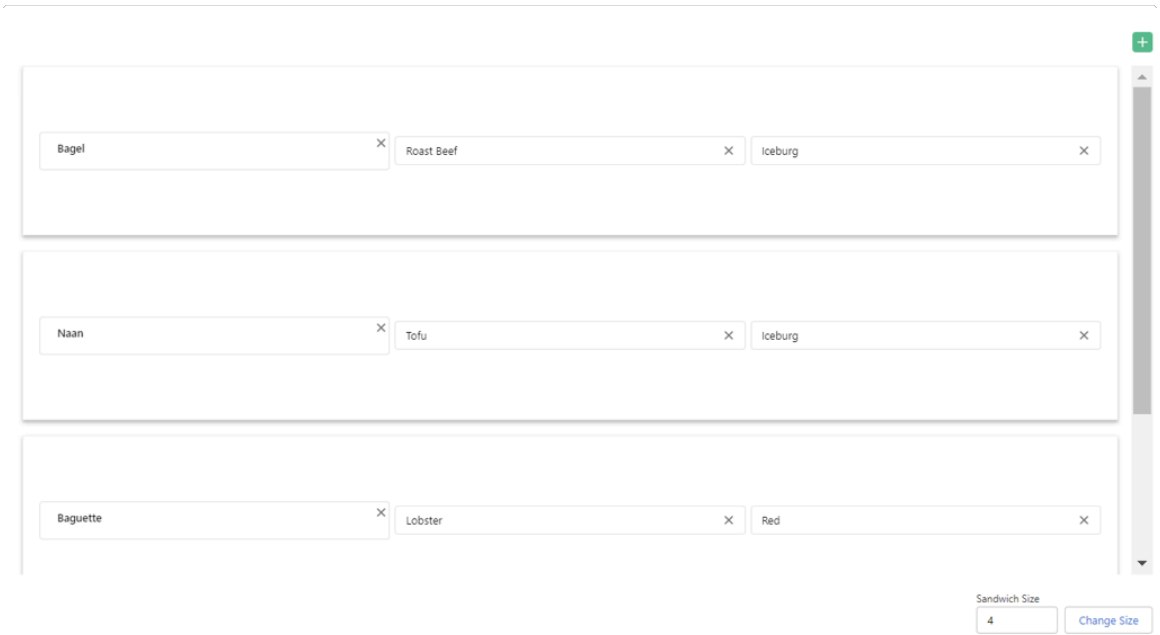


- As list rows:



- As a set repeater where each index is tied to a tier:



Set repeaters are distinct in their administration. For more information about set repeaters, see Creating a Set Repeater.

To manage the different display types, find the set in the Layout Wizard and select the gear icon. Here the admin has two options for Display Type: Table and List. Table is a basic grid, while List is a series of tiles.

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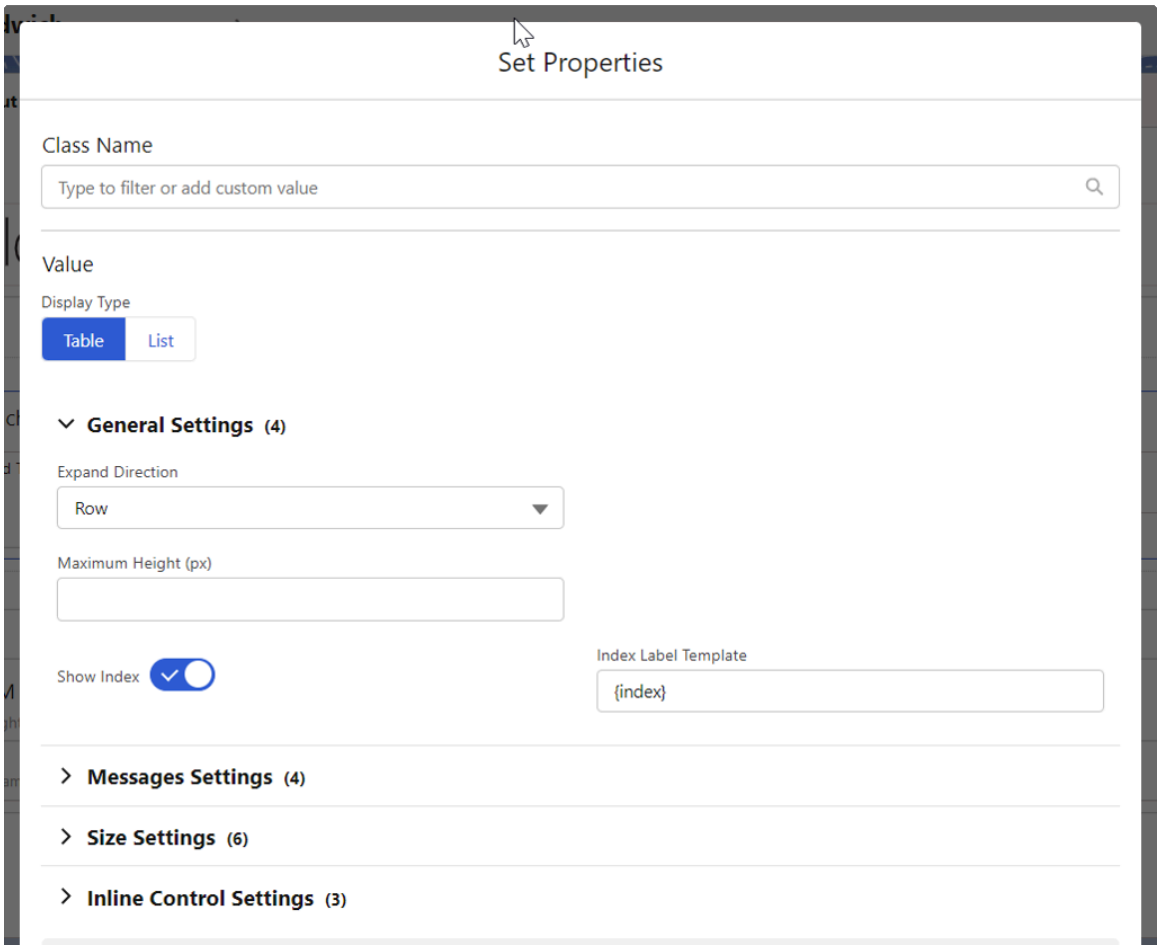
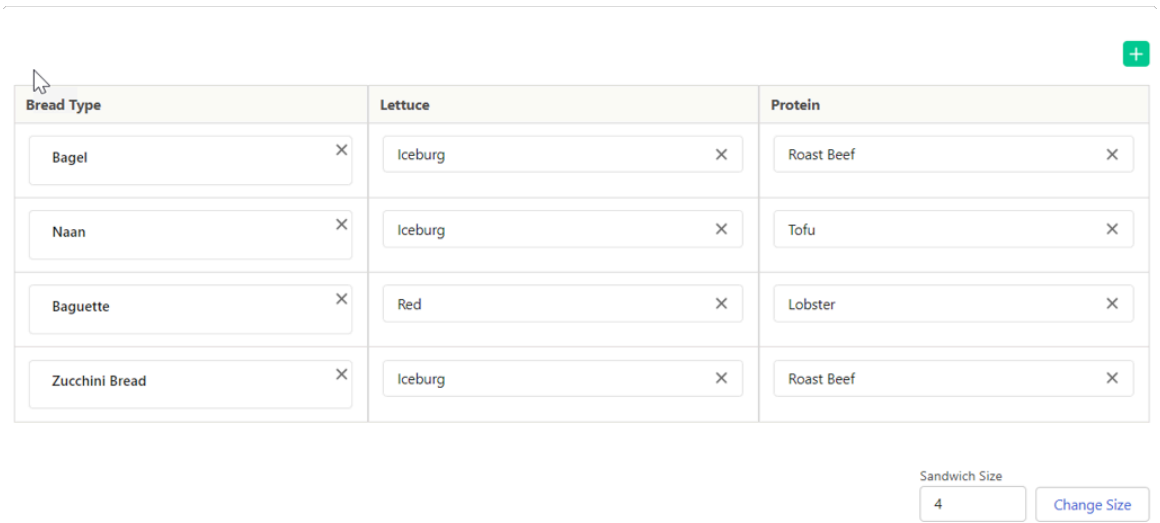


General settings

- Expand Direction: Allows the user to specify how the set is formatted.
  - Rows: Each index is displayed as a row. As the set size increases, it will expand down the page.
  - Columns: Each index is displayed as a column As the set size increases, it will expand horizontally to the right.
- Maximum Height: The height of the set.
- Show Index (Table Display Type only): Whether the index is displayed in the set.



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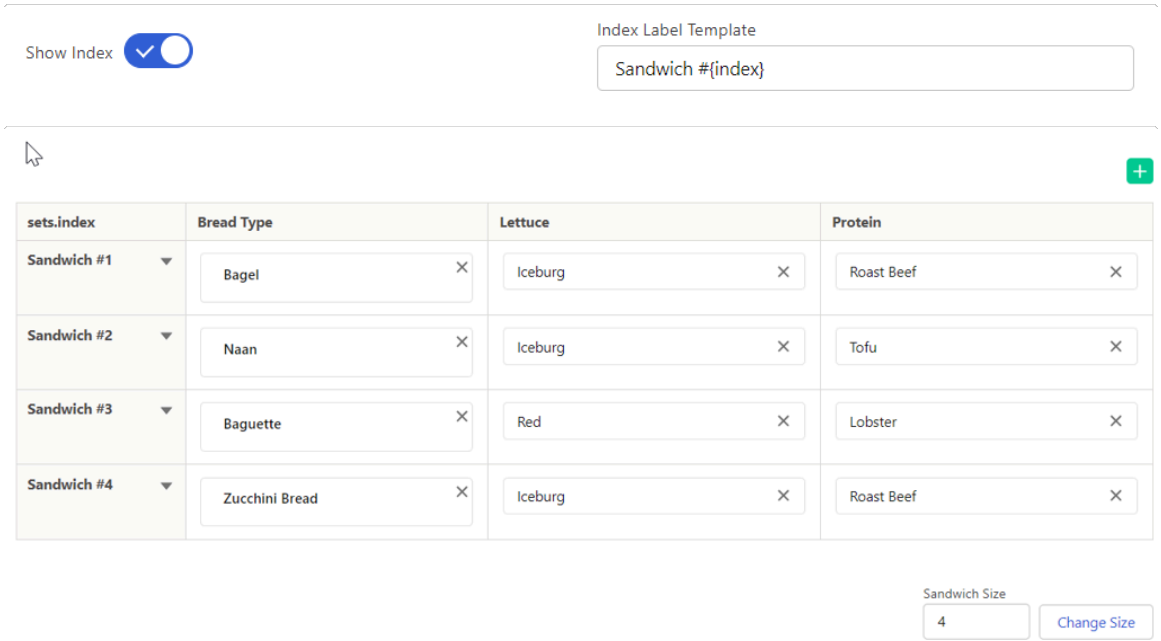
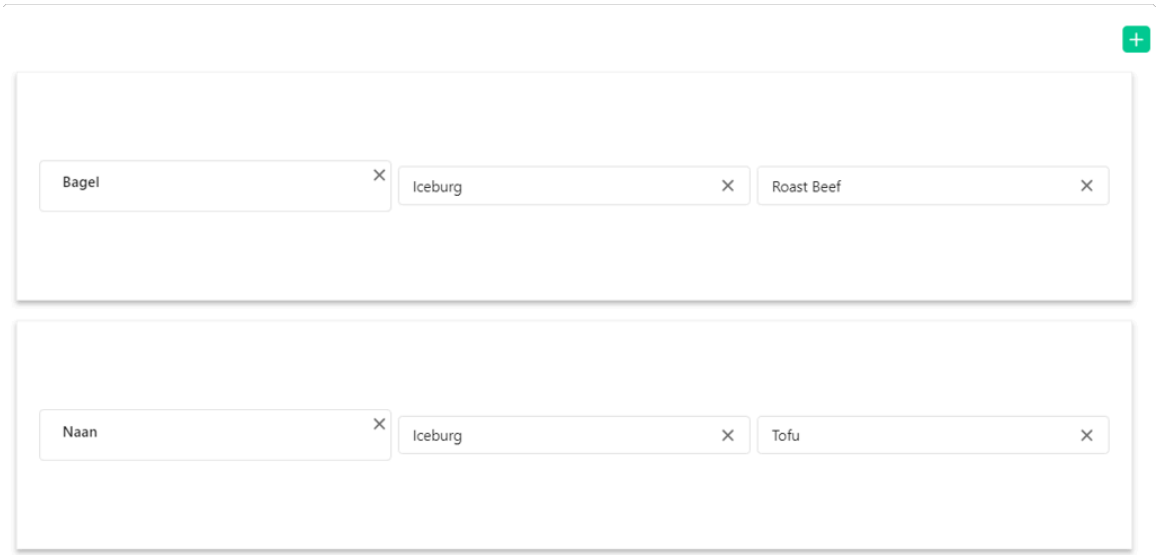
- Index Label Template (Table Display Type Only): display a prefix or suffix string to the index numbers. Helps provide context of each index.



- Vertical Alignment (List Display Type Only): Control the alignment.
  - Middle



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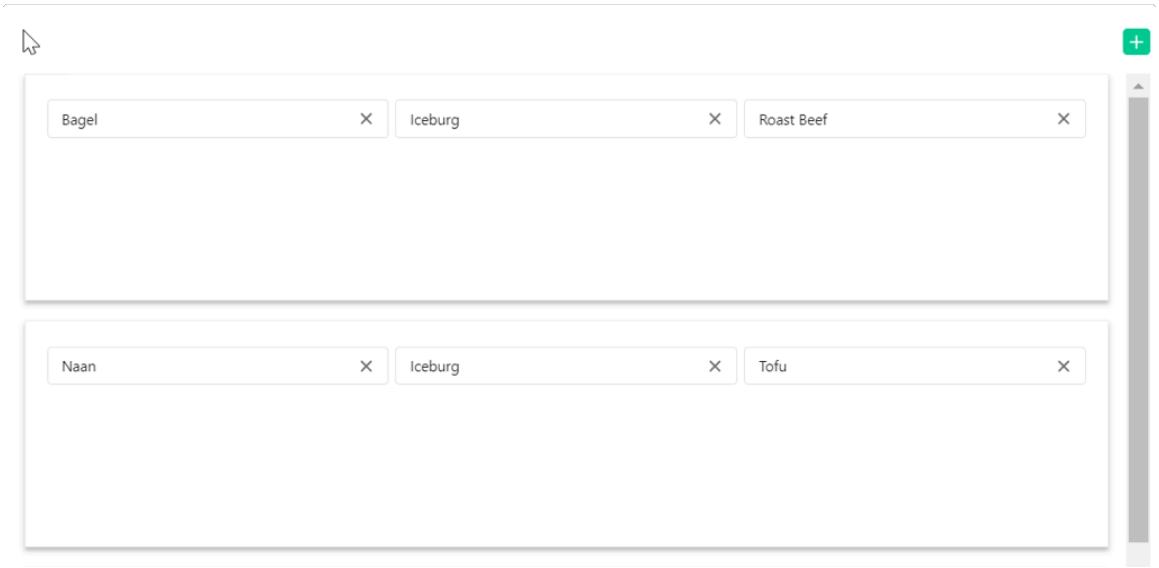
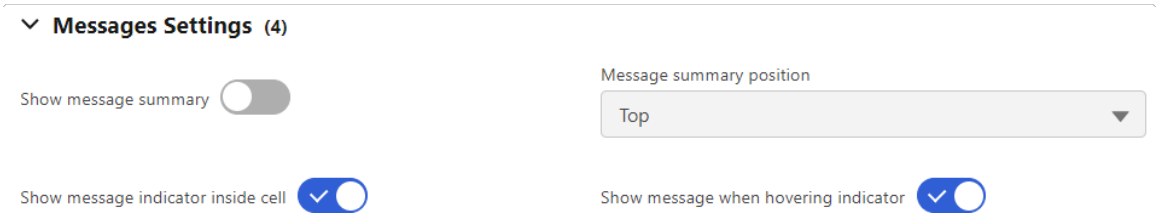
- Top

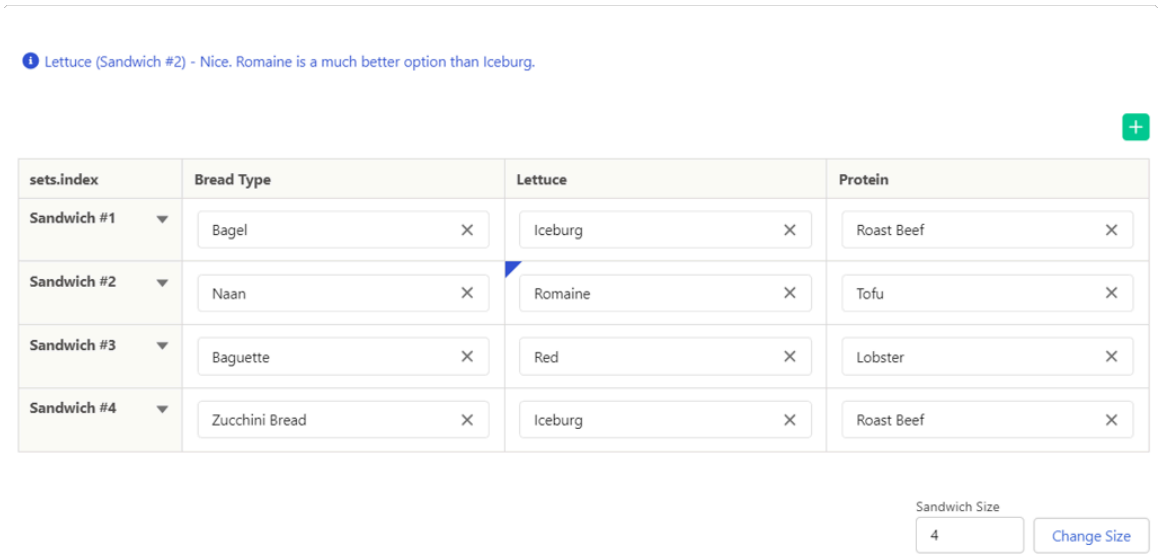


Message settings

These options allow the admin to control how and where messages are displayed.



- Show message summary: summarizes all message actions and recommendation messages in one position. Toggling this to true will show the summary. Toggling to false, removes the summary.
- Message summary position: display the message summary above or below the set. The following image shows Show Message Summary = true and Message Summary Position = Top.



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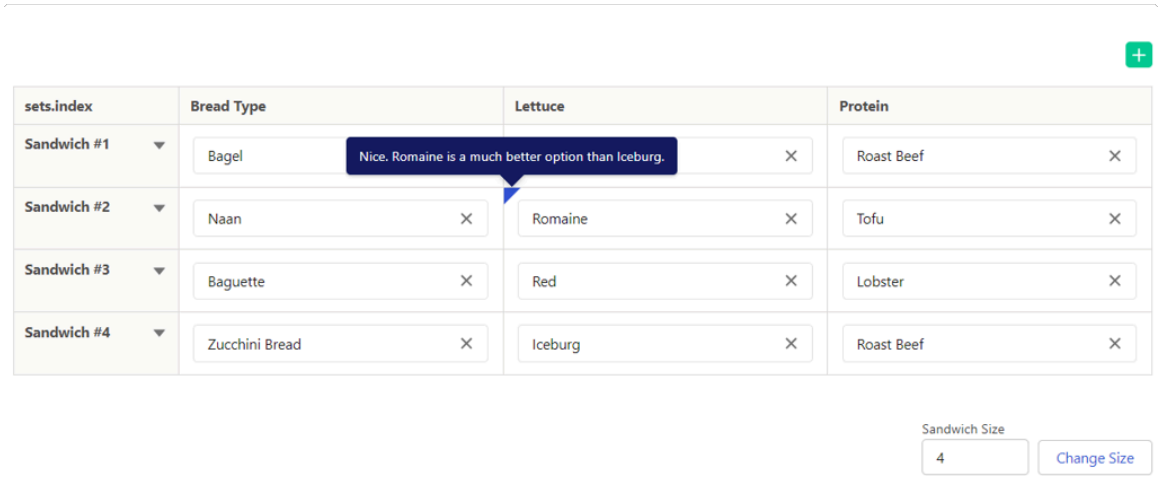
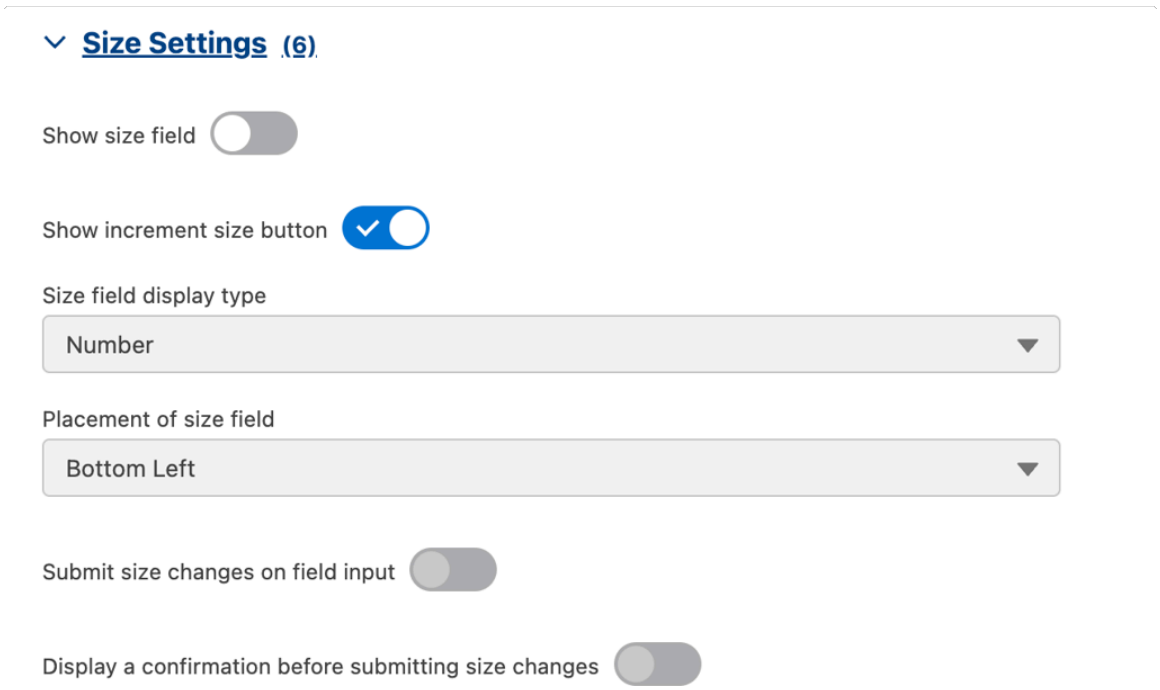
- Show message indicator inside cell (table display type only): places a color-coded triangle in the cell that caused the message.
- Show message when hovering indicator (table display type only): displays messages when users hover over the color-coded triangle.



Size settings

The size of the set refers to the number of indexes that will be displayed. This is applicable to sets with the size type of field, not for associate picklist sets. A size of 1 means that there is 1 index. A size of 10 means that there are 10 indexes.



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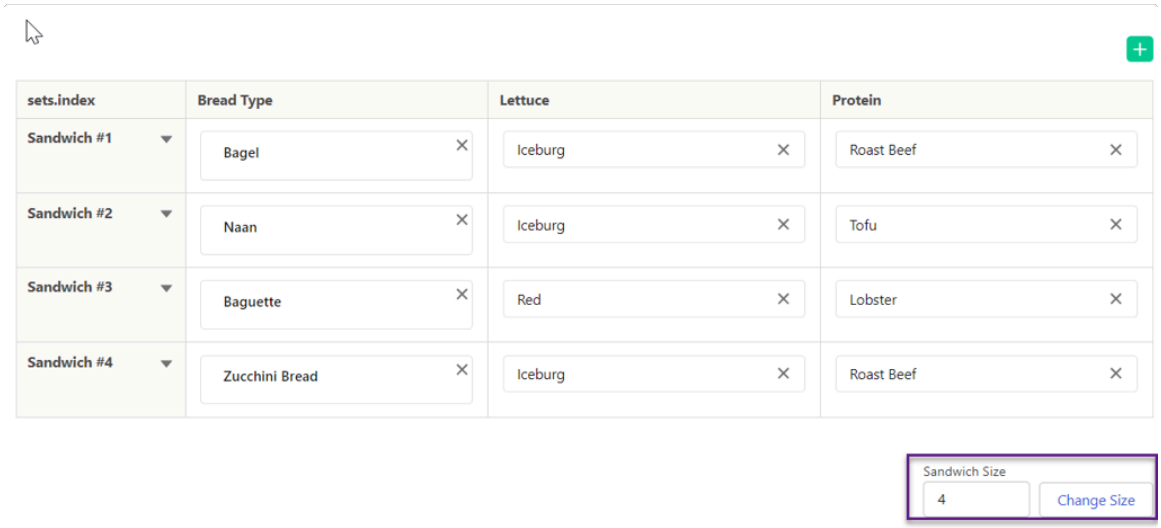
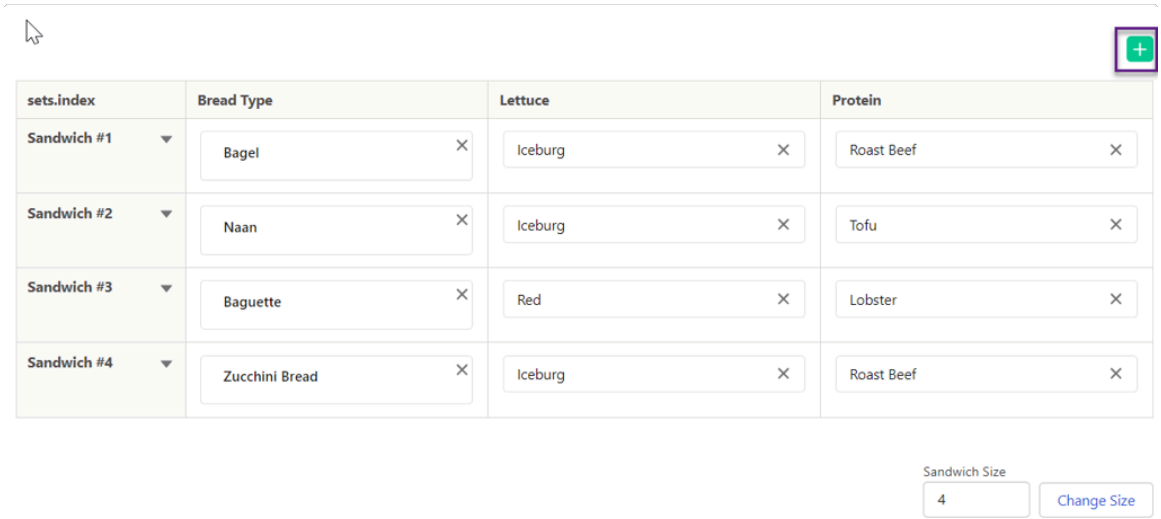
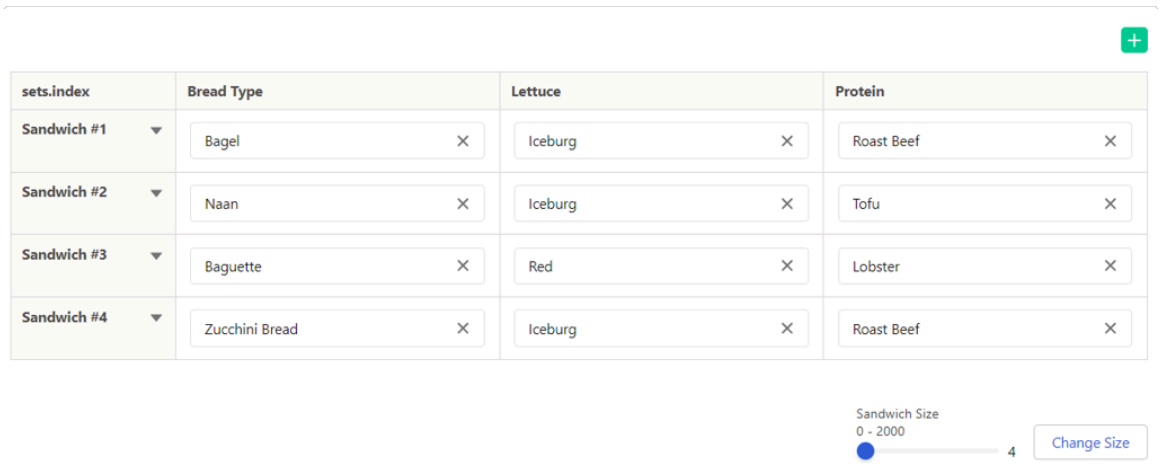
- Show size field: shows or hides the size field.



- Show Increment Size Button: control whether the green + icon is visible.



- Size Field Display Type: Pick between a number field or a slider field for user input.



- Placement of Size Field: Control the location of the size field relative to the set itself.

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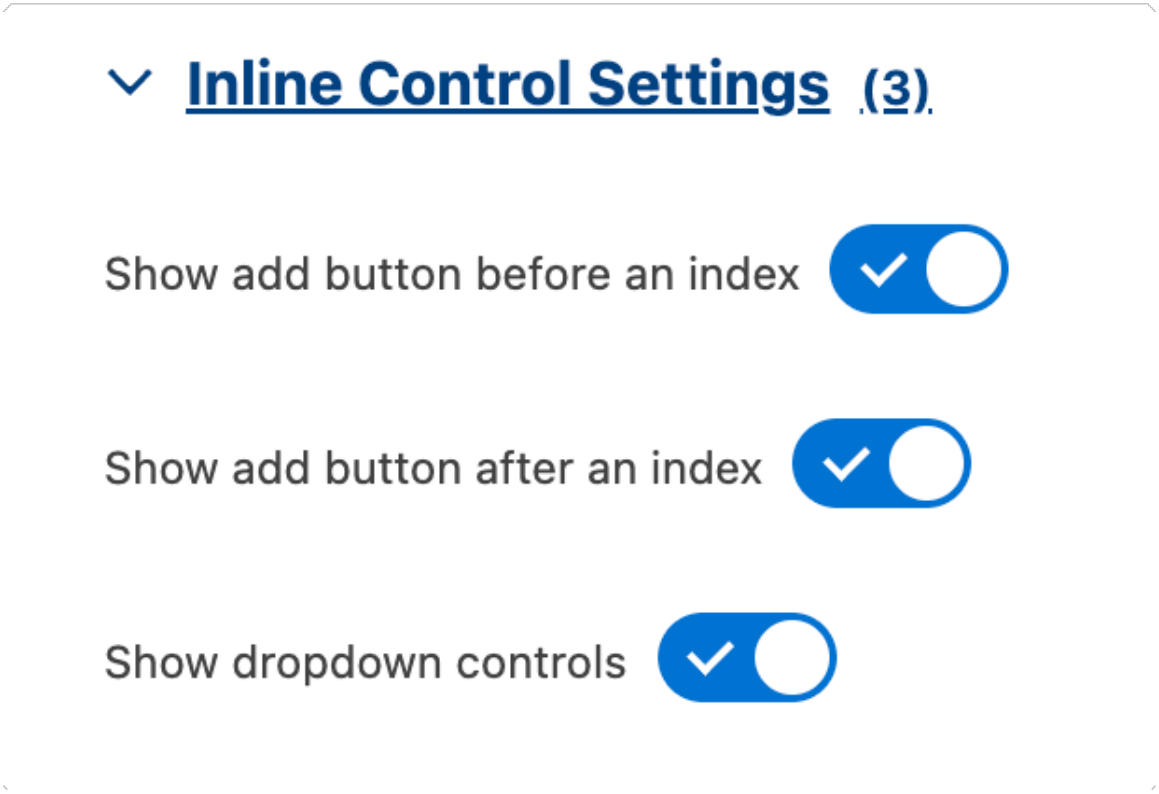
- Submit Size Changes on Field Input (Table Display Type Only): When true, the set adjusts according to any keystroke change in the size input field.
- Display a Confirmation Before Submitting Size Changes (Table Display Type Only): This property displays the confirmation button when set true. False hides the confirmation button.

Inline control settings

These settings refer to options in the index column menus.



- Show Add Button Before an Index: showAddBefore: show/hide the **Add Row Above** control.
- Show Add Button After an Index: showAddAfter: show/hide the **Add Row Below** control.
- Show Dropdown Controls: show or hide the inline size control menu.

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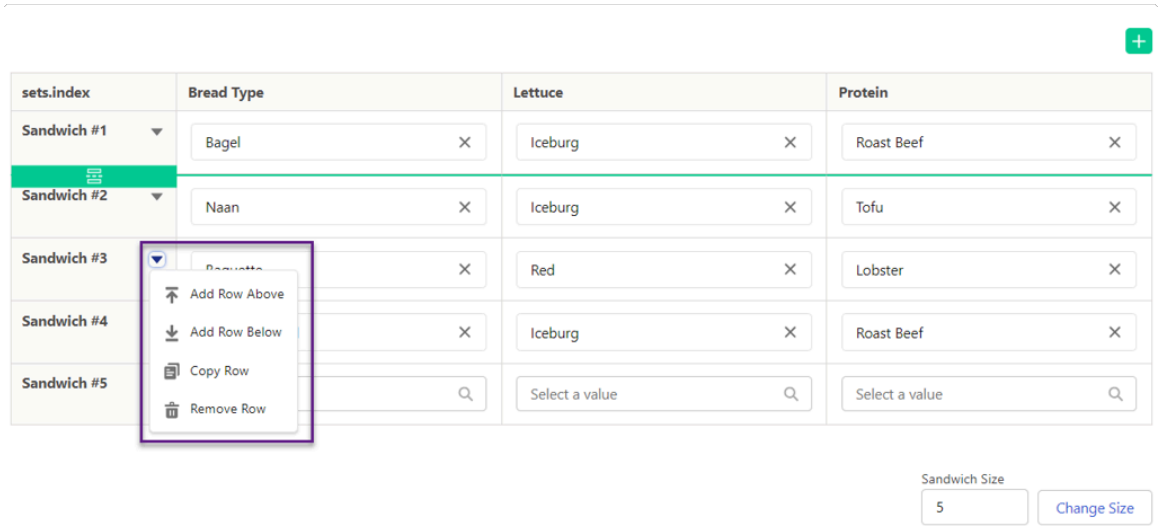

The dropdown controls setting refers to the caret icon on the index. It is not to be confused with the green bar for inserting indexes. Add Row Above and Add Row Below refer to the other controls here.

Selection settings

Selection settings apply only to the list display type. These controls affect how the user interacts with a set that is displayed as a list.



- Show Selector: toggles selectors on and off.
- Selection Type: choose between Single or Multiple. Single will appear as radio buttons and Multiple will appear as check boxes.

  Example of single selection where Show Selector is true:

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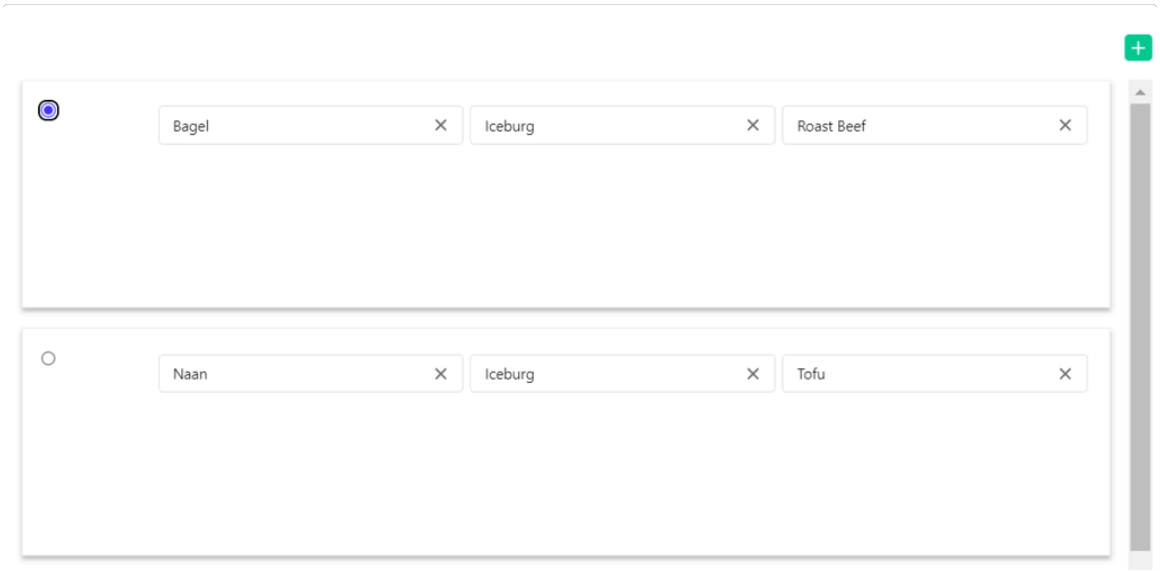
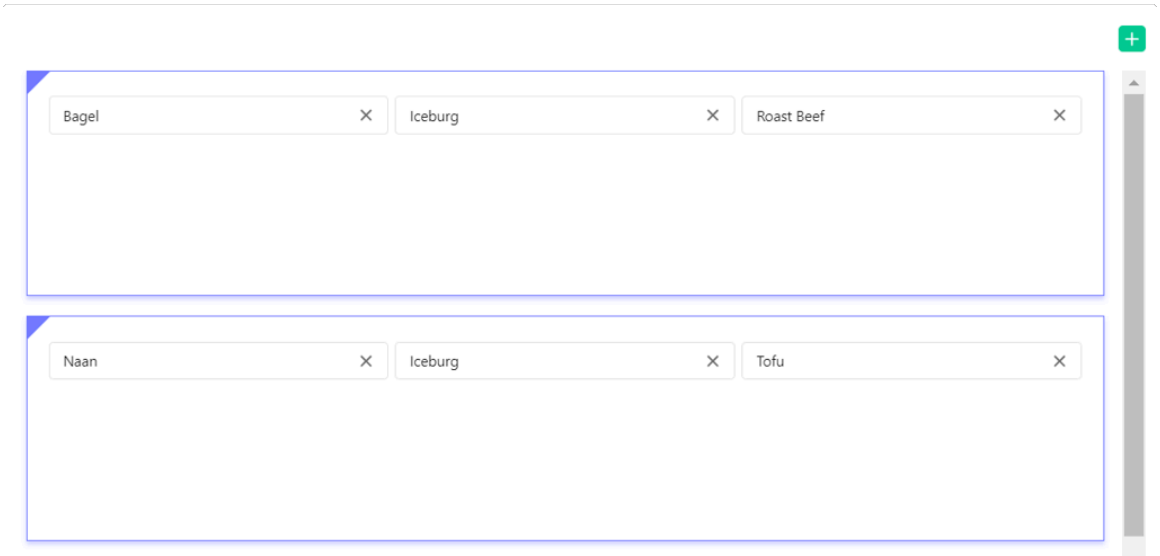


Example of multiple selection where Show Selector = false:



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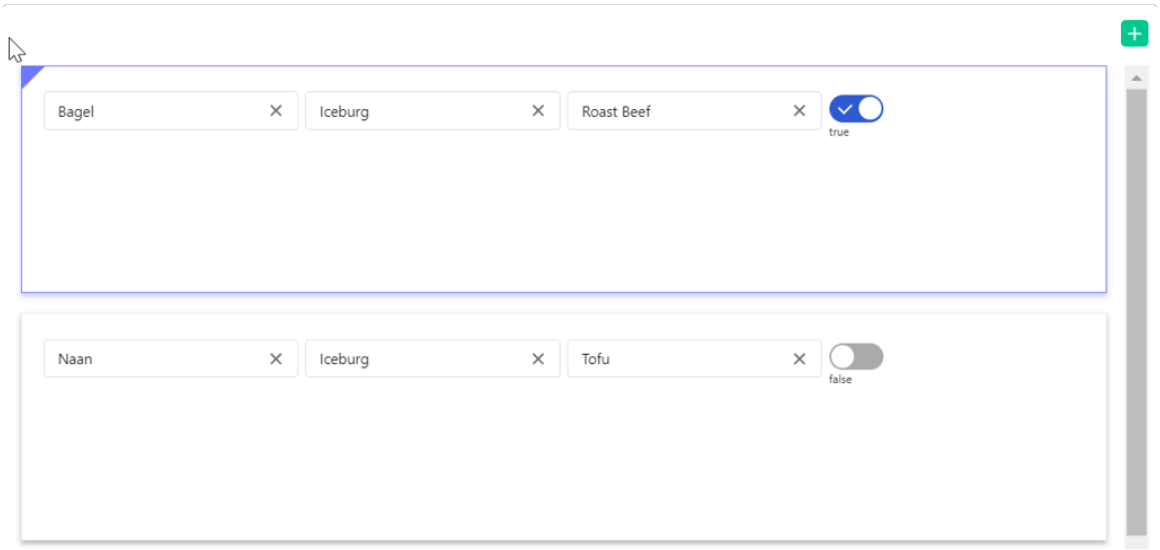
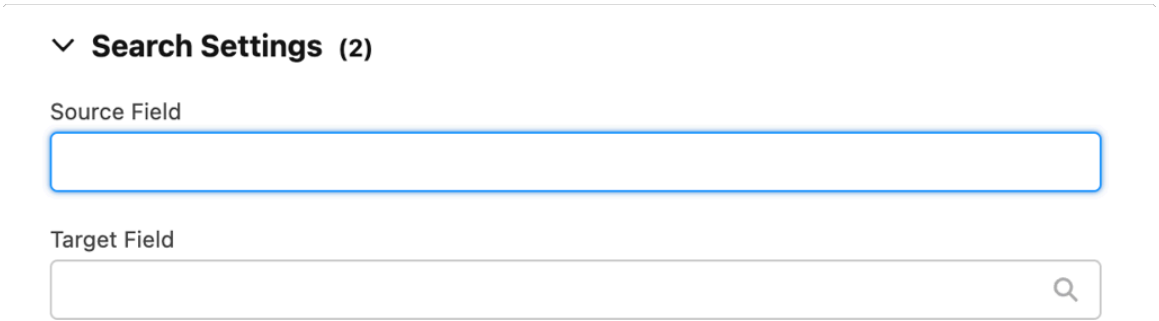
- Boolean field for selection: specify a field in the set that will be marked as true. This is required for the selection to work. If desired, the value can be displayed in the set itself:



Note: All of the set settings are editable in the value column of the layout CSV file. Admins are still able to update the JSON there and make changes. If this method is chosen, the entire list of properties does not need to be included, but be sure to keep the proper data structure intact.

Search settings

Search settings apply only to the list display type.



Search settings (List display type only)

- Source Field: The global field that, when the user changes, triggers the UI to search based on the value of the field.
- Target Field: The set subfield that has its value compared to the source field's value to determine whether it is a match.

Displaying aggregates

Aggregates are a way to evaluate the data in a set. Set aggregates have five types and can aggregate on any field type. The types are:

- Average
- Count
- Max

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- Min
- Sum

For example, a sum aggregate on a number field will add all the instances of that subfield across all indexes. The admin can display that aggregate just as with any other field in the layout by specifying the field in the Layout Wizard.

The variable name for aggregates have the following syntax: `set.{set variable name}.{aggregate variable name}`

Related topics

How sets interact with the rest of a blueprint

Creating set aggregates

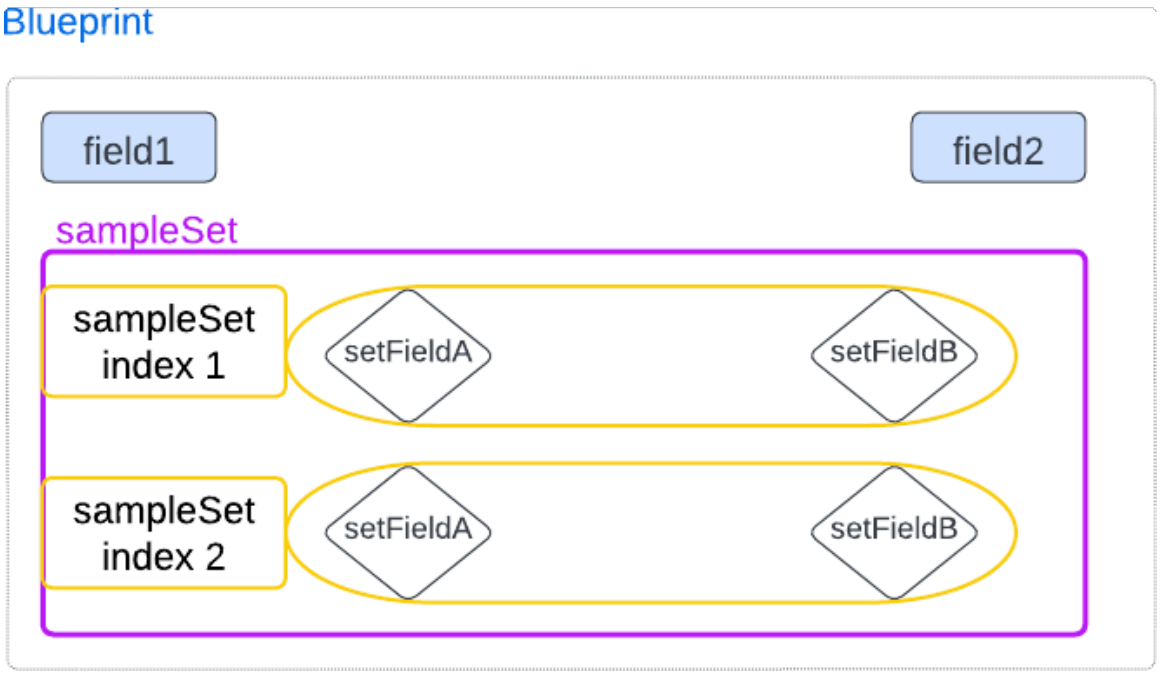
How sets interact with the rest of a blueprint

The implications of sets when used in blueprints.

Suppose you have a blueprint with the following fields:

- field1
- field2
- setFieldA
- setFieldB

The setFieldA and setFieldB fields are part of a set named sampleSet. The field1 and field2 fields are not part of a set, but they are in the same blueprint as sampleSet. For our case, assume that sampleSet has a size of 2. That structure would look something like this:



Because a field can have a different value for each set index, a field in the set cannot influence a field outside the set (such as field2). However, fields outside the set (such as field1) can influence fields in the set. See the diagram:

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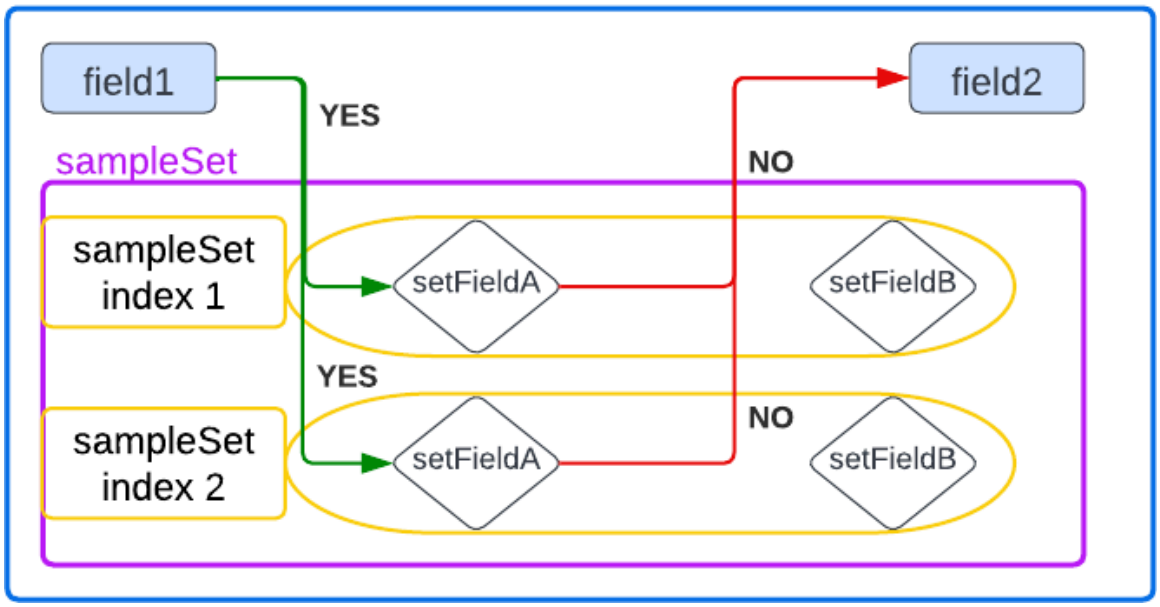
Blueprint



Example: Ambiguous conditions

If in sampleSet index 1, setFieldA=Video and in sampleSet index 2, setFieldA=Audio, we cannot have the following rule:

- Condition: “if setFieldA==Video
- Action: set field2 to mp4

For index1, the condition is true, and the rule fires. For index2, the condition is false, and the rule does not fire. Because field2 is outside the set, it is not clear whether the rule should fire.

However, you can write rules for fields that affect other fields in the same set. These rules are independently applied to each index. Fields in indexes cannot influence fields in other indexes.

Example: A valid rule

The following rule is valid:

- Condition: field1 == Mammals
- Action: Include the following field options on setFieldA: [“Lions”, “Tigers”, “Bears”]

The field options Lions, Tigers, and Bears are present for each index in sampleSet.

Example: Independent indexes

Suppose in sampleSet index 1, setFieldA=Video and in sampleSet index 2, setFieldA=Audio, and the following rule is set:

- Condition: If setFieldA == Video
- Action: setFieldB = true

For index1, the condtion is true, and the rule fires. For index2, the condition is false, and the rule does not fire. Therefore, setFieldB for index 1 is true, but the rule does not fire for the second index. Each index is independent of the other indexes.

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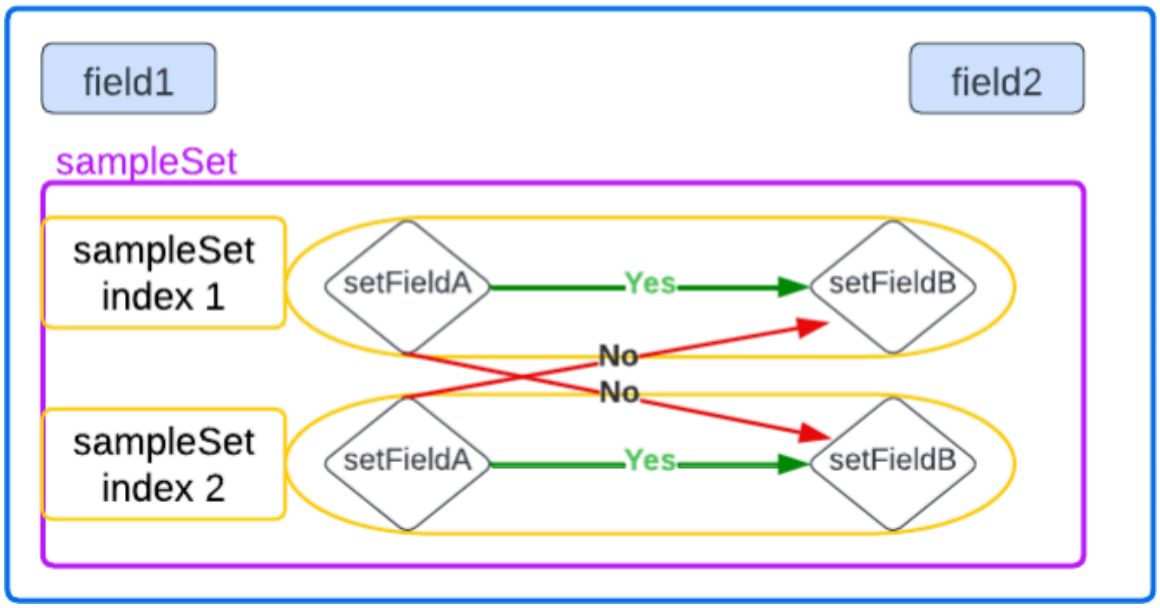
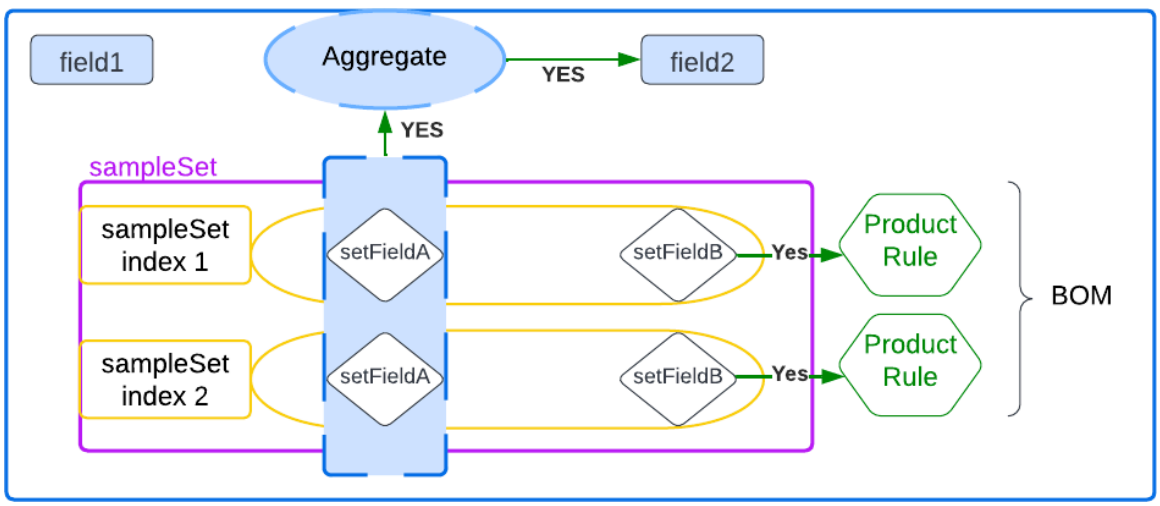
Blueprint



A set that is isolated from the rest of the blueprint is not very useful, but there are ways that the set can affect the blueprint outside of the set. First, if a Product rule is created using fields in the set, each Index in the set uses the Product rule to affect the BOM when the conditions are met. This is beneficial because you can write a single rule that each Index of the set follows differently, depending on the field values in that index.

If we want to have set fields affect fields outside the set, we have to use the set aggregates. There are five set aggregates: Sum, Average, Min, Max and Count. Each created aggregate will have a field variable name (with special formatting). This is because the aggregate fields operate like any other field outside the set, and they can influence other fields.

Blueprint



Related topics

Creating set aggregates

Creating set aggregates

You can collect the average, count, maximum, minimum, and sum of the data in any field in a set by using a set aggregate.

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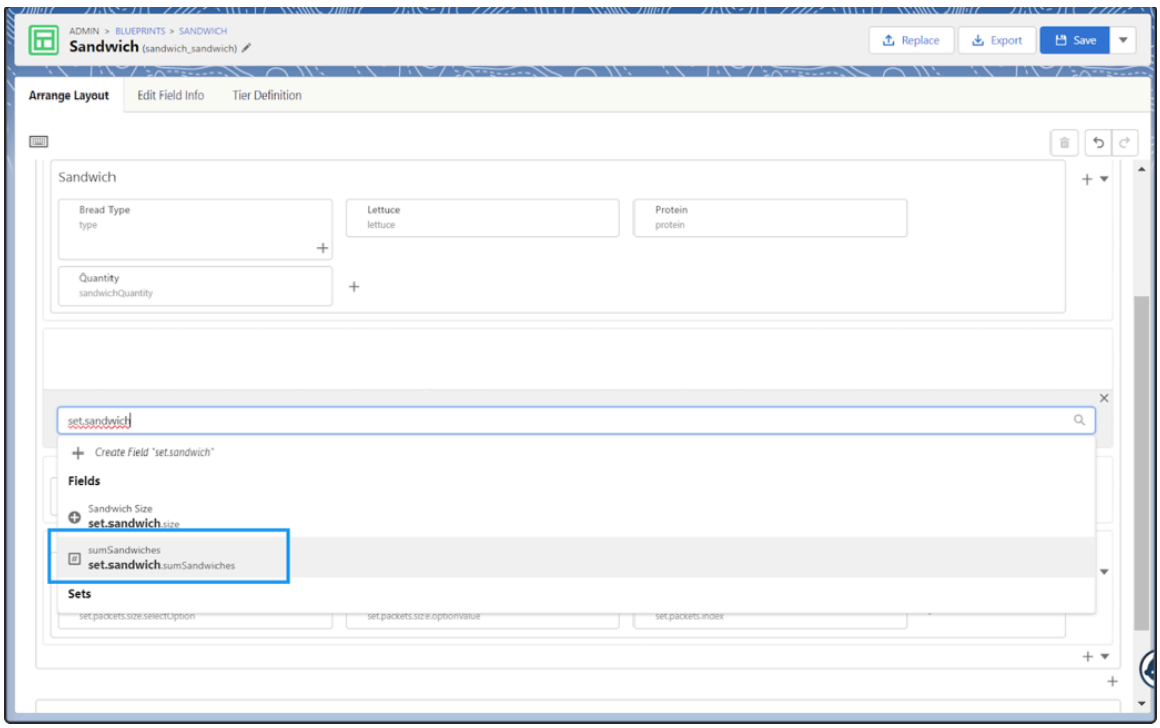
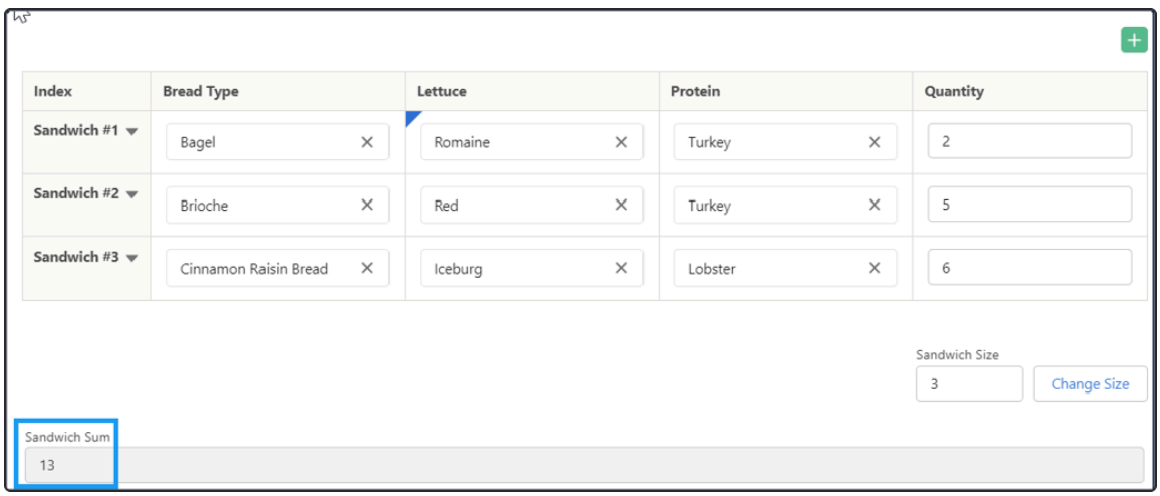
Set aggregates collect the data for each field in the set and output the result. Options include average, count, maximum, minimum, and sum. For example, a sum aggregate on a number field called Quantity will store the sum of all Quantity field values in the set. These aggregates function as a field outside of the set, can be used in global rules, and can be displayed anywhere in the layout.

To create an aggregate, open a set, scroll to the subfield that you want to aggregate, and click **Create New Aggregate**. You can then choose the aggregate type and give the new aggregate a name.

You can add the aggregate to the layout just like any other field, and deploy.



Below is the new sum aggregate during runtime:



Note: The Sandwich Sum aggregate represents the sum of the Quantity field. This is not to be confused with the Sandwich Size of 3, which is the number of rows in the set.

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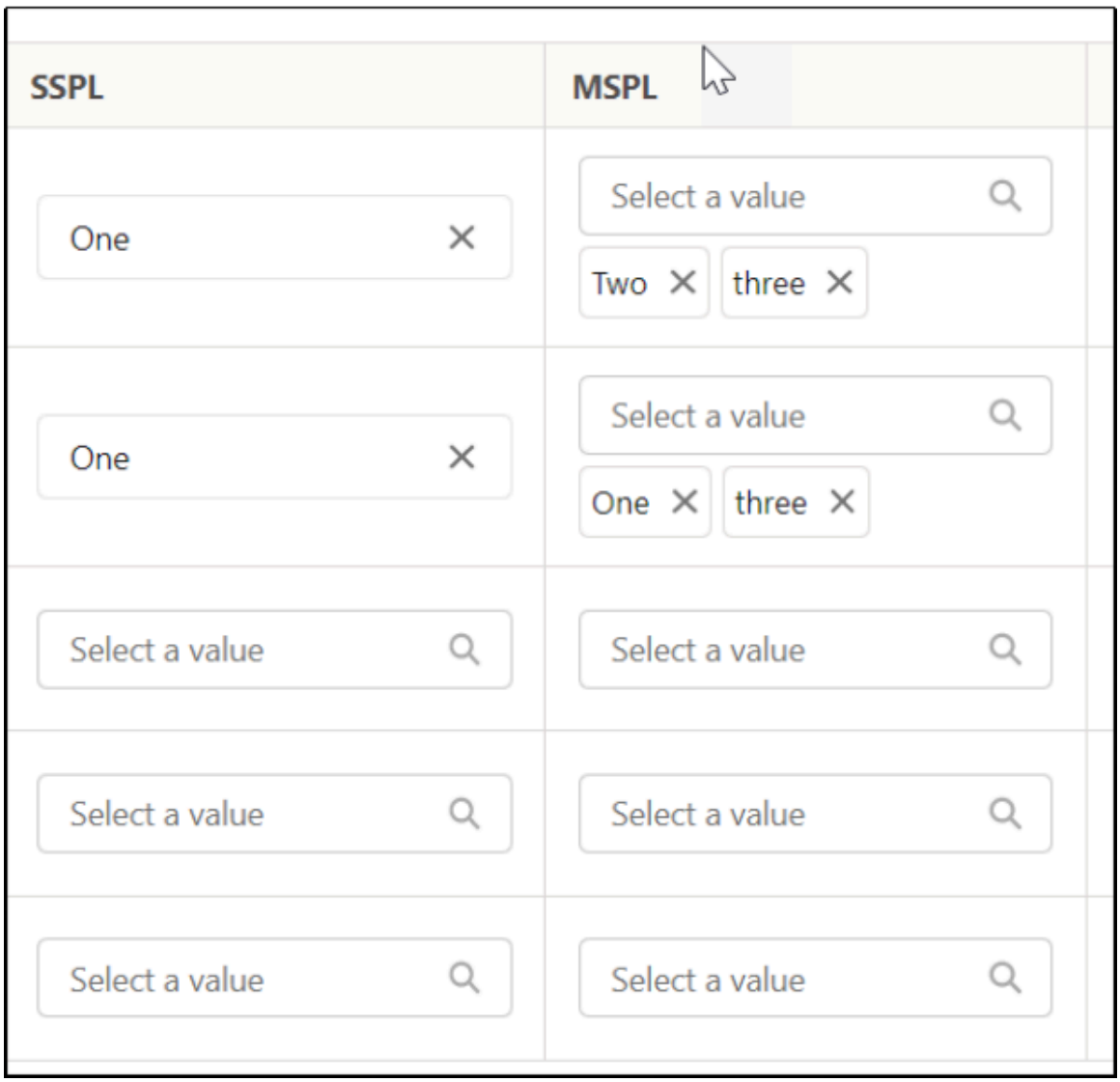
Although the five aggregate types seem straightforward, there are important details about how they function with Boolean fields, picklist fields, and fields that have blank values. The following sections clarify these particulars.

The Count aggregate

This aggregate can cause the most confusion. Count can be defined as “count the number of times the field has defined values in the set.” It tallies instances of the following types of values:

- Non-blank
- Non-zero
- Non-false

For both single-select and multi-select picklists, the count aggregate is based on how many indexes have a value selected. The Count aggregate for the following sample field would be 2, because indexes 1 and 2 have values. Indexes 3, 4, and 5 don’t count because they are blank.



Note: For multi-select picklists, it does not matter how many values are selected—it counts as one.

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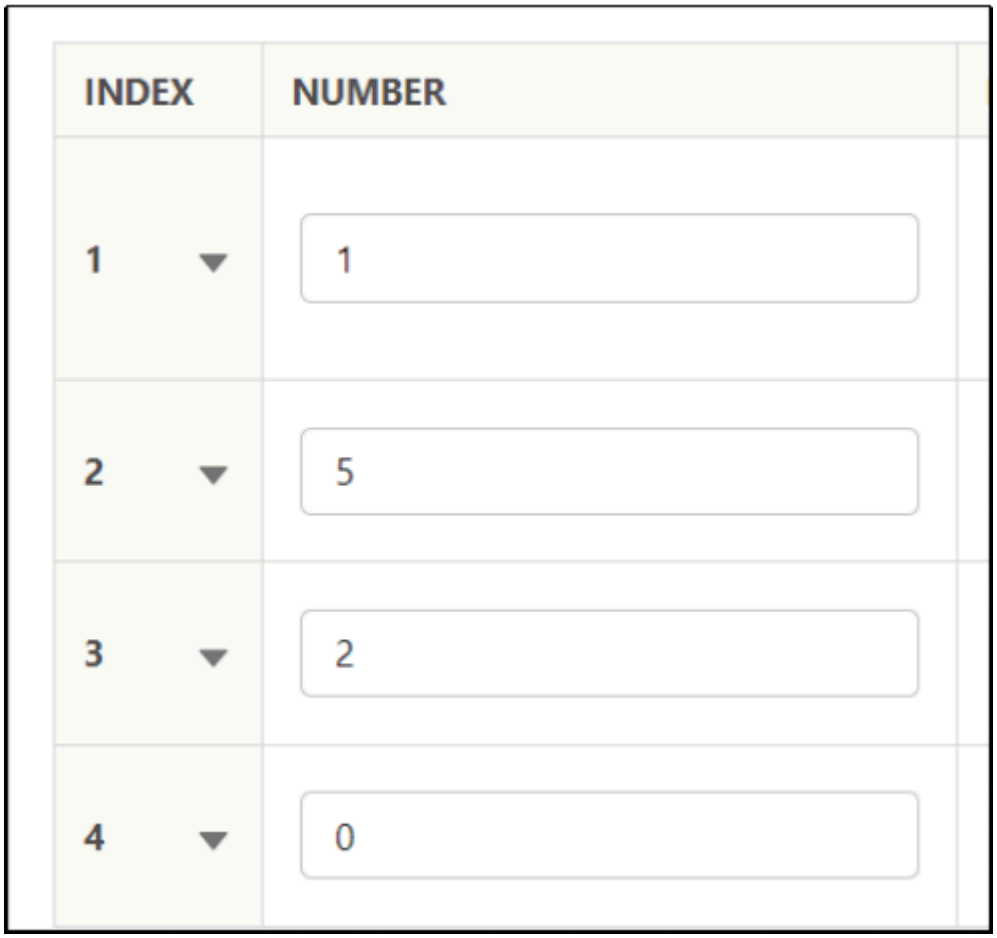
Example: Number field



The count aggregate on this field would be 3 (from index 1, 2, and 3).

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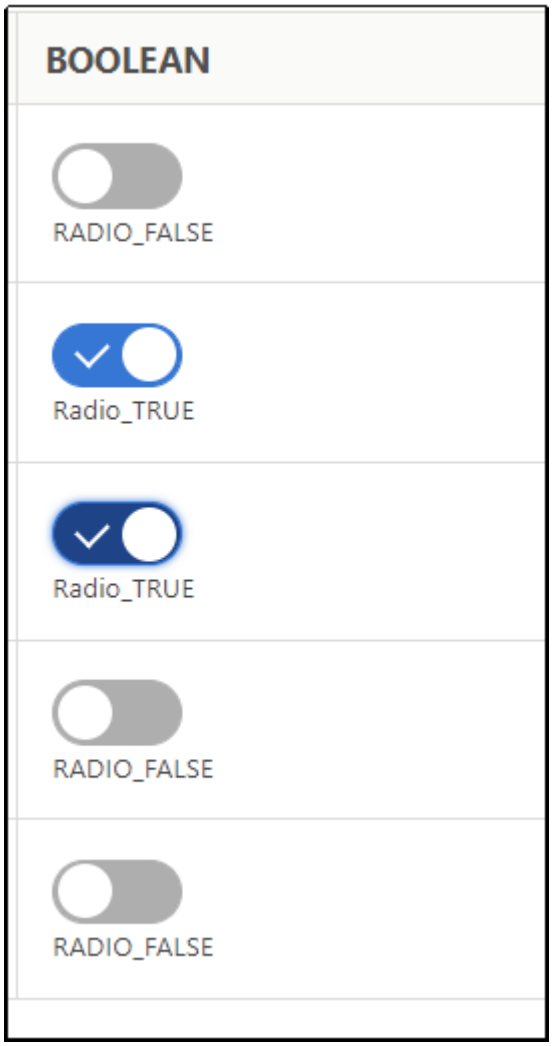
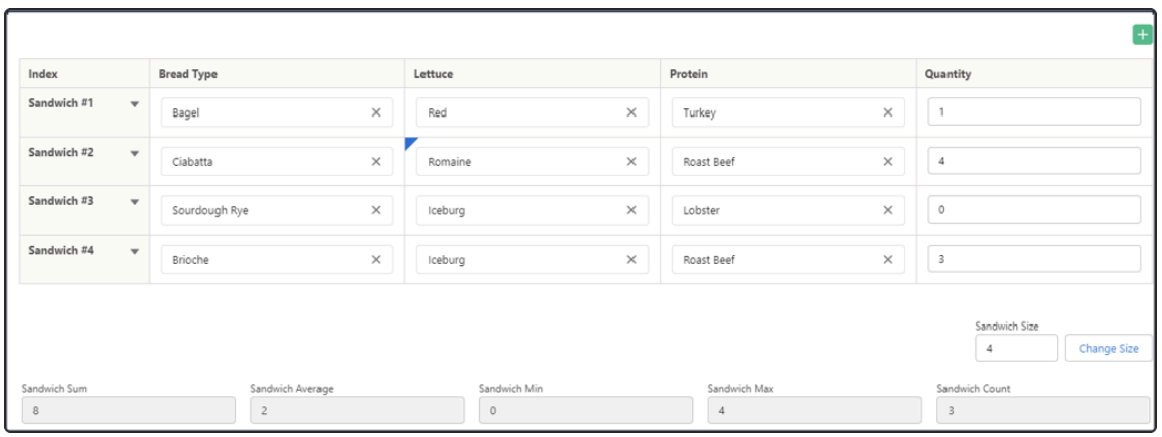
Example: Boolean field



The count aggregate on this would be 2.

The Average, Minimum, Maximum, and Sum aggregates

An average aggregate runs on all iterations of the number field in the set, including zero values. This is in contrast to count aggregates, which ignore zero number values.



In this number field, indexes 1, 2, 3, and 4 add up to a quantity of 8. Since Index 3 with the 0 value is included, 4 is the divisor and the average is 8/4=2.

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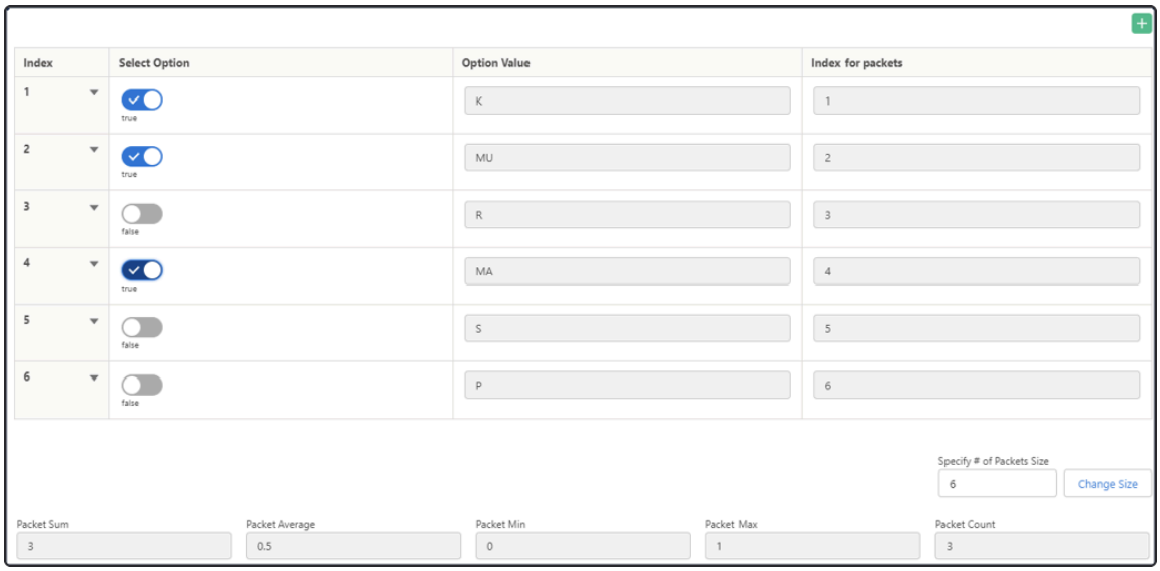
This “including-zero” behavior is true for Sum aggregates, Minimum aggregates, and Maximum aggregates as well. In the example above, the minimum aggregate value is 0 since that is the smallest value.

An average aggregate on a Boolean field will usually be in decimal form. It lets the user know what percentage of the indexes are selected as true. In the following Boolean field, three of the six indexes' Select Option values are true, and the resulting aggregate is 0.5.



A sum aggregate will show the number of Boolean fields marked as true. In the example provided, the aggregate is 3.

A maximum aggregate will be 0 unless one of the Boolean fields is selected, in which case it will be 1.

A minimum aggregate will be 0 unless all of the Boolean fields are selected, in which case it will be 1.

Aggregates on picklist subfields

Four of the five aggregates (average, minimum, maximum and sum) work only on number values, not text. So if you add one of these aggregates on a set field that is a picklist, you will get an error once you deploy and select a text field option.

For example, suppose two fields were created. Both fields had the same field options, but one is a single-select picklist and one is a multi-select picklist. Here are the field options:

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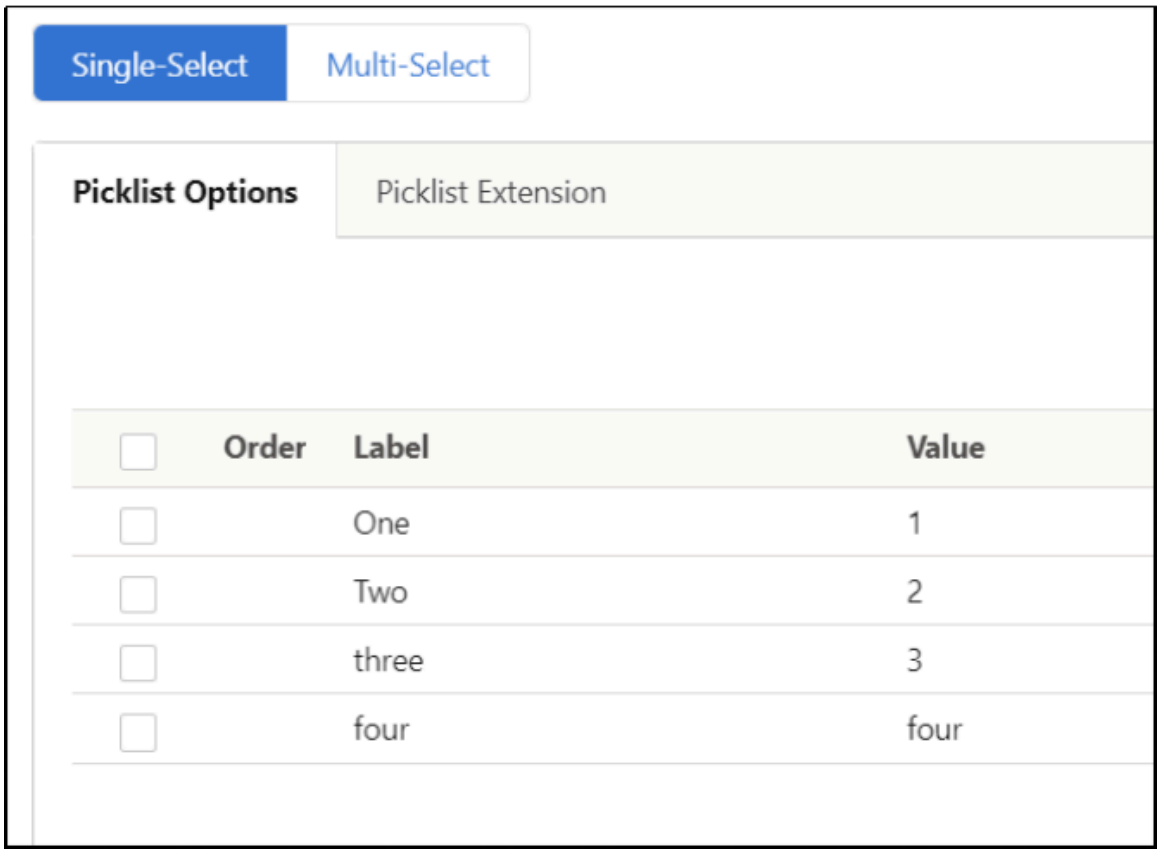

The fourth field option uses the word “four” instead of the number 4. As noted above, when deployed and “four” is selected, an error message occurs:

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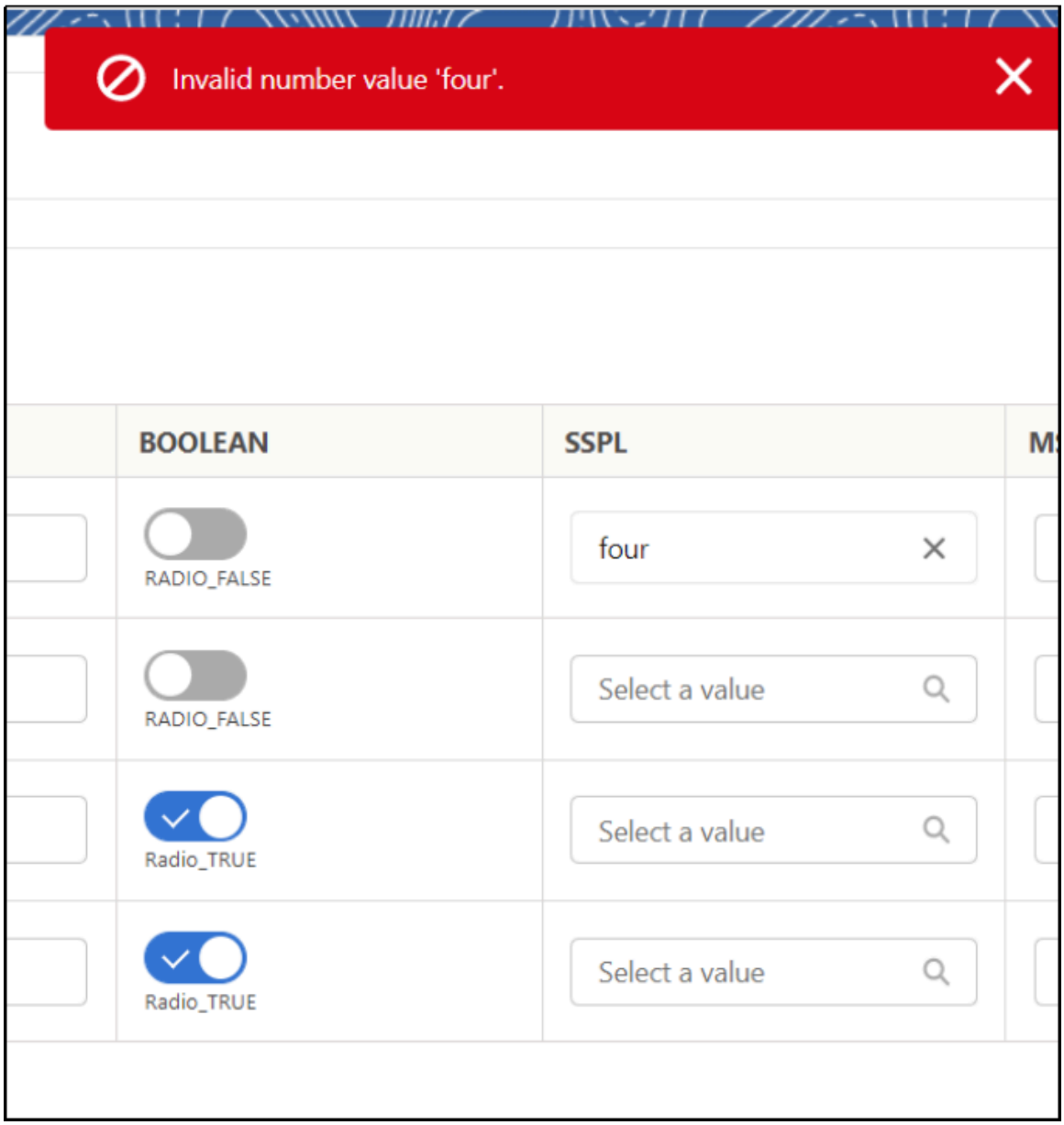

But if we select the numeric based options, the aggregates work.

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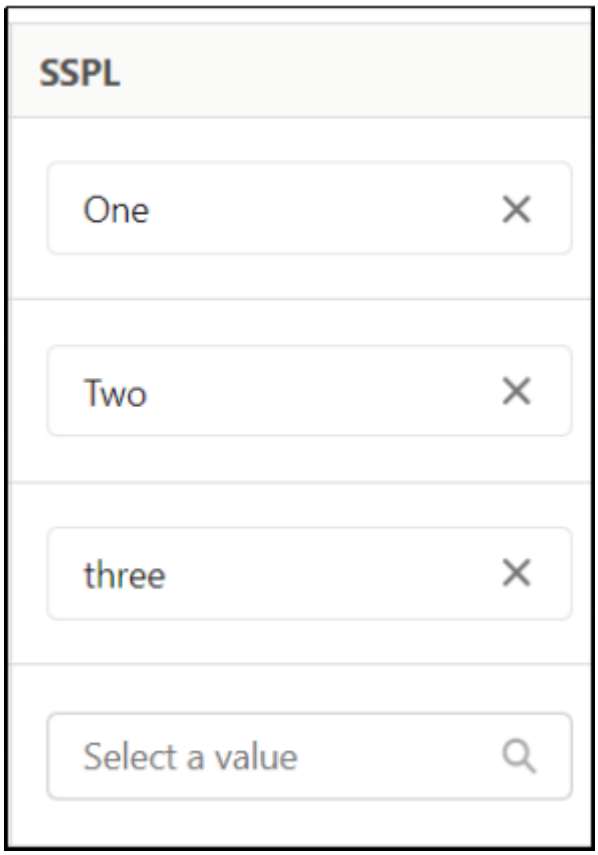
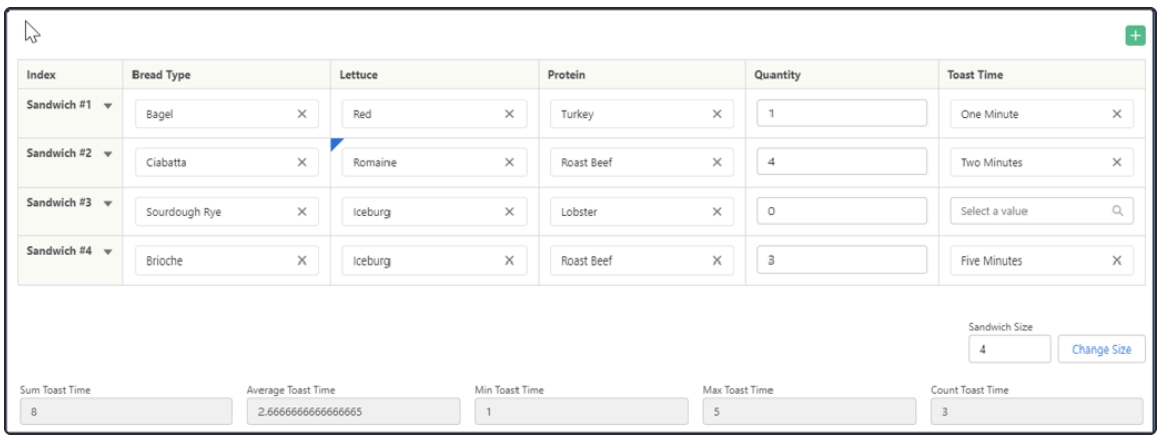


In the following single-select picklist field, there are four indexes. The picklist “Toast Time” has the option label displayed as text, but behind the scenes, the option value is numeric.



The four values selected are “One Minute” (1), ”Two Minutes” (2), blank, and “Five Minutes” (5). By applying each of the aggregates to the single-select picklist field, the result is:

- Sum: 8 = 1 + 2 + 0 + 5
- Maximum: 5 (the largest field option value selected)
- Minimum: 1 (The blank index does not apply to the minimum)
- Average: 2.66 = (1 + 2 + 5) / 3 (The blank index does not count toward the total and the divisor)
- Count: 3 (The blank value does not apply to a count aggregate)

Keep in mind that blank picklist values count towards the minimum, maximum, sum, and average aggregates.

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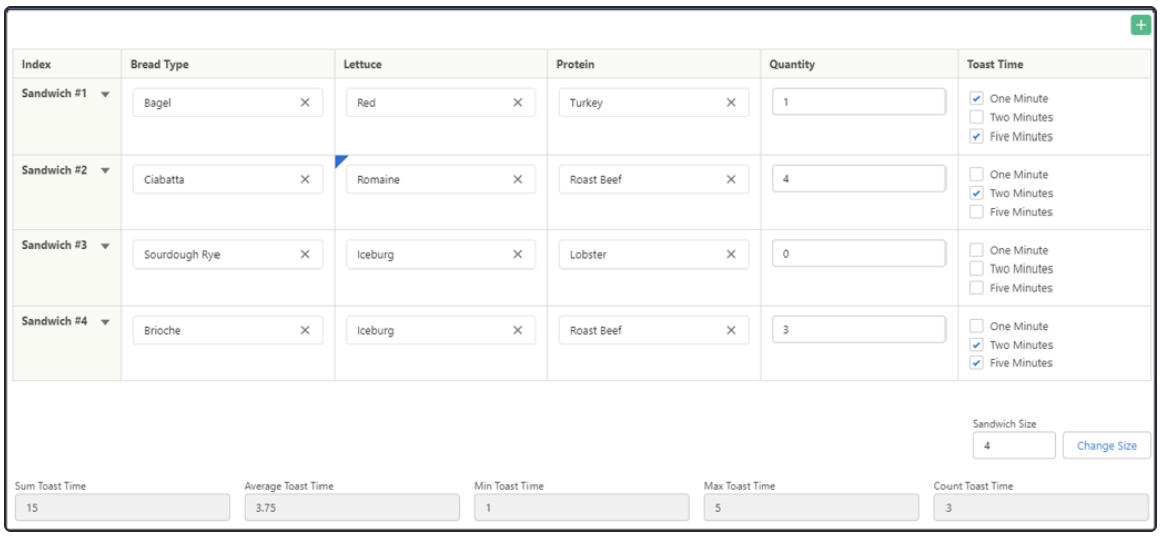
In the following picklist field, Toast Time has been converted into a multi-select picklist. The four indexes have the following option values: [1, 5], [2], [ ], and [2, 5].

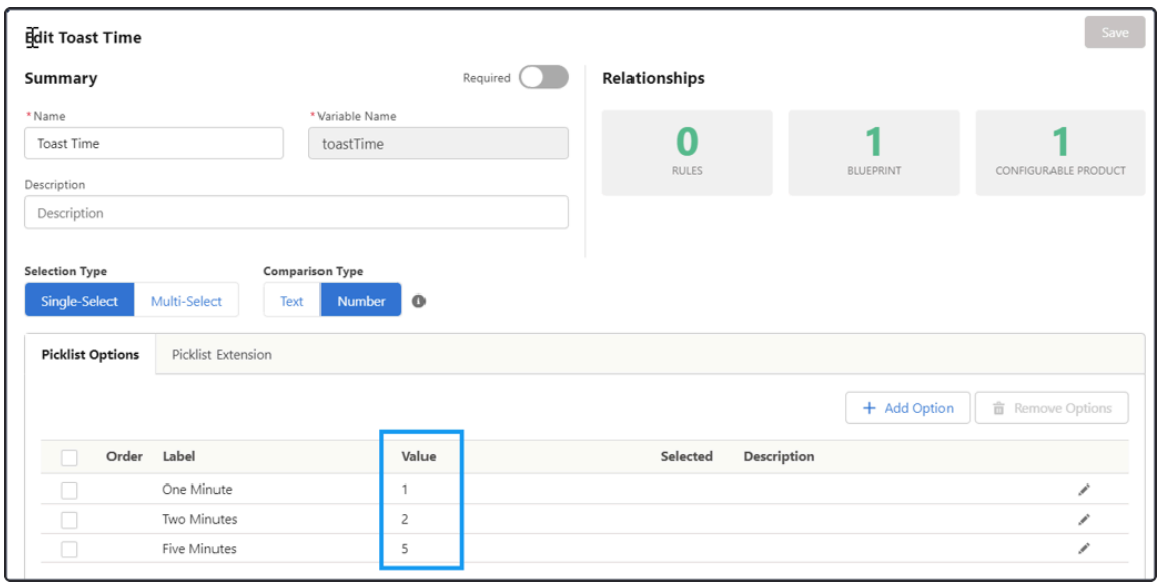


By applying each of the aggregates to the field, the results are:

- Sum: 15 = (1 + 5) + 2 + 0 + (2 + 5)
- Maximum: 5 (Still the largest value selected in the picklist. It is not the combined value in the index. To accomplish that, create a field and a rule in the set to add the multi-select picklist values together)
- Minimum: 0 (The blank row applies to the minimum)
- Average: 3.75 = [(1 + 5) + 2 + 0 + (2 + 5)] / 4 (The blank row counts towards the total and the divisor. The divisor is the number of indexes, not the number of picklist field options selected)
- Count: 3 (The blank value does not apply to a count aggregate)

Remember: The average, minimum, maximum and sum aggregates only work for picklist fields if the field option values are of number type. If the field option values are of text type, users will experience an error in runtime.

The following field is the field set up for the examples in this topic. Note that the Comparison Type is Number, and the values are numbers.



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Related topics

Using sets in layouts

Using set indexes

Watch a video that demonstrates how to use set indexes to drive a product rule.

Sets automatically create a set index field (`set.{{setName}}.index`). Using this field, the indexes of Individual rows in a set can be used in rules or in calculations.

Note: Set indexes cannot be used for cross-index rules. For example, a row at index 1 cannot access or use values from a row at index 2.

The following video demonstrates set indexes and how to use them to drive a product rule.

Set indexes in CPQ

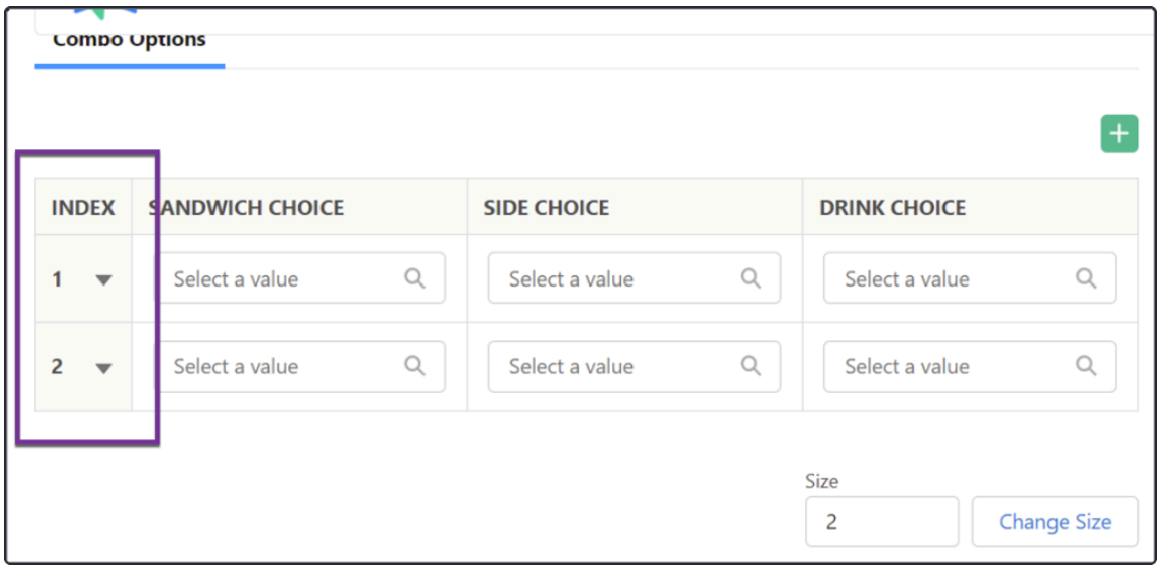
Related topics

Hiding the set grid and field grid indexes

Hiding the set grid and field grid indexes

You can hide the index column in a set grid or a field grid.

By default, the index column is displayed in a set grid or a field grid. This index column can be hidden in two ways: by using the layout wizard or by modifying the layout CSV file.



Hide the index by using the layout wizard

Navigate to the layout in question in the CPQ Admin. Then click the gear icon next to the set or field grid. Then select the General Settings expandable section. Set the Show Index toggle to false, save the layout, and deploy. The index will no longer be displayed.

Note: the Show Index setting is available for field grids as well.

Hide the index by modifying the layout CSV file

To hide the column, adjust your layout CSV to include the following instruction in the “Value”, for an appropriate row: `{“indexVisible” : “false”}`

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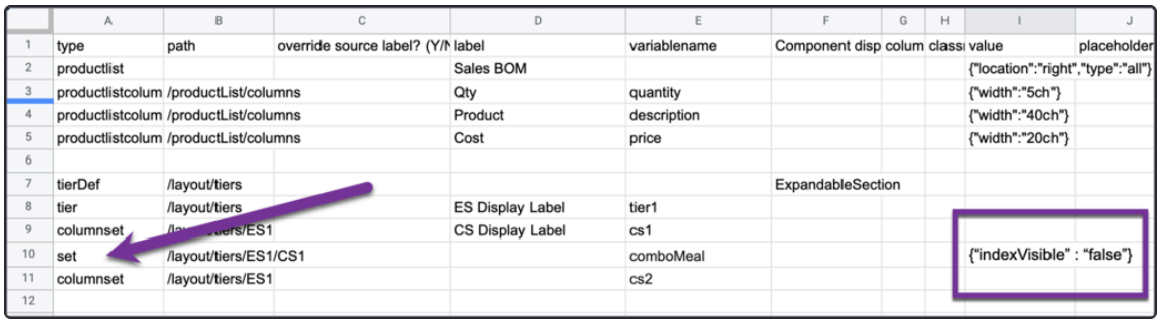
The examples below illustrate the CSV files for a field grid and for a set. In both cases, the Index is hidden on runtime:

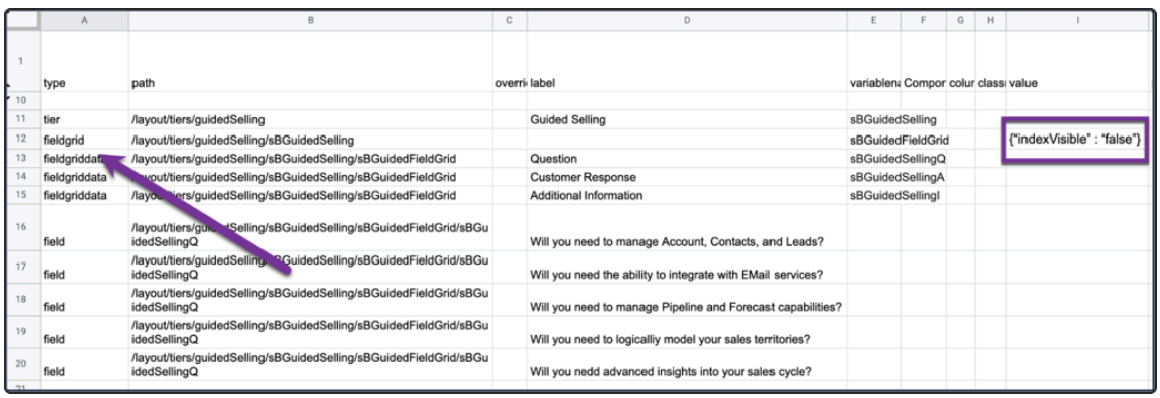


Example: Field grid CSV file



Link to CSV example

Example: Sets CSV file



Link to CSV example

Related topics

Modifying the Size and Change Size fields for a set

Modifying the Size and Change Size fields for a set

You can change the appearance of the size fields for a set, or hide them altogether.

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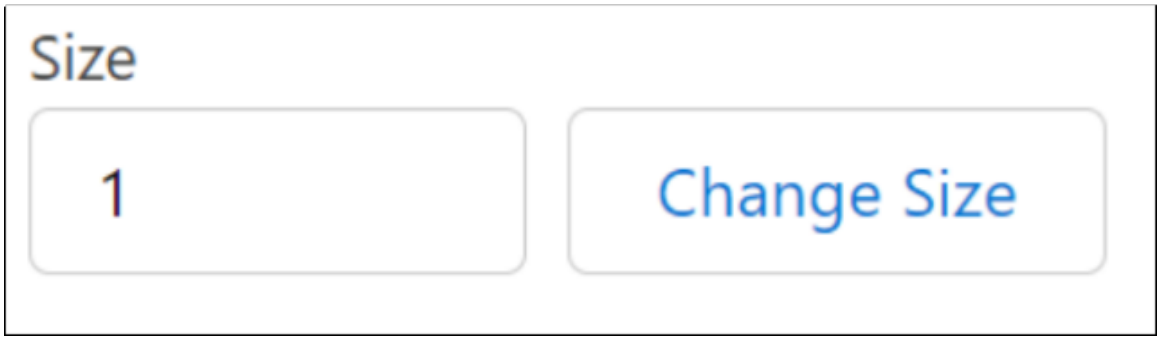
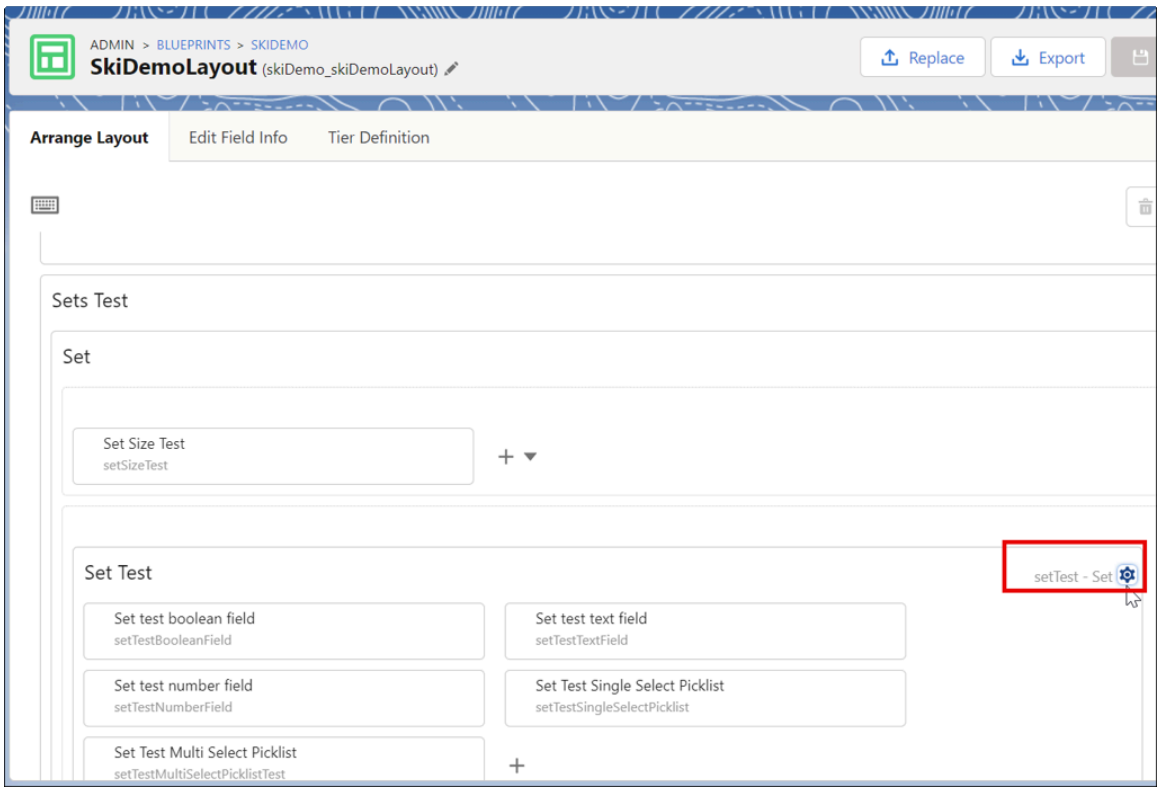


You can hide these fields by making an adjustment in the layout of the blueprint. In the layout editor, click the gear icon next to the set:



In the size settings, you can choose to show or hide the set size field, as well as the appearance, location, and behavior of the field:

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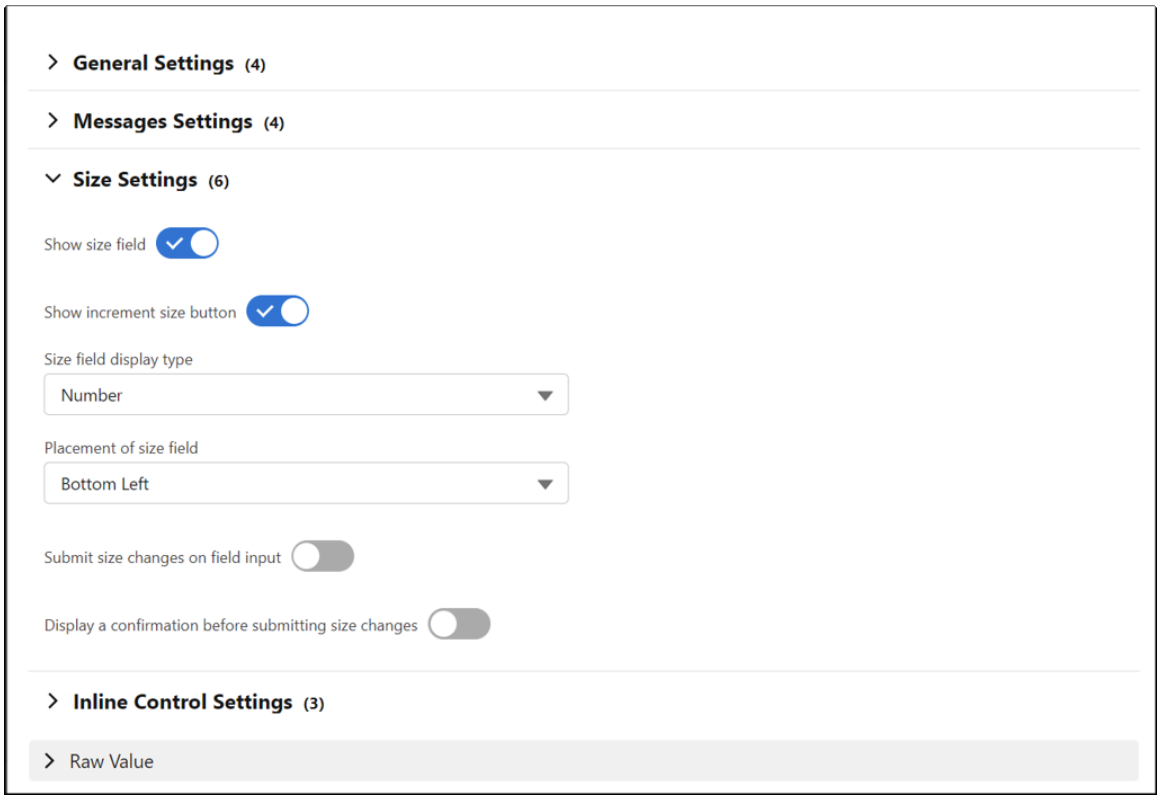


An admin can also hide the size field by modifying the Set type value column in the layout CSV file. Enter the following:

```
{ "sizeControl": { "visible": false } }
```

For more information about how to control the size and behavior of sets, see Using sets in layouts.

Related topics

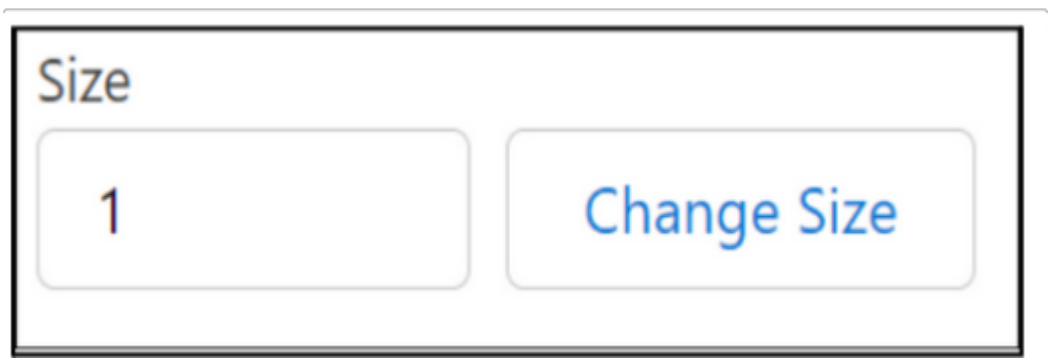
- Example: Use a custom field to dynamically control set size
- Configure sets

Example: Use a custom field to dynamically control set size

This example demonstrates how to hide a standard field and replace it with a custom field.

About this task

This article demonstrates how to hide the Size field (shown below) on a layout and replace it with a different field. A rule populates the value from the new field into the hidden field.



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Before you begin

Role required: Admin

Procedure

1. In the layout wizard, turn off the Show Size Field setting.



   Although the set size field still exists, it no longer appears in the layout. For more information about sets and layouts, see Using sets in layouts.

2. Create your replacement number field and add it to the layout.
   You can change the display type as desired. In the example below, we created a number field using a slider.



   The final task is to create a rule to take the value from the new field and enter it into the (hidden) Size field.

3. Create a rule, set your conditions, and create a Determination Action.
   In the rule action:
   - Define your original Set Size field as the field in which the value will be injected.
   - Select **Advanced**.
   - Click **Edit Advanced Function** and input a single line of code that returns the value of your new field.

   For example, assume that the new field has a value of numberOfHardDrives. As seen in the image below, our line of code would simply be:

```
return cfg.numberOfHardDrives;
```

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4. Deploy and test your updated blueprint.
   When you modify the values of the field that you created, the size of the Set should be updated accordingly.

Configure picklist extensions

Learn how to create and configure picklist extensions (Picklist extensions) in CPQ. Add extended option details, apply filters, and map products and quantities to display enriched picklist data in layouts for more dynamic and efficient configurations.

Before you begin

1. Create a single-select or multi-select picklist field for your picklist extension (example: dogBreed).
2. Create a single-select picklist field that you want to use to filter your picklist extension (example: dogBarking).

   Tip: For prerequisite steps 1 and 2, use Matrix Loader to upload the following two CSV files:

   dogBreed Fields CSV

   dogBreed FieldOptions CSV

3. Create an SFDC Product2 record, such as “Configured Canine”. Make a note of the ID (the format is a 15-20 character token, similar to 01t5f0000004GBwAAM) or Product Code, depending on your environment's ProductIdField setting. Define a standard pricebook price to the product record.

In steps 1 through 7 of the procedure, we set up the extension data. In the remaining steps, we map the data.

Role required: Admin

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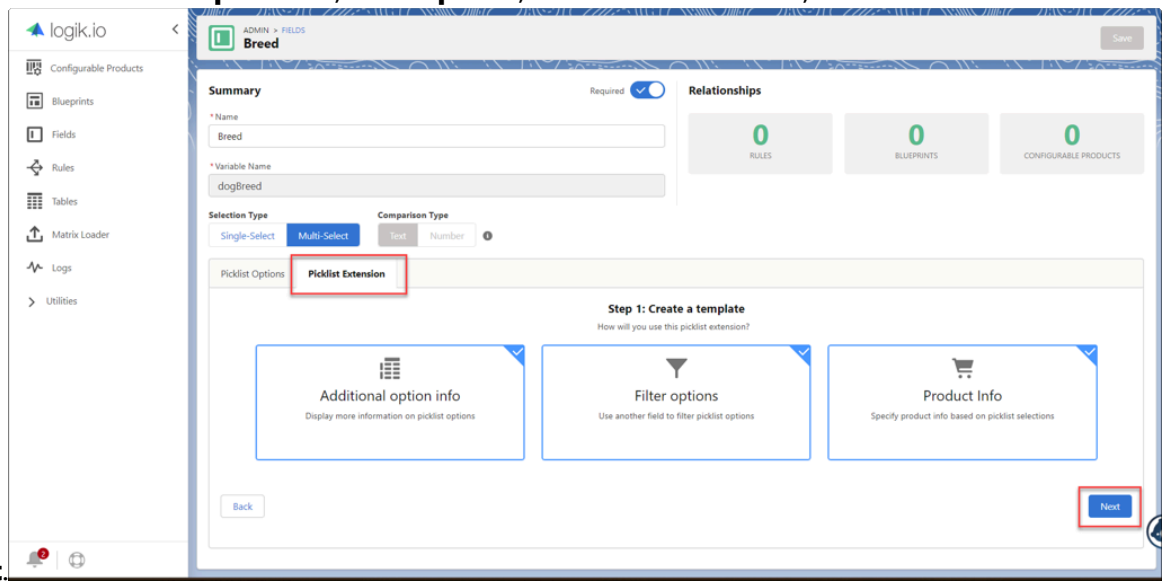
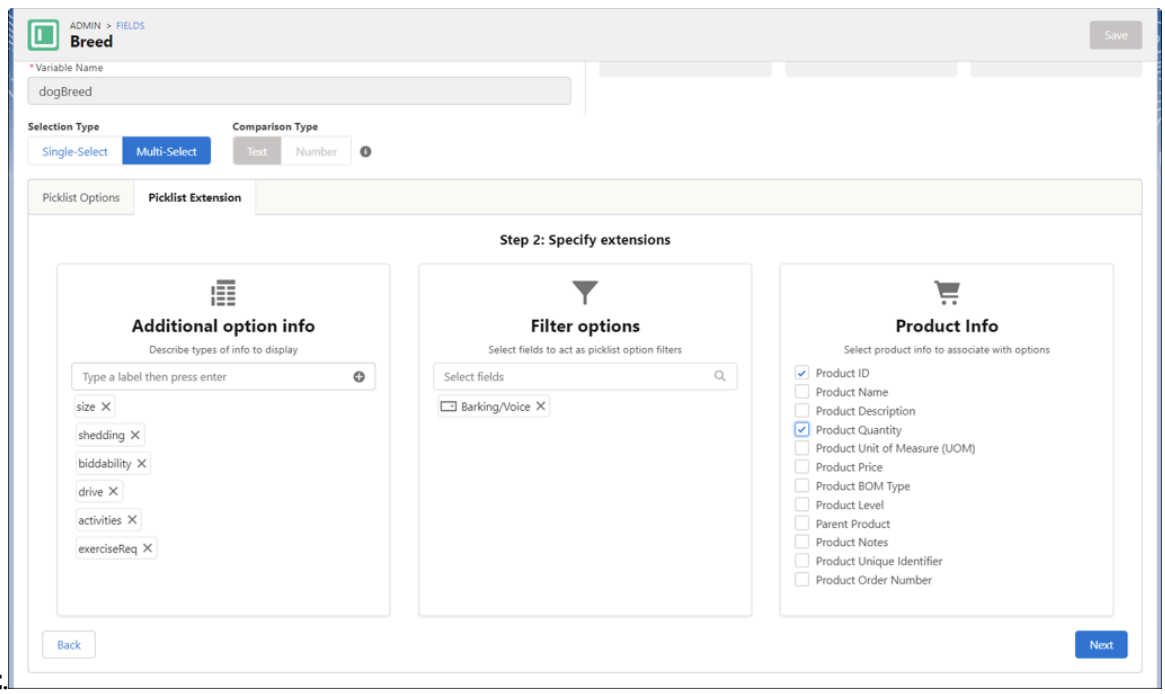
Procedure

1. In dogBreed picklist administration, click the Picklist Extension tab, and then click **Guided Setup**.
2. Click the **Additional option info**, **Filter options**, and **Product Info** tiles, and then click **Next**.



3. For each option in the picklist, enter labels for the extended information to show. Examples: size, shedding, exerciseReq, biddability, drive, activities.
4. Filter Options: choose the fields with which you will filter picklist extension. Example: Barking/Voice
5. Product Info: check **Product ID** and **Product Quantity**.
6. Click **Next**.



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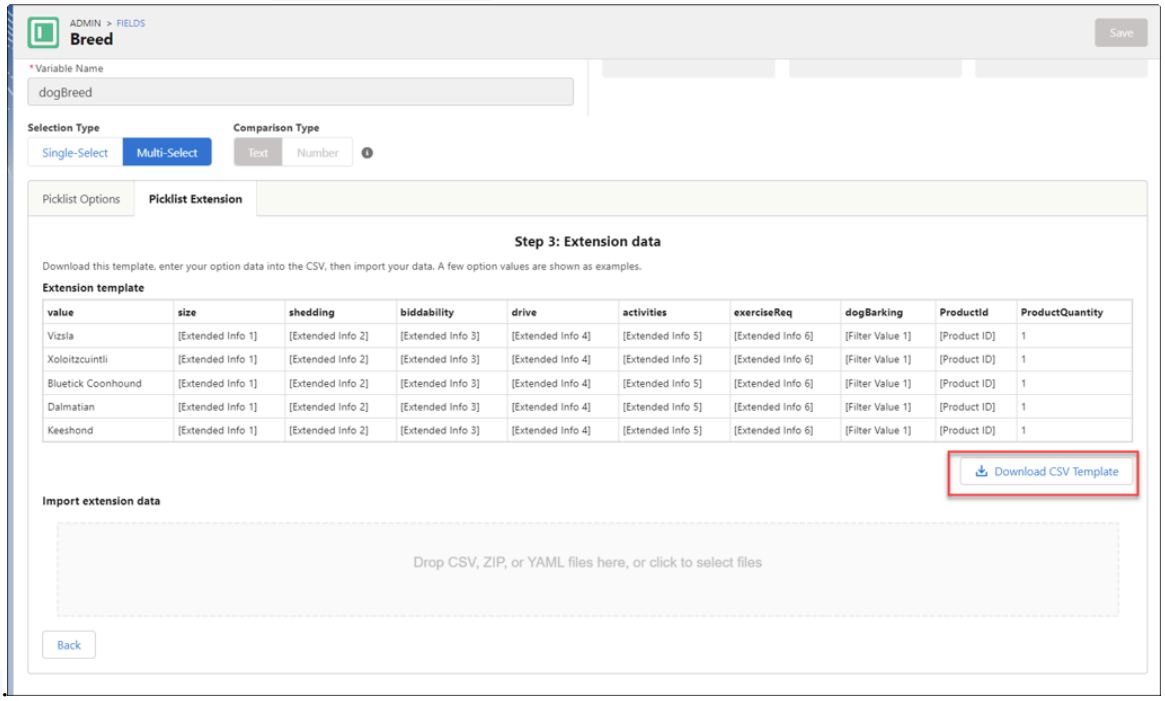
7. Review the format, and then click `Download CSV Template`.



8. Complete the CSV file on your local machine.
   (If you're implementing the dogBreed example: leverage the spreadsheet dogBreed picklist extension data; replace ProductId with token or Product Code from prerequisite step 3; and export to CSV format.)
9. In the picklist field you are editing, drag the CSV file to Import Extension Data, and then click **Import**.
10. Map the 'value' column to 'Option Reference'.
    This instructs the picklist extension to display defined values of the picklist in the leftmost column. The column that is mapped as the option reference must be named 'value'.
11. Map 'size' to 'Extended Info: "size" as API Payload Key'.
    The corresponding **Available In Layout** checkbox should be automatically checked.
12. Perform the same mapping for the 'shedding', 'exerciseReq', 'biddability', 'drive', 'activities', and 'dogBarking' fields.
    That is, for the 'shedding' imported column, map to 'Extended Info: "shedding" as API Payload Key', and so on.
13. Map 'size_filter' to the Size [dogSize] field.
    This will filter the picklist according to the user's selection in dogSize.
14. Map 'shedding_filter' to the Shedding [dogShedding] field.
15. Map 'dogBarking_filter' to the Barking/Voice [dogBarking] field.
16. Map 'ProductId' to the Product ID entry with the shopping cart icon, under 'Set product info'.
    This tells the app to reference the ProductId or Product Code in the picklist extension data to add the corresponding product to the Shopping Cart.
17. Map 'ProductQuantity' to the Product Quantity entry with the shopping cart icon, under 'Set product info'.
    This tells the app to set the quantity of the line item in the cart with this value from the picklist extension upload data.
18. Click **Save Mapping**, and then in the upper right corner, click **Save**.

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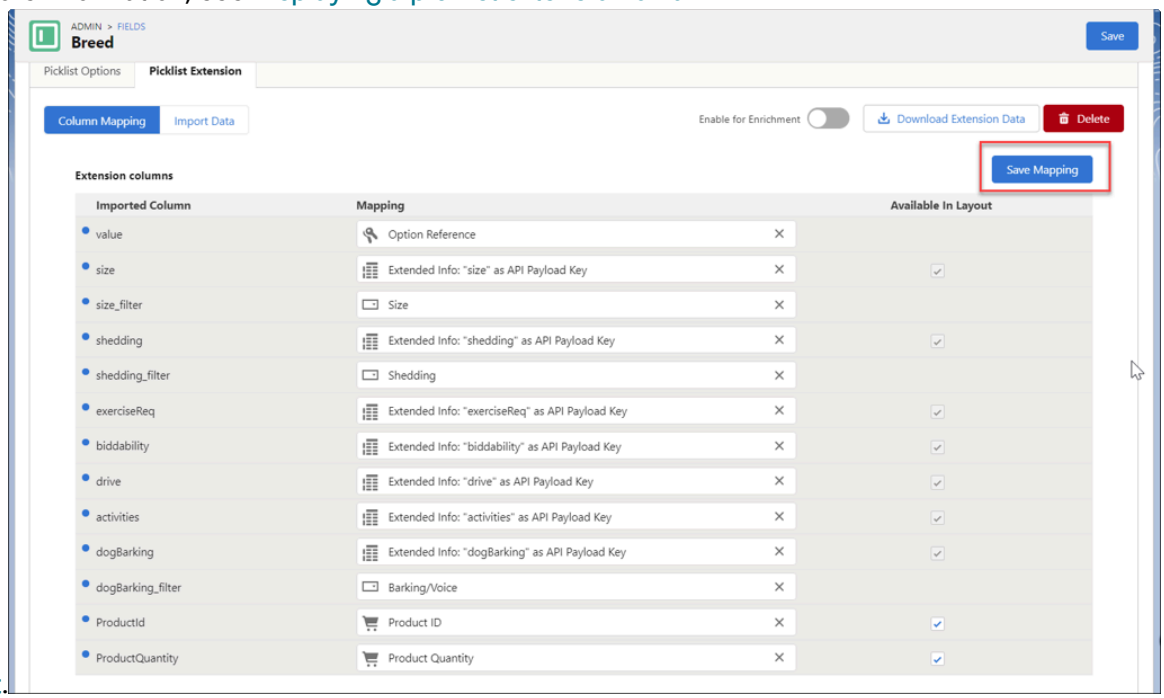
19. Add the picklist extension field to the layout via the Logik Admin UI or by CSV upload, and deploy.
    For more information, see Displaying a picklist extension on a layout.



Related topics

- Displaying a picklist extension on a layout
- Picklists and picklist extensions in rules

Adding a field with an extended picklist to the layout

Add an extended picklist field to a CPQ layout by placing it in a column set and defining each extension column in the layout CSV. Make sure that the picklist extension is marked “Available in layout” so its data appears correctly in the user interface.

Adding a field with an extended picklist to the layout is similar to how a field is added to a layout. First the field has to be added to a Columnset in a Tier. After that, each column of the extended picklist must be added to the layout with the field added at the end of the path. In the following example, row 16 adds the field “dogBreed” to the layout. The path in rows 17- 24 all have “dogBreed” at the end of the path. They also have the value, fieldExtension, in the type column (column A).

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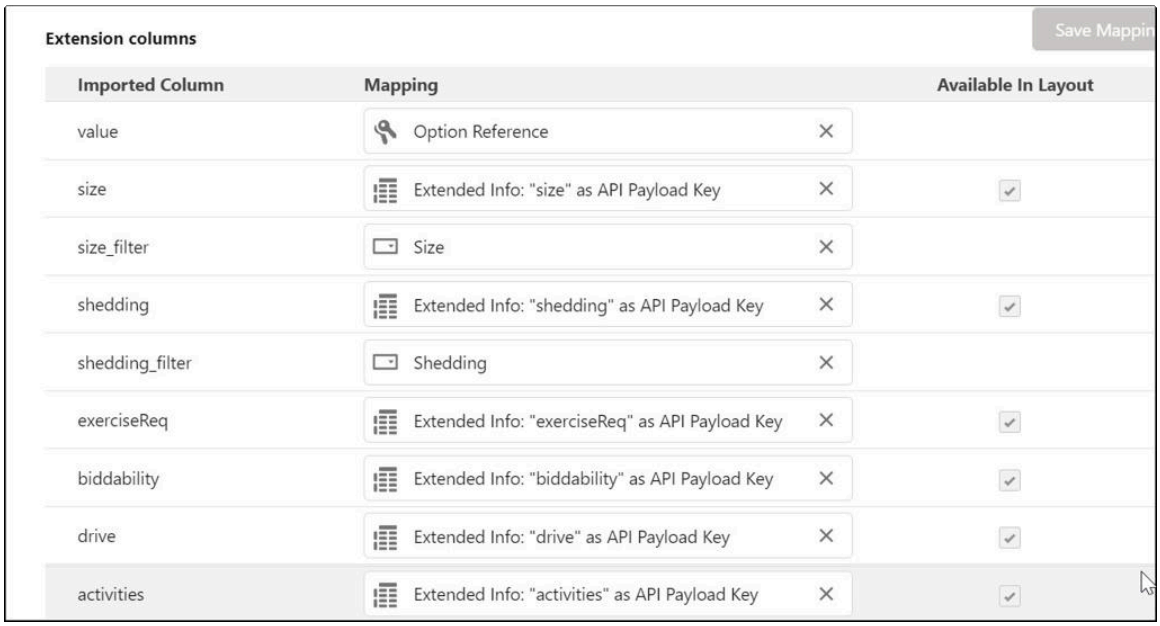
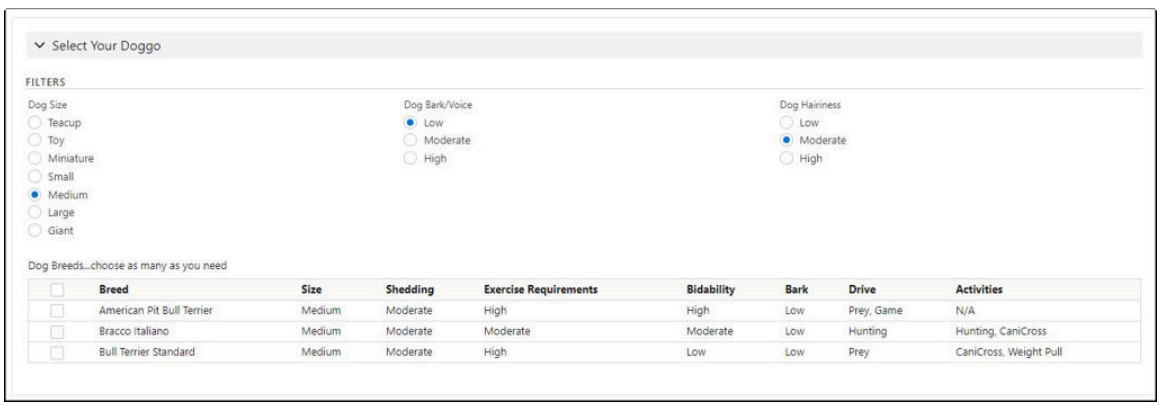
	A	B	C	D	E	F
7	productlistcolumn	/productList/columns		List	price	
8	tierDef	/layout/tiers				ExpandableSection
9	tier	/layout/tiers		Select Your Doggo	doggo1	
10	columnset	/layout/tiers/doggo1		Filters	CS1	
11	columnset	/layout/tiers/doggo1			CS2	
12	columnset	/layout/tiers/doggo1		PLE in a Set	CS3	
13	field	/layout/tiers/doggo1/CS1		Dog Size	dogSize	VerticalRadio
14	field	/layout/tiers/doggo1/CS1		Dog Bark/Voice	dogBarking	VerticalRadio
15	field	/layout/tiers/doggo1/CS1		Dog Hairiness	dogShedding	VerticalRadio
16	field	/layout/tiers/doggo1/CS2		Dog Breeds...choose as many as you need	dogBreed	MultiSelectPicklistGrid
17	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Breed	label	
18	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Size	size	
19	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Shedding	shedding	
20	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Exercise Requirements	exerciseReq	
21	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Bidability	biddability	
22	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Bark	dogBarking	
23	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Drive	drive	
24	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Activities	activities	

It is also important to make sure that any extension that will be added to the layout is selected on the picklist extension menu by checking the “Available in layout” box.



The setup above images would result in the following layout:



Related topics

Displaying a picklist extension on a layout

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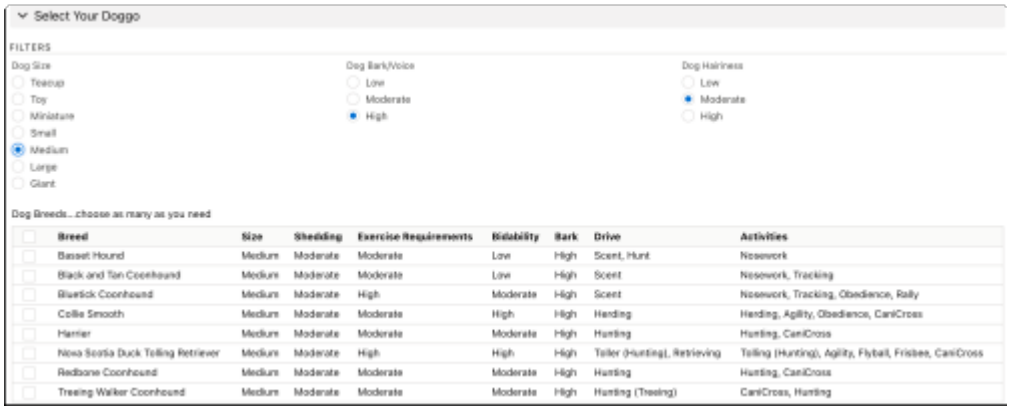
Displaying a picklist extension on a layout

Learn how to display a picklist extension (PLE) on a layout using either the CPQ Admin UI or a CSV upload. Configure foundational picklist fields, map extension columns, and design layouts that present rich, multi-column picklist data.

In this article, we show a simple picklist extension (PLE) as it appears to an end user and how to display it in the layout, either by adding it using the admin UI or by uploading a CSV file.

End-user view



In this layout, we have the following structure:

- An ExpandableSection with the label "Select Your Doggo"
- A ColumnSet with the label "Filters"
- Three fields that act as filters for the PLE: Dog Size, Dog Bark/Voice, and Dog Hairiness
- A ColumnSet with no label (optional; administrators choice, but doesn't serve any purpose)
- The PLE framework. Label: "Dog Breeds...choose as many as you need". Displayed as a MultiSelect picklistGrid to match the multi-select type of the foundational picklist field (Breed [dogBreed]) that we're extending
- Eight columns in the PLE framework, consisting of (from left to right):
  - Breed: we're showing the label of the foundational multi-select picklist field, dogBreed
  - Size [size], referenced from the PLE data structure
  - Shedding [shedding], referenced from the PLE data structure
  - Exercise Requirements [exerciseReq], referenced from the PLE data structure
  - Biddability [biddability], referenced from the PLE data structure
  - Bark [dogBarking], referenced from the PLE data structure
  - Drive [drive], referenced from the PLE data structure
  - Activities [activities], referenced from the PLE data structure

Picklist extension data structure

In the dogBreed multi-select picklist field, extension information is mapped as follows:

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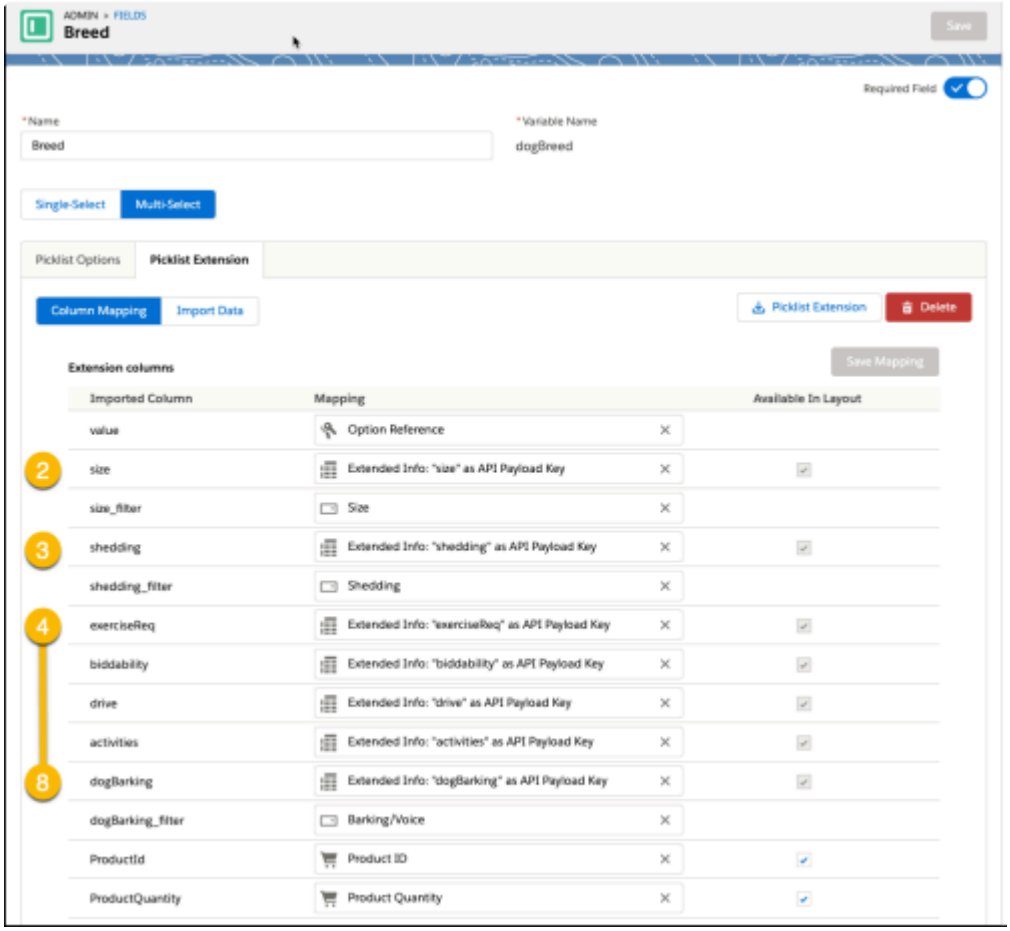
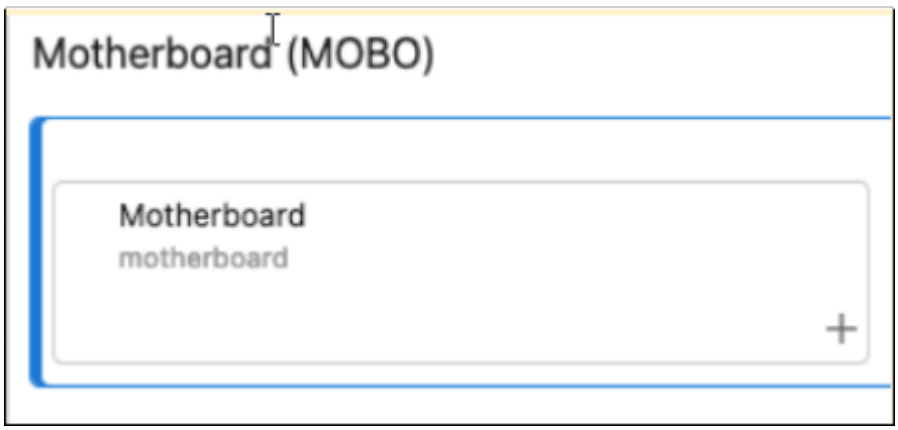


Observe the extended info columns, marked with yellow circles. Later, in the CSV layout, we will map these as fieldExtensions to the foundational dogBreed picklist field. (See the picklist extension CSV layout section.)

Adding a picklist extension to the layout using the CPQ Admin UI

CPQ supports the ability to easily add a picklist extension to the layout using the CPQ Admin UI. Navigate to the layout from the Blueprint and add the picklist extension field as you normally would any other field. We've added a picklist extension field, "Motherboard" to our layout.



You will see a "+" at the bottom-right of the newly added picklist extension field. Click it, and from here you can add columns that you defined on the picklist extension field itself. In the image below, we've added our columns for "value", "socketType", and "memoryCapacity".

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Picklist extension CSV layout

The following is an image of the CSV layout. Ignore the gray-highlighted rows (1-8), as these have nothing to do with the picklist extension definition. Focus your attention on rows 9 through 17.

	A	B	C	D	E	F	G
1	type	path	override	label	variablename	Component disp	columnorder
2	tierDef	/layout/tiers				ExpandableSection	
3	tier	/layout/tiers		Select Your Doggo	doggo1		
4	columnset	/layout/tiers/doggo1		Filters	CS1		
5	columnset	/layout/tiers/doggo1			CS2		
6	field	/layout/tiers/doggo1/CS1		Dog Size	dogSize	VerticalRadio	
7	field	/layout/tiers/doggo1/CS1		Dog Bark/Voice	dogBarking	VerticalRadio	
8	field	/layout/tiers/doggo1/CS1		Dog Hairiness	dogShedding	VerticalRadio	
9	field	/layout/tiers/doggo1/CS2		Dog Breeds...choose as many as you need	dogBreed	MultiSelectPicklistGrid	
10	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Breed	label		
11	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Size	size		
12	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Shedding	shedding		
13	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Exercise Requirements	exerciseReq		
14	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Biddability	biddability		
15	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Bark	dogBarking		
16	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Drive	drive		
17	fieldExtension	/layout/tiers/doggo1/CS2/dogBreed		Activities	activities		

Row 9 (green highlighted): this is the picklist extension framework. In E9, we identify the variable name of the foundational picklist field [dogBreed]. As dogBreed is a multi-select picklist, we set the Component display type, F9, to 'MultiSelect picklistGrid', to match. (If our foundational picklist field was a single-select picklist, we would set the corresponding Component display type to 'SingleSelect picklistGrid'.)

In the rows highlighted yellow (rows 10 through 17), we reference the columns that are defined in the PLE data structure. Notes:

- The type in A10:A17 is 'fieldExtension', the child type to a field whose Component display type is [Multi|Single]Select picklistGrid (F9).
- The path in B10:B17, /layout/tiers/doggo1/CS2/dogBreed, references the parent foundational picklist field, dogBreed (E9).
- Row 10 instructs CPQ to show the labels ('label' in E10) of the foundational picklist options. This is optional, but highly recommended. The first fieldExtension row (A10), this is the left most column of the PLE displayed.
- The remaining fieldExtension rows lay out the remaining columns, from left to right, in the PLE display table.

The setup above would result in the following layout:

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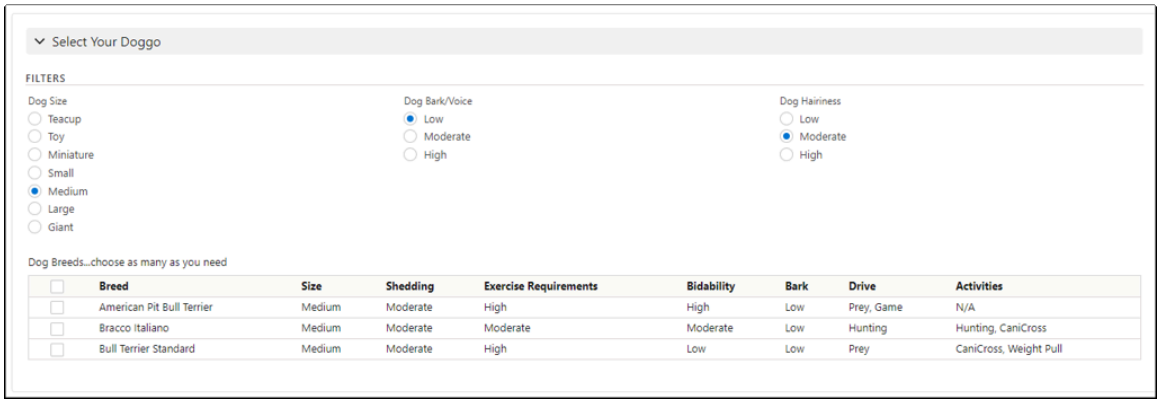

For your reference, this is the sample CSV layout in spreadsheet format.

Table-based picklists

A table-based picklist lets an administrator query and retrieve data from managed tables.

Table-based picklists allow administrators to retrieve configuration picklist field options from a managed table. This feature is particularly useful when:

- The number of options in the picklist is large. The buyside UI representation of the table-based picklist paginates options, and thus, improves the user's experience of page response.
- Several picklists make use of the same options. Picklist-specific query filters facilitate data reuse.

Managed Tables are not deployed. As a result, a picklist which references table data for its options will present the end-user with the data available in the table when it is queried, at runtime.

If the referenced managed table contains duplicate data, the application attempts to present the best picklist experience to the user at runtime. For example, consider the following three scenarios.

Scenario 1:

Two identical items

Label	Value
Apple	apple
Banana	banana
Banana	banana
Chayote	chayote

CPQ removes the second instance of Banana [banana], presenting the user with three picklist options.

Scenario 2:

Two items with the same label but different values

Label	Value
Apple	apple

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Two items with the same label but different values (continued)

Label	Value
Banana	banana
Banana	banana2
Chayote	chayote

In this scenario, CPQ retrieves picklist options with four unique values. Unfortunately, two values, “banana” and “banana2” share the same label, “Banana”. The app cannot determine which value is best for label, “Banana”. Therefore, the user will be presented with a total of four options, two labeled “Banana”. Administrators must mind their managed tables data to avoid this poor end-user experience.

Scenario 3:

Two items with different labels but identical values

Label	Value
Apple	apple
Banana	banana
Banana2	banana
Chayote	chayote

When duplicate values are returned from a managed table, CPQ displays the label associated with the first occurrence of the value. All other labels associated with that value are eliminated and are not displayed as picklist options to the end-user.

If the referenced table returns a row with no data contained in the label or value, the application will ignore the entry, and the record will not be presented to the end-user as a picklist option.

Note: Table-based picklists do not support picklist extensions.

Related topics

Picklists and picklist extensions in rules

Picklists and picklist extensions in rules

Learn how to use picklist extensions (PLEs) effectively in rules. Understand how filtering, inclusion, and exclusion interact, and apply correct operators like equals and contains for single- and multi-select picklists to ensure accurate rule behavior in advanced configurations.

Picklist extensions (PLEs) are a powerful way for administrators to display as much information as possible about a product while making it easy for end users to select exactly what they want. However, simplicity at the front end can mask complexity at the back end. This article shows administrators how to correctly use PLEs in rules and advanced functions and explains some important caveats.

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Note:

- Try using Filter Options & Product Info first.
- Do not use inclusion rules for PLEs. PLE filtering works like inclusion rules, so in order to remove further options, the user should use exclusion rules.
- **Contains** and **Equals** act differently on multi-select picklists. `Array.includes()` and `==` also act differently.

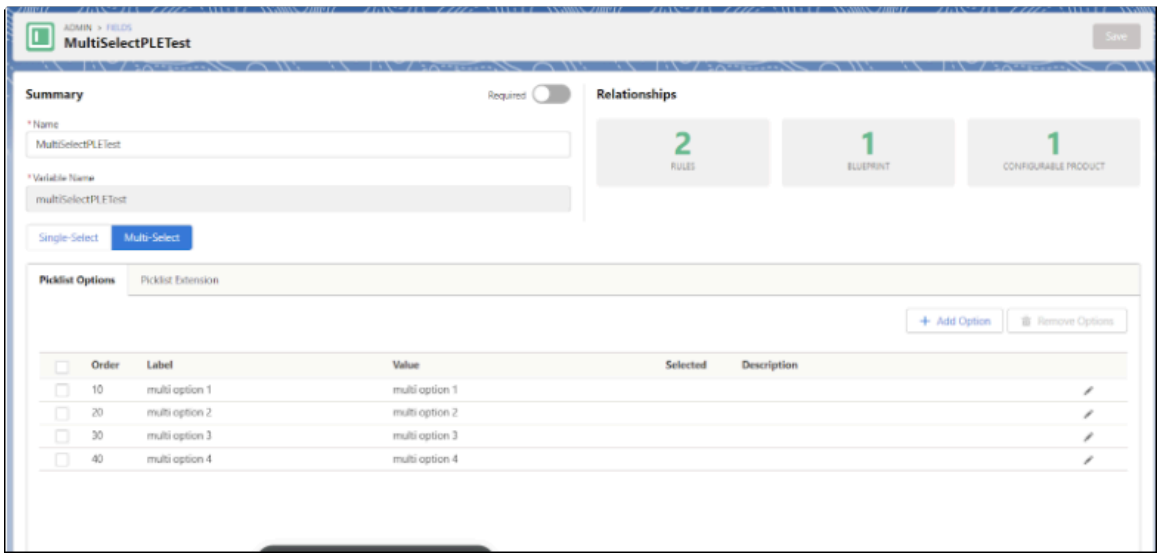
Simple rules

It's best not to use rules with picklist extensions. PLEs are designed so that you can filter options and send data to the bill of materials without writing rules. Therefore, most reasons to use inclusion, exclusion, and product rules are not present in PLEs. Make sure your use case can't be completed with typical PLE features before you continue to build your rules.

If you are using selections in a PLE to drive actions, make sure to note the difference between the Equals and Contains operators.

- Equals checks whether the selection in the PLE exactly matches the condition's value.
  - It can be used with both single-select and multi-select picklists, but it is recommended to be used with single-select PLEs since it is the closest to what users usually imagine the functionality would be.
  - If you are using a multi-select in the condition, if the user makes multiple selections, the condition will not be met if using equals.
- Contains checks whether the selection in the PLE includes the value described. This is the recommended operator for multi-select PLE fields.

For example: A user creates a multi-select picklist field with four options.



Suppose the condition of a rule (in this case, a determination action) is set to fire if the multi-select field equals multi option 4.

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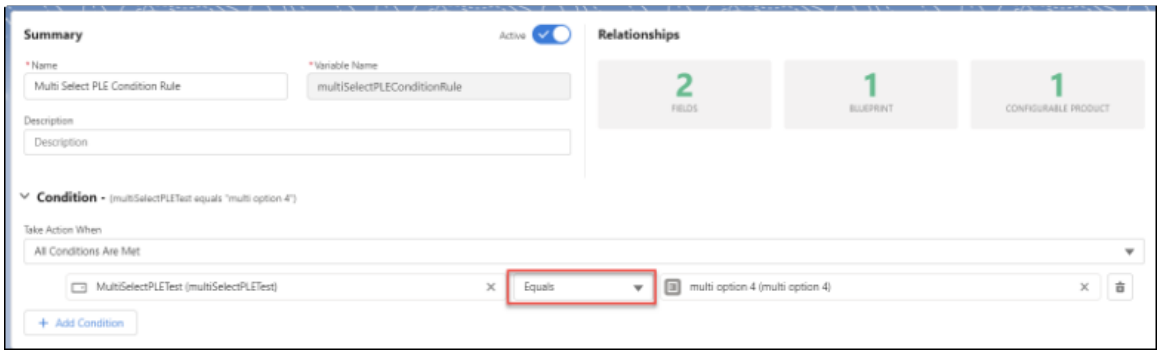
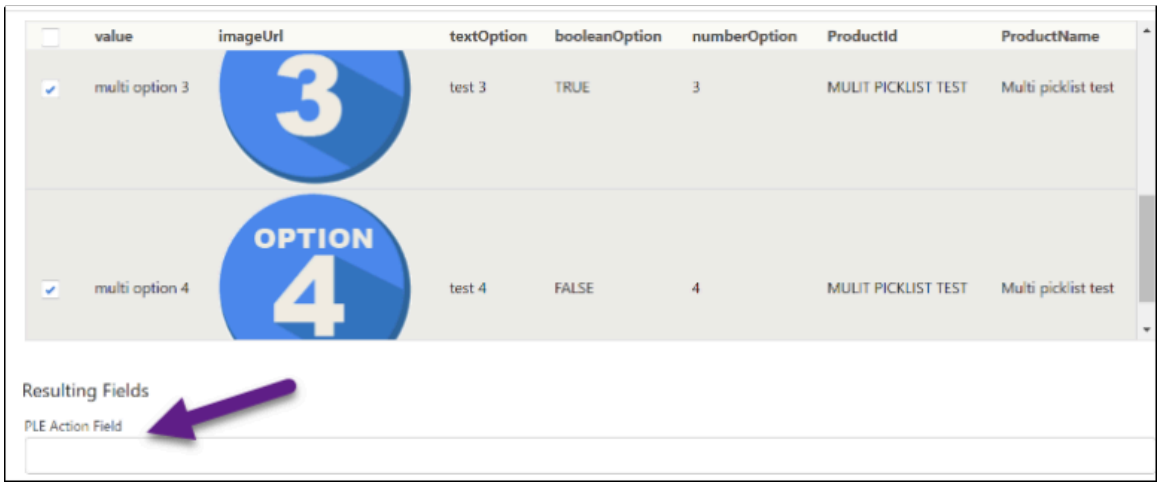


If the end user selects only multi option 4, the rule fires:



If the end user selects multi option 3 and multi option 4, the rule does not fire:



On the other hand, if the condition is set to fire if the multi-select field contains option 4, it fires in both instances.

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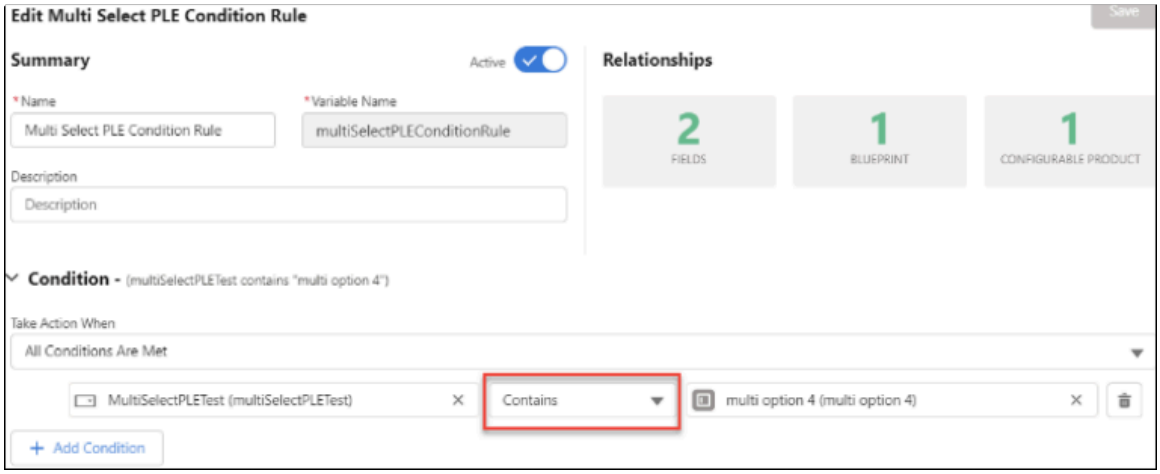

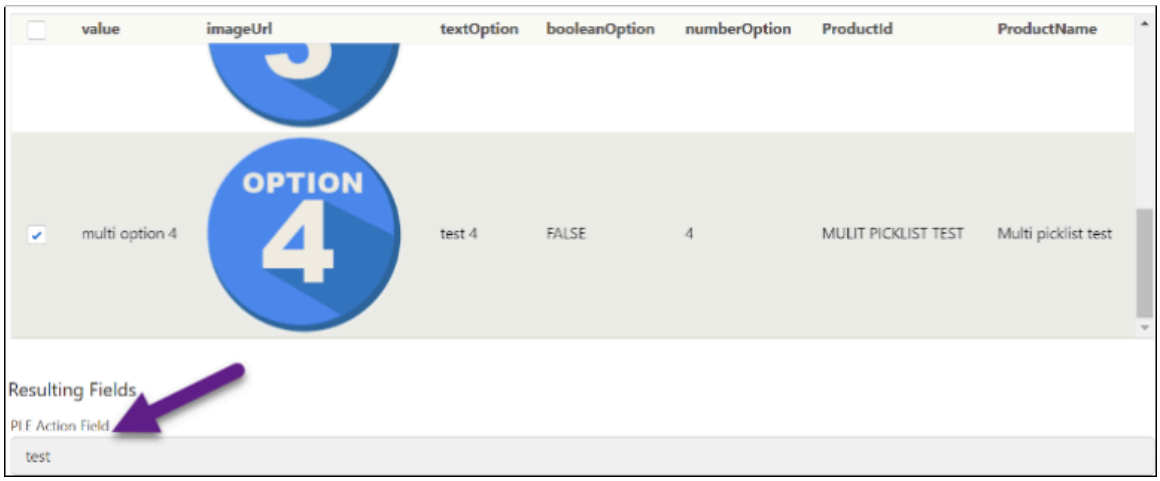

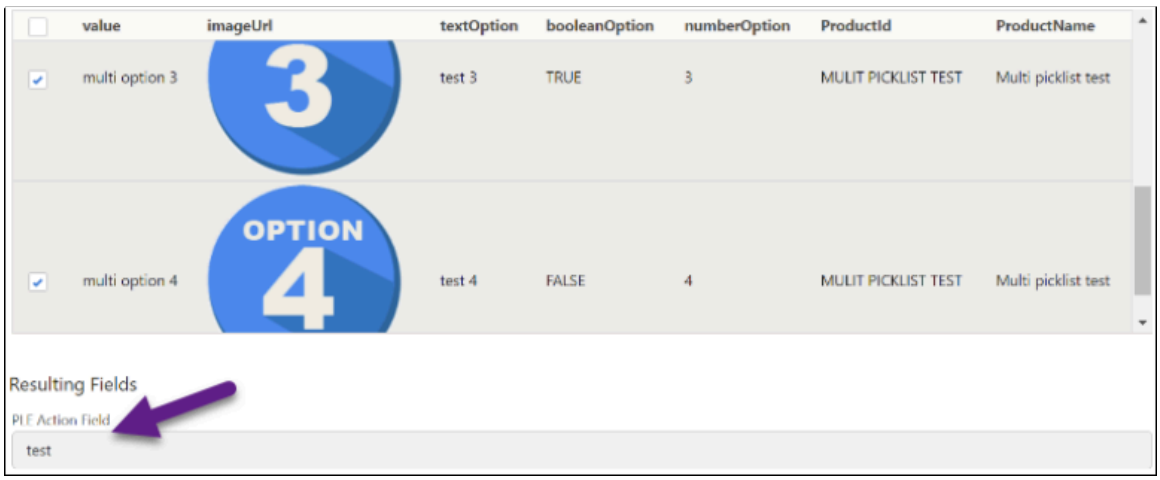

How PLE filters interact with exclusion rules

Picklist extension filters act in the same way that simple inclusion rules work, except that when the defined filter fields are empty, no options are included instead of all options when a simple inclusion rule is not firing.

If you want to have a field that is not defined as a filter in the PLE and that limits options in your PLE field, you need to use a simple exclusion rule in order to further limit those field options, since using an inclusion rule would combine with the inherent inclusion contained in the PLE filter and leave all field options available.

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Note: Due to the nature of mapping the extended information via filter fields, using an inclusion rule to show more options for a PLE will show only the option value and no further data. Do not use inclusion rules that act on the options of a PLE.

Advanced rules

When using picklists in advanced rules, it's important to know how these fields appear when referenced using the `cfg` object. For single-select picklists, the field has the text of the option, but for multi-select picklists, they will be in an array. This difference can often lead to discrepancies when building advanced functions.

Similar to the differences in simple conditions between Equals and Contains, while single-select picklists can be referenced in an "if" statement as:

```
1 if (cfg.field == "option") {
2 //code
3 }
```

Multi-select picklists should use the function "Array.includes()" to see if one of the options has been selected:

```
1 if (cfg.field.includes("option")) {
2 //code
3 }
```

This function acts on an array and will return true or false depending on whether the array includes the inputted value.

To determine the selections of a multi-select picklist in an advanced function, use the `.push()` function to add the option. Adding an option that is not defined in the picklist's fields results in an error.

For other manipulations with the multi-select picklist array in advanced functions, refer to the Help menu's Array functions. If there are conflicting inclusion and exclusion actions, exclusion actions have precedence.

Additional reading

For an overview of the picklist extension feature, see Picklist extensions.

For a deeper understanding of the back end and how to display PLEs, see Displaying a picklist extension on a layout.

For an overview of the Picklist Extension Pricing enrichment feature, see The Picklist Extension Pricing enrichment.

Creating an associated picklist set

Learn to use an associated picklist instead of a set field when you create a new set.

Note: Be sure to read about product pickers and their functionality before building associated picklists, as they may be better suited to your use case. See Product pickers.

The New Set dialog box includes an option for size type. **Set Field** is the default. If you select **Associated picklist**, a new field appears where you can select the picklist field that will be associated with the set.

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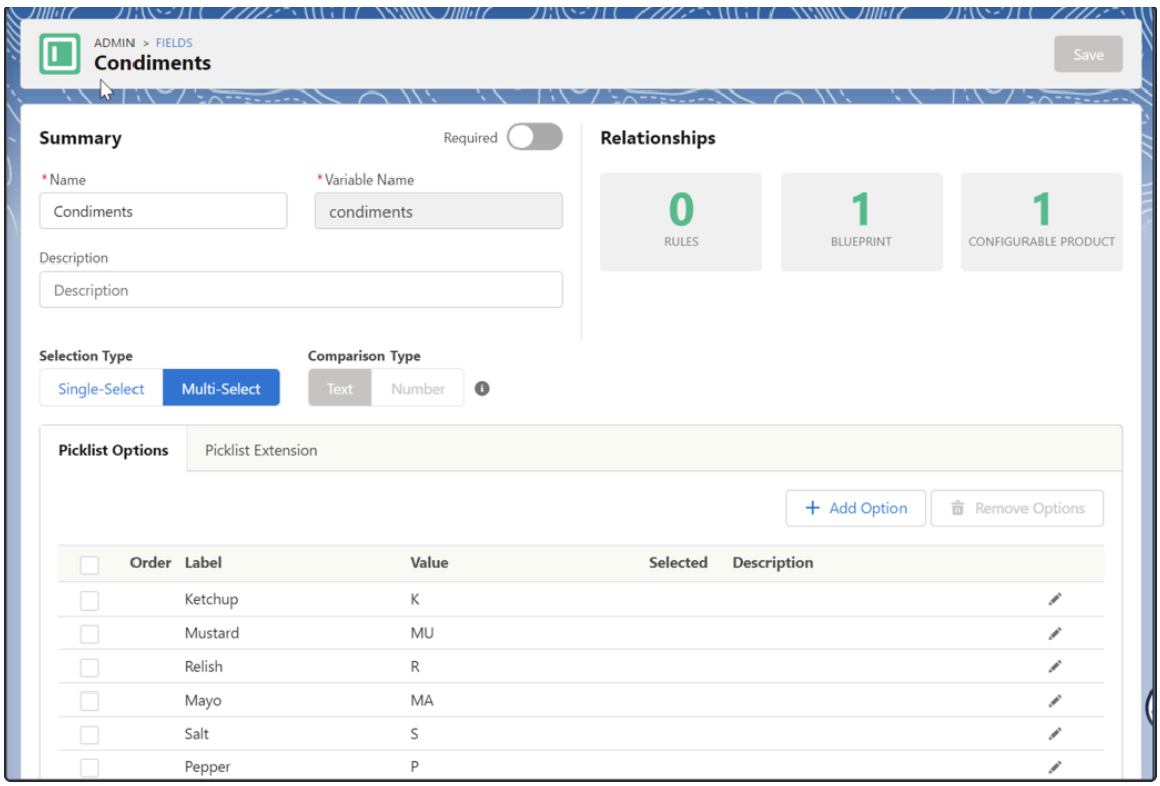
This associated picklist must be a multi-select picklist field. This field determines the size of the set based on the number of field options in the picklist. If you edit the field to add or remove field options, the set size will adjust accordingly. This is the only way to adjust the size of the set associated with the picklist.

For example, a “Condiments” picklist could let users choose to include specific condiments, such as ketchup, mustard, or relish. A “Packets” associated picklist set could then let users specify the quantity of each item using set subfields.

Unlike a regular set where a user can add as many rows as they want, each non-excluded field option of a picklist generates a row and index of the set. Inclusion and exclusion rules still work on the associated field, which can dynamically change the number of rows in the associated picklist set. The following is the sample picklist field we will use in this example. (Note that the labels and values differ.)



Once we select Condiments as the associated picklist, the normal set UI appears. Associated picklist sets automatically create three fields in the set:

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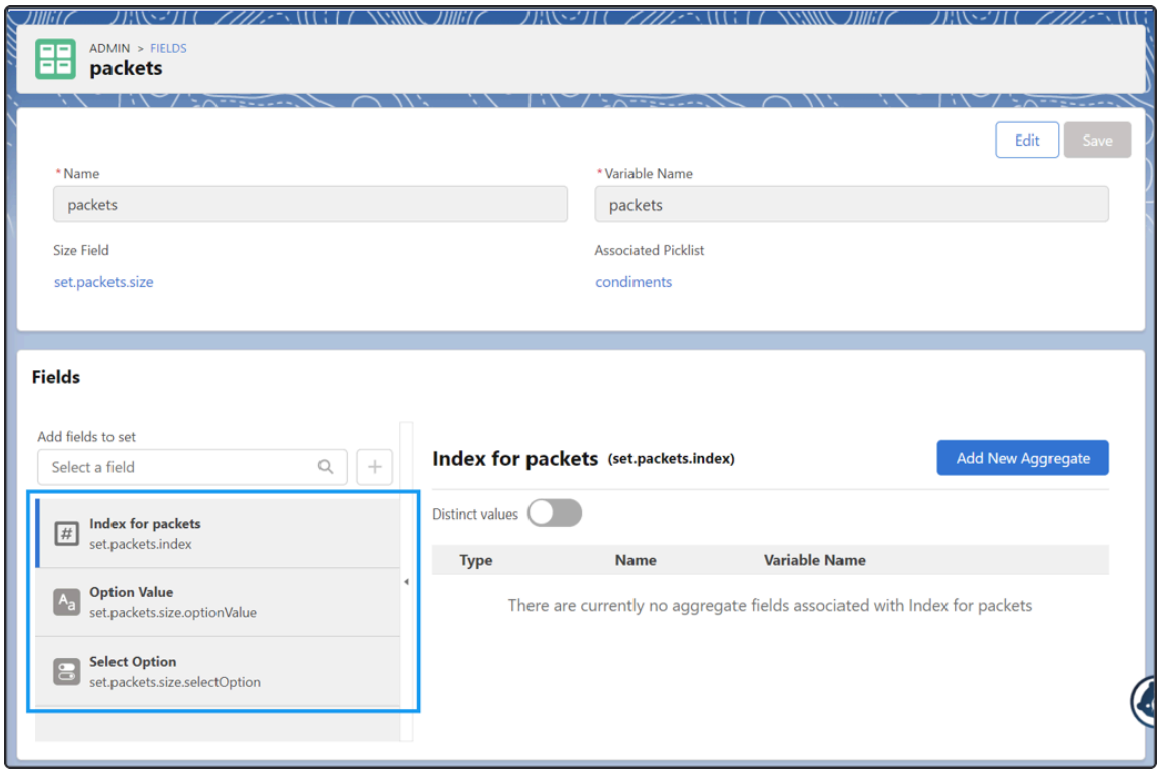
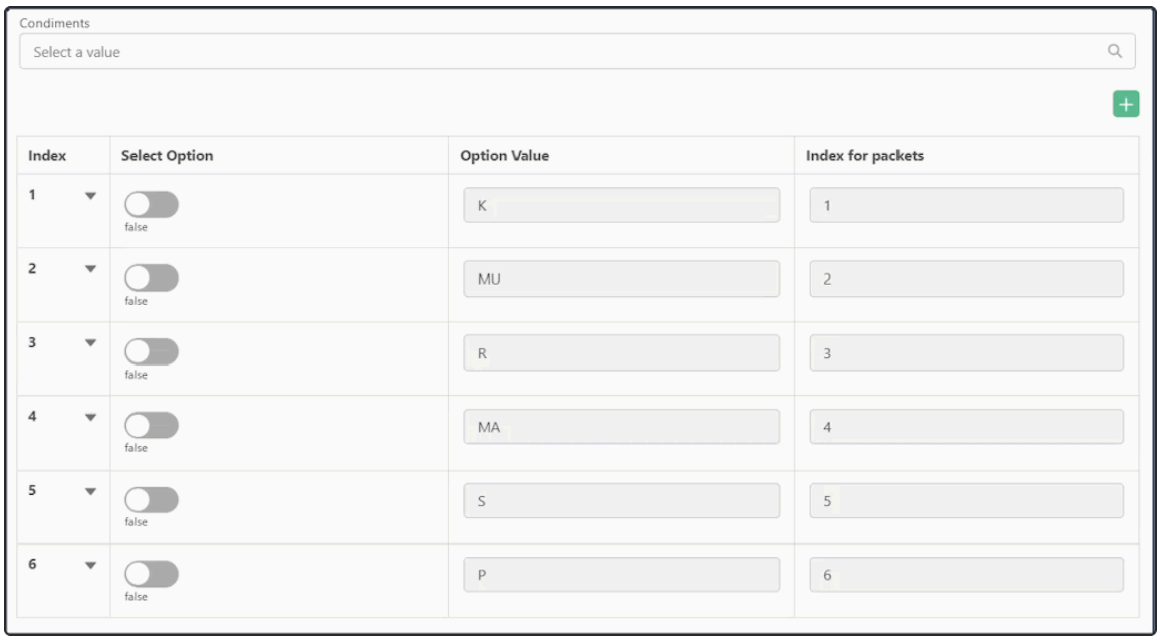
- Index: the row number of the set, starting at 1
- Option Value: the associate picklist's field option values
- Select Option: a Boolean field to indicate that the set index is selected



Like all other fields in the set, the option value, the select option, and the set itself need to be added to the layout. The following image shows the interaction between the Condiments associated picklist and the packets set:



Note that the option values in the set reflect the associate picklist's field option values. ("Ketchup" is reflected as "K", the field option value.) Also note that option values are read-only and cannot be edited.

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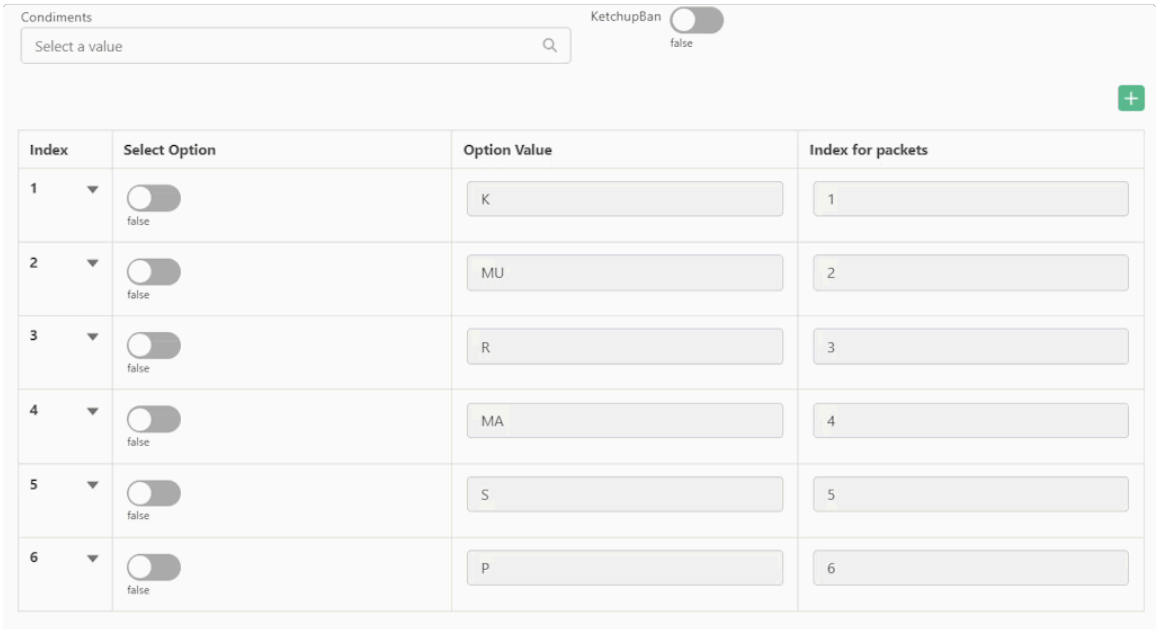
Associated picklist sets can still be acted upon with determination actions, inclusion actions, and exclusion actions. In the example below, a new field called KetchupBan removes Ketchup as a value from the Condiments picklist:



Benefits of the associated picklist set

Depending on the configuration, there may be several reasons why an associated picklist set would be better than a regular set.

- Situations where each option value can only be used once
- Situations where select Option and Option Value fields that are used for index specific actions and other rules
- Associated picklist sets have a finite size, with as many indexes as the picklist has field options

Note that picklist extension fields can also be used as the associated picklist. Furthermore, the associated picklist can live elsewhere on the page layout or in the background—it does not need to be near the set it controls.

Example: A complex rule

The customer has 100 different fees that could be applied to the configuration. To determine the value of these fees, each fee is calculated using a complex formula. Each fee is only be applied once. The formula is the same for all fees. The customer does the following in CPQ:

- Creates a multi-select picklist field called Fees with 100 field options (one for each fee)
- Creates an associated picklist set and selects Fees as the associated picklist
- Creates inclusion rules for the Fees field
  - This would create an inclusion rule for each fee based on the condition of that fee.
  - This would also create an inclusion rule that included none of the fees as a default. This way, the Fees are added, as inclusion rules are additive.
- Creates a rule for calculating the fee

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This is where the associated picklist set is really beneficial. The customer only has to write 1 rule, and it is applied to each row of the set. If the customer did not use the set, they would have had to replicate this script multiple times in multiple rules throughout the configuration. This can lead to errors downstream when the complex calculation changes.

Example: Picklist extension with varying quantities for product rules

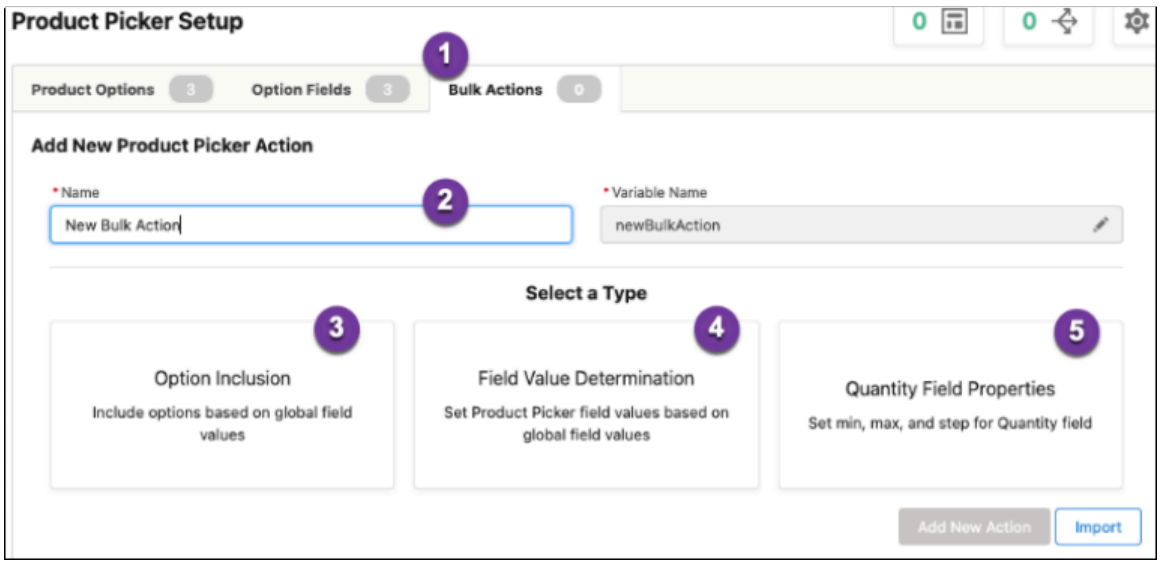
Another customer has effectively used the picklist extension to filter field options and provide columns of extra information. However, they cannot use the picklist extension to add products to the bill of materials because they want to give the end user the ability to specify the quantities as each field option is added to the BOM.

They put the picklist extension grid on a single tab tier, and then they put the set, which shows all the field options selected on the first Tab Tier, on the second tab tier. Using the associated picklist set, the end user can customize for each customer the quantity added to the BOM.

Product picker bulk actions

Learn how to use bulk actions to automate product picker behavior without writing rules. Configure option inclusion, field determination, and quantity limits through table-based logic to control what products appear, how values are set, and when conditions apply—all directly in the product picker interface.

Bulk actions are a simple yet powerful way to manage product pickers. Bulk actions can function as table:based rules to control and modify product pickers without needing to write traditional, global rules. Like global rules, bulk actions consist of conditions and targets. All the bulk actions together control the behavior of the product picker.



- (1) Bulk actions tab: displays all associated bulk actions of the product picker
- (2) Name, Variable Name: name and variable to set for the bulk action

There are three basic types of bulk actions:

- (3) Option Inclusion: What options are displayed to the user
- (4) Field Determination: What values should be set for product picker child fields
- (5) Quantity Field Properties: Quantity limits of options

For an example use case, view the following video: Product Picker bulk actions2

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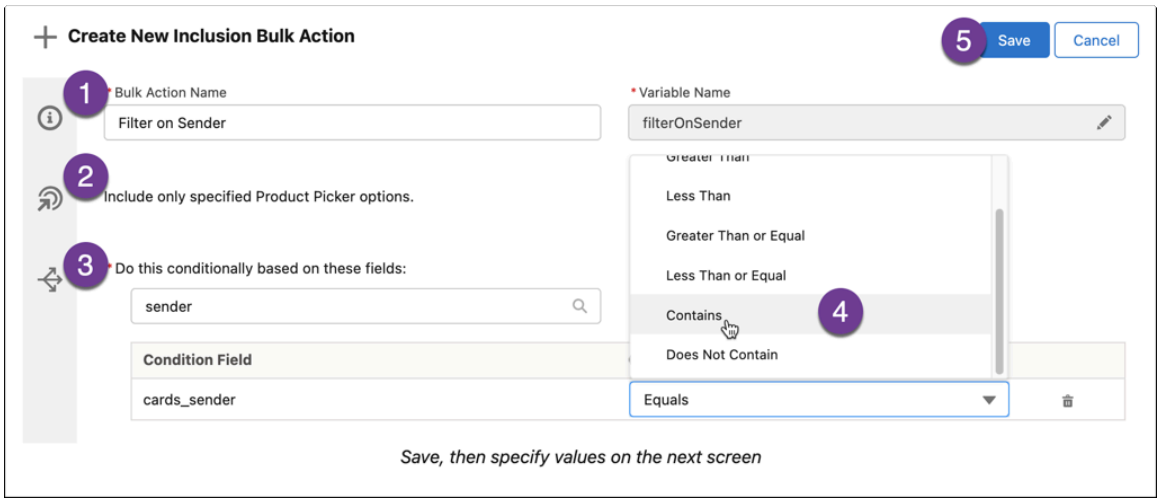
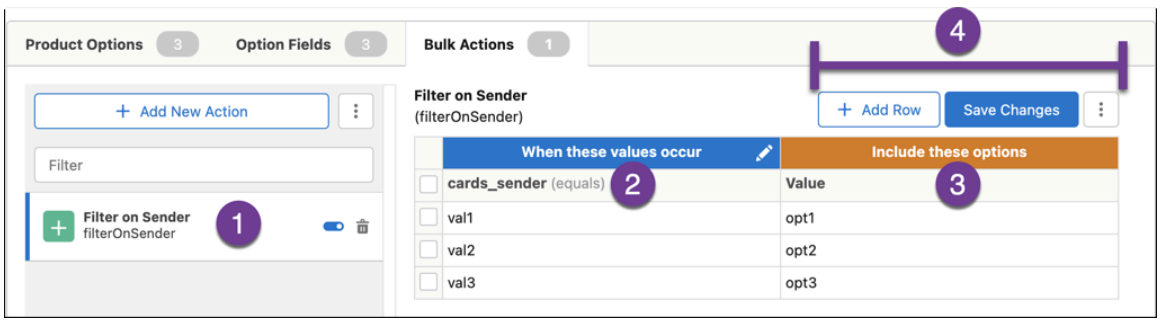
Bulk actions: Inclusion

Option Inclusion bulk actions can automatically include (and exclude) product options in a product picker based on the value of global fields. If no action is in place to include options, all are included by default.



- (1) Bulk Action Name: The name of your Option Inclusion bulk action. Variable Name will be automatically populated, but you can customize it by clicking the pencil icon.
- (2) Info: What this Option Inclusion bulk action will do
- (3) Select Condition fields: Global fields to use for the comparison. Additional fields can be selected, but at least one is required
- (4) Select Comparator for this Condition field: The comparison that should be made against the field's value. Comparison Options depend on the field type. For example, a Boolean field type would use either 'Equals' or 'Does Not Equal'. A picklist field type, such as cards_sender, offers a large number of comparison options.
- (5) Save: When finished, move to the next step to add the data for the bulk action



The bulk action data drives the outcome of the Option Inclusion.

- (1) Current bulk action: In the list of defined bulk actions, the selected bulk action's data is displayed in pane to the right
- (2) When these values occur: One column for each field selected as a condition in the prior step. The corresponding comparator is noted in parenthesis.
- (3) Include these options: product picker Option value to include if the conditions on that row are met
- (4) Add Row and Save Changes: Add a new blank row to input new data; save changes to the data

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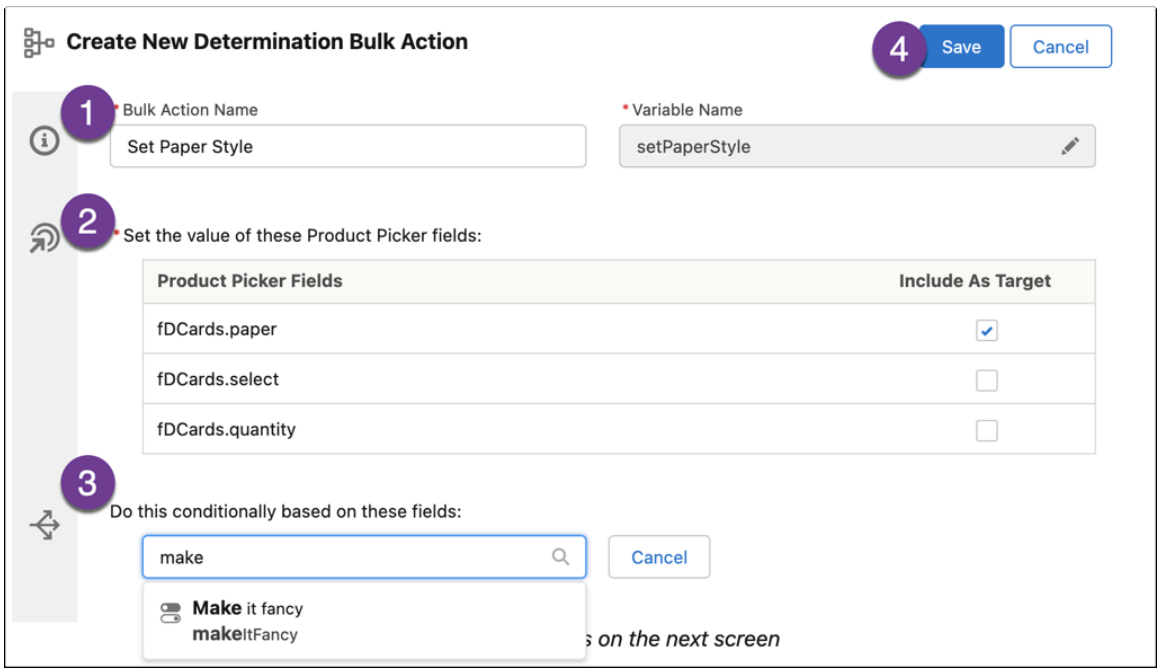
Additional actions:

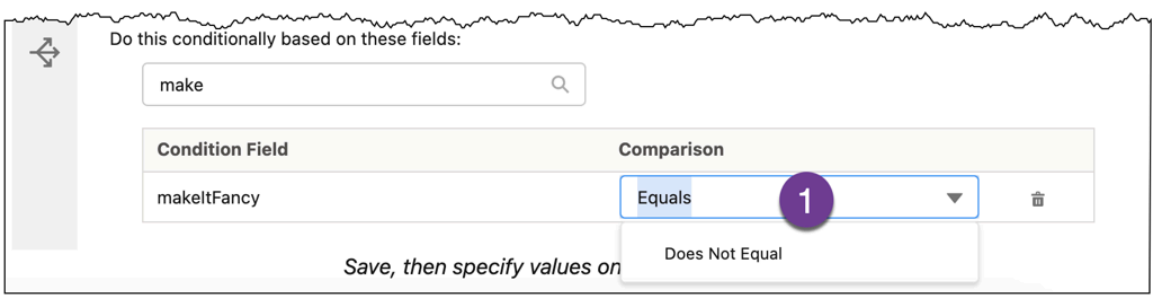
- Import Data: Import a CSV file
- Export Data: Export the data as a CSV file
- Delete Rows: Delete the selected rows

Bulk actions: Field determination

Field determination bulk actions are an easy way to set and default values into product picker subfields.



- (1) Bulk Action Name: The name of your Option Inclusion bulk action. Variable Name will be automatically populated, but you can customize it by clicking the pencil icon.
- (2) Select the target subfields: Review what this action will do, and select the target fields this action will set
- (3) [Optional] Select the condition fields: The global fields to use for the comparison
-



Select Comparators: For each condition field, select the comparator with which you will determine the condition. Comparison options will depend on the field type.

Save: When finished, move to the next step to add the data for the bulk action.

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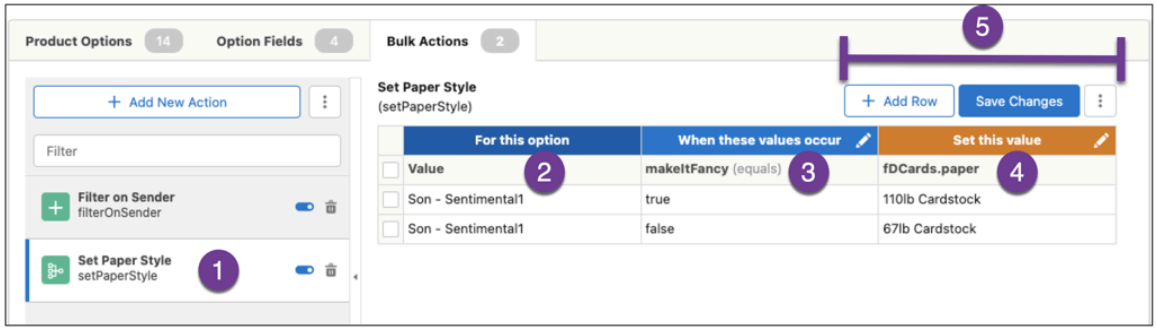


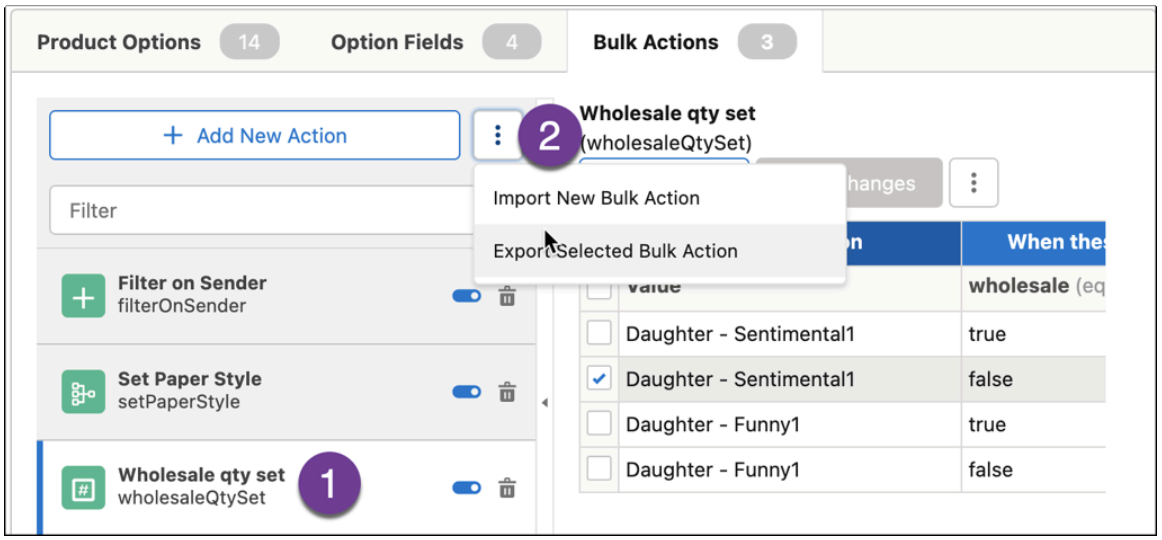
The bulk action data drives the outcome of the Field Determination.

- (1) Current bulk action: In the list of defined bulk actions, the selected bulk action's data is displayed in pane to the right
- (2) For this option: the product picker option for which this Field Determination applies
- (3) When these values occur:- one column for each field selected as a condition in the prior step. The corresponding comparator is noted in parenthesis.
  - If no condition fields and comparators were selected in the condition setup step, this column heading will read "Always" and you will not be able to add data to this column.
  - To change the conditions on this bulk action, click the pencil icon in the column heading.
- (4) Set this value: the value that this rule will apply to the product picker subfield when the condition is true
- (5) Add Row and Save Changes: Add a new blank row to input new data; save changes to the data

Additional actions:

- Import Data: Import a CSV file
- Export Data: Export the data as a CSV file
- Delete Rows: Delete the selected rows

Import and export bulk actions and bulk action data



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Individual bulk actions can be exported from a product picker as a ZIP file. The export will include both the rule definition and the data itself as a CSV file. To export a bulk action, select the action, and then click **Export**.

The data for a bulk action can also be exported in the data pane. The data can be modified and imported in the same location. To export the data from the data pane, select the action, and in the menu, click **Import Data**. Then, select the CSV file that contains the data.

Forcing data override

By default, bulk actions that set the values of product pickers will not override a value that was set by the end user. To change this setting so that bulk actions will change user-edited values, submit a Support case and request "set the bulk actions Override User Edited Values behavior to True." This setting acts across the environment.

Related topics

Product picker aggregates

Product picker aggregates

Aggregates help calculate and summarize data in products. Learn how to use aggregates in a product picker.

Product pickers let users select products from a list. Aggregates help calculate and summarize data (like sums, counts, or averages) from the selected products.

Note: Before you read this article, we recommend that you understand the product picker field type and how to create a product picker. See Product pickers.

Product picker aggregates allow data collection and calculation for specific fields in a product picker. This helps analyze data directly from the product picker options.

Suppose you have a product picker containing various measurable products, and you need to identify which product has the least volume in demand. By applying a "Min" aggregate on the volume field, the smallest value is automatically determined, streamlining the decision process without needing a rule.

Available aggregate functions

Aggregate Type	Behavior
Sum	Sum of the base field values for each selected option, if they can be coerced to a number Does not multiply by the option quantity
Count	Count of options selected in a product picker
Min	Minimum of the base field values of the selected options, if they can be coerced to a number
Max	Maximum of the base field values of the selected options, if they can be coerced to a number
Average	Average of the base field values of the selected options, if they can be coerced to a number

Aggregates can be configured through the UI configuration or by using admin APIs.

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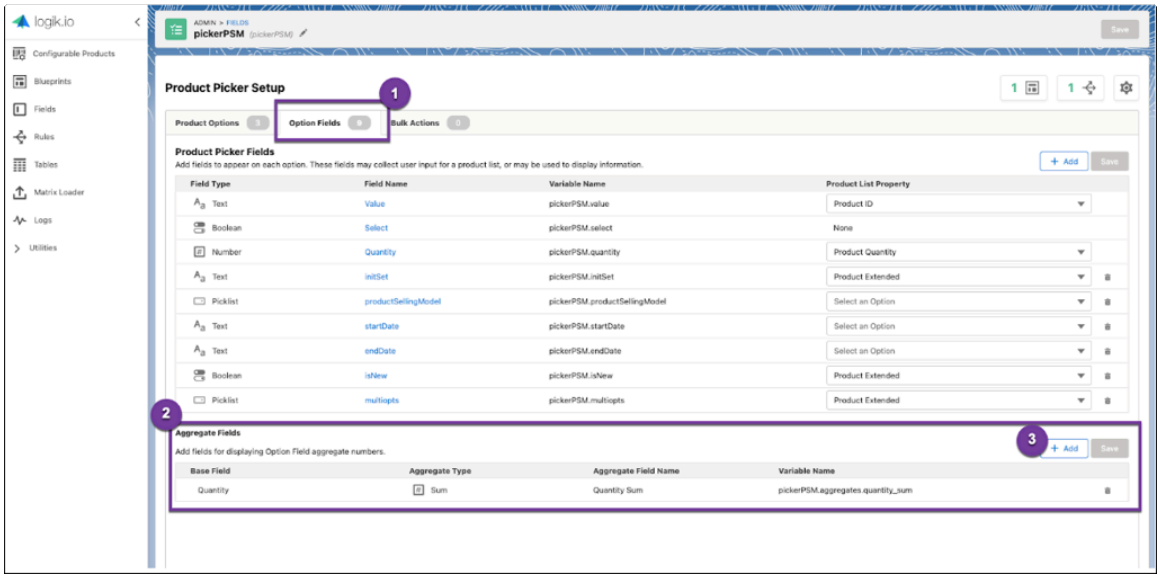
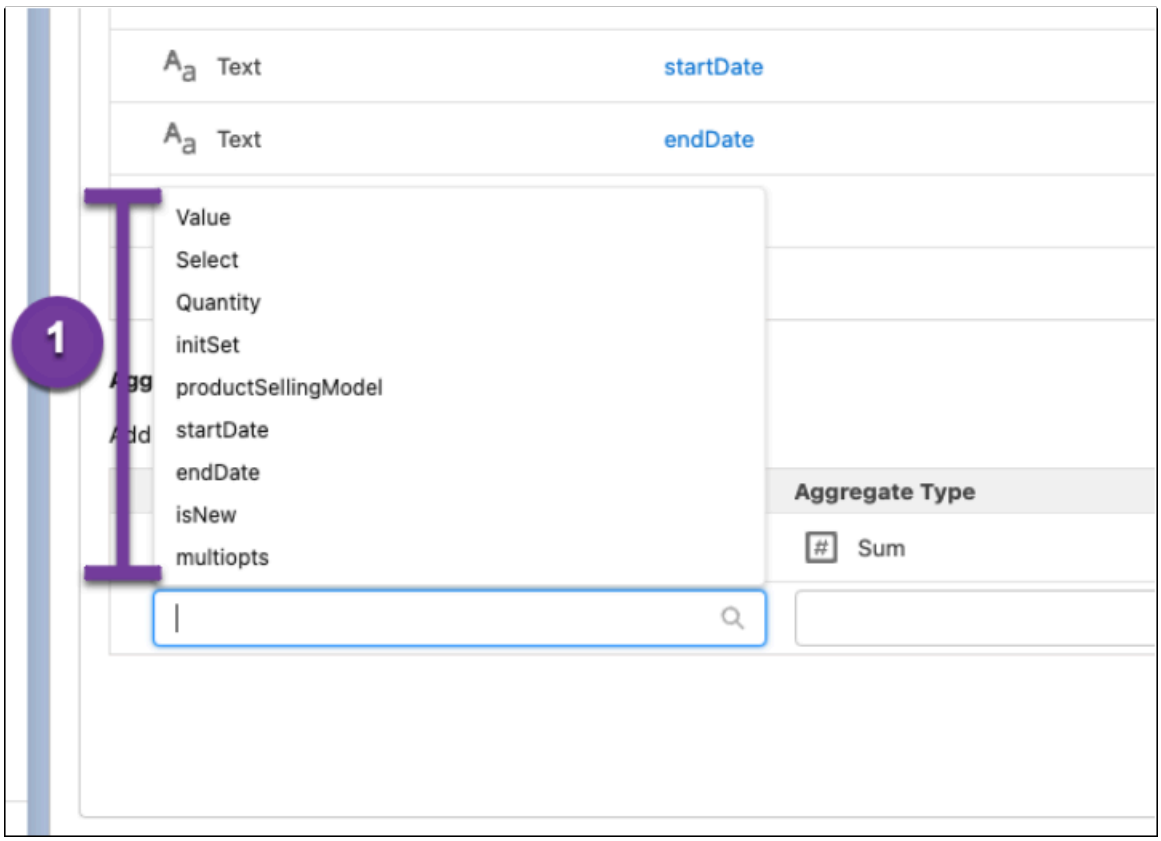
Configuring aggregates through the UI

To configure an aggregate through the UI, go to any product picker, and then on its definition page, click **Option Fields**. Then, in the Aggregate Fields section, click **+ Add.**



When you create a new aggregate, provide the following details:

- Base Field: A list of available subfields of the product picker is displayed here. Select the sub-field to create a new aggregate.



- Aggregate Type: Select the aggregate type whose behavior fits your use case: Sum, Average, Min, Max, or Count.

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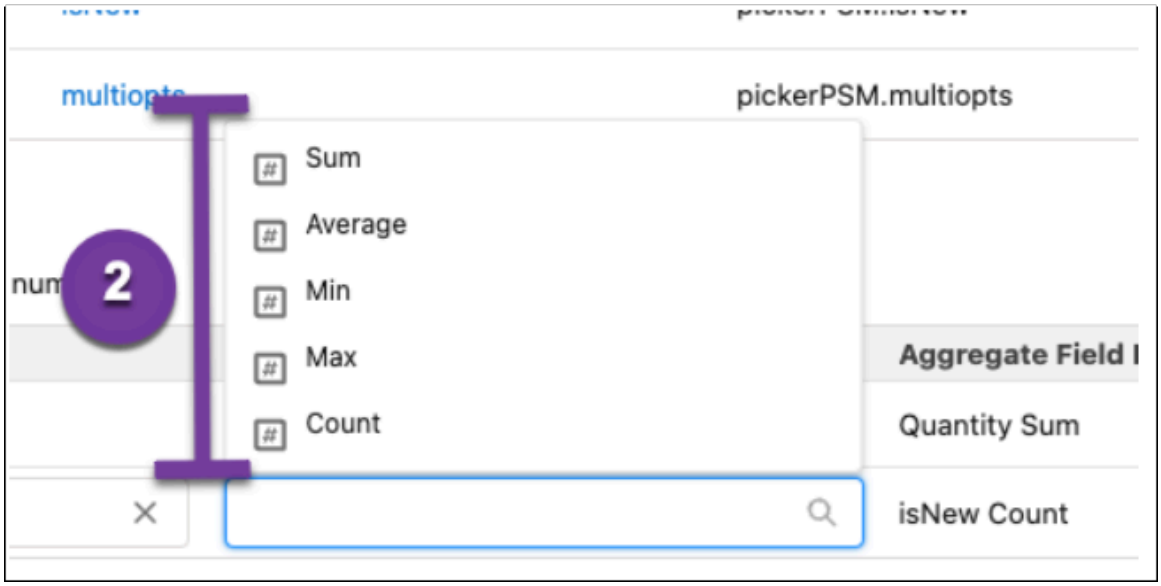


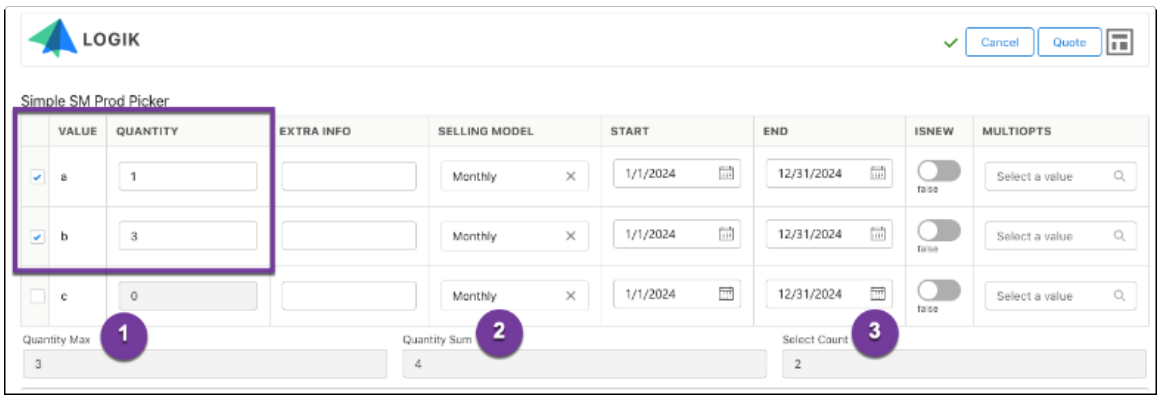
- Aggregate Field Name: After defining the aggregate, its value is stored in a separate field to facilitate data display. This field is typically located beneath the product picker. The field's name clearly indicates that it represents an aggregate, ensuring easy interpretation. This is auto-generated by the system.
- Variable Name: This is the variable name of the aggregate field name that is created. The variable name is usually used to reference the product picker aggregates in scripting. This is auto-generated by the system.
- Delete: Use this icon only if you want to delete the added aggregate or if you want to remove any existing aggregates.

Configuring aggregates through the admin APIs

For steps to create and configure an aggregate using API calls, see Adding a product picker aggregate using APIs.

Viewing a product picker aggregate

Aggregate fields can be added to the layout and will automatically be calculated on the change of a field. Just as we can search a normal field by its display name or variable name and add it to the layout, we can do the same with the product picker aggregate. We search the aggregate field name or variable name of the newly created field, define the position in the layout by adding it under the product picker field for ease of display, and save the layout. To read more about the layout editor, see Layout editor.



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The product picker field “Simple SM Prod Picker“ has many subfields. On the Subfield “Quantity“, we have added three aggregates: Max, Sum, and Count.

Products with different quantities

Suppose product A has a quantity of 1, and product B has a quantity of 3.

- Applying Max aggregate on quantity gives the value of aggregate field name “Quantity Max” as 3, as product a has the maximum quantity among the selected products.
- Applying Sum aggregate on quantity gives the value of aggregate field name “Quantity Sum” as 4, as product a quantity + product b quantity has value 4.
- Applying Count aggregate on quantity gives the value of aggregate field name “Select Count” as 2, as there are only 2 selected products among the list.

Adding a product picker aggregate using APIs

Follow these steps to add a product picker aggregate using API calls.

Before you begin

Role required: Admin

Procedure

1. Using Postman or another API tool, set the authorization mode to "Bearer token", and provide the token of the environment where you want to create the aggregate.

   In the product picker aggregates area, two endpoints are available in the admin APIs:

Get Product Picker Aggregates	GET	/api/admin/v1/productPickers/productPickerName/aggregateFields
Create a Product Picker Aggregate Field	POST	/api/admin/v1/productPickers/productPickerName/aggregateFields

   The GET endpoint gets the list of all the aggregates that are already available on a product picker. The parameter is the variable name of the product picker field that is passed in the URL in Postman.

   The POST endpoint creates a new aggregate on the product picker. The parameters are the variable name of the product picker field and the request body or payload that gives the details of the aggregates to create.

   Examples of product picker endpoints:

   - **Get Product Picker Aggregates (GET)**
     https:// {tenant}.{sector}.logic.io/api/admin/v1/productPickers/productPickerName/aggregateFields
     https://mark-pg.demo01.logik.io/api/admin/v1/productPickers/equipmentRacks_PP_mad/aggregateFields
   - **Create a Product Picker Aggregate Field (POST)**
     https:// {tenant}.{sector}.logic.io/api/admin/v1/productPickers/productPickerName/aggregateFields
     https://mark-pg.demo01.logik.io/api/admin/v1/productPickers/equipmentRacks_PP_mad/aggregateFields

2. Set the following URL as the URL of the Postman API call.
   (This is the URL from the image just above.)

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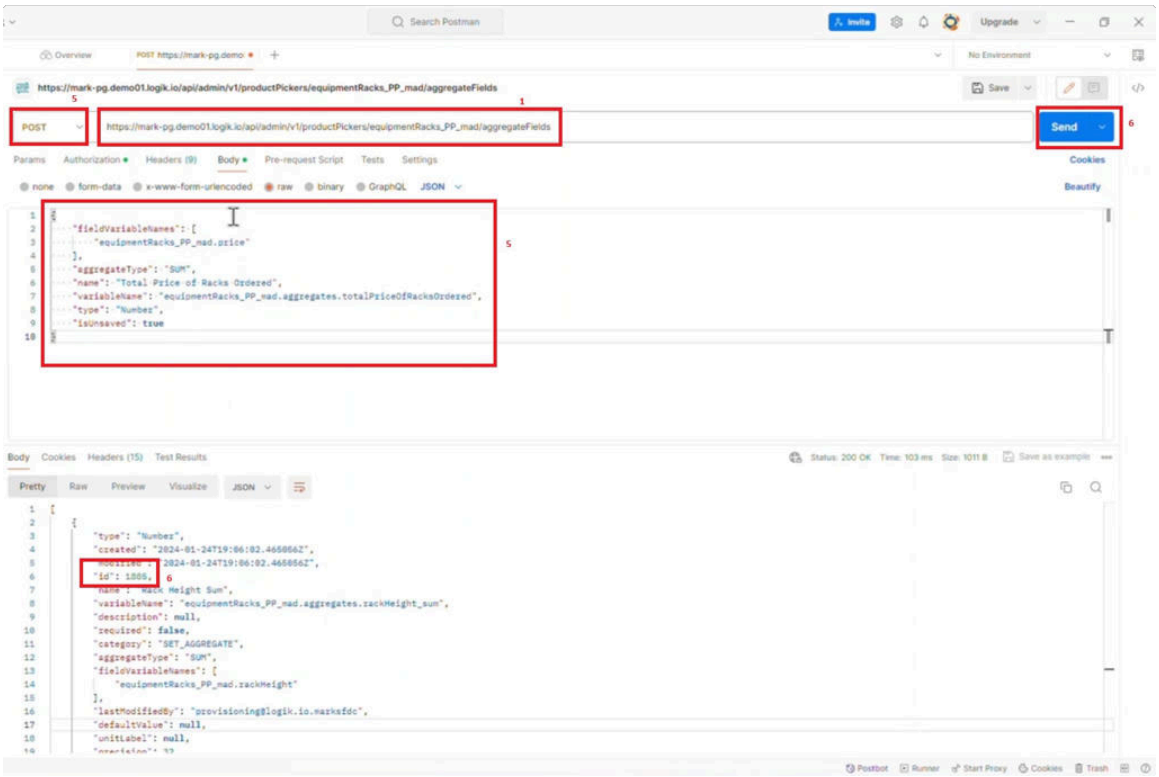
`https://<tenant>.<sector>.logik.io/api/Admin/v1/productPickers/<productPickerName>/aggregateFields`

Replace the URL with the parameters that apply to your environment, including the sector name and the variable name of the product picker from the UI.

3. Send the call.
   This returns a list of aggregates already applied in the UI. You can copy any of the responses for a particular aggregate entry to set the request body for the post method in the next step meant to create a new aggregate. If there are no preconfigured aggregates, you can take the sample request code directly from the API documentation.
4. Change GET to POST, copy the body of the request from the previous steps, and replace the body with the new aggregate details, including the field variable name and the aggregate type. You can add only one field per API call.
5. Send the call.
   The response includes an aggregate ID that indicates that the aggregate is successfully created.

Result

In the UI, refresh the page to see the added aggregate.



Related topics

- Product picker aggregates
- Product pickers

Set up layouts

Layouts define the structure and appearance of the configuration interface. They organize fields into pages, tabs, and sections, shaping how users interact with configurations and view shopping cart details in CPQ.

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A layout record defines the buyside user interface for a configuration experience. It consists of fields and the organizational structures—pages, tabs, sections, column sets, and headings—that govern how fields will be represented on the screen. It also describes how the shopping cart should be displayed, by default.

When a blueprint has more than one layout defined, the user can step through them using the alternate layout ( ) button in the upper-right corner of the buyside UI.

CPQ layouts are defined in spreadsheets and uploaded via matrix loader. Refer to CSV layout upload for detailed instructions.

Related topics

- Layout Wizard

Layout Wizard

Watch a video about how to generate a layout.

Use the Layout Wizard to quickly build a layout for a blueprint with a visual representation of how configuration experience will display to the end user.

Note: The Layout Wizard works only to generate layouts. Edits or additions to an existing layout must still be made by downloading and editing the layout CSV file and uploading the updated file.

Prerequisites

Have a blueprint created with desired fields associated to it.

How it works

View a walkthrough of the CPQ Layout Wizard.

Layout Wizard Walkthrough

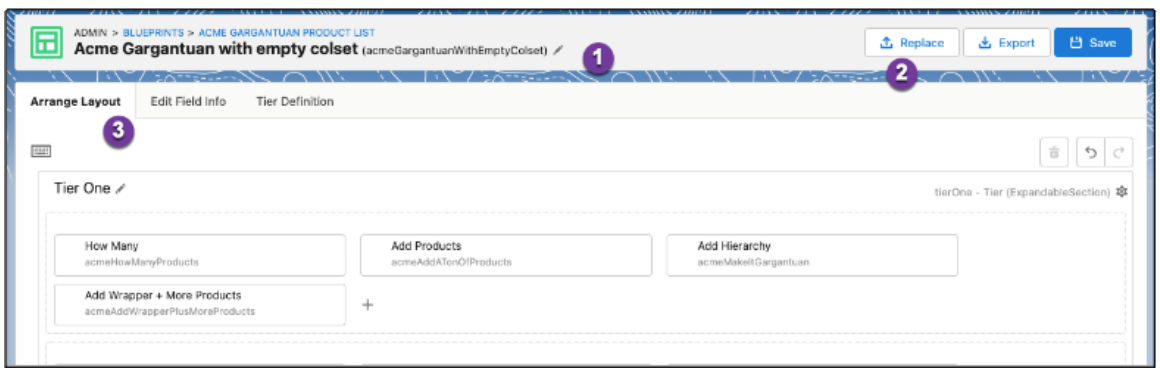
Related topics

- Set up layouts
- CSV layout upload

Layout editor

Learn how to use the layout editor to modify a layout without leaving CPQ.

The layout editor enables an admin to edit an layout without leaving CPQ.



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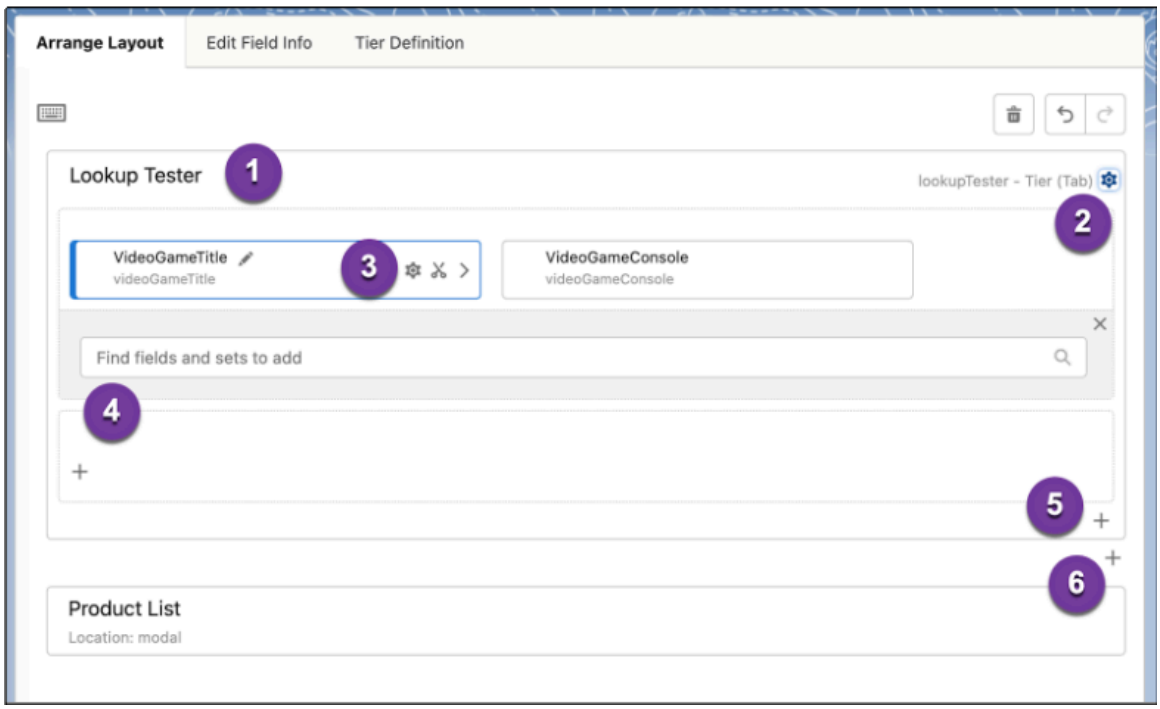
1. The layout variable name appears in parenthesis in the header. The layout name and description can be edited by clicking the pencil icon.
2. Three actions are available: **Replace**, **Export**, and **Save**.
   - **Replace**: Launches the file picker to select a CSV file to replace the current layout.
   - **Export**: Exports and downloads a CSV file of the current layout
   - **Save**: Save changes to the layout. This button will be disabled if no changes have been made to the layout.
3. The layout editor provides three tabs for editing different aspects of the layout: Arrange Layout, Edit Field Info, and tier definition.

The Arrange Layout tab

The Arrange Layout tab provides a similar experience to the Layout Wizard. It lets you adjust various depths but does not allow for a change in the overall tier format.



1. Tier labels can be edited inline by clicking the pencil icon that appears on hover.
2. Extended properties of the element can be edited by clicking the gear icon, which will launch a window to update the values.
3. The field label can be edited by clicking the pencil icon, and extended properties of the field can be edited by clicking the gear icon. Fields can also be edited in the Edit Field Info tab.
4. Clicking the plus icon in a column set lets you search for fields to add to the column set.
5. Additional column sets can be added to the layout by clicking the plus icon in the tier you want to add to.
6. Tiers can be added to the layout by clicking the plus icon outside of the existing tiers.

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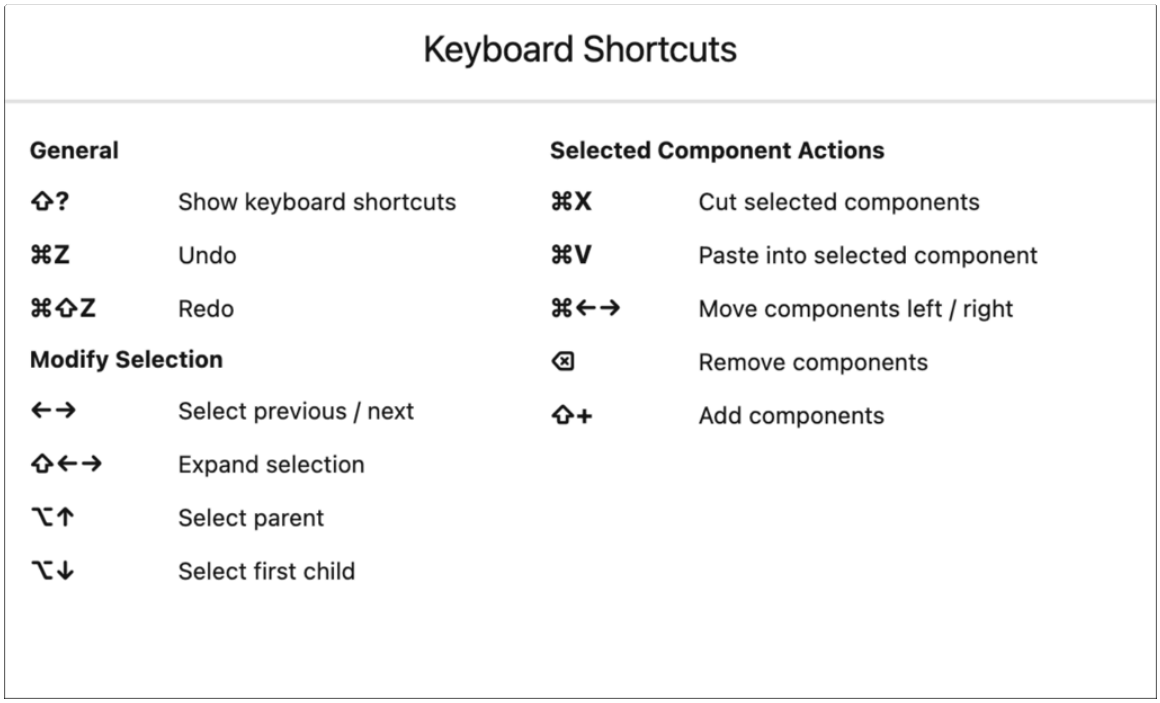
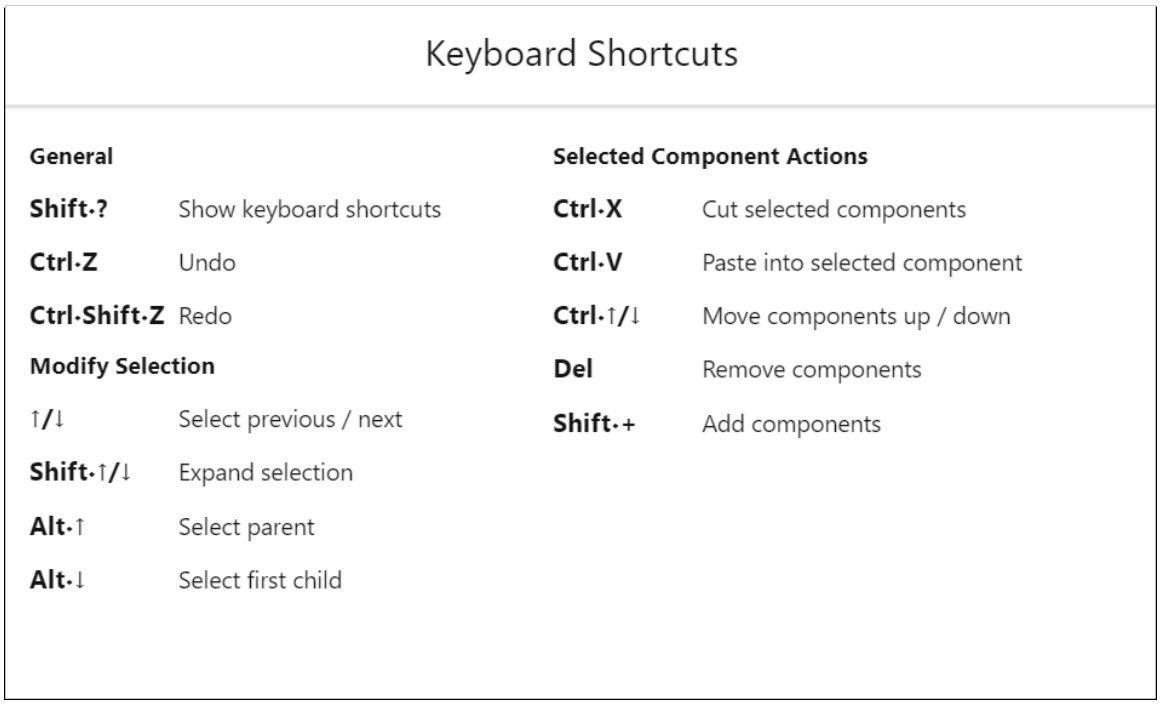
Tip: Several keyboard shortcuts are available to rearrange these visual elements. For example, tiers and column sets can be moved vertically by pressing Cmd/Ctrl + ↑ or ↓, and fields can be moved horizontally by pressing Cmd/Ctrl + ← or →. While in the Arrange Layout tab, you can view the keyboard shortcuts by pressing Shift + ? or by clicking the keyboard icon at the top of the page.

Keyboard shortcuts

Mac:



PC:



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Missing fields

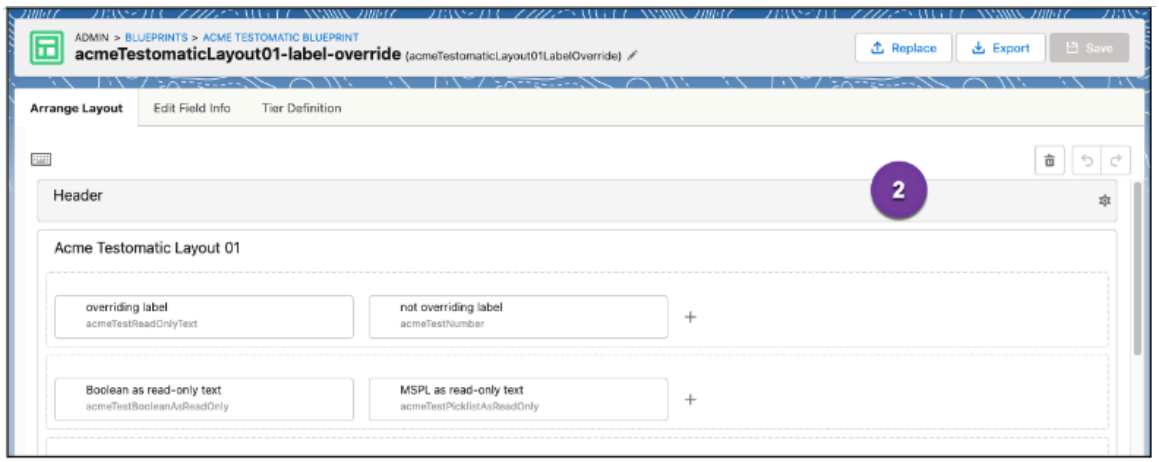
If a layout contains fields that are no longer available appear slightly grayed out, with a dashed border.



Partially supported elements

Layout elements that are only partially supported appear with a darker gray background. Some properties can still be edited by clicking the gear icon.

Field information such as label, display type, and extended properties can be edited in the layout editor.



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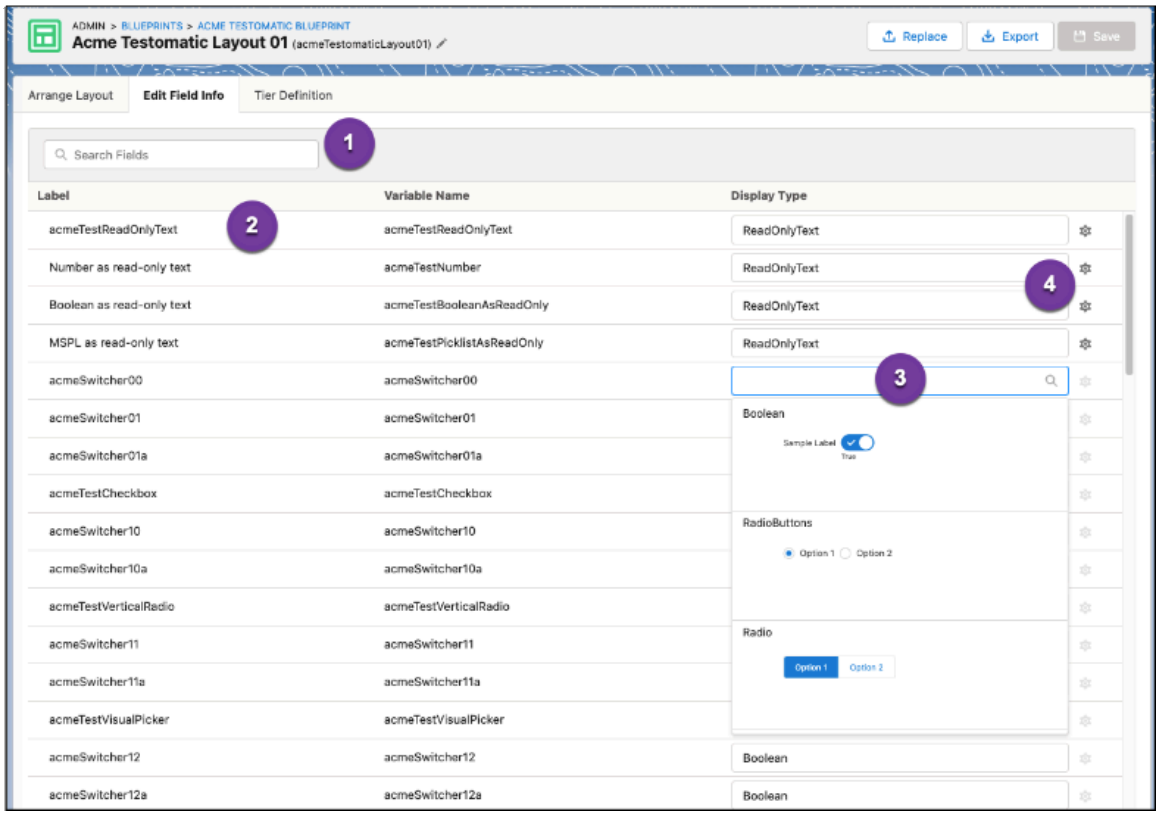
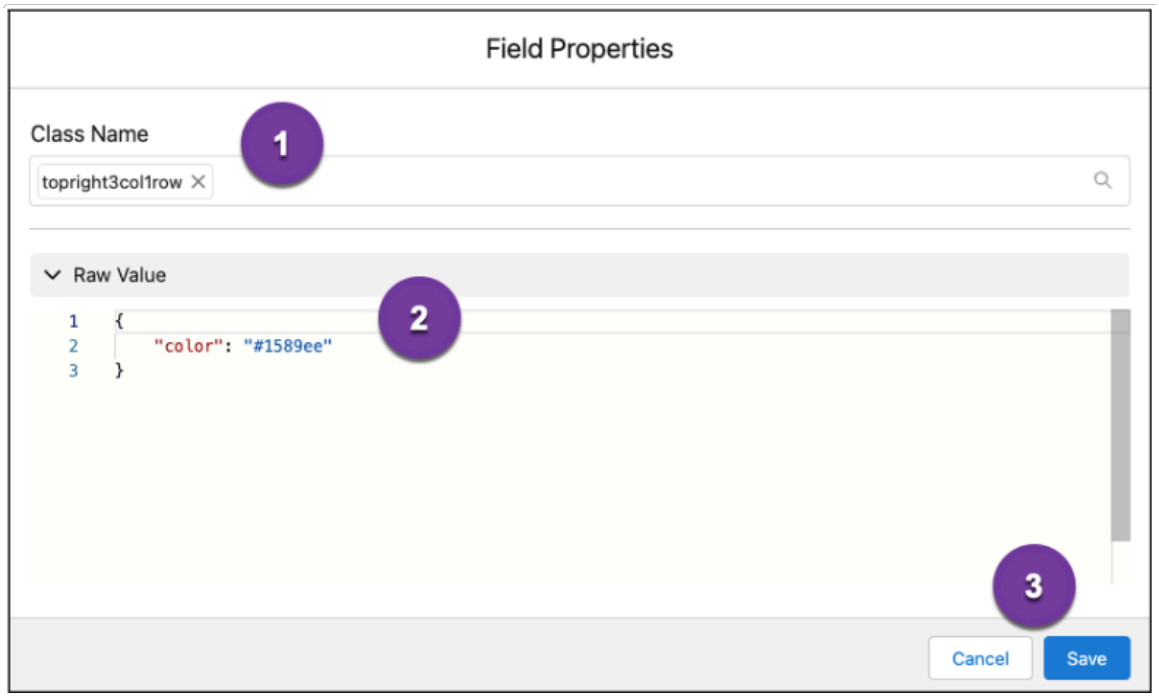


1. Search and filter fields associated with the layout.
2. The field label can be edited inline by clicking the label to edit.
3. The field display type can be updated from a list of available options for the field type by clicking the display type value for the field you are updating.
4. Extended properties of the field can be edited by clicking the gear icon and making the edits in a dialog box.

Edit extended field properties



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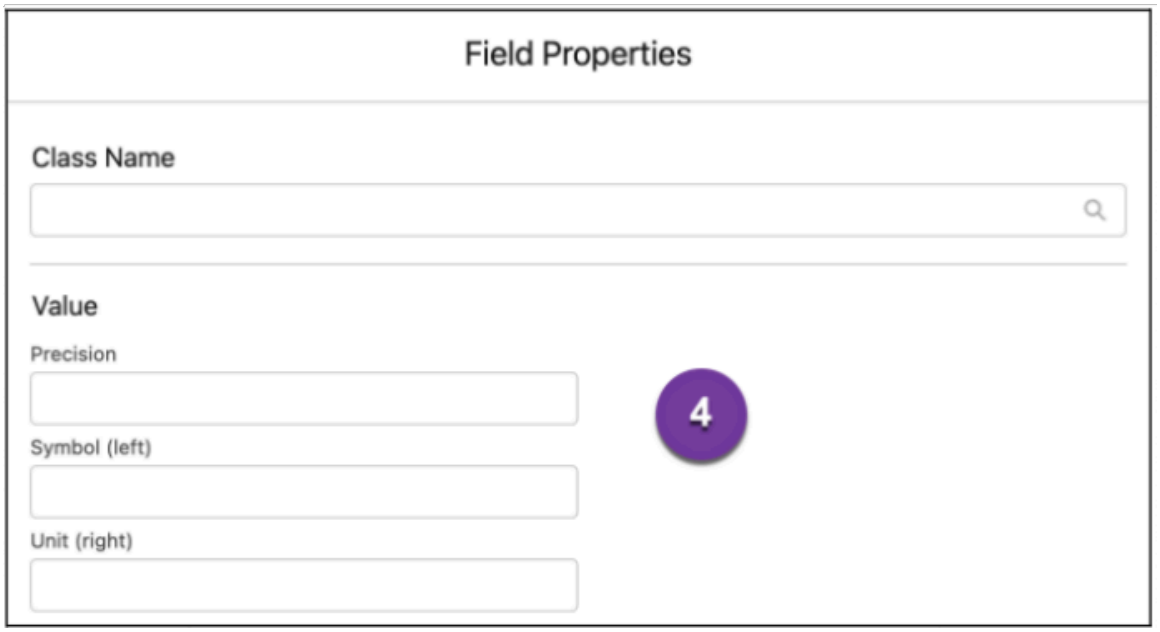
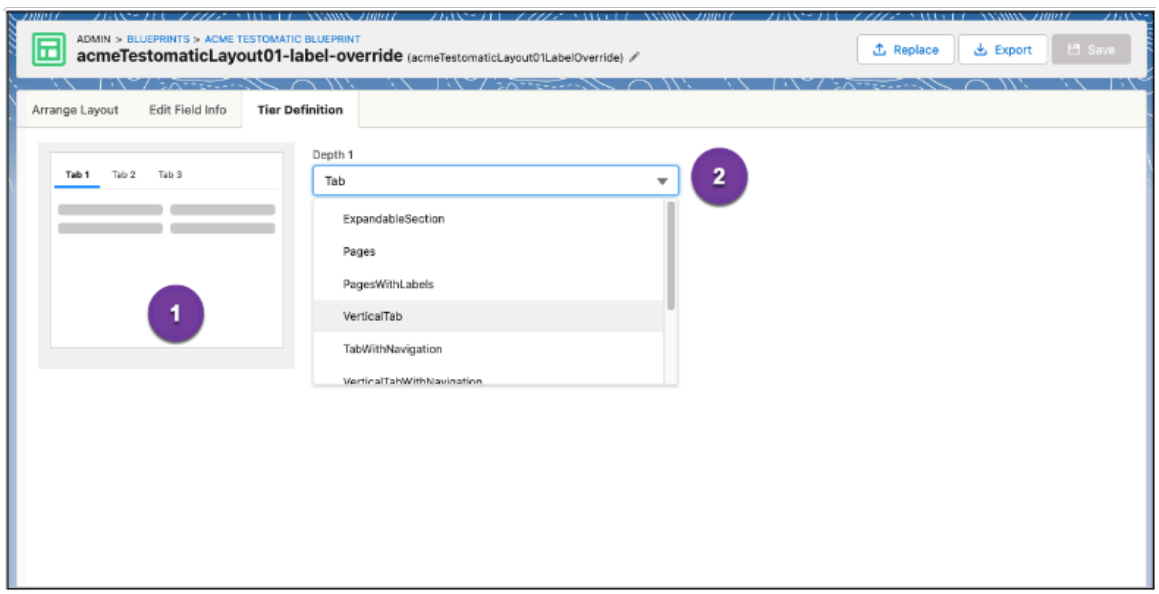
1. Class Name: Classes can be added to fields and searched for in the search bar. Classes appear as a pill once added. Classes that control the width and height of the field or align the field to a grid layout have built-in support.
2. Raw Value: The value can also be edited directly, in the format of key:value pairs. This corresponds to the value column in the layout.csv file.
3. Cancel and Save



4. Number fields also have three values: **Precision**, **Symbol**, and **Unit**.
   - **Precision**: Controls the decimal precision of the number field
   - **Symbol**: Displays to the left of the number field
   - **Unit**: Displays to the right of the number field

Tier definition

The overall structure of the layout tiers can be updated in the tier definition tab. This is similar to selecting the initial tier definition when using the Layout Wizard.



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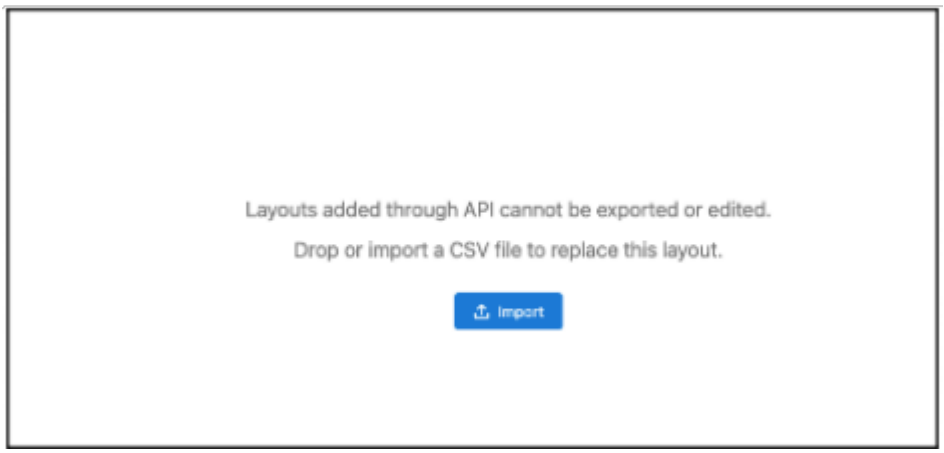
1. Tier definition preview: Shows a simplified preview of the currently selected tier definition
2. Tier definition menu: Provides a list of available tier definitions to select from

When you have made all the changes to the layout, don't forget to save it, using the Save button in the header.

Additional considerations

Layouts that were uploaded by using API calls cannot be edited in the layout editor. A message will appear that lets you import a CSV file to replace the layout.



Modifications that cannot be made by using the layout editor can be made by exporting, adjusting, and importing layout CSV files.

The order of rows is not maintained as the layout editor parses the values.

Layout: a deeper dive

Learn advanced layout concepts in CPQ, including tiers, column sets, and product list layouts. Understand how to structure pages, tabs, and sections in CSV files to create dynamic, responsive configuration interfaces with organized and intuitive user experiences.

Tiers and tierDef

Tiers define the sections of the page.

Each tier and subtier needs a tierDef that defines the component display type (column F). Each tier has the following options: Tab, ExpandableSection, Pages, Accordion, AccordionWithNavigation, and VerticalTab. Each of the examples below shows the same configuration with different tier structures.

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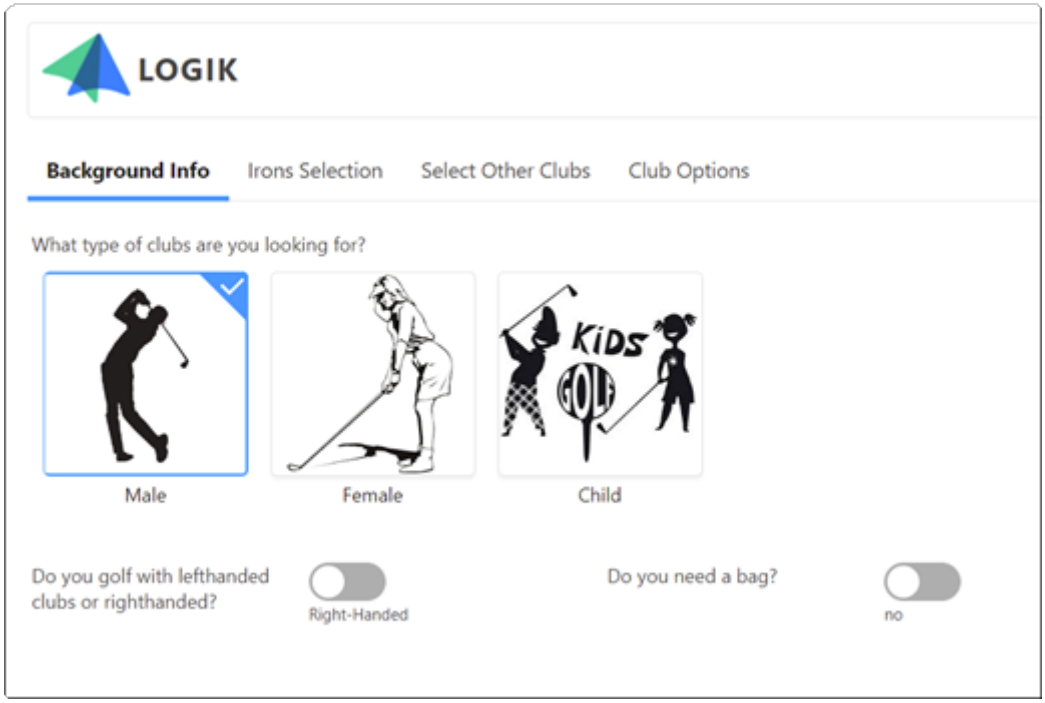
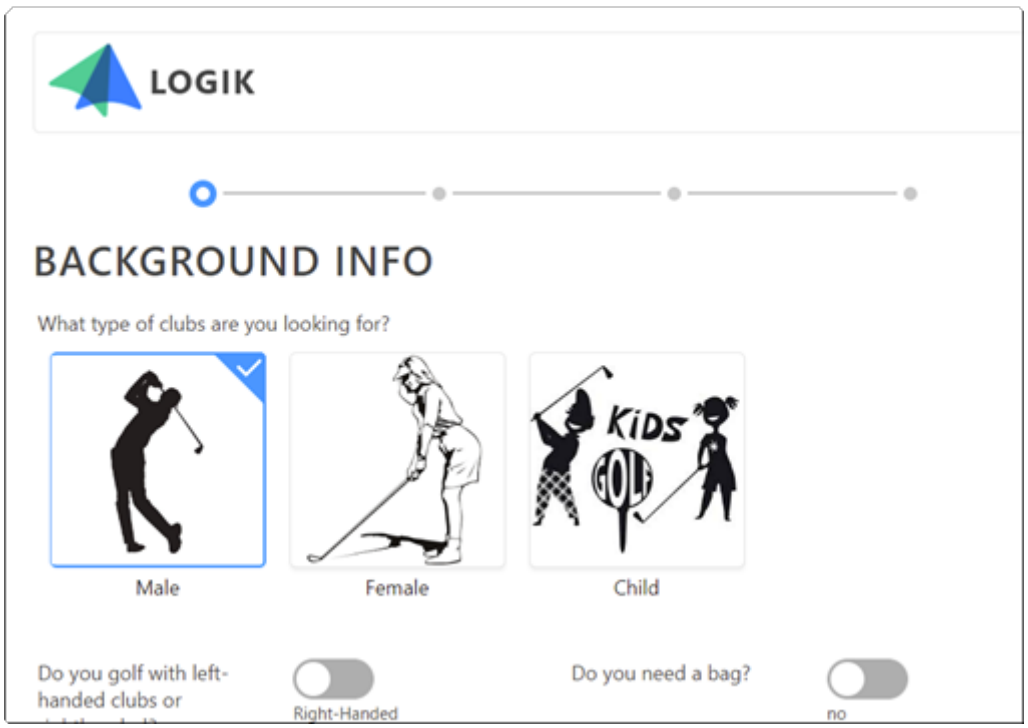
- Tabs:



- ExpandableSection (this makes the layout more vertical)
- Pages:



You also can have subtiers inside tiers.

Tab tier with an ExpandableSection subtier:

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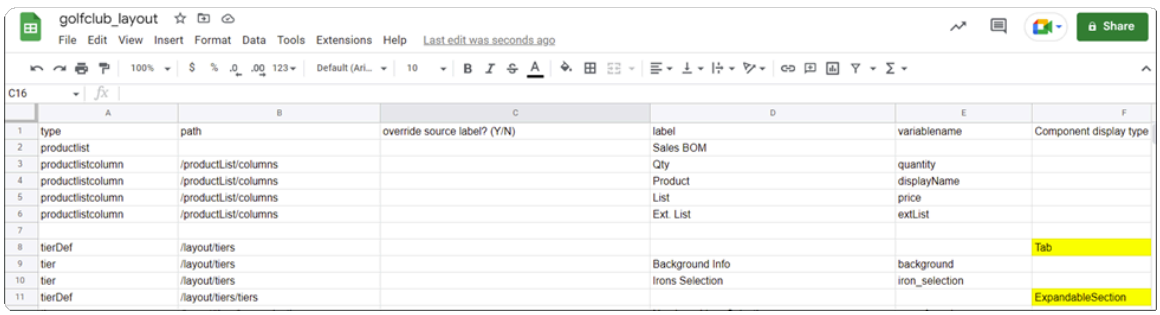
A screenshot of the CSV file used to create this two-tiered layout is shown below. The highlighted cells show how the different tiers are flagged. Because rows 9 and 10 have the same path as the top row tierDef in row 8, the cells are displayed in a tab layout.



	type	path	override source label? (Y/N)	label	variablename	Component display type
2	productlist			Sales BOM		
3	productlistcolumn	/productList/columns		Qty	quantity	
4	productlistcolumn	/productList/columns		Product	displayName	
5	productlistcolumn	/productList/columns		List	price	
6	productlistcolumn	/productList/columns		Ext. List	extList	
7						
8	tierDef	/layout/tiers				Tab
9	tier	/layout/tiers		Background Info	background	
10	tier	/layout/tiers		Irons Selection	iron_selection	
11	tierDef	/layout/tiers/tiers				ExpandableSection

Do not define label or variablename at the tierDef level (row 8 in the image). They are applied at the tier level (rows 9 and 10).

Label column

For both fields and tiers, the text entered in the label column is the text that appears on screen in the layout. The label for the yellow rows appears as the label for each tab. The label column is also used for fields.

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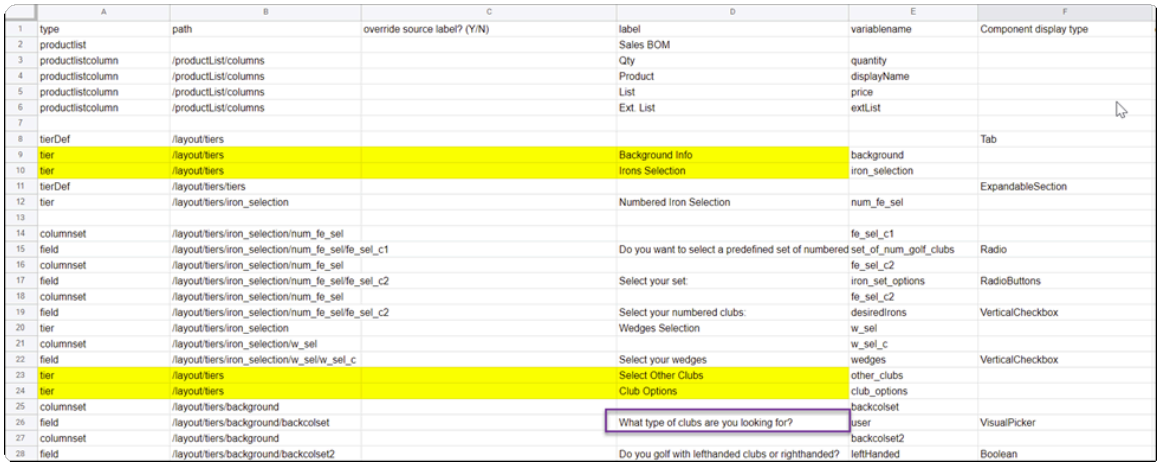
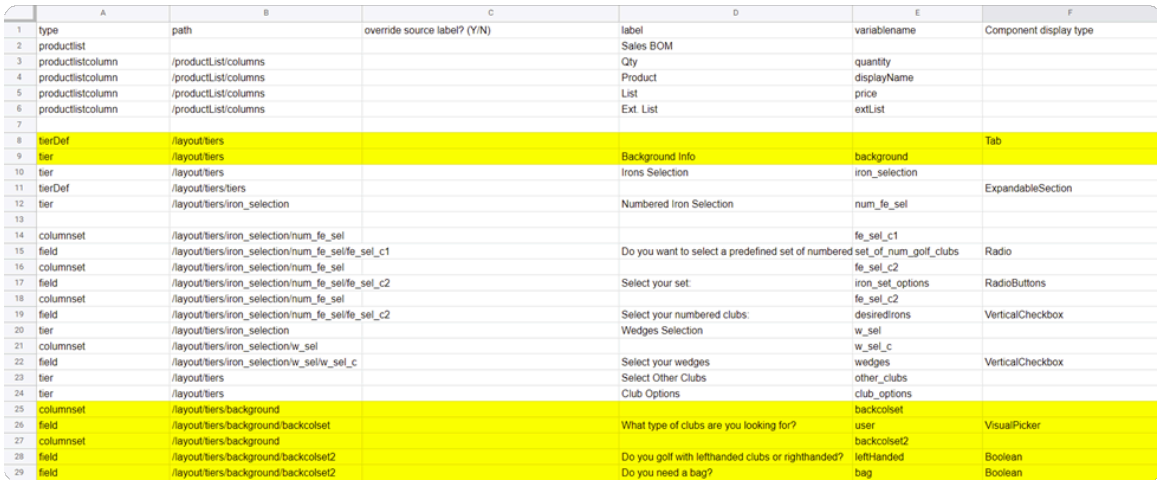


	A	B	C	D	E	F
1	type	path	override source label? (Y/N)	label	variablename	Component display type
2	productlist			Sales BOM		
3	productlistcolumn	/productList/columns		Qty	quantity	
4	productlistcolumn	/productList/columns		Product	displayName	
5	productlistcolumn	/productList/columns		List	price	
6	productlistcolumn	/productList/columns		Ext. List	extList	
7						
8	tierDef	/layout/tiers				Tab
9	tier	/layout/tiers		Background Info	background	
10	tier	/layout/tiers		Irons Selection	iron_selection	
11	tierDef	/layout/tiers/tiers				ExpandableSection
12	tier	/layout/tiers/iron_selection		Numbered Iron Selection	num_fe_sel	
13						
14	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c1	
15	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c1		Do you want to select a predefined set of numbered	set_of_num_golf_clubs	Radio
16	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
17	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your set:	iron_set_options	RadioButtons
18	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
19	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your numbered clubs:	desiredIrons	VerticalCheckbox
20	tier	/layout/tiers/iron_selection		Wedges Selection	w_sel	
21	columnset	/layout/tiers/iron_selection/w_sel			w_sel_c	
22	field	/layout/tiers/iron_selection/w_sel/w_sel_c		Select your wedges	wedges	VerticalCheckbox
23	tier	/layout/tiers		Select Other Clubs	other_clubs	
24	tier	/layout/tiers		Club Options	club_options	
25	columnset	/layout/tiers/background			backcolset	
26	field	/layout/tiers/background/backcolset		What type of clubs are you looking for?	user	VisualPicker
27	columnset	/layout/tiers/background			backcolset2	
28	field	/layout/tiers/background/backcolset2		Do you golf with lefthanded clubs or righthanded?	leftHanded	Boolean

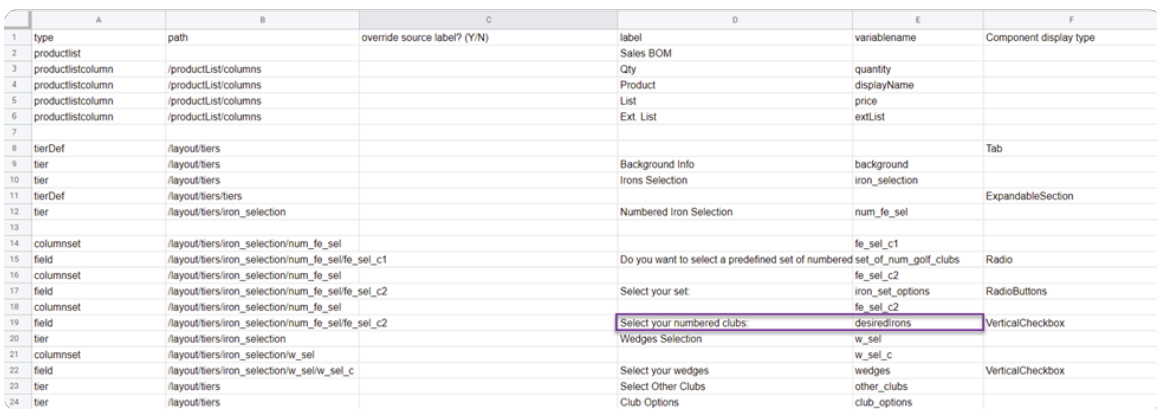
variablename

Variables are used to define the path and call specific fields created in CPQ. In row 9 of the following image, the variablename *`background`* is defined in column E. In rows 25-29, *`background`* is added to the path (column B). This lets CPQ know that those go in the *`background`* tier.



	A	B	C	D	E	F
1	type	path	override source label? (Y/N)	label	variablename	Component display type
2	productlist			Sales BOM		
3	productlistcolumn	/productList/columns		Qty	quantity	
4	productlistcolumn	/productList/columns		Product	displayName	
5	productlistcolumn	/productList/columns		List	price	
6	productlistcolumn	/productList/columns		Ext. List	extList	
7						
8	tierDef	/layout/tiers				Tab
9	tier	/layout/tiers		Background Info	background	
10	tier	/layout/tiers		Irons Selection	iron_selection	
11	tierDef	/layout/tiers/tiers				ExpandableSection
12	tier	/layout/tiers/iron_selection		Numbered Iron Selection	num_fe_sel	
13						
14	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c1	
15	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c1		Do you want to select a predefined set of numbered	set_of_num_golf_clubs	Radio
16	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
17	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your set:	iron_set_options	RadioButtons
18	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
19	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your numbered clubs:	desiredIrons	VerticalCheckbox
20	tier	/layout/tiers/iron_selection		Wedges Selection	w_sel	
21	columnset	/layout/tiers/iron_selection/w_sel			w_sel_c	
22	field	/layout/tiers/iron_selection/w_sel/w_sel_c		Select your wedges	wedges	VerticalCheckbox
23	tier	/layout/tiers		Select Other Clubs	other_clubs	
24	tier	/layout/tiers		Club Options	club_options	
25	columnset	/layout/tiers/background			backcolset	
26	field	/layout/tiers/background/backcolset		What type of clubs are you looking for?	user	VisualPicker
27	columnset	/layout/tiers/background			backcolset2	
28	field	/layout/tiers/background/backcolset2		Do you golf with lefthanded clubs or righthanded?	leftHanded	Boolean
29	field	/layout/tiers/background/backcolset2		Do you need a bag?	bag	Boolean

Variables pertaining to layout must be different than variables defined in CPQ for fields or rules. This is because variables defined in CPQ are also used in the layout CSV. The variables names assigned to a field in CPQ UI are used to add the field to the layout. The following images show the CSV file referencing a field variable (variablename=*`desiredIrons`*) that was created in CPQ resulting in the field appearing in the layout.



	A	B	C	D	E	F
1	type	path	override source label? (Y/N)	label	variablename	Component display type
2	productlist			Sales BOM		
3	productlistcolumn	/productList/columns		Qty	quantity	
4	productlistcolumn	/productList/columns		Product	displayName	
5	productlistcolumn	/productList/columns		List	price	
6	productlistcolumn	/productList/columns		Ext. List	extList	
7						
8	tierDef	/layout/tiers				Tab
9	tier	/layout/tiers		Background Info	background	
10	tier	/layout/tiers		Irons Selection	iron_selection	
11	tierDef	/layout/tiers/tiers				ExpandableSection
12	tier	/layout/tiers/iron_selection		Numbered Iron Selection	num_fe_sel	
13						
14	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c1	
15	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c1		Do you want to select a predefined set of numbered	set_of_num_golf_clubs	Radio
16	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
17	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your set:	iron_set_options	RadioButtons
18	columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
19	field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your numbered clubs:	desiredIrons	VerticalCheckbox
20	tier	/layout/tiers/iron_selection		Wedges Selection	w_sel	
21	columnset	/layout/tiers/iron_selection/w_sel			w_sel_c	
22	field	/layout/tiers/iron_selection/w_sel/w_sel_c		Select your wedges	wedges	VerticalCheckbox
23	tier	/layout/tiers		Select Other Clubs	other_clubs	
24	tier	/layout/tiers		Club Options	club_options	

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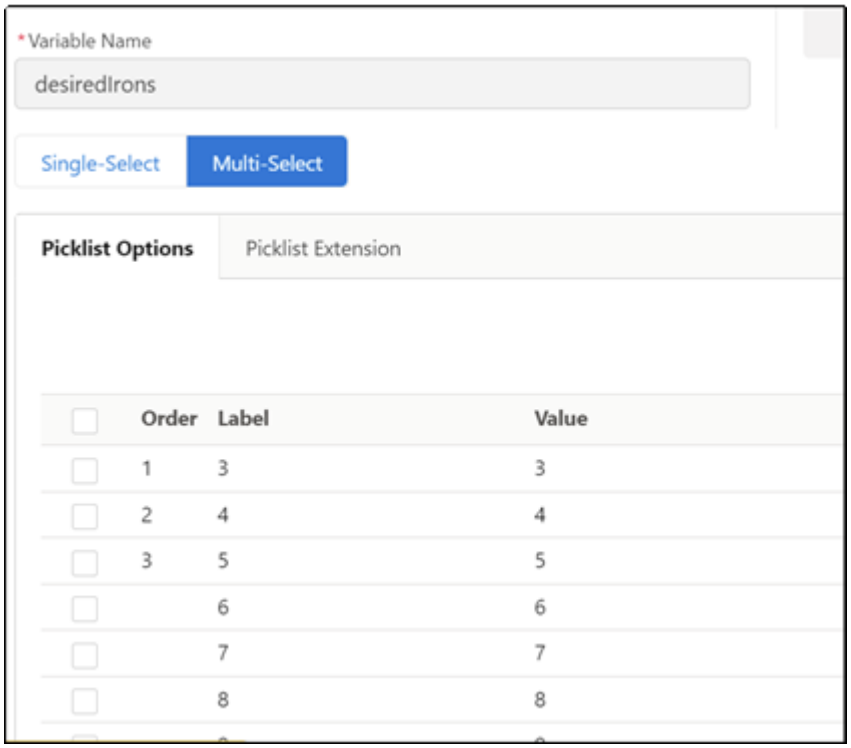

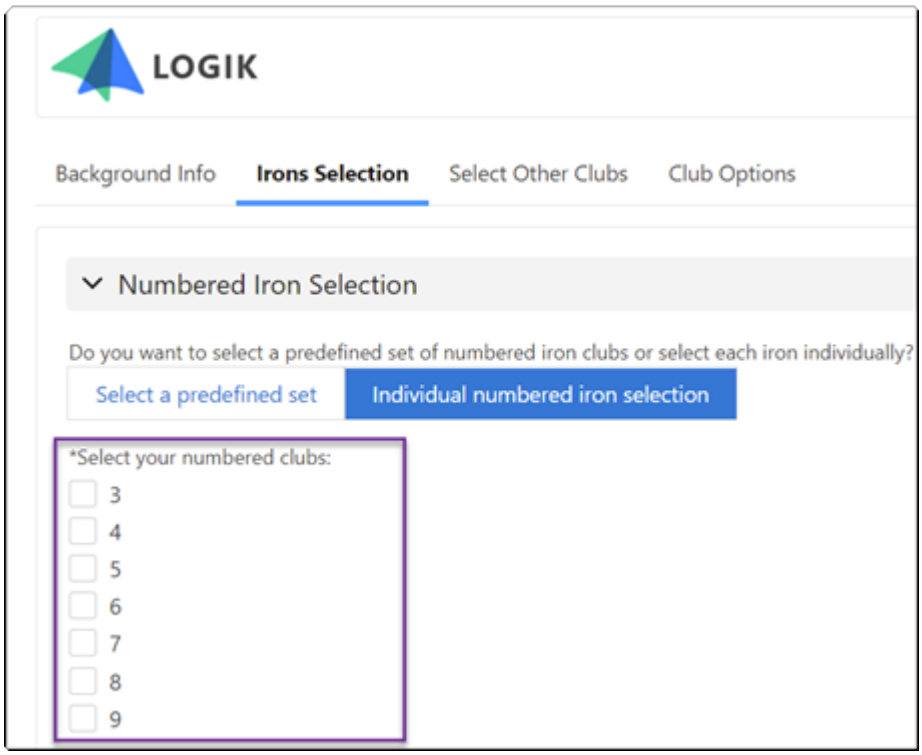

Column set types

Column sets help define the vertical positioning of objects in a tier. The layout is responsive to the width of the browser (which can change), so CPQ uses column sets to help the Admin identify an intentional row breakpoint.

If the user is using a smaller window where the whole column set does not fit on one row, columns will continue onto the next row. The end of the column set always triggers a new row.

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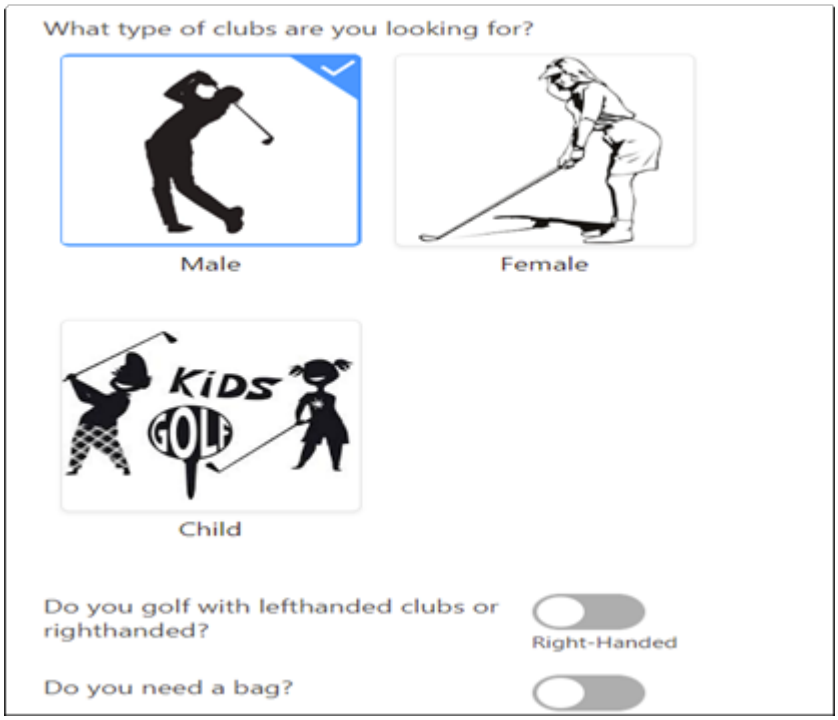
In the following images, the *user* field is part of 1 column set, while the fields *leftHanded* and *bag* are part of a second column set. If the browser window becomes too small for all three pictures (picklist options for *user*), the column set continues on the next row. Even though there is room for the *leftHanded* field next to the third image, it is on a new row.

type	path	override source label? (Y/N)	label	variablename	Component display type
productlist			Sales BOM		
productlistcolumn	/productList/columns		Qty	quantity	
productlistcolumn	/productList/columns		Product	displayName	
productlistcolumn	/productList/columns		List	price	
productlistcolumn	/productList/columns		Ext. List	extList	
tierDef	/layout/tiers				Tab
tier	/layout/tiers		Background Info	background	
tier	/layout/tiers		Irons Selection	iron_selection	
tierDef	/layout/tiers/tiers				ExpandableSection
tier	/layout/tiers/iron_selection		Numbered Iron Selection	num_fe_sel	
columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c1	
field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c1		Do you want to select a predefined set of numbered	set_of_num_golf_clubs	Radio
columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your set:	iron_set_options	RadioButtons
columnset	/layout/tiers/iron_selection/num_fe_sel			fe_sel_c2	
field	/layout/tiers/iron_selection/num_fe_sel/fe_sel_c2		Select your numbered clubs:	desiredIrons	VerticalCheckbox
tier	/layout/tiers/iron_selection		Wedges Selection	w_sel	
columnset	/layout/tiers/iron_selection/w_sel			w_sel_c	
field	/layout/tiers/iron_selection/w_sel/w_sel_c		Select your wedges	wedges	VerticalCheckbox
tier	/layout/tiers		Select Other Clubs	other_clubs	
tier	/layout/tiers		Club Options	club_options	
columnset	/layout/tiers/background			backcolset	
field	/layout/tiers/background/backcolset		What type of clubs are you looking for?	user	VisualPicker
columnset	/layout/tiers/background			backcolset2	
field	/layout/tiers/background/backcolset2		Do you golf with lefthanded clubs or righthanded?	leftHanded	Boolean
field	/layout/tiers/background/backcolset2		Do you need a bag?	bag	Boolean



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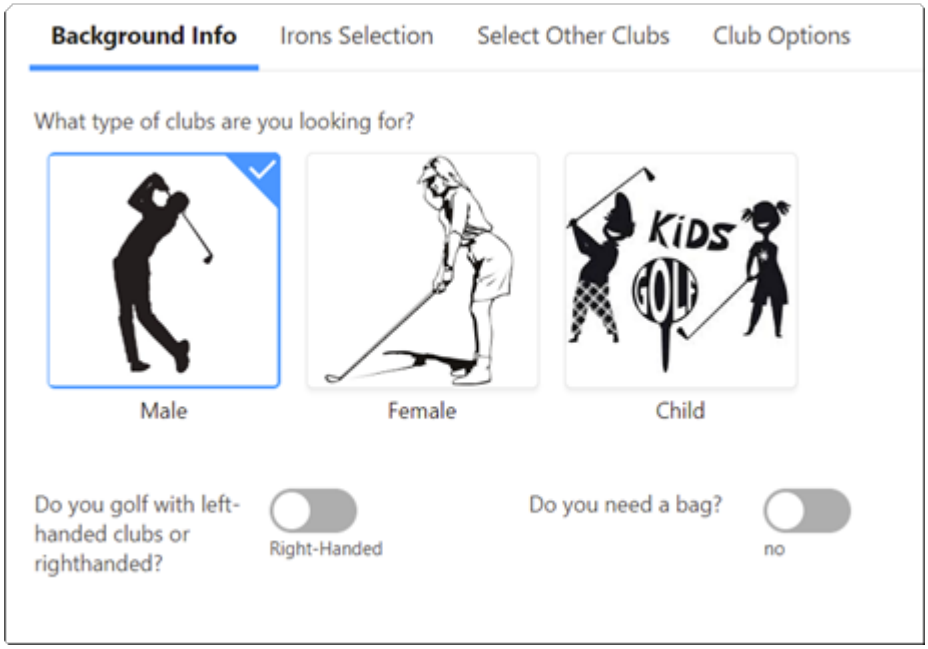
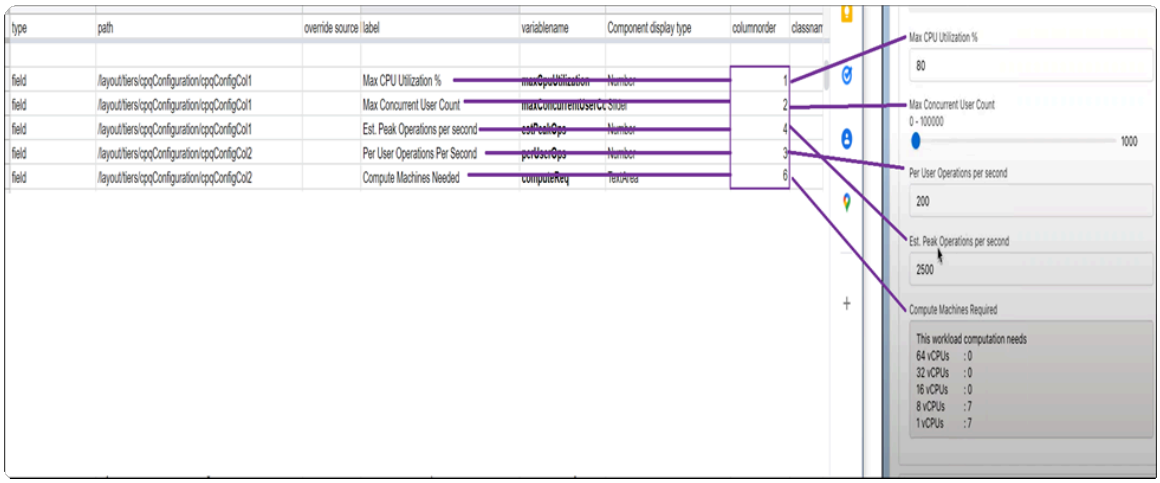


Column order

The *columnorder* column in the CSV file changes the order of the columns in the same column set. Fields do not have to be added to the CSV in order, as seen in the following image.



Product list layouts

The product list is how the shopping cart feature of configurations are customized. To add items to the product list, a new product rule is created. When the user selects **Simple**, the following fields are available:

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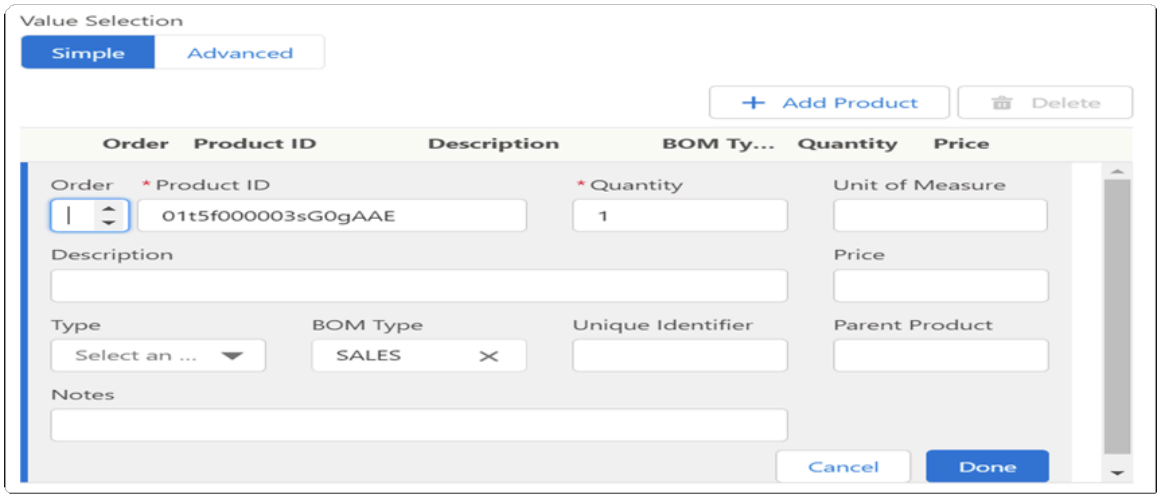
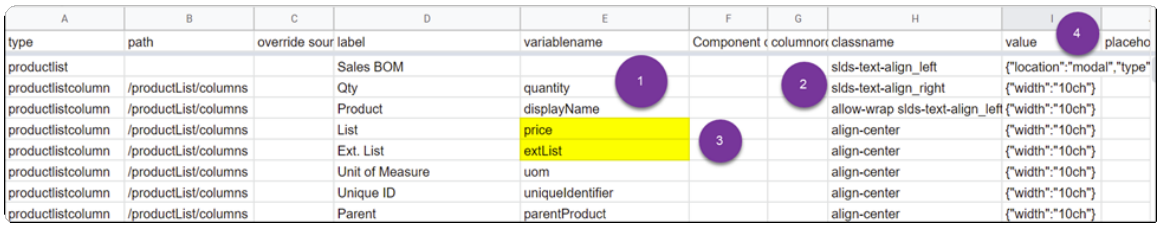


If the user wants the field to be displayed in the layout, they would add a column to the layout CSV for the field. (The user would use the values in the *ProductList.<param>* column of the linked table as the variable name. See note 1 for the following image.)

The following is a screen shot of the product list section of the layout CSV.



type	path	override sour	label	variablename	Component (	columnor(	classname	value	placeho
productlist			Sales BOM				slds-text-align_left	{"location":"modal","type"	
productlistcolumn	/productList/columns		Qty	quantity			slds-text-align_right	{"width":"10ch"}	
productlistcolumn	/productList/columns		Product	displayName			allow-wrap slds-text-align_left	{"width":"10ch"}	
productlistcolumn	/productList/columns		List	price			align-center	{"width":"10ch"}	
productlistcolumn	/productList/columns		Ext. List	extList			align-center	{"width":"10ch"}	
productlistcolumn	/productList/columns		Unit of Measure	uom			align-center	{"width":"10ch"}	
productlistcolumn	/productList/columns		Unique ID	uniqueIdentifier			align-center	{"width":"10ch"}	
productlistcolumn	/productList/columns		Parent	parentProduct			align-center	{"width":"10ch"}	

A few things to note:

1. The variables in this column match the values in the productList.<param> column {hauss-extList and List are missing}. This tells CPQ to add the user inputs to the table.
2. To adjust the alignment of the text in the individual columns add the class *slds-text-align_left*, *slds-text-align_right*, or *slds-text-align_center*. To add multiple class names, separate them with a space.
3. *price*, *list*, and *extList* always align right so the numbers align nicely.
4. To save space on the screen, select *modal* for *location*.

Tier components

Use these tier component property names in the component column of a CSV layout.

Tier components

Component	Property name	Description
Basic container	*BasicContainer*	Tier container with no decoration or navigation
Expandable sections	*ExpandableSection*	Display tiers in expandable sections with gray bar as section header

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Tier components (continued)

Component	Property name	Description
		Value setting for initial state: `defaultState: delay | collapsed` To lazy-load the tier, use "delay", which will open the section after other sections have begun rendering
Accordion	*Accordion*	Similar to expandable sections, but only one is expanded
Accordion with navigation	*AccordionWithNavigation*	Similar to expandable sections, but only one is expanded, and next/previous buttons are included
Tabs	*Tab*	Display tiers in a horizontal tab group
Vertical tabs	*VerticalTab*	Display tiers in a vertical tab group (tabs are on the left)
Pages	*Pages*	Display tiers as pages with a progress nav bar at the top (tier names are displayed on hover)
Pages with labels	*PagesWithLabels*	Display tiers as pages with a progress nav bar at the top, including labels that truncate as needed (no hover display)

Using the sidebar

Use the sidebar element to display persistent information—such as visualizations, product details, or alternate shopping carts—across tiers in a configuration. Define its position and content in the layout CSV to enhance visibility and user experience throughout the configuration process.

In a layout, the sidebar element can be used to show persistent information to the end user across multiple tiers.

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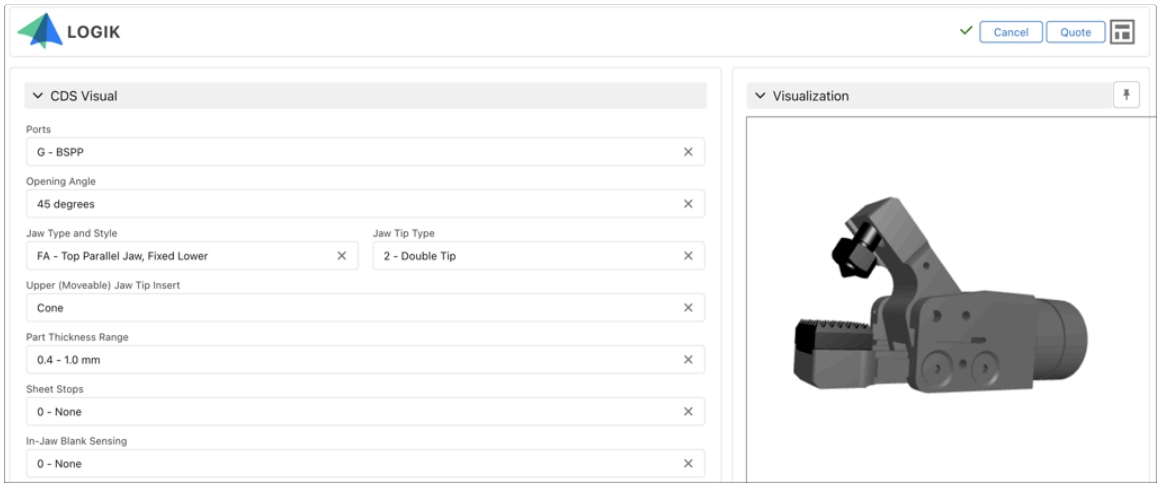

Note: Currently, you cannot implement this feature using the CPQ layout editor. You must create the sidebar element in the layout CSV and then import the CSV file.

Setup

When setting up the sidebar, you must define the sidebar element as a child of the entire layout. The cells to fill in are below together with an example of the sidebar section of the CSV file.

- Type: sidebar
- Path: /layout/sidebar
- Value: `{"location":"right"}` or `{"location":"left"}`

Sidebar element

type	path	label	variablename	component display type	value
sidebar	/layout/sidebar				`{"location":"right"}`
tierdef	/layout/sidebar/tiers			BasicContainer	
tier	/layout/sidebar/tiers	Tier	tier		

The *`location`* property determines whether the sidebar appears to the user on the left or right of the screen. This is where the sidebar exists during configuration, and unlike the shopping cart's similar property, it cannot be on the bottom of the configurator, nor can it be moved during configuration.

The child of the sidebar can only be a *`tierdef`* object. If you add a *`tier`* or a *`columnset`* element as a child, the layout fails. After a tierdef is defined in the CSV, you can then add the necessary tiers, columnsets, and fields as children as in any other tier.

Only one sidebar can exist on a layout. Adding another will result in their being combined into the same tier upon deployment.

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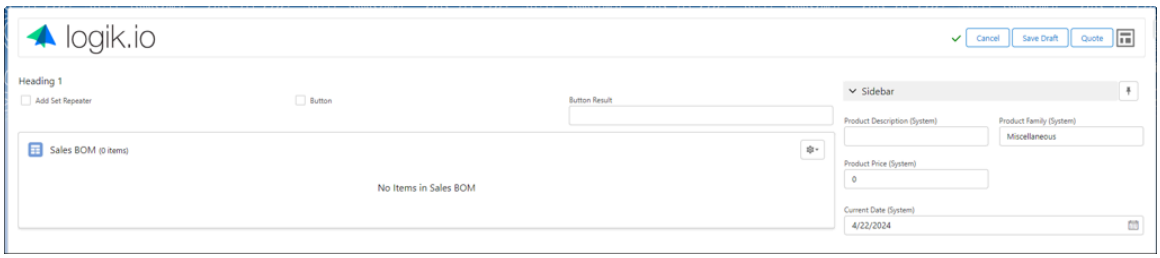
Use case: 3D visualizer

The sidebar can host the 3D visualization tools an organization uses during configuration. As shown in the example above, any changes to fields that are tied to updating the visualization are shown to end users no matter the tier they are currently on.

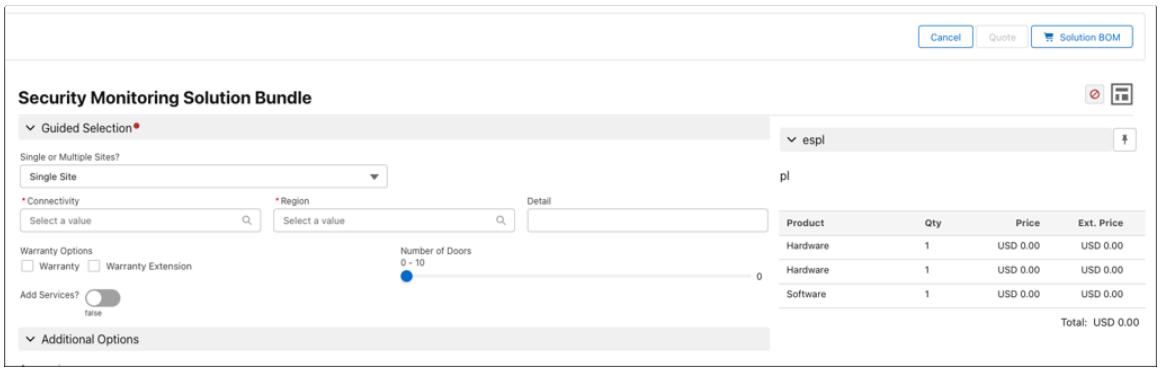
Use case: product information



The sidebar can host anything from the product or quote using the system or partner fields that you would like to make available to the end user throughout the configuration process.

Example CSV file

Use case: shopping cart



To show a product list other than the shopping cart to the end user, you can host it in the sidebar. This could be helpful if you need to list a separate manufacturing BOM type while only showing sales BOM types in the shopping cart.

Example CSV

Layouts: Field grid setup

A field grid collects multiple fields in a single layout, but unlike a set, it can reference other rows.

A field grid presents numerous fields in a matrixed layout. These are helpful when you need to request the same set of information a predetermined number of times. Field grids allow users to create a table of repeated values. In a field grid, rows can reference other rows, while in a set a user cannot write rules between indexes.

Field grids can expand in columnar or row direction (that is, horizontally or vertically).

Define all fields that are intended to be displayed in the field grid. Matrix Loader is a good tool for this. Associate the fields with the blueprint in which they will be used.

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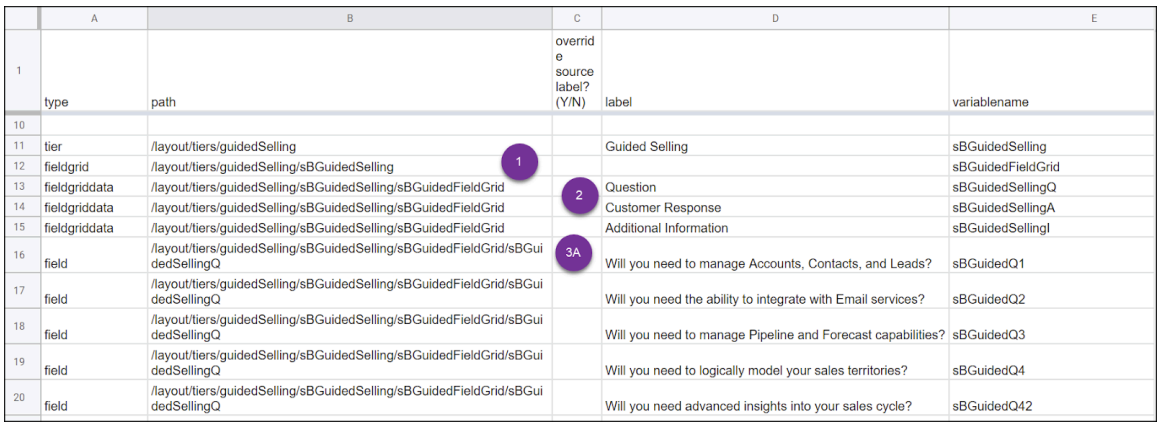
Field grid layout setup

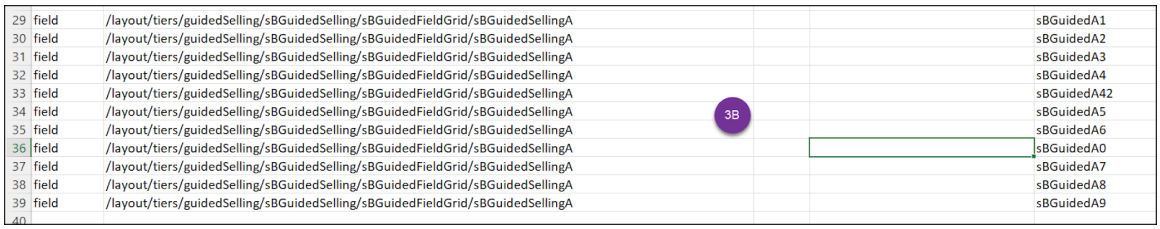
To add a field grid to the layout, a column set is not needed because the field grid creates the rows and columns. Instead, the following row types are needed:

- *`fieldgrid`*: this type tells the layout that a field grid will be used in the layout
- *`fieldgriddata`*: this type is used for each column of the field grid
- *`field`*: this type is needed for each cell in the field grid (not each row)

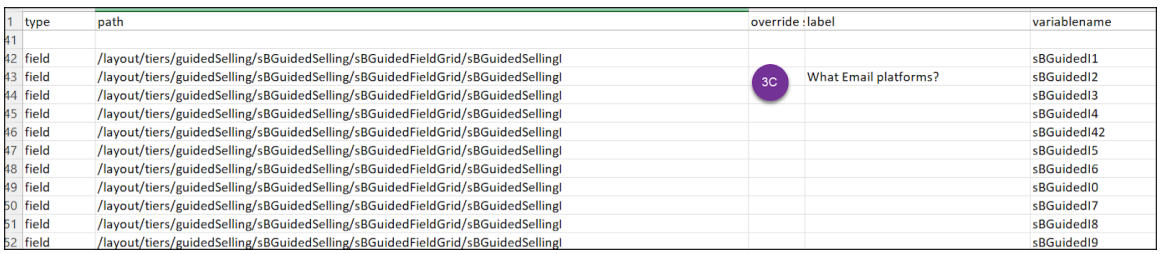
The first three images show the CSV file. The last image shows the corresponding user layout. The numbers above align with the numbers in the images below. (Because number 3 is shown several times, a letter is added for clarity.) Individual cells in the field grid cannot have both a label and an input field. Note that by 3C, both a label and input field are added to the layout CSV file. However, only the input field goes in the layout.



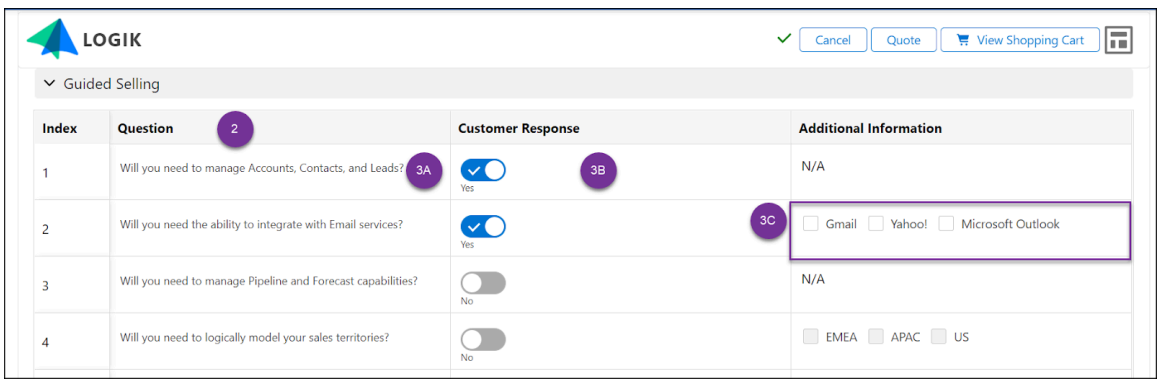
	A	B	C	D	E
1	type	path	override source label? (Y/N)	label	variablename
10					
11	tier	/layout/tiers/guidedSelling		Guided Selling	sBGuidedSelling
12	fieldgrid	/layout/tiers/guidedSelling/sBGuidedSelling			sBGuidedFieldGrid
13	fieldgriddata	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid		Question	sBGuidedSellingQ
14	fieldgriddata	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid		Customer Response	sBGuidedSellingA
15	fieldgriddata	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid		Additional Information	sBGuidedSellingI
16	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ		Will you need to manage Accounts, Contacts, and Leads?	sBGuidedQ1
17	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ		Will you need the ability to integrate with Email services?	sBGuidedQ2
18	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ		Will you need to manage Pipeline and Forecast capabilities?	sBGuidedQ3
19	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ		Will you need to logically model your sales territories?	sBGuidedQ4
20	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ		Will you need advanced insights into your sales cycle?	sBGuidedQ42



29	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA1
30	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA2
31	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA3
32	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA4
33	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA42
34	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA5
35	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA6
36	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA0
37	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA7
38	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA8
39	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA			sBGuidedA9
40					



	type	path	override	label	variablename
41					
42	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI1
43	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI		What Email platforms?	sBGuidedI2
44	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI3
45	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI4
46	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI42
47	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI5
48	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI6
49	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI0
50	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI7
51	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI8
52	field	/layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI			sBGuidedI9



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fieldGrid Sample Layout JSON

Field grid UI controls

Various aspects of the field grid UI can be controlled by updating the value field in the layout CSV file:

- Gridline visibility
- Dynamic column headers
- Field grid field width

Fieldgrid elements

The following values can be added to the value column of fieldgrid elements:

- *`indexPre`*: String value to be displayed in the index column before the index number. optional
- *`indexPost`*: String value to be displayed in the index column after the index number. optional
- *`indexVisible`*: true | false, whether to display the index number and column in the field grid layout. Optional, default: true
- *`maximumHeight`*: Maximum height to set in CSS px. I.e. "180px". optional
- *`gridlines`*: all | horizontal | vertical | none, control how grid lines are displayed between cells. Optional, default is all.

Fieldgriddata elements

The following values can be added to the value column of fieldgriddata elements:

- *`fieldIndex`*: name of field to use for header value. Optional. If included, the label for the fieldgriddata element should be blank.
- *`width`*: width of the fields. Optional. If included, examples of valid value are *`auto`*, *`300`* (px are assumed here), *`300px`*, *`20vw`*, and *`calc(100% - 100px)`*.

Field grids default to 100% width, but if even one width value is specified for a contained fieldgriddata component, the field grid's width will change to *`auto`* so that a specified width can be applied.

Example field grid dynamic headers and grid lines CSV file

Example field grid width CSV file

CSV layout upload

Learn how to create and upload a CSV file that contains a layout specification.

Layouts are defined in a blueprint. When more than one layout is defined for a blueprint, end users rotate through them using the alternate layout button in the upper-right corner of the buyside UI.

Layouts are defined via CSV file that contains all instructions for the layout. For ease of administration, we recommend that admins build their layout in a spreadsheet (Google Sheets, Microsoft Excel, or similar) and export to CSV format.

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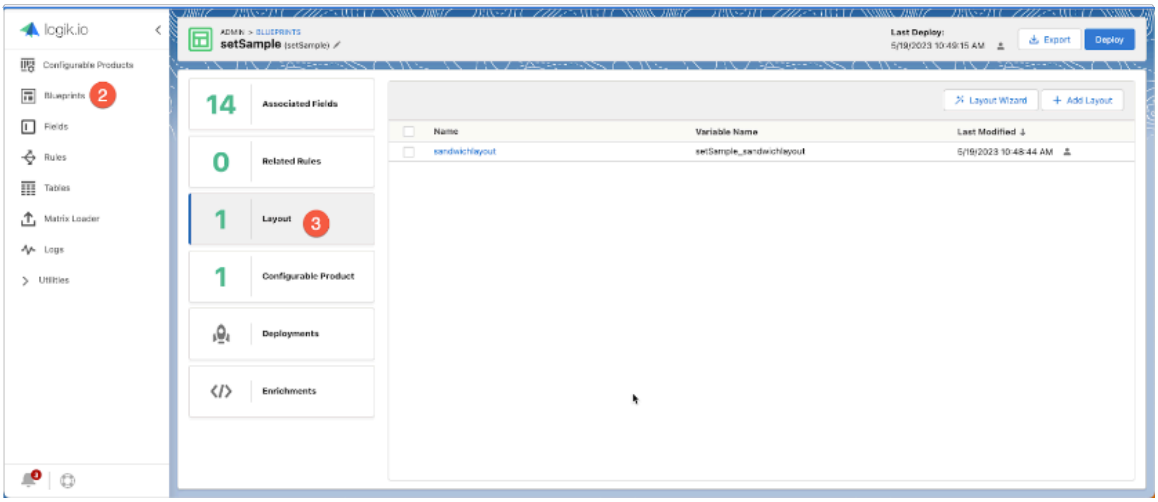
Creating and editing a layout

Access a layout from its corresponding blueprint administration page.

1. In the CPQ Admin navigation pane, click **Blueprints** (2).
2. Click the Layouts tab (3).
3. Click the name of the blueprint you want to access.



To start a new layout, click **Create Layout**. To edit an existing layout, click the name of a layout in the list.

You can also edit a layout in the Layout Wizard. After you redeploy your blueprint, the new UI changes appear on the buyside.

When you begin a new layout, the New Layout window opens. You can import a CSV file by dropping it in the box or click to select it from your computer. (i) You can also download a sample layout file for your reference. (ii)

Sample layout file

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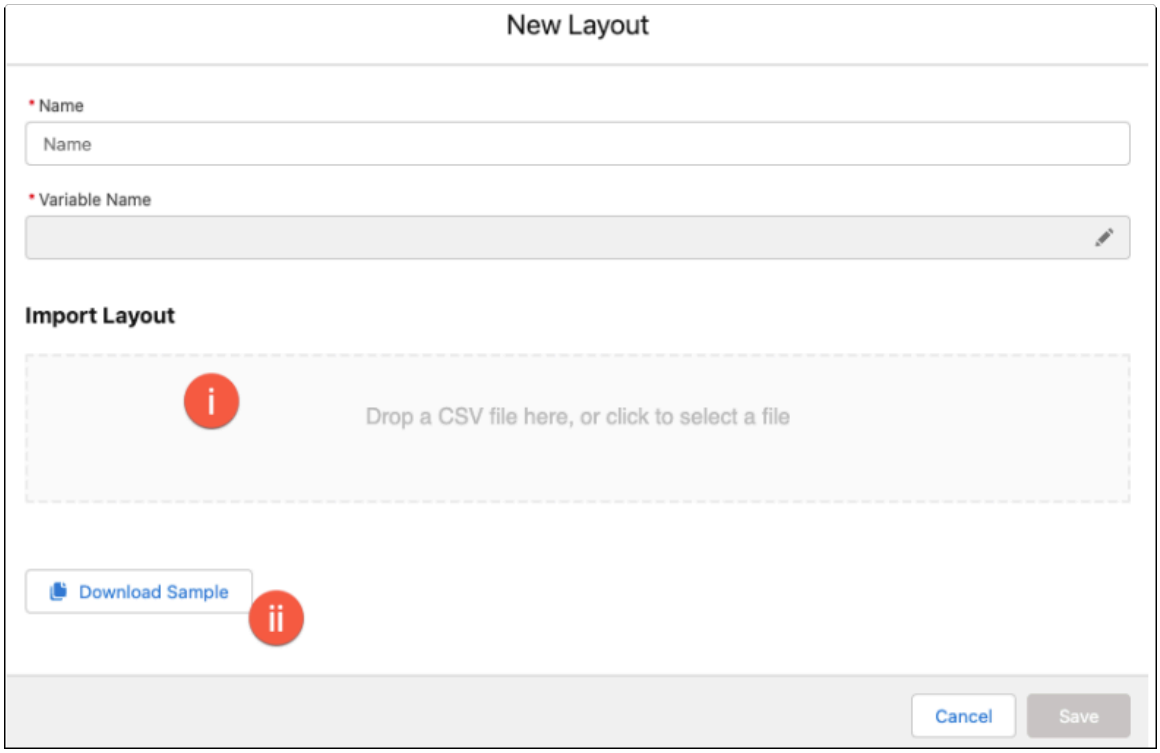
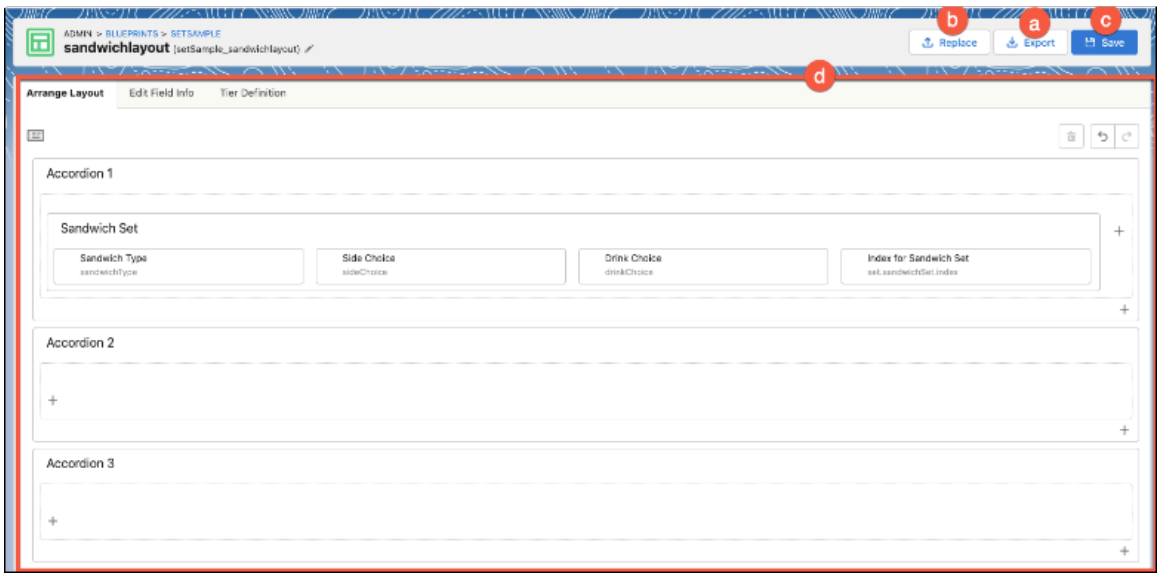


When you edit an existing layout:

Click **Export** to download the current layout file. (a)

Import a layout CSV file by clicking **Replace** (b).

Click **Save** (c) to replace the current layout with the edited layout. If CSV file upload fails, all errors found in the file will be shown to the administrator in an error dialog.



Using layout CSV file upload

For a thorough introduction to the layout CSV format, view the following 26-minute video:

Layout CSV Overview

For an example of how a layout CSV is used, view the following 4-minute video:

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HiTech Layout Overview

Download the corresponding HiTech Layout CSV file:

HiTech layout CSV file

Layout CSV format

Column headings are lower case.

The type column defines the layout components. The following table shows valid values for this column.

Valid values for the type column

Type value	Description
tierDef	Properties: Pages, PagesWithLabels, PagesWithNavigation, ExpandableSection, Tab, TabWithNavigation, VerticalTab, VerticalTabWithNavigation, Accordion, AccordionWithNavigation
tier	
columnset	
image	
productlist	
productlistcolumn	
field	

The path column value format gives a visual cue to the placement of the element override source label, and is not currently used by the application. Leave it empty.

`label` defines the label to display to the end-user in the UI for tiers and fields.

`variablename` defines a unique identifier for a tier or field.

- For tiers, administrator should define distinct values.
- For fields, populate the field variable name.

The component display type column defines how a field should be displayed. The following types are available.

Component display types

Field type	Component display types
Text	ReadOnlyText Text TextArea Date

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Component display types (continued)

Field type	Component display types
Boolean	Boolean Radio RadioButtons
Number	Number Slider NumberWithSubmit ReadOnlyText ReadOnlyCurrency FormattedNumber
Picklist (single-select)	Extended picklist Extended picklistDisplayOnly Picklist ReadOnly picklist Radio RadioButtons SingleSelect picklistGrid VerticalRadio VisualPicker
Picklist (multi-select)	MultiSelectExtended picklist MultiSelectExtended picklistDisplayOnly MultiSelect picklist MultiSelect picklistGrid MultiSelectVisualPicker Checkbox VerticalCheckbox

`columnorder` is relevant for components in a column set. Used to provide the sort order of the Fields based on screen resolution in the responsive UI.

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`classname` is used to reference predefined classes available in CPQ. For example, when placing an image, a class can define the flow of fields around that image. Add these class names to the layout CSV file in the className column. As max-height and grid controls interact with the width of the browser, we recommend you experiment with each class distinctly, exploring how the class responds to a variety of browser sizes.

Effects classes

Effect	Applies to	Supported classes	Notes and examples
Grid	Fields, Images	topleft1col1row, topleft1col2row ... topleft1col6row	topleft1col1row { grid-column: 1/2; } topleft1col2row { grid-column: 1/2; grid-row: 1/3; } topleft1col3row { grid-column: 1/2; grid-row: 1/4; } topleft1col4row { grid-column: 1/2; grid-row: 1/5; } topleft1col5row { grid-column: 1/2; grid-row: 1/6; } topleft1col6row { grid-column: 1/2; grid-row: 1/6; }
		topleft2col1row, topleft2col2row ... topleft2col6row	topleft2col1row { grid-column: 1/3; } topleft2col2row { grid-column: 1/3; grid-row: 1/3; } topleft2col3row { grid-column: 1/3; grid-row: 1/4; } topleft2col4row { grid-column: 1/3; grid-row: 1/5; } topleft2col5row { grid-column: 1/3; grid-row: 1/6; } topleft2col6row { grid-column: 1/3; grid-row: 1/6; }

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Effects classes (continued)

Effect	Applies to	Supported classes	Notes and examples
		topleft3col1row, topleft3col2row ... topleft3col6row	topleft3col1row { grid-column: 1/4; } topleft3col2row { grid-column: 1/4; grid-row: 1/3; } topleft3col3row { grid-column: 1/4; grid-row: 1/4; } topleft3col4row { grid-column: 1/4; grid-row: 1/5; } topleft3col5row { grid-column: 1/4; grid-row: 1/6; } topleft3col6row { grid-column: 1/4; grid-row: 1/6; }
		topright1col1row, topright1col2row ... topright1col6row	topright1col1row { grid-column: -2/-1; } topright1col2row { grid-column: -2/-1; grid-row: 1/3; } topright1col3row { grid-column: -2/-1; grid-row: 1/4; } topright1col4row { grid-column: -2/-1; grid-row: 1/5; } topright1col5row { grid-column: -2/-1; grid-row: 1/6; } topright1col6row { grid-column: -2/-1; grid-row: 1/6; }
Height	Fields	mh5, mh10, mh15 ... mh40	Maximum height from 5 rem to 40 rem, in increments of 5
Width	Fields	w5, w10, w15 ... w40	Maximum width from 5 rem to 40 rem, in increments of 5

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Effects classes (continued)

Effect	Applies to	Supported classes	Notes and examples
Grid column width	Fields	lc-15m-15max, lc-15m-20max, lc-15m-25max, lc-15m-30max	These classes set the width of the columns in the layout grid. • lc: layout column • 15m: width of 15 rem • 15max: maximum width of 15 rem
Display vertically, align center	Picklist Fields	vertical-layout, align-center	Default: horizontal (when layout is vertical, default is left)
Hide field label, hide field option label	Display components: Extended picklist, MultiSelectExtended picklist	hide-field-label, hide-field-option-label	

The value column contains a JSON string to represent properties for element (Field or productlistcolumn) referenced on that row.

`placeholder` allows the Admin to define placeholder text that will display in a text field until the end-user inputs a value.

Components with images

For picklist display components that include images, when options are disabled, the image is faded. Admins can override this behavior and force the image to look normal by applying the `override-disabled` class to the classname field in the layout.

Note: An earlier means of defining and editing layouts using JSON is available. When leveraging JSON, the files must be loaded into the application via REST API. Once a layout has been edited via JSON, CSV manipulation is no longer available. If a layout has been edited via JSON, the Current Layout button is disabled.

Related topics

Layout Wizard

Layout editor

Configure the Matrix Loader

The art of design: show-stopping layout ideas

Discover how thoughtful layout design can transform complex configurations into clear, intuitive, and visually engaging user experiences. Learn best-practice patterns, spacing strategies, and industry-inspired structures to create polished, high-impact layouts for your product configurations.

Designing visually appealing layouts for your configurations can significantly enhance the overall experience for users who interact with your data. Implementing consistent formatting, using white space strategically, and thoughtfully considering other design elements can transform your layout into a well-structured and engaging resource. As your data continues to play a crucial role

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in decision-making, the importance of presenting it in an intuitive and appealing manner cannot be underestimated.

Here are some real world examples (with their associated CSV files) of the layouts we've used in our most popular demo videos and builds- inspired by our customers. If you haven't already, familiarize yourself with the basics of layout, with the use of the Layout Wizard and the Layout editor, and take a deeper look at tiers and tier definitions.

Manufacturing- Industrial Generator Layout

Logik.io Industrial Generator Demo: Configure Complex Products Based on Customer Needs

Download the Layout CSV file

Technology- High Tech Configuration Layout

Logik.io High Tech Configuration Demo

Download the Layout CSV file

Headless- B2B e-commerce w/3D Visualization

Logik.io for eCommerce

Download the Layout CSV file

Product lists in layouts

Define and customize product lists in CPQ layouts to display data from bills of materials (BOMs) and product details. Configure list placement, columns, and display settings in the layout CSV file or the layout editor to present clear, structured product and pricing information to end users.

In CPQ, layout definition is accomplished via CSV file. Product lists are components that can show products and related information in the bill of materials (BOM). There are 2 types of columns in the layout to control the product list component: *`productlist`* and *`productlistcolumns`*. Multiple product lists can be included in a layout to display products of different BOM types.

Defining a product list

In the layout CSV file, define your product list row with the following column guidelines:

- Type (column A in the layout CSV file) for the product list is defined as *`productlist`*
- Path (column B in the layout CSV file) is not required for the product list. When left blank, this places the product list in the standard position. To place the product list in a tier, specify the path relative to the tier. For example, `/layout/tiers/myTier/myProductList`

A product list has many properties that can be controlled by setting the value field in JSON format.

Example:

```
{
  "location": "right",
  "type": "sales",
  "totalLocation": "bottom",
  "hierarchyColumn": "displayName",
  "displayZeroPriceAs": "On Request",
```

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```
  "displayNullPriceAs": ""
}
```

Available options

- `location` indicates where you want the product list component to display in the layout. The value can be *`right`* (default), *`left`*, *`bottom`*, or *`modal`*.
- `type` determines which products are included in this product list, based on the *`bomType`* field in the product. Values can be *`sales`*, *`manufacturing`*, or any custom type specified in the products by the admin. Multiple BOM types can be included. For example, `type: sales, customBOMTypeA, customBOMTypeB`, `type: all`
- `totalLocation` determines where the cart total is shown. Valid values are *`bottom`*, *`top`*, *`both`*, and *`none`*.
- `hierarchyColumn` determines which column shows an expand arrow or collapse arrow when a product has child products.
- `displayZeroPriceAs` and `displayNullPriceAs` determine how to display zero and null prices in the product list. The display value can be any string, such as "On Request". If 0 (zero) is provided, a zero price is shown with locale and symbol or code (for example, USD 0.00). Blank is the default, and will be the behavior if not specified.

Product list columns

Product list columns are children of the product list and define what columns of data are displayed, with the data coming from the products that are displayed in the BOM. For each column of product data you want to display, create a product list column.

In the layout CSV file, define your product list column rows with the following column guidelines:

- *`type`* (column A in the layout CSV file) for the product list column rows are defined as *`productlistcolumn`*.
- *`path`* (column B in the layout CSV file) for product list columns are defined relative to the product list. For example, /productList/columns.
- *`variablename`* (column E in the layout CSV file) determines what data to display based on the matching field from the product. Extended product list values can be displayed by putting `extended.columnName` in the *`variablename`* column. For example, `extended.taxExempt` displays the value of `ProductList.extended.taxExempt`.
- *`classname`* (column H in the layout CSV file) can be set to `allow-wrap` to allow content in that column in the layout to wrap. *`value`* (column I in the layout CSV file) defines the visual styling of the column in the layout.
  - The *`value`* column can specify a width. For example: `{"width":"10%"}`.
  - If specifying a width, using a percentage is recommended for a modal or bottom-docked product list.
  - The use of fixed units such as *`px`* (pixels) is recommended for left-docked or right-docked product lists, since the width of the product list is fixed. Using *`ch`* is not recommended.

Layout editor

The product list and its properties can be edited by using the layout editor in the CPQ UI. The product list layout element is at the bottom of the page:

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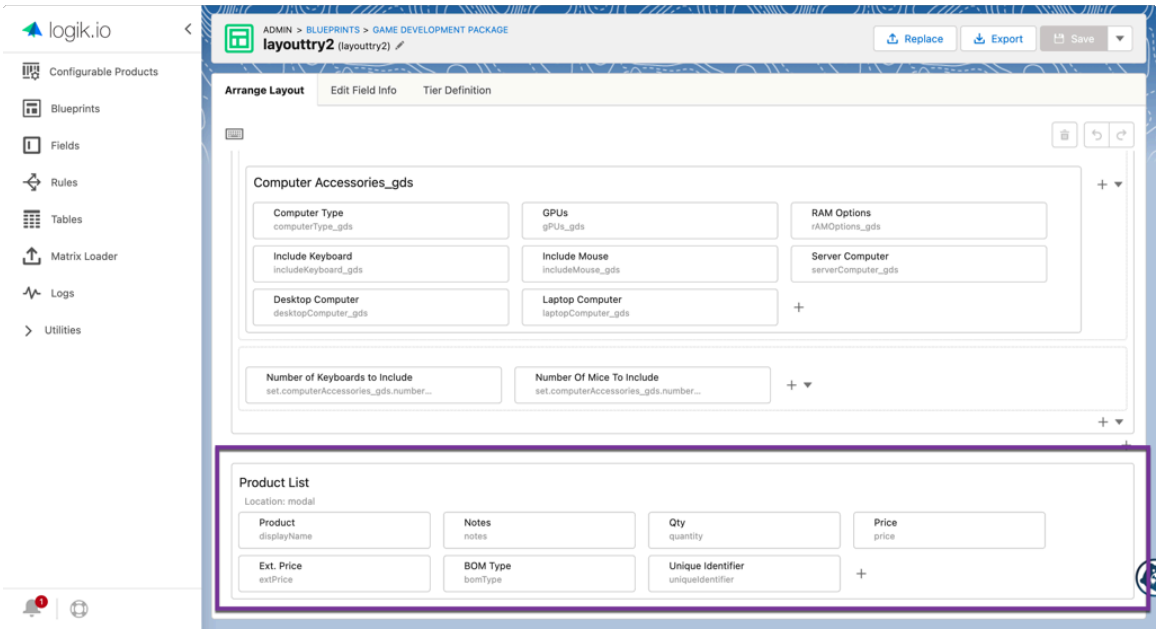
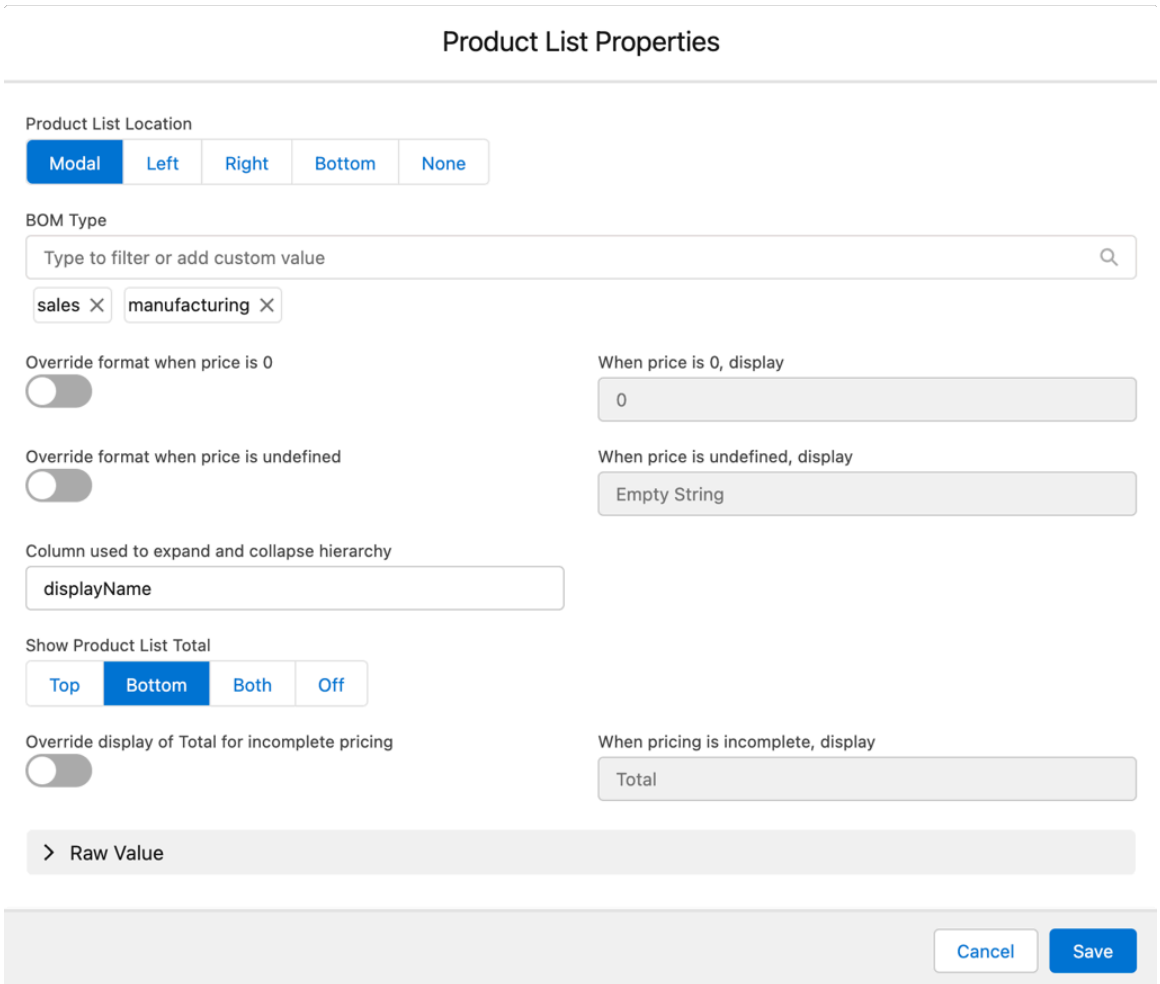


You can edit this part of the layout by clicking the gear that appears in the top right of the product list layout element when you move your mouse into it. The product list has a settings screen that contains all the properties referenced earlier.



For more information, see Displaying multiple product lists in layouts.

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Number field properties in layouts

Control how number fields behave and display in CPQ layouts using the step and precision properties. Define valid input intervals, enforce decimal formatting, and ensure consistent numeric entry for use cases like quantities and currency values.

When the input parameters of a number field are defined in the layout editor, either the step property or the precision property can be set.

These properties can conflict and should not be combined.

The step property

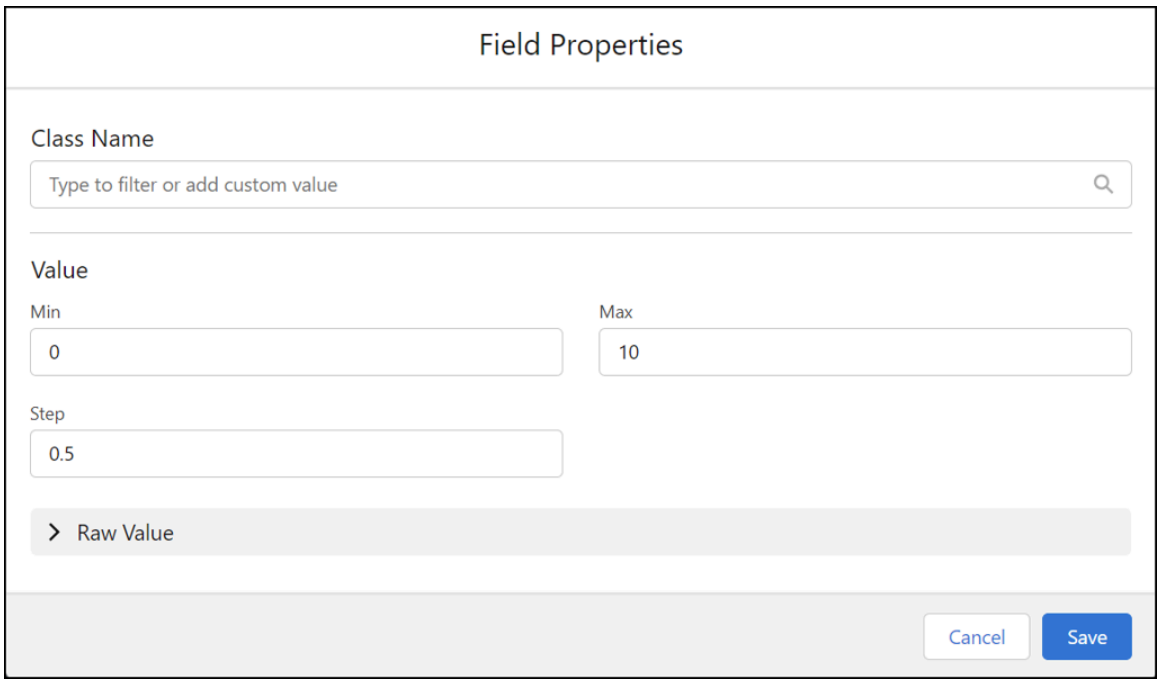
The step property restricts entered values to multiples of the step (or zero if undefined). The step must be a whole positive integer, and the UI will truncate (not round) an entered value if it contains decimal places beyond that of the step value. A common use case for the step property is to limit inputs to whole numbers.

If the number entered is not a multiple of the step, the setting is not logged immediately, in case the user is entering a value slowly. The value will be reverted to its original value when the user clicks out of the field.

If the number entered is a multiple of the step, an input is logged after a 1-second delay.

Using a rule to set a value that is not a multiple of the step is not recommended. If the user clicks the up or down arrow in the input, the value is changed according to the step value, which may result in an invalid user-entered value.

The following Field Properties dialog illustrates one use of the step property.



The precision property

The precision property displays the number of decimal places provided, regardless of what is entered. When defined, the field will round (not truncate) if decimals are entered beyond the set number of decimal places. (The complete number is saved on the server.) A common use case for the precision property is to display currency in dollars and cents, such as 19.99 or 10.00.

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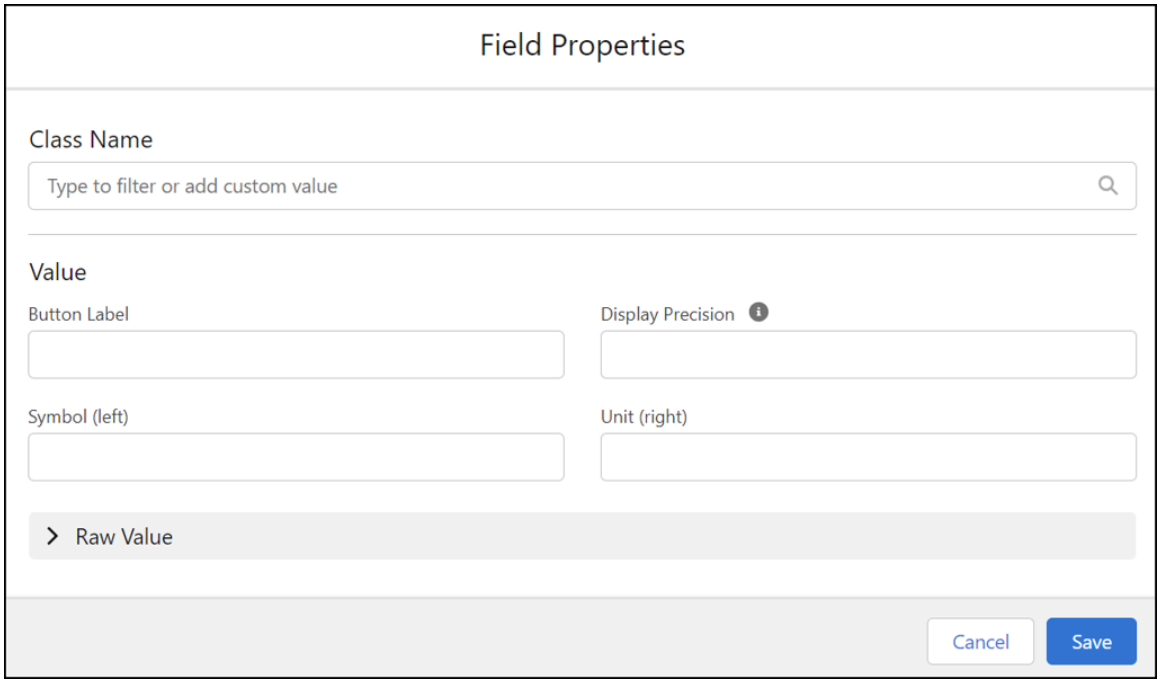
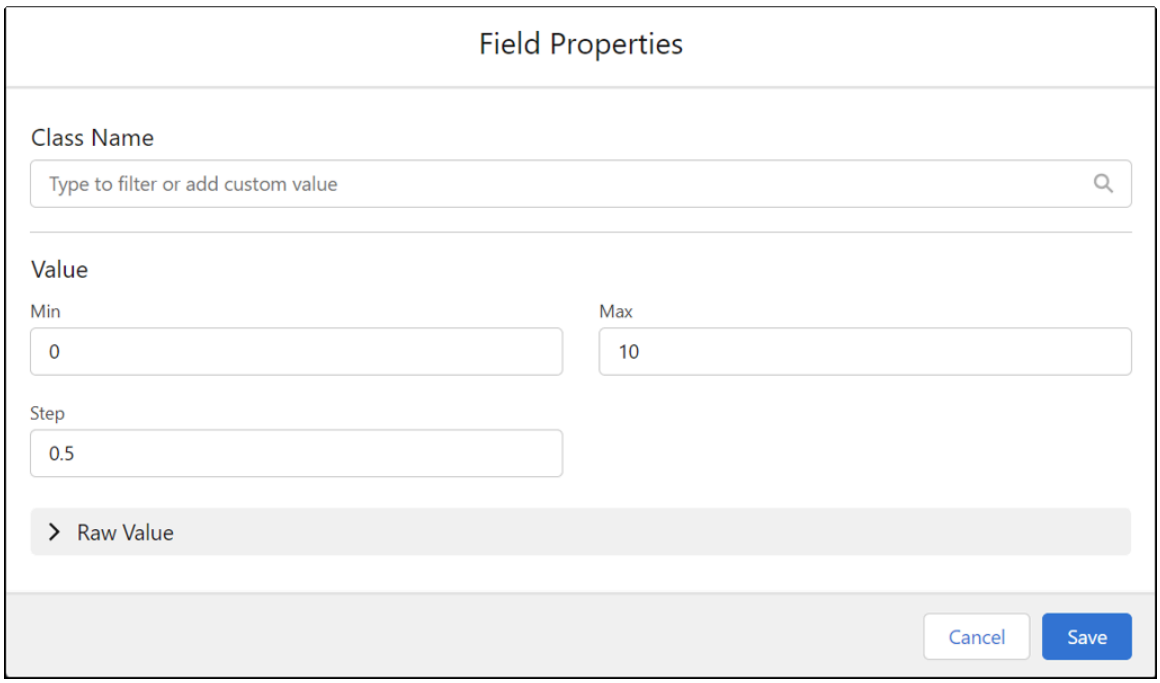
The precision property defaults to 0 if not set.

The following Field Properties dialog illustrates one use of the precision property.



The Display-Type-Specific Constraints Slider



The step property is required for this component. Minimum and maximum values are included, but precision is not.

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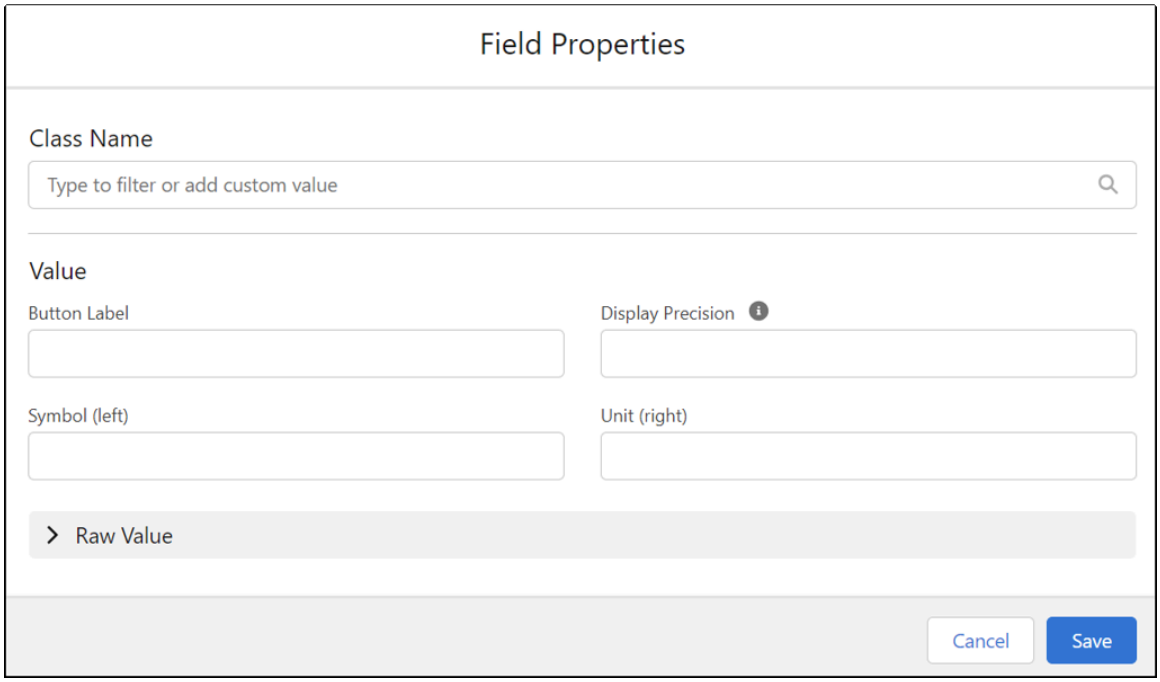
NumberWithSubmit



The precision property is included and defaults to 0. The step property is not included.

Multi-tier structure (nested tiers)

Create complex, multi-tier layouts in CPQ by nesting tiers in other tiers using a layout CSV file. Define tier display types—such as tabs, expandable sections, and basic containers—to organize fields and achieve flexible, structured, and visually clear configuration interfaces.

In CPQ, there are two basic container types: tiers and column sets. This article focuses on the top-level container (tiers) and how to achieve more complex layouts by nesting different types of tiers.

Note: As of May 23, 2023, nesting tiers is not supported in the Layout Wizard or in the layout editor. However, you can change the display type of existing tiers, including nested tiers.

The basic CSV format for a single-tier structure looks like this:

type	path	override source label? (Y/N)	label	variablename	Component display type
tierdef	/layout/tiers				Tab
tier	/layout/tiers		Tab 1	tab1	
columnset	/layout/tiers/tab1			col1	
field	/layout/tiers/tab1/col1		Sandwich Type	sandwichType	Picklist
tier	/layout/tiers		Tab 2	tab2	
columnset	/layout/tiers/tab2			col2	
field	/layout/tiers/tab2/col2		Side Choice	sideChoice	Picklist
tier	/layout/tiers		Tab 3	tab3	
columnset	/layout/tiers/tab3			col3	
field	/layout/tiers/tab3/col3		Toppings	toppings	MultiSelectPicklist

The tier definition defines the visual display of a level of tier, not just one particular tier. So in this case, all three tiers (tab1, tab2, and tab3) are defined as the Tab display type. This creates a simple structure where each tier in the CSV file appears as a tab.

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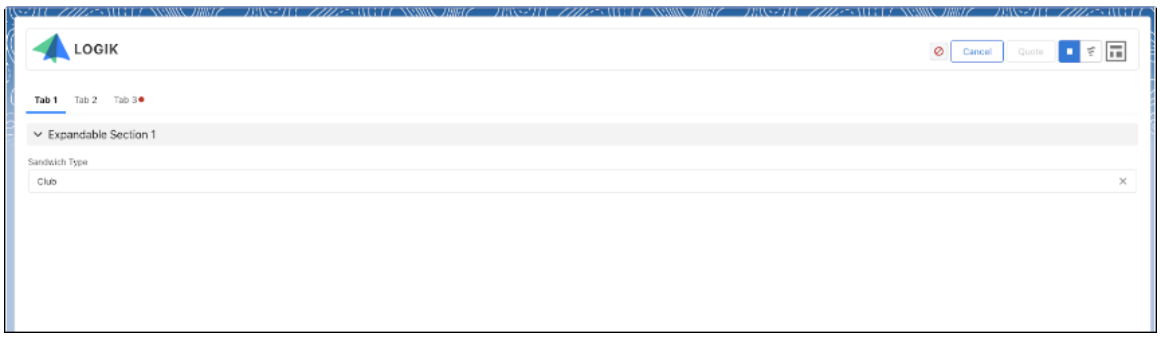
However, different types of tier display types may sometimes be nested in another tier. The simplest example is a two-tier structure. Let's build off of our first example and nest some expandable sections in one of our tabs.

type	path	override source label? (Y/N)	label	variablename	Component display type
tierdef	/layout/tiers				Tab
tierdef	/layout/tiers/tiers				ExpandableSection
tier	/layout/tiers		Tab 1	tab1	
tier	/layout/tiers/tab1		Expandable Section 1	exsect1	
columnset	/layout/tiers/tab1/exsect1			col1	
field	/layout/tiers/tab1/exsect1/col1		Sandwich Type	sandwichType	Picklist
tier	/layout/tiers		Tab 2	tab2	
columnset	/layout/tiers/tab2			col2	
field	/layout/tiers/tab2/col2		Side Choice	sideChoice	Picklist
tier	/layout/tiers		Tab 3	tab3	
columnset	/layout/tiers/tab3			col3	
field	/layout/tiers/tab3/col3		Toppings	toppings	MultiSelectPicklist

Notice how the nested tier is defined. The tier definition row path is "layout/tiers/tiers", indicating that a tier that is below another tier in the path should be defined as an expandable section. You can then see that on rows 3 and 4, the tier "exsect1" is placed below the tier "tab1" in the path. This displays for the end-user like so:



You can extrapolate this pattern to create deeper tier structures, declaring more and more nested definitions. However, note that you cannot have multiple tier definitions at the same level. For example, the tiers in the first image shown below are valid, but the tiers in the second image are not valid, because the component display type for /layout/tiers/tiers is both ExpandableSection and VerticalTab.

Valid tiers:

type	path	override source label? (Y/N)	label	variablename	Component display type
tierdef	/layout/tiers				Tab
tierdef	/layout/tiers/tiers				ExpandableSection
tierdef	/layout/tiers/tiers/tiers				VerticalTab

Invalid tiers:

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type	path	override source label? (Y/N)	label	variablename	Component display type
tierdef	/layout/tiers				Tab
tierdef	/layout/tiers/tiers				ExpandableSection
tierdef	/layout/tiers/tiers				VerticalTab

Displaying fields outside the bottom tier

A common use case of nested tiers may be to have a bottom layer nested inside a top layer tier, with some general fields displayed outside the bottom tier. This can be achieved by using an intermediary tier of the BasicContainer display type. This structure might look like this for the end user:



The layout CSV file is structured like so:

type	path	override source label? (Y/N)	label	variablename	Component display type
tierdef	/layout/tiers				Tab
tierdef	/layout/tiers/tiers				BasicContainer
tierdef	/layout/tiers/tiers/tiers				ExpandableSection
tier	/layout/tiers		Tab 1	tab1	
tier	/layout/tiers/tab1		Basic Container 1	basic1	
columnset	/layout/tiers/tab1/basic1			col1	
field	/layout/tiers/tab1/exsect1/col1		Sandwich Type	sandwichType	Picklist
tier	/layout/tiers/tab1		Basic Container 2	basic2	
tier	/layout/tiers/tab1/basic2		Expandable Section 1	exsect1	
columnset	/layout/tiers/tab1/basic2/exsect1			col2	
field	/layout/tiers/tab1/basic2/exsect1/col2		Side Choice	sideChoice	Picklist
field	/layout/tiers/tab1/basic2/exsect1/col2		Toppings	toppings	MultiSelectPicklist

Identify endless loops in blueprint rules

Use the Rule Cycle Report to identify endless loops that may be hard to find during ordinary operation.

Before you begin

Role required: Admin

Procedure

1. In CPQ Admin, click to open Configuration Blueprints, and open a blueprint.
2. Click the three vertical dots next to **Deploy**, and then click **Rule Cycle Report**.
3. Click **Run Report**.
4. Alternatively, from a top-level Transaction Manager element page such as Stages, Associated Fields, or Related Rules, click the three vertical dots in the sub-header, and then click **Rule Cycle Report**.

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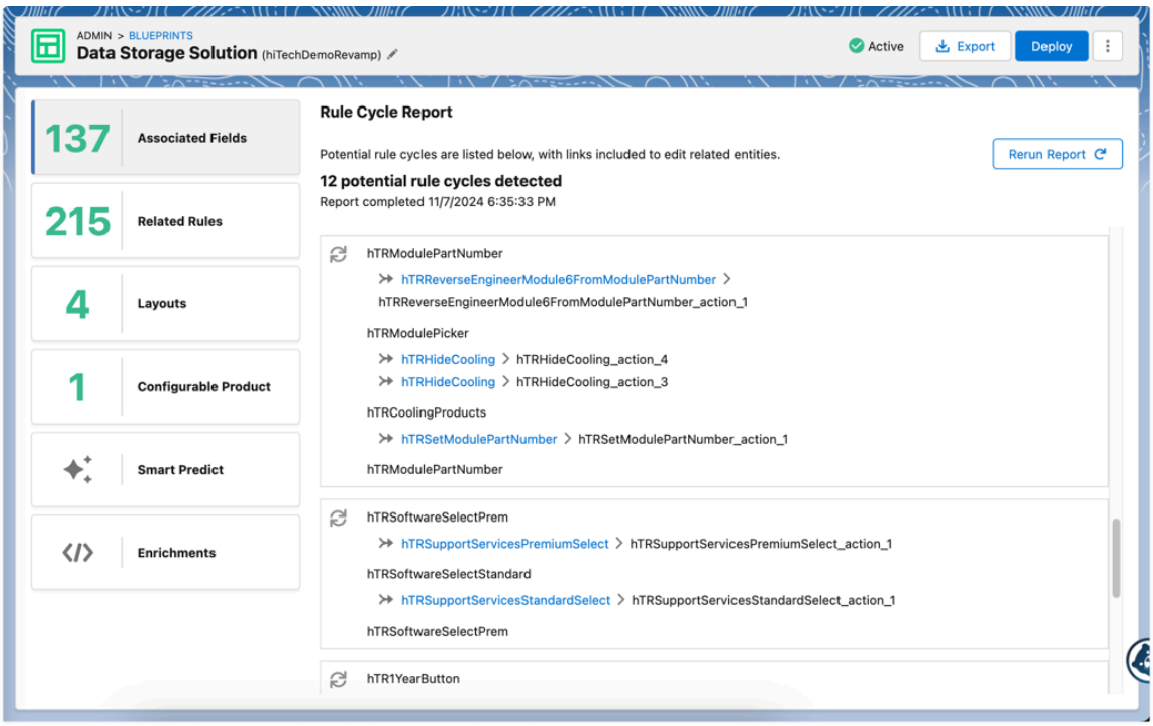
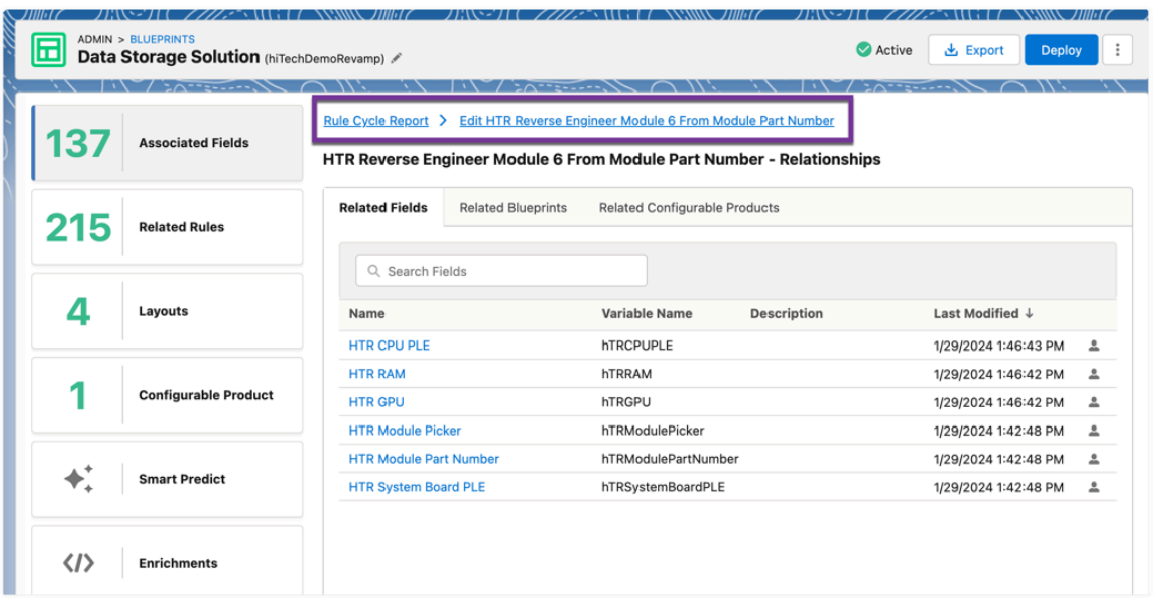
Result

The report provides a list of all potential circular references in the blueprint. For each record, the involved rules and fields are noted. Links help the administrator quickly review rule definitions. Often, an admin needs to examine related fields. When investigating in this way, a breadcrumb trail is provided to help the administrator navigate amongst the related components and back to the Rule Cycle Report.

The most recent Rule Cycle Report remains visible to all administrators until the report is run again by clicking **Rerun Report**.





Set up a runtime client

Configure a runtime client. Doing so creates a token that you can use to authenticate runtime calls. This can be useful when CPQ is embedded within a VisualForce page.

Runtime clients can be set up that provide a token for authentication of runtime calls when launching CPQ outside of the regular workflow. For example, CPQ may be started through a

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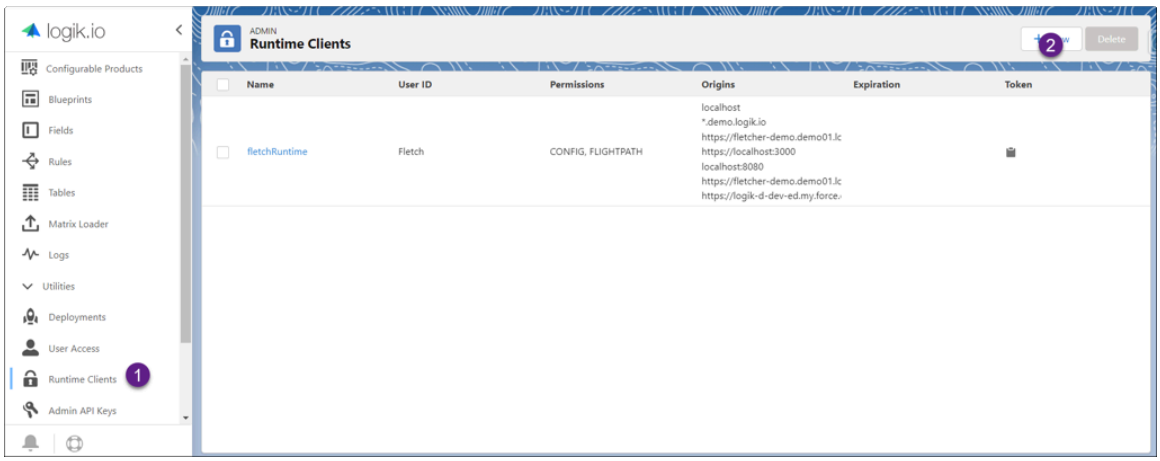
quote in Salesforce when embedding CPQ in a Visualforce page, Lightning web component, or HTML page.

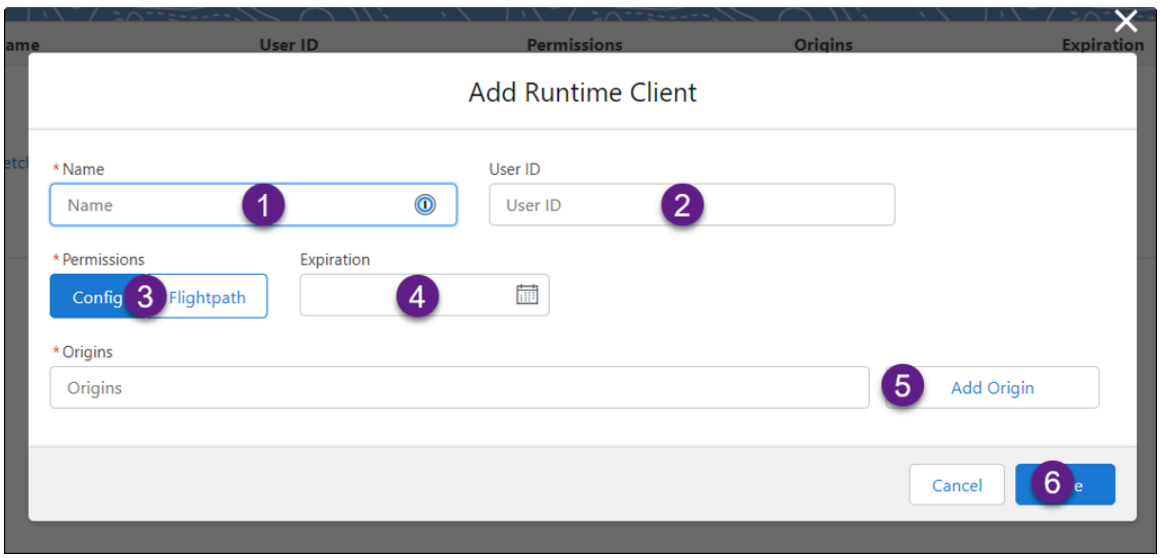
Note: This authentication can be used only by end users launching a CPQ configuration in runtime. To authenticate admin calls, users should leverage admin API keys. For a more complete discussion of admin API keys, see Intro to admin API keys.

Create a runtime client



1. Navigate to the Utilities tab of the left hand navigation pane, and click **Runtime Clients**.
2. Click **New** in the upper right corner.

Configure the new client



1. Create a name for your runtime client.
2. Setting the User ID will attach it to any calls authenticated by this runtime client. This may be useful for tracking the origin of the calls.
3. For Permissions, choose either Config or Config and Flightpath. Config will allow for launching configurations. Flightpath will allow for accessing Flightpath data of the configuration for use with debugging.
4. Optionally, set an expiration date for the runtime client. This expiration date can be changed to extend or shorten the time frame during which this token can be used.

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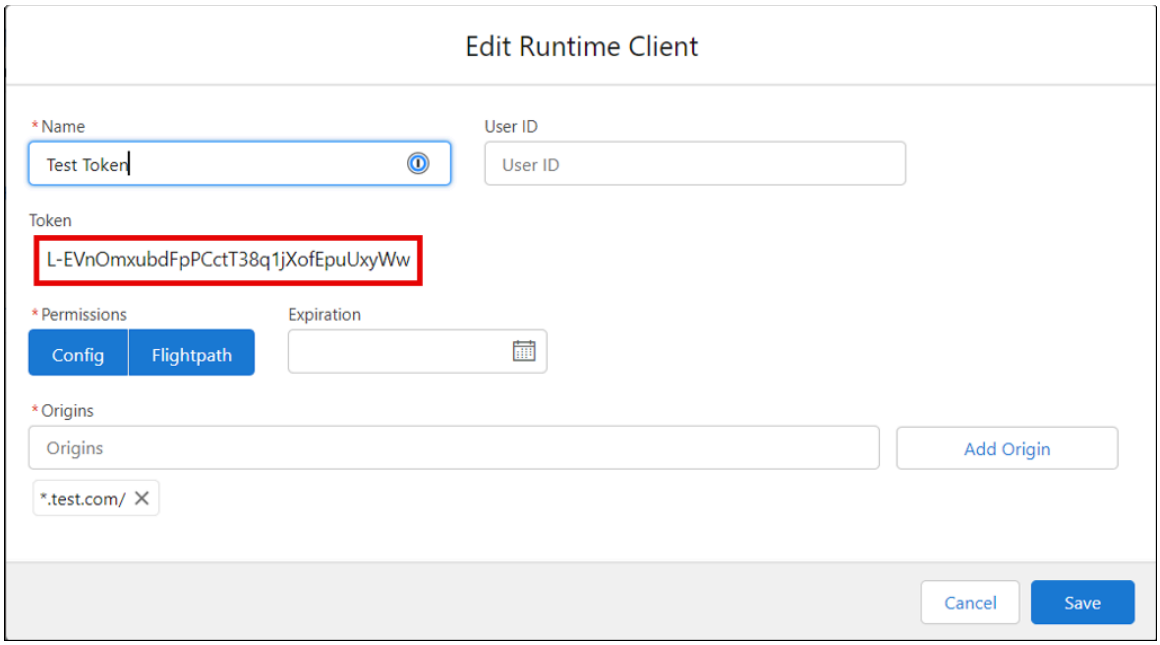
5. Users must specify the origins of calls that aree made using this token as authentication. In the origins box, add the desired URL, such as `https://<yourLogikUrlName>.<sector>.CPQ` or `*.salesforce.com`. click `Add Origin` to add the origin, and continue adding more.

   Note: Make sure that your origin does not have a trailing slash. For example, use `*.salesforce.com` and not `*.salesforce.com/`.

6. When all the origins have been added, click `Save`.

When the runtime client has been created, click into it and copy the token:



Related topics

Use case: Embed CPQ UI in a Salesforce VisualForce page

Customizing the CPQ UI header

Customize the CPQ UI header to reflect your brand with logos, text, and background styles. Configure header elements and buttons—such as Cancel, Reset, Return, and Switch Layout—through the layout CSV file to create a branded, user-friendly configuration experience.



The CPQ header lets you brand the configuration page with a logo. Essential buttons and actions are also customizable. CSV layout upload supports these features.

Branding options

The header accommodates text, a logo, or both. If using text, the logo must be relatively narrow, so it fits without overlap.

If you want to remove or replace the blue Salesforce-like background frame, use the backgroundStyle control.

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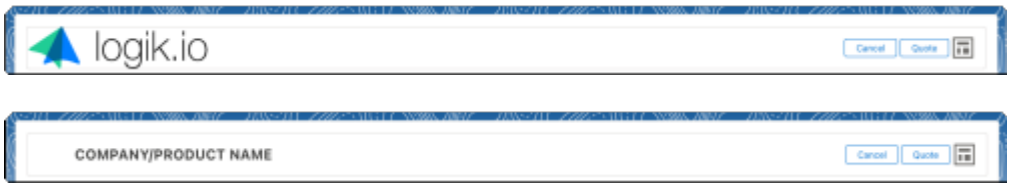
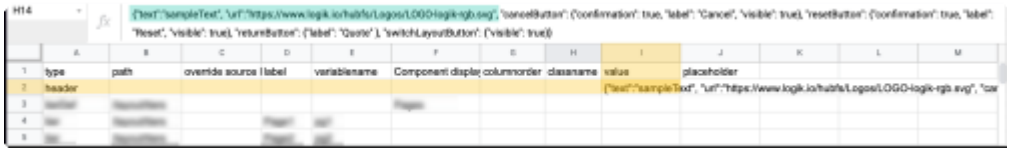


All header elements are defined in a header row component, in the values column. Logically, the header component is the first informational row in your CSV file, with the header values definition in cell I2. The following screenshot shows a spreadsheet that is not yet exported to a file.



The header value contains instructions for several header elements, so here's a breakdown of common content in that cell:

```
{
"text":"Company/Product Name",
"url":"<image url>",
"backgroundStyle": "url(http://www.some.url/bg.png) transparent
 no-repeat top center / cover",
"cancelButton": {
 "confirmation": true,
 "label": "Cancel",
 "visible": true
 },
"resetButton": {
 "confirmation": true,
 "label": "Reset",
 "visible": true
 },
"returnButton": {
 "label": "Quote"
 },
"switchLayoutButton": {
 "visible": true
 }
}
```

As a general guideline, we recommend that administrators include both text and URL keys in the header component row. If the Admin does not intend to leverage either text or URL, they should include the key and an empty value. Examples:

`"text": ""`

The key: value pair above indicates that no text is displayed, where as the pair below leaves the image empty.

`"url": ""`

Customize the background style (the frame surrounding the configuration pane) with the following:

`"backgroundStyle": "url(http://www.some.url/bg.png) transparent no-repeat top center / cover"`

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Here, `http://www.some.url/bg.png` is the location of a publicly available image. The remaining style instructions are recommended:

Adjust the header definition in your layout spreadsheet. Export to a CSV file and upload to the appropriate blueprint. Navigation:

CPQ Admin -> Blueprints -> [click appropriate blueprint] -> Layouts tab -> [click appropriate layout name] - Import Layout.

Button configurations

The CPQ UI offers four buttons: Cancel, Reset, Return, and Switch Layout. Return, commonly labeled Quote, is required. All others are optional.

In the following table, bracketed properties are the default values.

Button properties

Button	Visible	Confirmation	Default Label	Behavior
Cancel	[true], false	[true], false	Cancel	When configuring a solution for the first time, Cancel takes the user back to the Product Selection page in Salesforce (SFDC). When reconfiguring, Cancel returns the user to the SFDC Quote Line Editor (QLE) without saving changes.
Reset	true, [false]	[true], false	Reset	Resets all fields to their initial states so that the user can start over without moving from the page.
Return	N/A	N/A	Quote	Pushes the bill-of-material (BOM) into SFDC and returns to the user to the QLE.
Switch Layout	[true], false	N/A	N/A	If multiple layouts are defined for this Blueprint,

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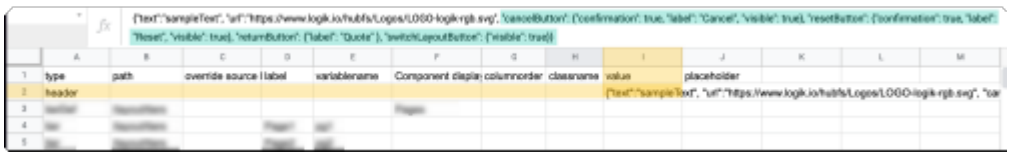
Button properties (continued)

Button	Visible	Confirmation	Default Label	Behavior
				displays the next layout.

By default, Cancel, Return/Quote, and Switch Layout buttons display. Cancel and Reset allow the administrator to set a confirmation parameter. When true, a popup requires end users to confirm their intentions, as follows.



All header elements are defined in a header row component, in the values column. Here is a screenshot of the spreadsheet before it is exported in CSV format:



The header value contains instructions for several elements. In the graphic below, the parameters relevant to each button definition are separated by green dashed lines:



To copy this text to your local clipboard for editing, use the code block in the Branding Options section above.

Adjust the header definition in your layout spreadsheet. Export to a CSV file and upload to the appropriate blueprint. Navigation:

CPQ Admin -> Blueprints -> [click appropriate blueprint] -> Layouts tab -> [click appropriate layout name] -> Import Layout.

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Currency display

You also use the values column of the header row component of the CSV layout upload file to configure how currency displays in the Shopping Cart. For more information, see Customizing the currency display in the shopping cart.

Optimizing rules engine performance

You can help make your pages responsive by following a few guidelines.



In any online shopping or configuration experience, end-user engagement requires a responsive web page. CPQ achieves excellent performance as a result of its proprietary rules engine. CPQ also provides the following benefits:

- The end user receives instantaneous feedback after every input change.
- End users do not need to click an Update button for the configurator to evaluate their input. Administrators do not need to distinguish fields that automatically run from fields that must be updated through user interaction.
- Because the rules engine evaluates the optimal rule order, rules do not have to manually ordered by the admin.

Although the CPQ rules engine is engineered to process rules quickly, not all rules perform the same. Therefore, the administrator plays an essential role in optimizing the performance of the CPQ UI. Use the following rules of thumb when you build rules:

- Simple rules are best. The CPQ rules engine can quickly run tens of thousands of rules whose conditions have defined logical expressions and whose actions are defined without scripting.

  Reliance on unscripted rules allows the rules engine to determine the subset of rules that must be run in specific scenarios. Simple rules allow the rules engine to predictively optimize.

- Avoid scripting, which degrades end-user performance.

  Configuration maintenance and extension engage numerous stakeholders, many of whom prioritize task completion over end-user performance. Experience with thousands of CPQ implementations shows that administrators often don't script with performance in mind. Even implementers who script optimally cannot prevent poor decisions by future administrators.

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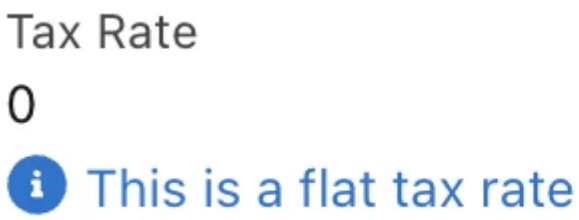
- Table lookups adversely impact end-user performance.
  - Table lookups feature inherent costs of query, matching against unbounded volumes of tabular data, and scripted post-processing of the retrieved data.
  - In contrast, some CPQ vendors simplify administration by leveraging tabular data and scripts that query and process the tables, CPQ converts these tables to many simple rules. This conversion short-cuts the queries and post-processing, eliminates inefficient coding practices, and allows the rules engine to intelligently determine when a rule should run, and the specific tasks it must accomplish.

Change how messages are displayed to the end user

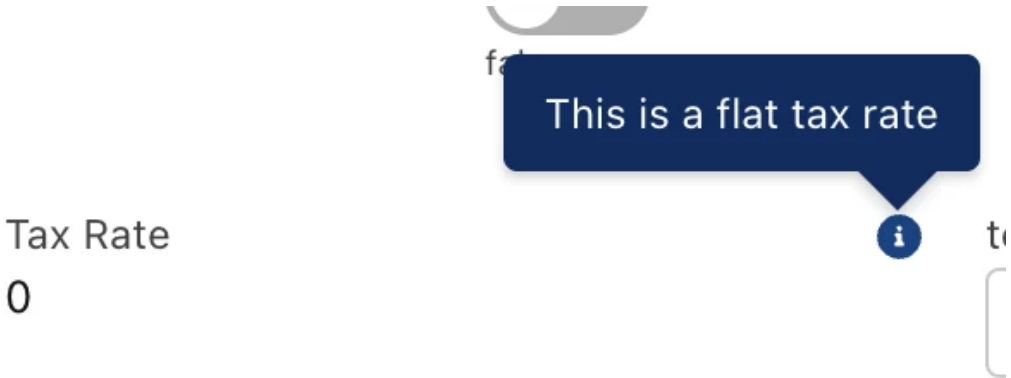
Control how messages appear in CPQ.

You can show messages to the end user in different formats.

By default, the messages shown for fields on a layout when messaging rules are fired are shown below the field.



However, you can override this behavior, such as to show an icon which can be hovered over to display the message ("tooltip").



In the layout editor, add `{"messageDisplayType": "<type>"}` to the raw value in the field properties (the gear icon) of the element where you want to add the custom message display type.

Accepted type values are `above`, `below`, `popup`, and `tooltip`.

The following image shows a popup message (`{"messageDisplayType": "popup"}`).

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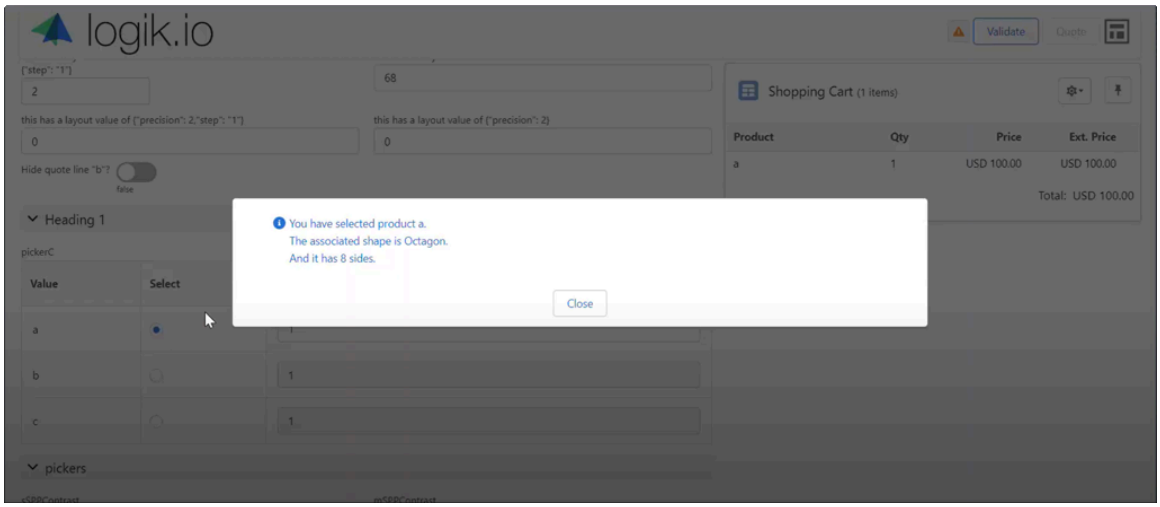

ProductList.Type options: Accessory and Component

Define quantity behavior in product hierarchies. The Accessory type keeps quantity constant; The Component type multiplies it by the parent.

ProductList.Type tells CPQ whether to manipulate a product's quantity based on the parent-child hierarchy in which it falls. When defining product actions, the Type parameter in the ProductList object can accept two values:

- Accessory: When the value of ProductList.Type is set to Accessory, the quantity value set in the Product Action will be replicated as is in the CPQ shopping cart. That is, an Accessory product's quantity stays the same, no matter the quantity of its parent (if it has a parent). Accessory is the default value.
- Component: Use this value if the quantity of a child should be multiplied by the quantity of its parent. This is useful for scenarios in which the user selects a quantity for a parent and the quantity of its child item needs to be set in a specific ratio. For example, if the parent is a car and its child is a tire, the Product Action that defines the tire would have quantity = 4.

If the child's ProductList.Type is set to Component, the bill of materials will always include the correct number of tires for the number of cars requested. When car quantity = 1, tire quantity = 4; when car quantity = 3, tire quantity = 12, and so on. The calculated tire quantity will be displayed in the CPQ shopping cart and transferred to the Salesforce Quote Line Editor or ecommerce cart when saved.

This concept replicates Salesforce CPQ bundle pricing.

The following video details ProductList.Type options for manipulating product quantities: ProductList.Type = Accessory v. Component

Related topics

Using ProductList.extended to populate the Quote Line record

Using ProductList.extended to populate the Quote Line record

You can use the Extended product data object to populate custom fields on the Quote Line record.

Populate custom fields in the Quote Line record by utilizing the `extended` product data object in Advanced Product Actions.

```
ProductList.extended = { "key": "value" };
```

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The key must match the API name of the fields on both the Product Option and Quote Line objects. This takes advantage of Salesforce CPQ twinning. For information about twinning in Salesforce CPQ, see the following Salesforce documentation topic:

Mapping of Custom Salesforce CPQ Fields Between Objects

In the following video, a custom text field with the variable name `Color_c` is created on both the Product Option and Quote Line objects. Then the extended product data in the advanced product action is defined as `ProductList.extended = { "Color__c": color };`. `Color_c` serves as the key, and the previously defined `color` variable in the script is assigned.

Reverse Twin ProductList.extended Data To QuoteLine

Reverse twinning extended product data also enables admins to populate quote line data directly to the Quote Line Editor (QLE). The custom Quote Line field must be added to the Line Editor field set.

Note: Salesforce CPQ does not allow users to edit the following product option fields, including when passing data back from an external configurator such as CPQ.

- Product Code
- Product Configuration Type
- Product Description
- Product Family
- Product Name
- Product Quantity Scale
- Product Subscription Pricing
- Price Editable

Related topics

Adding custom attributes to the product list

Adding custom attributes to the product list

Use ProductList.extended to add custom attributes such as cost, margin, and discount to a product list.

Custom attributes can be added to a product list, bill of materials, or Shopping Cart beyond the standard attributes that are provided by default. Common use cases include attributes for cost, margin, list price, discount, and so on.

Advanced Script

To add a custom attribute to a product list, use `.extended` and provide data in JSON format in an advanced script:

```
ProductList.extended = {"cost": 62};
```

To add multiple custom fields, add to the same JSON object, as shown below:

```
var myMargin = 38;
ProductList.id = "Test Product";
ProductList.price = 100;
ProductList.extended = {"cost": 62, "margin": myMargin,
 "customText":"Example 2"};
ProductList.description = "Example 1";
```

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```
ProductList.bomType = "sales";
ProductList.next();
return ProductList;
```

Some tips:

- Numbers can be entered directly as the value.
- Text should be surrounded by double quotes.
- Variables can be used for values.
- Math or other value manipulation must occur outside of the JSON. Use a variable to get the final value into the JSON object.

Writing to Salesforce quote line fields

Admins can also set ProductList.extended information to map to a field on a Salesforce quote line by referencing the field name in the product action when setting the ProductList.extended information.

For example, to set the description field, admins would set the ProductList.extended information to:

```
ProductList.extended = {“SBQQ__Description__c”: “Text
 Description”}
```

Layout

To add custom ProductList attributes to a layout, use `extended.{attributename}` in the value column:

type	path	overric	label	variablename
tierDef	/layout/tiers			
productlist				
productlistcolumn	/productList/columns		Product	displayName
productlistcolumn	/productList/columns		Cost	extended.cost
productlistcolumn	/productList/columns		Margin	extended.margin
productlistcolumn	/productList/columns		List	price
productlistcolumn	/productList/columns		Custom Text	extended.customText
productlistcolumn	/productList/columns		Description	description

Related topics

Using ProductList.extended to populate the Quote Line record

Displaying multiple product lists in layouts

You can configure multiple product lists for a single layout by creating and importing a layout CSV file.

In CPQ, a layout can show multiple bills of material (BOMs) at once. This can help separate different types of products or separate sales items from manufacturing details.

Note: To display in different BOMs, products must have different BOM types. By default, products whose BOM type is not `sales` are not created as a quote line when going through Salesforce CPQ.

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Use the BOM Types to Include in Save Request admin setting to add additional BOM types to a Save request. Any BOM types added here are passed in the save request and created as quote lines when going through Salesforce CPQ.

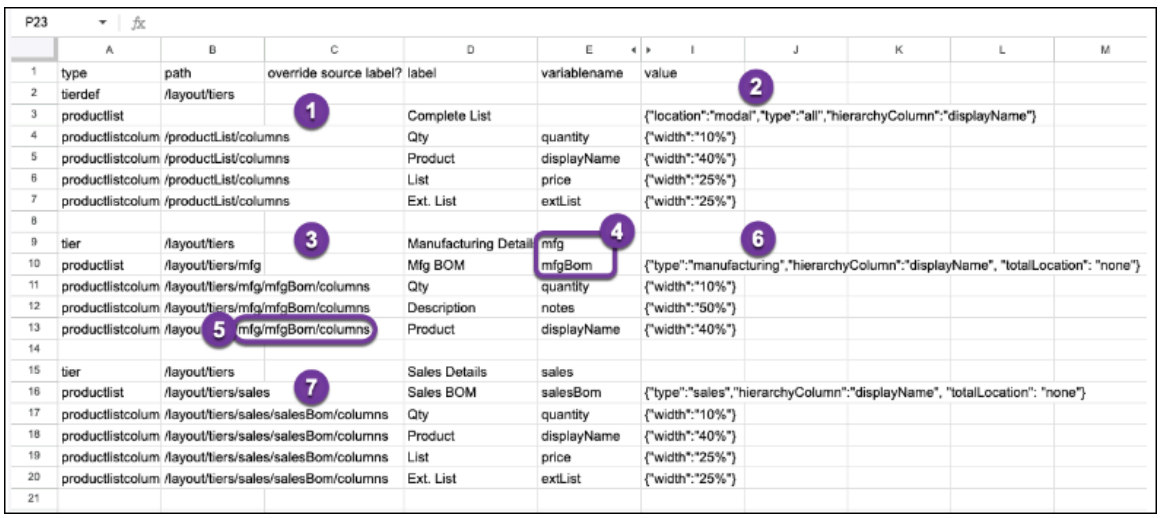
Use the Push BOM Data to Logik Salesforce Object admin setting to configure BOM items to be passed back and written into Salesforce as configuration line items.

To learn how to add additional BOM types to a Save request and to configure BOM items to be written to Salesforce as configuration line items, see CPQ admin settings.

To add multiple product lists to a layout, use tiers to separate the additional BOMs. Product lists can be added by editing the layout CSV file and importing it. For information about displaying multiple BOMs in a layout, view the following video:

Multiple BOM Display

Multiple bills of material: CSV setup



	A	B	C	D	E	I	J	K	L	M
1	type	path	override source label?	label	variablename	value				
2	tierdef	/layout/tiers								
3	productlist			Complete List		{"location":"modal","type":"all","hierarchyColumn":"displayName"}				
4	productlistcolum	/productList/columns		Qty	quantity	{"width":"10%"}				
5	productlistcolum	/productList/columns		Product	displayName	{"width":"40%"}				
6	productlistcolum	/productList/columns		List	price	{"width":"25%"}				
7	productlistcolum	/productList/columns		Ext. List	extList	{"width":"25%"}				
8										
9	tier	/layout/tiers		Manufacturing Detail	mfg					
10	productlist	/layout/tiers/mfg		Mfg BOM	mfgBom	{"type":"manufacturing","hierarchyColumn":"displayName", "totalLocation": "none"}				
11	productlistcolum	/layout/tiers/mfg/mfgBom/columns		Qty	quantity	{"width":"10%"}				
12	productlistcolum	/layout/tiers/mfg/mfgBom/columns		Description	notes	{"width":"50%"}				
13	productlistcolum	/layou	mfg/mfgBom/columns	Product	displayName	{"width":"40%"}				
14										
15	tier	/layout/tiers		Sales Details	sales					
16	productlist	/layout/tiers/sales		Sales BOM	salesBom	{"type":"sales","hierarchyColumn":"displayName", "totalLocation": "none"}				
17	productlistcolum	/layout/tiers/sales/salesBom/columns		Qty	quantity	{"width":"10%"}				
18	productlistcolum	/layout/tiers/sales/salesBom/columns		Product	displayName	{"width":"40%"}				
19	productlistcolum	/layout/tiers/sales/salesBom/columns		List	price	{"width":"25%"}				
20	productlistcolum	/layout/tiers/sales/salesBom/columns		Ext. List	extList	{"width":"25%"}				
21										

1. The first product list uses the same format as the default product list included in layouts
2. The value for this product list determines that this will display in a modal window and with type:all will contain all of the BOM items
3. The second product list is the manufacturing BOM, now contained in a tier as indicated in the type and path fields
4. Variable names are required to construct the path for the layout to render correctly
5. The complete path for columns is in the format `/layout/tiers/<tierVariableName>/<productListVariableName>/columns`
6. The value for this product list component does not have a location, as it is in a tier. "type":"manufacturing" will include all products with the manufacturing bomType. The total field for this product list is also hidden with "totalLocation": "none"
7. The third product list component is the sales BOM, and repeats most of the manufacturing BOM product list

See this sample layout CSV.

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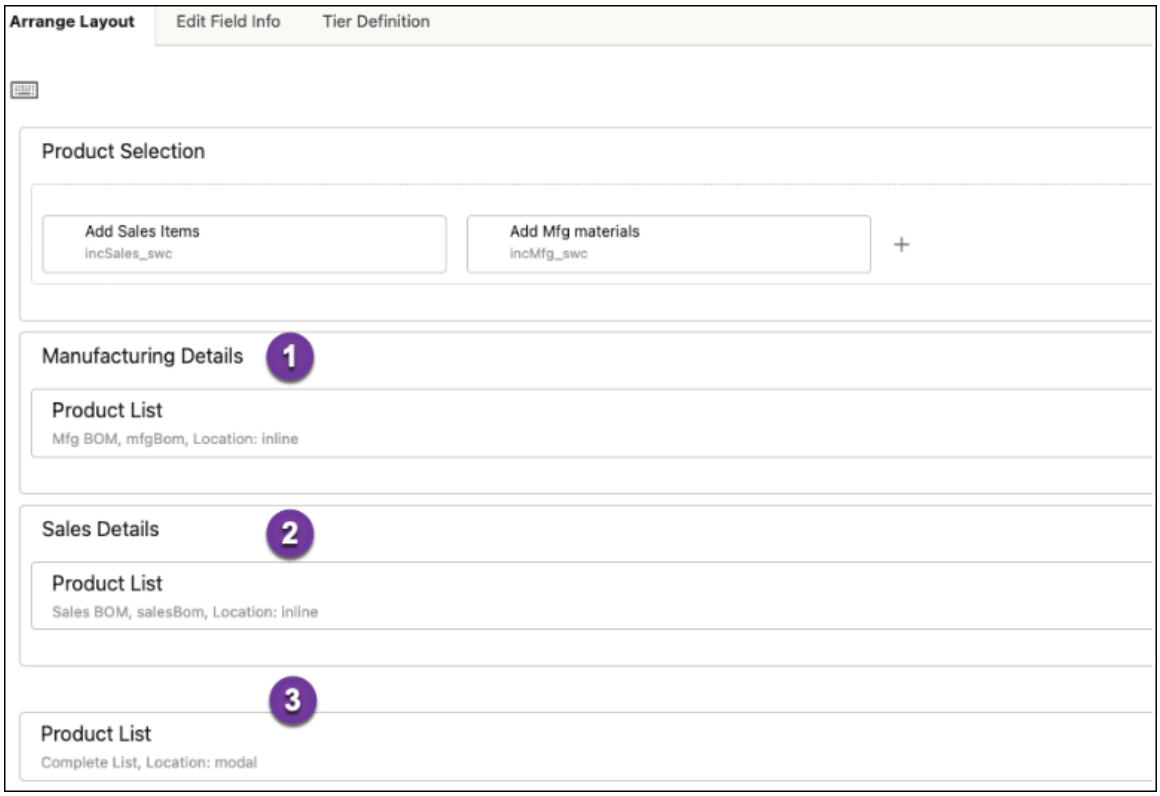
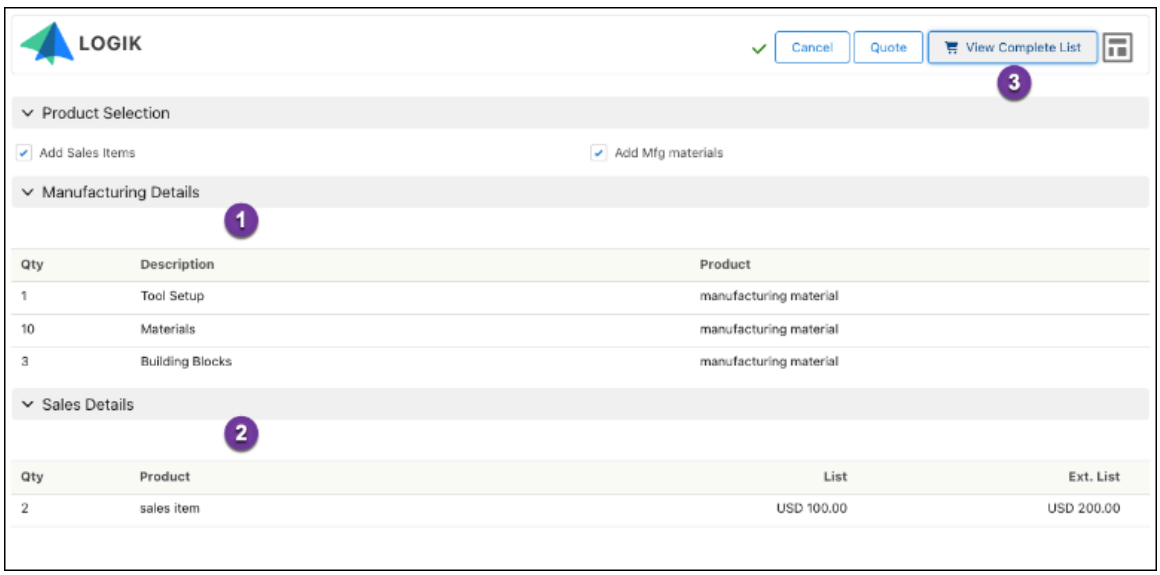
Multiple bills of material: layout editor



1. Display of the manufacturing BOM product list in the layout editor in a tier
2. Display of the sales BOM product list in the layout editor in a tier
3. Display of the Complete (all) product list in the layout editor as a modal window

Final configuration experience



1. Manufacturing product list, only displaying the manufacturing bomType products
2. Sales BOM product list, only displaying the sales bomType products
3. The complete list in a new window set to show all the products from any bomType

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Related topics

Customizing the currency display in the shopping cart

Export the configuration BOM to a CSV file

Export the configuration bill of materials (BOM) to a customizable CSV file before the quote is finalized.

Before you begin

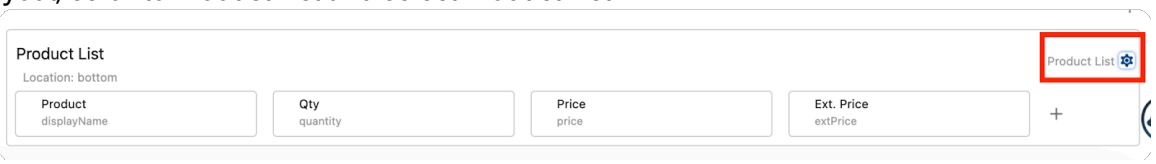
Role required: Admin

Enhanced shopping cart with CSV export

CPQ lets you export the configuration bill of materials (BOM) before the quote is finalized by exporting the BOM to a CSV file. The BOM UI has been enhanced to enable on-screen manipulation of fields, such as resizing of columns, pinning of fields, and hiding of fields.

Procedure

1. In your blueprint, navigate to Layouts.
2. In your layout, scroll to Product List and select Product List Settings.



3. In Settings, scroll to Raw Value and insert the following code block:

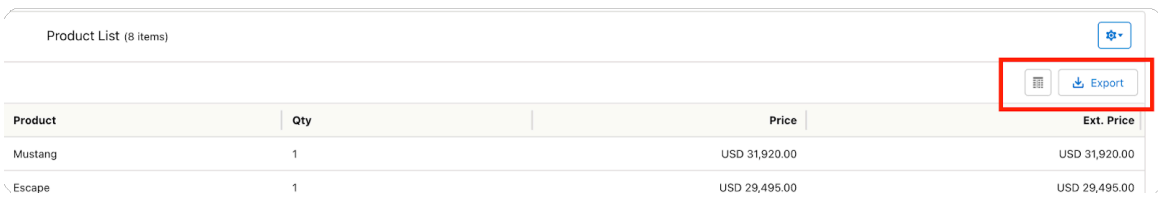
```
"advanced": {
    "export": true
}
```

`advanced` enables the enhanced shopping cart, and `export` enables the BOM export. `advanced` must be enabled to use `export`. The final code block should resemble the following:

```
{
  "location": "bottom",
  "type": "sales",
  "hierarchyColumn": "displayName",
  "advanced": {
    "export": true
  }
}
```

4. When the blueprint is enabled, deploy it and launch the configurator experience.

   In the UI, you see two new icons on the far right of the product list:



   The icon to the left of **Export** lets you manipulate the columns via the UI, such as hiding and pinning certain columns. You can also manually resize columns as you would in a spreadsheet.

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The **Export** icon lets you export the current BOM to a CSV file. This will export all contents that are visible in the BOM at the time of export.

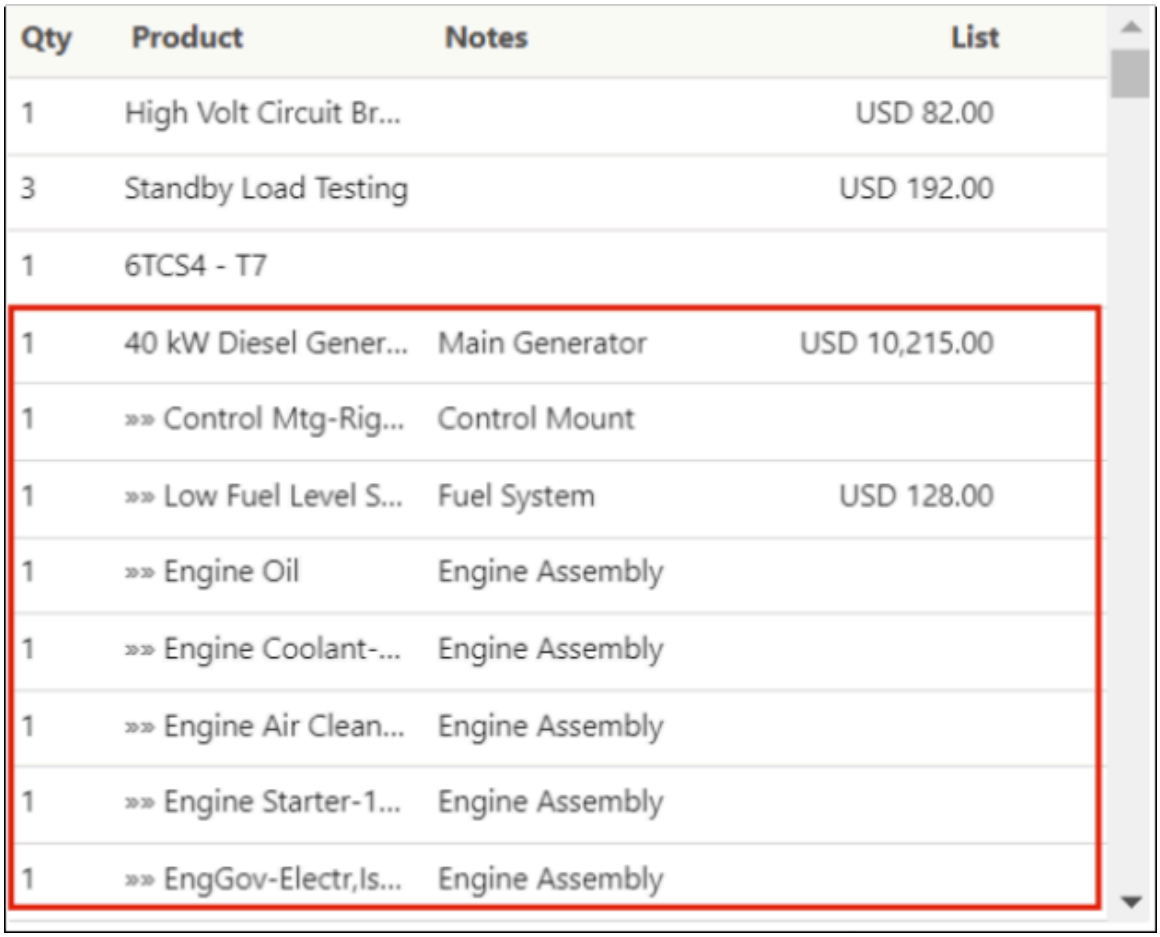
Note: The process requires the Quoting tool.

Collapse parent or child BOM lines

You can configure child products to hide under their parent products unless expanded.

Default behavior

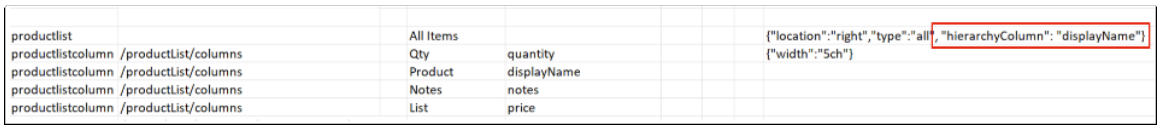
When product actions are set with a defined parent/child relationship, by default, child products are indented as in the following:



Qty	Product	Notes	List
1	High Volt Circuit Br...		USD 82.00
3	Standby Load Testing		USD 192.00
1	6TCS4 - T7		
1	40 kW Diesel Gener...	Main Generator	USD 10,215.00
1	»» Control Mtg-Rig...	Control Mount	
1	»» Low Fuel Level S...	Fuel System	USD 128.00
1	»» Engine Oil	Engine Assembly	
1	»» Engine Coolant-...	Engine Assembly	
1	»» Engine Air Clean...	Engine Assembly	
1	»» Engine Starter-1...	Engine Assembly	
1	»» EngGov-Electr,Is...	Engine Assembly	

Collapsible behavior

This behavior can be overridden by adding `{"hierarchyColumn": "<productListColumnVariableName>"}` to the value column of the productList element in the layout editor or in the layout CSV file.



productlist		All Items			{"location":"right","type":"all", "hierarchyColumn": "displayName"}
productlistcolumn	/productList/columns	Qty	quantity		{"width":"5ch"}
productlistcolumn	/productList/columns	Product	displayName		
productlistcolumn	/productList/columns	Notes	notes		
productlistcolumn	/productList/columns	List	price		

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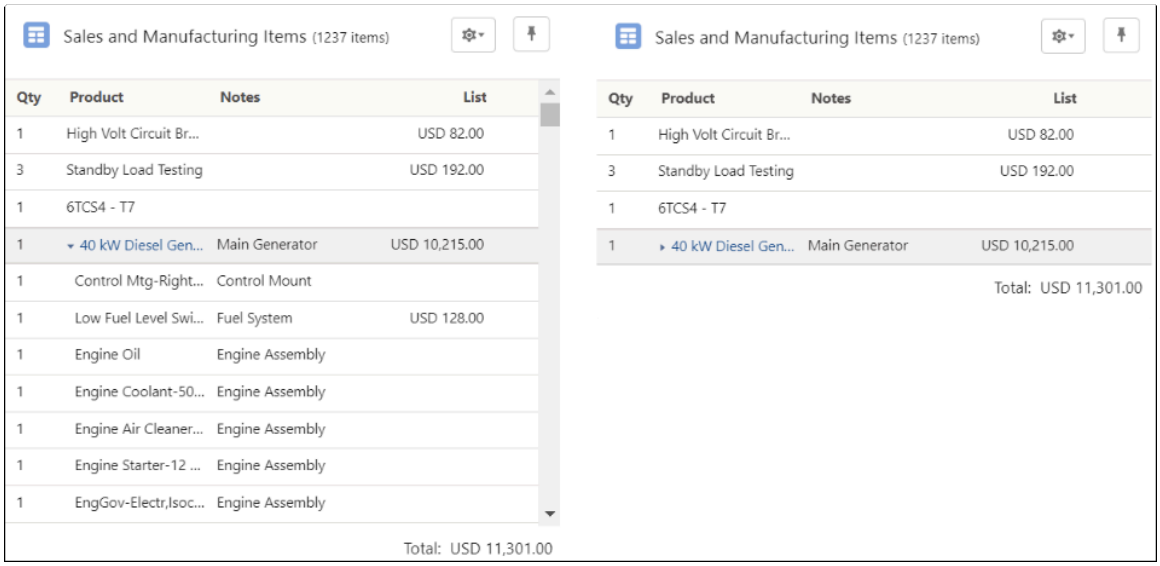
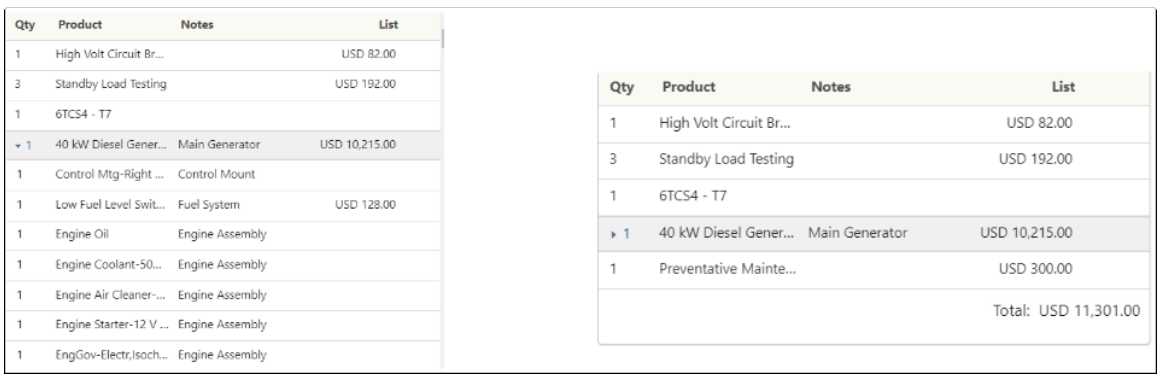
Result



Admins can change where the collapse arrow appears by defining a different product list column as the hierarchy column (`"hierarchyColumn"`). For example, using `quantity` in the CSV snippet above results in the following:



Set up pricing display

You can configure how currency values appear, choose to display rollup pricing in the Shopping Cart, and display a custom message for items that have a zero price or a null price. CPQ shows only the price of the products in each bill of materials.

Customizing the currency display in the shopping cart

Configure how currency values appear in the CPQ shopping cart. You can choose to display amounts with the ISO code (USD 25.99), currency symbol, or plain numbers.

Administrators can customize how currencies are displayed in the CPQ shopping cart.

The CPQ shopping cart displays amounts according to the Currency ISO Code partner field passed from the Salesforce.com (SFDC) quote. Unless SFDC is customized in this area, the quote's currency will determine the ISO currency code for CPQ. If no ISO currency code is provided, CPQ defaults to USD.

Shopping cart currency display options

By default, the shopping cart displays the ISO code to the left of the currency amount.

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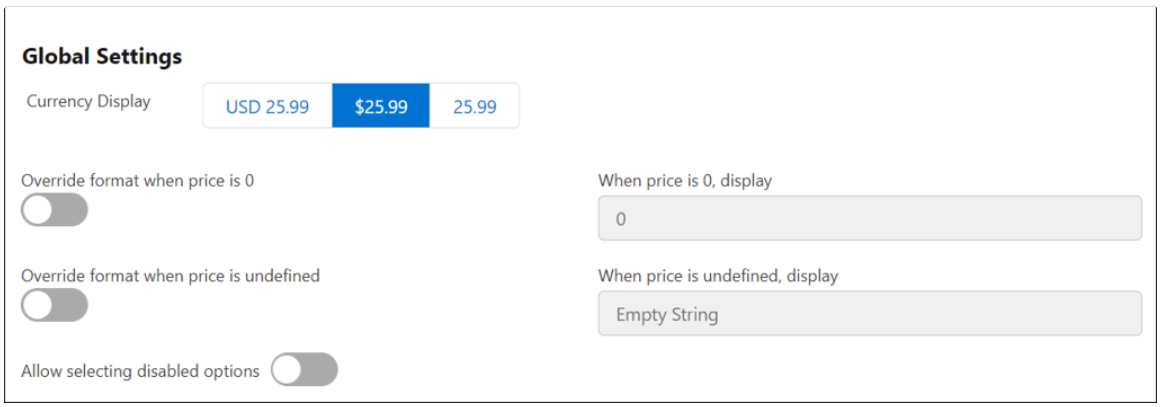
However, the currency symbol can be displayed instead.



Setting the shopping cart currency display with the layout editor

The shopping cart currency display is defined in the layout properties, which can be found in the layout editor. For more information, see Customizing the CPQ UI header



Three currency display options are available:

- USD 25.99: Displays currencies with their currency code
- $25.99: Displays currencies with their currency symbol
- 25.99: Displays currencies as numbers

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Related topics

- Show rollup pricing in the shopping cart
- How price is displayed on a layout with multiple BOMs

Show rollup pricing in the shopping cart

Configure the shopping cart to display the sum of the child items as the price of the parent item.

Before you begin

Role required: Admin

About this task

When a bill of materials (BOM) is represented with hierarchy, such as a parent-child relationship, you may prefer to total the prices of the child items and display them on the parent line as a sum. CPQ rollup pricing totals direct child and parent extended list values. Rollup pricing delivers the sum of all child line prices to the shopping cart, including the price of the parent, and displays it at the parent line.

To view a script that illustrates how a hierarchical bill of materials might be generated, see Adv Product Action with Product List.

The following example shows four child products rolling up to their related parent products.

Cost Rollup (6 items)

Qty	Product	Cost per	Total Cost	Rollup Price
1	Parent A	USD 10.00	USD 10.00	USD 27.00
3	»» Child 1A	USD 4.00	USD 12.00	USD 12.00
1	»» Child 2A	USD 5.00	USD 5.00	USD 5.00
1	Parent B	USD 10.00	USD 10.00	USD 43.00
5	»» Child 1B	USD 5.00	USD 25.00	USD 25.00
4	»» Child 2B	USD 2.00	USD 8.00	USD 8.00
				Total: USD 70.00

The next example shows a 2-tier roll-up, with a child product (child1B and child 2B) rolling up to a parent (parent B) and that parent rolling up to the parent product (parent A) in addition to the remaining child products (child 1A and child 2A).

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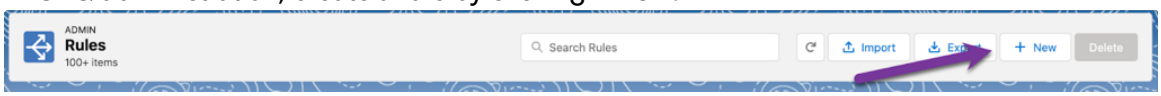
Cost Rollup (6 items)

Qty	Product	Cost per	Total Cost	Rollup Price
1	Parent A	USD 10.00	USD 10.00	USD 70.00
3	»» Child 1A	USD 4.00	USD 12.00	USD 12.00
1	»» Child 2A	USD 5.00	USD 5.00	USD 5.00
1	»» Parent B	USD 10.00	USD 10.00	USD 43.00
5	»» »» Child 1B	USD 5.00	USD 25.00	USD 25.00
4	»» »» Child 2B	USD 2.00	USD 8.00	USD 8.00
			Total:	USD 70.00

Procedure

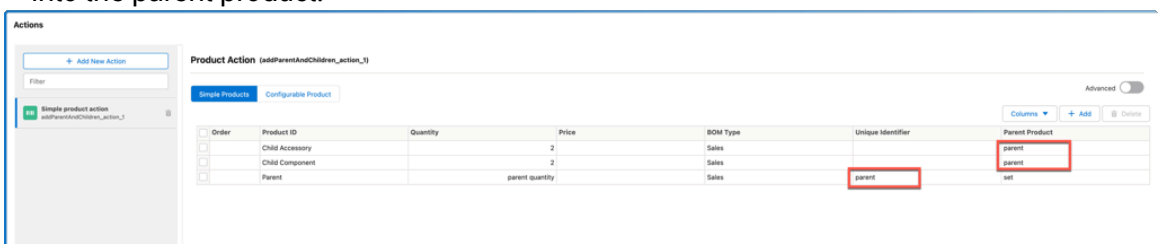
1. In CPQ administration, create a rule by clicking **+ New**.



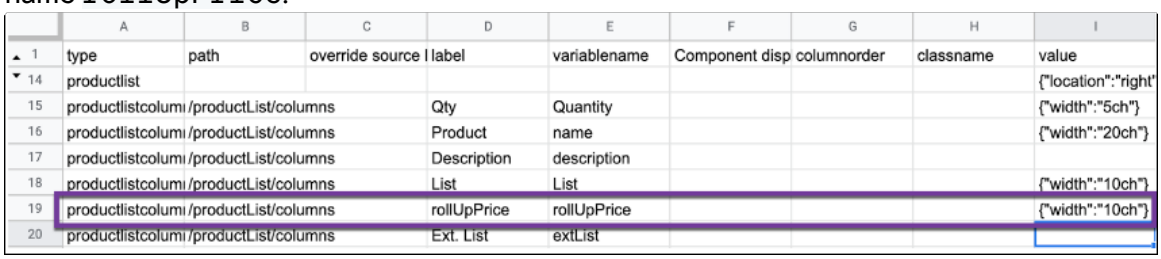
2. Name the rule, and click **Save**.
3. Set your condition and create your product actions.
   - Start with a parent product and set the parent product ID, quantity, price, type, BOM type, and unique identifier.

     For parent products, the type should be set to Component. For child products, the type should be set to Accessory.

   - Add the unique identifier to the parent product field of any products that you want rolled up into the parent product.



4. To display the rolled-up price in your cart, add `rollUpPrice` to your shopping cart in the layout editor, or define the `productlistcolumn` type in your layout CSV with the variable name `rollUpPrice`.



	A	B	C	D	E	F	G	H	I
1	type	path	override source l	label	variablename	Component disp	columnorder	classname	value
14	productlist								{"location":"right"
15	productlistcolumi	/productList/columns		Qty	Quantity				{"width":"5ch"}
16	productlistcolumi	/productList/columns		Product	name				{"width":"20ch"}
17	productlistcolumi	/productList/columns		Description	description				
18	productlistcolumi	/productList/columns		List	List				{"width":"10ch"}
19	productlistcolumi	/productList/columns		rollUpPrice	rollUpPrice				{"width":"10ch"}
20	productlistcolumi	/productList/columns		Ext. List	extList				

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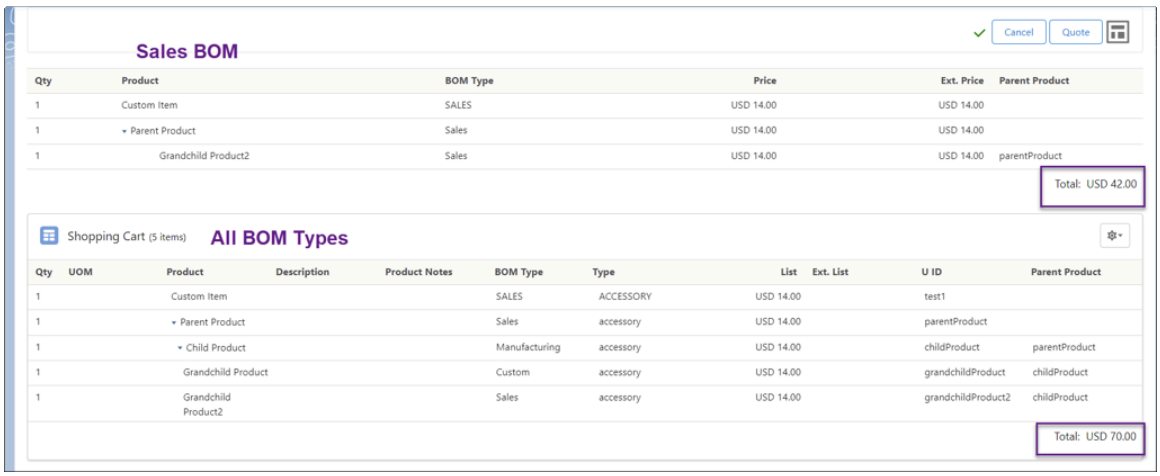
Related topics

- Customizing the currency display in the shopping cart
- How price is displayed on a layout with multiple BOMs
- Set a custom message for zero-priced and null-priced items

How price is displayed on a layout with multiple BOMs

CPQ shows only the price of the products in each bill of materials.

When multiple bills of material (BOMs) are displayed in a layout, CPQ automatically filters the total of each BOM to show only the price of the products contained in the BOM, filtered by BOM type. If a combined product list of all BOM types is displayed, it shows the prices of all products in the BOM. See the following example.



Related topics

- Customizing the currency display in the shopping cart

Set a custom message for zero-priced and null-priced items

Customize how zero-priced and null-priced items appear in CPQ layouts. Replace $0.00 or missing prices with custom messages—such as “Included,” “Pending,” or “Price TBD”—across product pickers, picklist extensions, and shopping cart components for clearer user communication.

Before you begin

Role required: Admin

About this task

Some configurations result in items that have a zero price or a null price. In these scenarios, the administrator may want to display a message in place of the zero or null price. Using the layout editor, you can define custom strings for null-priced or zero-priced items in product pickers, picklist extensions (with dynamic pricing), and the shopping cart.

Administrators frequently replace the $0.00 value with the display string "Included".

When the price is null, the solution may include components that require research or engineering before a price can be shared with the end user. When this is the case, the administrator may display strings such as "Pending" or "Price TBD". When a null-priced item is in the cart, the sum of cart items displayed in the total may be misleading. To alleviate this confusion, the administrator can define a string that overrides the cart total when null-priced items are present. For step by step instructions, see Override the shopping cart total when a null-priced item is included.

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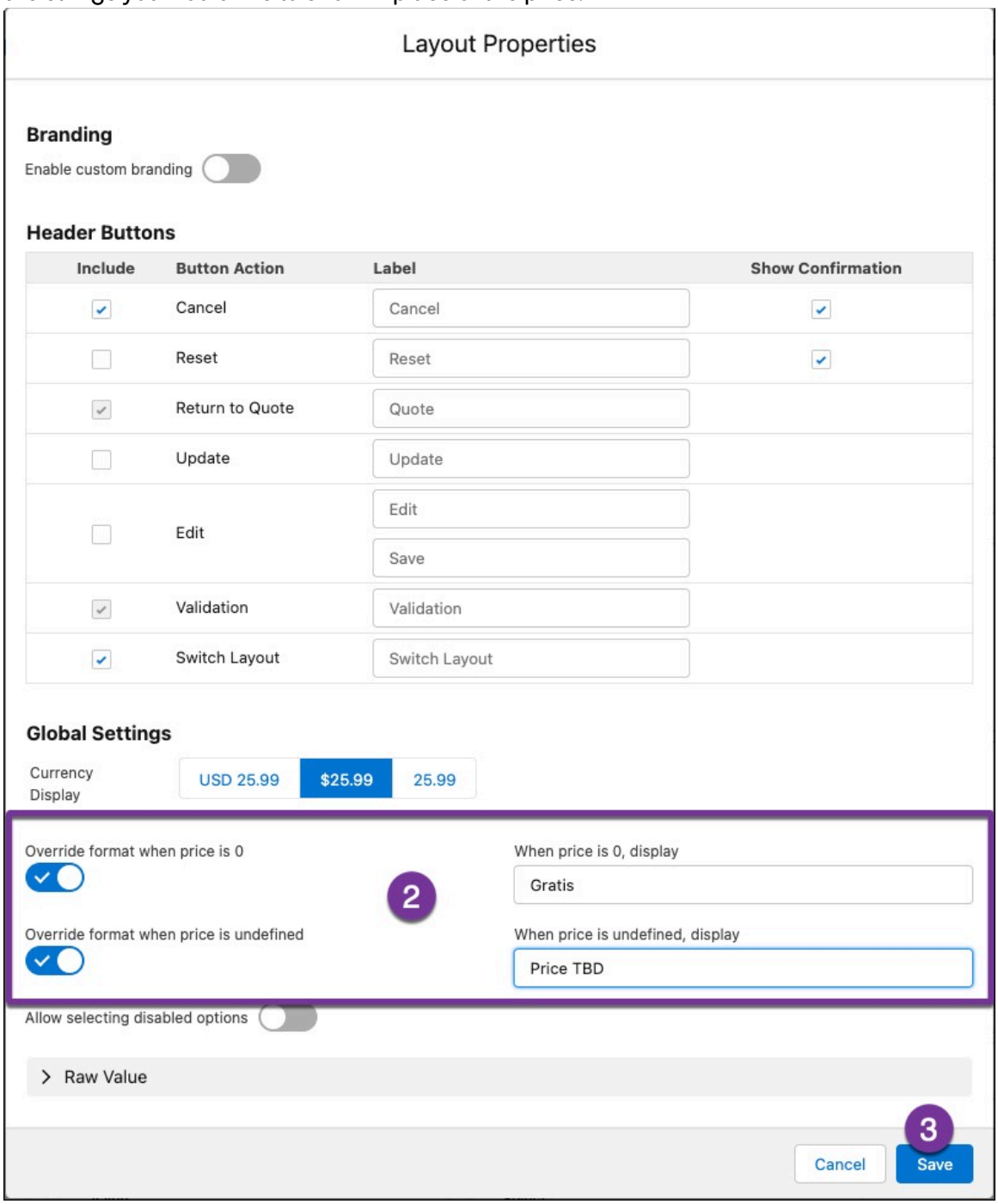
For a list of components that support null-price and zero-price overrides, see Availability of price value overrides.

Procedure

1. In the layout editor, click the gear icon associated with the header.
2. In the Layout Properties dialog, toggle the appropriate "Override format" switches, and enter the strings you would like to show in place of the price.



3. Save the layout properties, save the layout, and deploy.

Note: If you want to apply distinct price display behaviors at the component level, this can be done in the layout properties of each read-only currency field, picklist extension, product picker, or product list element. When formatting is set at the element level, it overrides the format defined at the layout level.

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Related topics

- Override the shopping cart total when a null-priced item is included
- Availability of price value overrides

Override the shopping cart total when a null-priced item is included

To avoid displaying an incorrect total price, show a custom string when a bill of materials includes an item with a null price.

Before you begin

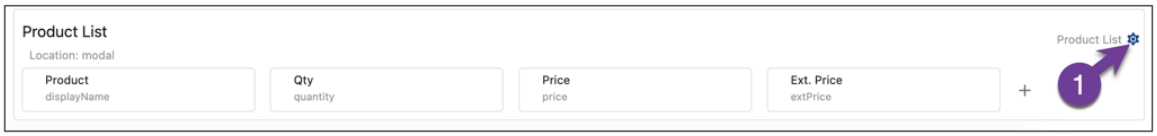
Role required: Admin

About this task

When a BOM contains null-priced items, the total price may be incorrect. When this is the case, the administrator can define a string to display in place of the BOM total.

Procedure

1. In the layout editor, open the product list properties.



2. In the properties dialog, set **Override display of Total for incomplete pricing** to true, and enter the string to display in the total's place.

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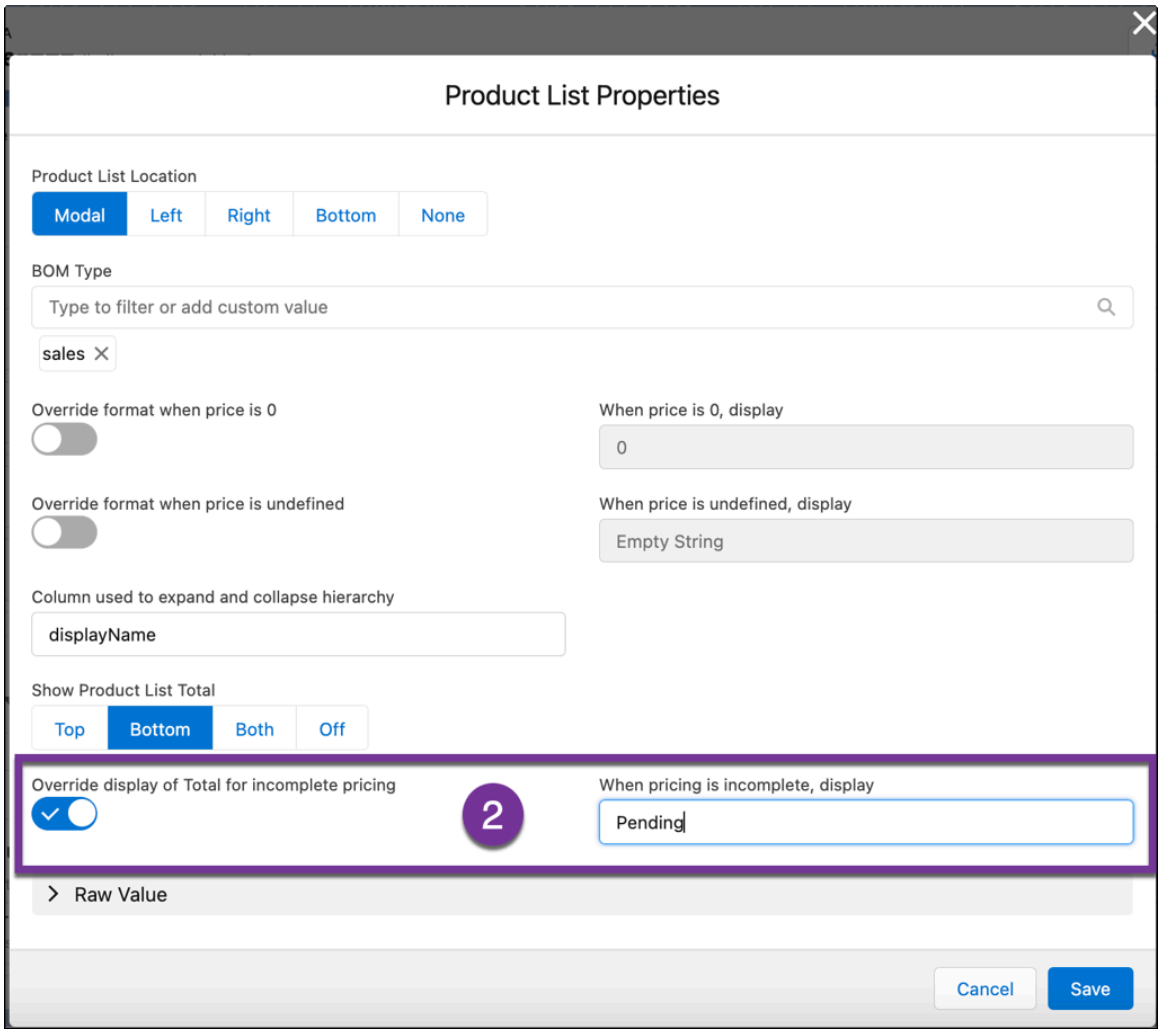

3. Click **Save**.

Related topics

- Set a custom message for zero-priced and null-priced items
- Availability of price value overrides

Availability of price value overrides

See which component types accept price-value overrides for zero-priced and null-priced items.

Component types that accept price value overrides

Component type	Zero-price override	Null-price override
Number field with ReadOnlyCurrency display type	Yes	(Cannot be set to null)
Picklist extension - static & dynamic pricing	Yes	Yes
Product Picker - price fields	Yes	Yes
ProductList.price	Yes	See note

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Component types that accept price value overrides (continued)

Component type	Zero-price override	Null-price override
ProductList.extended.<currency field>	Yes	Yes

Note:

To set a null-price override on a currency field, the administrator can set `ProductList.extended.<numericField> = ""` in an advanced product action or by using the OnBom enrichment. In the layout, define this numeric field to display as currency in the column properties of the product list, and follow the instructions in Set a custom message for zero-priced and null-priced items regarding override strings in the product list properties.

Related topics

- Set a custom message for zero-priced and null-priced items
- Override the shopping cart total when a null-priced item is included

Configure the Matrix Loader

Use the Matrix Loader to efficiently add, edit, and migrate fields, field options, rules, and layouts in CPQ. Upload CSV files, validate configurations, and streamline bulk updates or environment migrations with error-handling and verification support.

The Matrix Loader is the most efficient means of adding and editing fields, field options, rules, and layouts, particularly when the number of elements gets large. When using the Matrix Loader, administrators define their configuration elements in a spreadsheet file. This spreadsheet artifact provides a backup of data in CPQ; it also facilitates fast test-to-production migration processes.

Here is a quick tutorial on how to use the Matrix Loader.

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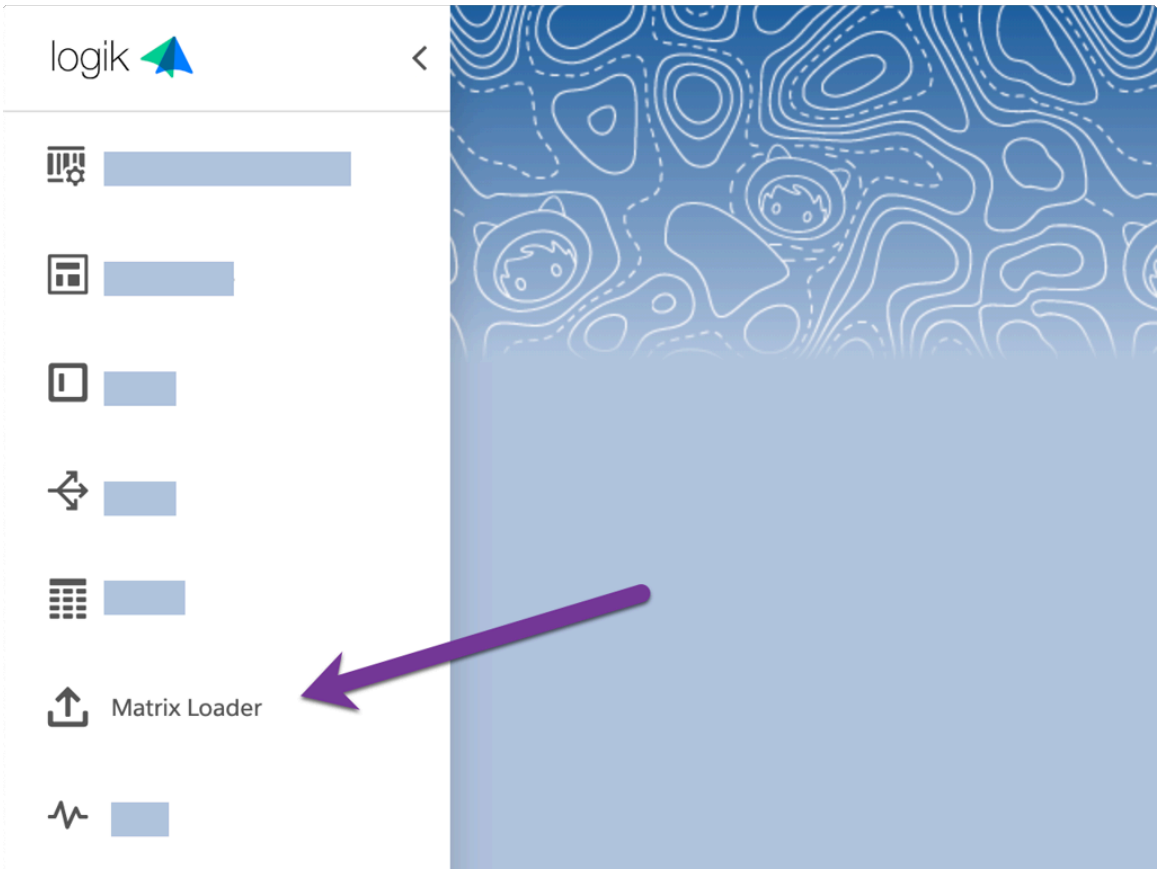
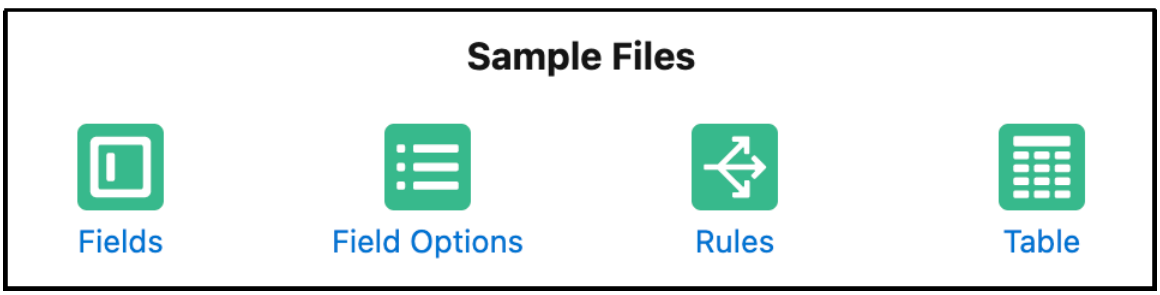
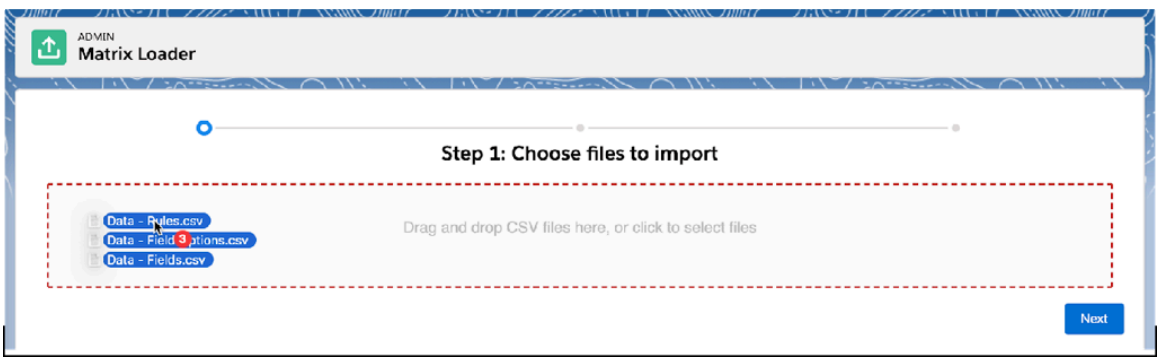
1. Click **Matrix Loader** in the navigation pane.



2. On the page that opens, export sample files in the upload formats that are accepted by the Matrix Loader: fields, field options, rules, and tables. Each sample file demonstrates a broad range of the features of the upload format.



3. Drag, or use the file browser to select the CSV files you intend to upload.



We discuss the formats of these CSV files in the following articles:

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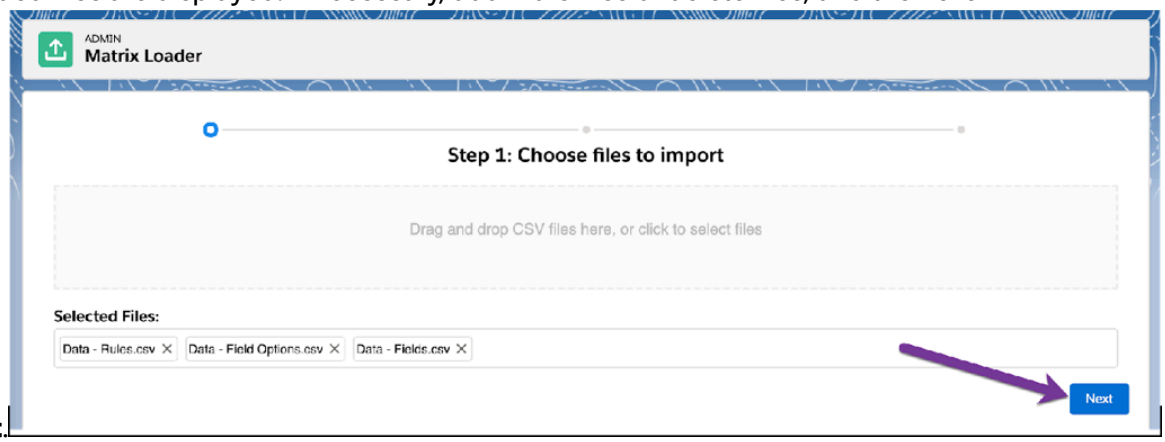
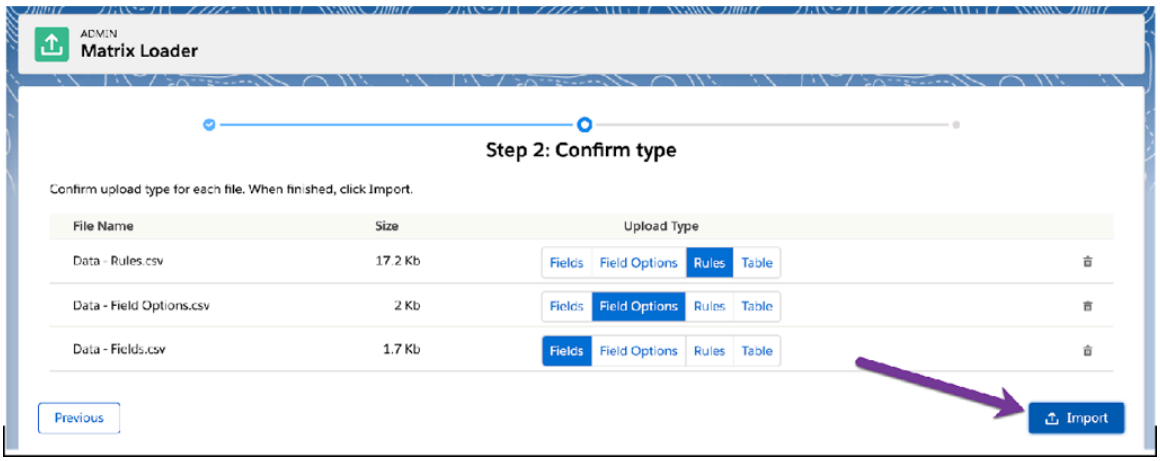
- Matrix Loader CSV fields and field options upload and export
- Matrix Loader: CSV rules upload
- Matrix Loader: CSV table upload

Queued files are displayed. If necessary, add more files or delete files, and then click **Next**.



4. The Matrix Loader guesses at the contents of each file according to keywords in the file titles. Confirm that the Matrix Loader guessed the upload file types correctly. If necessary, make corrections.

   The Matrix Loader performs the uploads in the sequence necessary to ensure all elements are uploaded correctly. Click **Import**.



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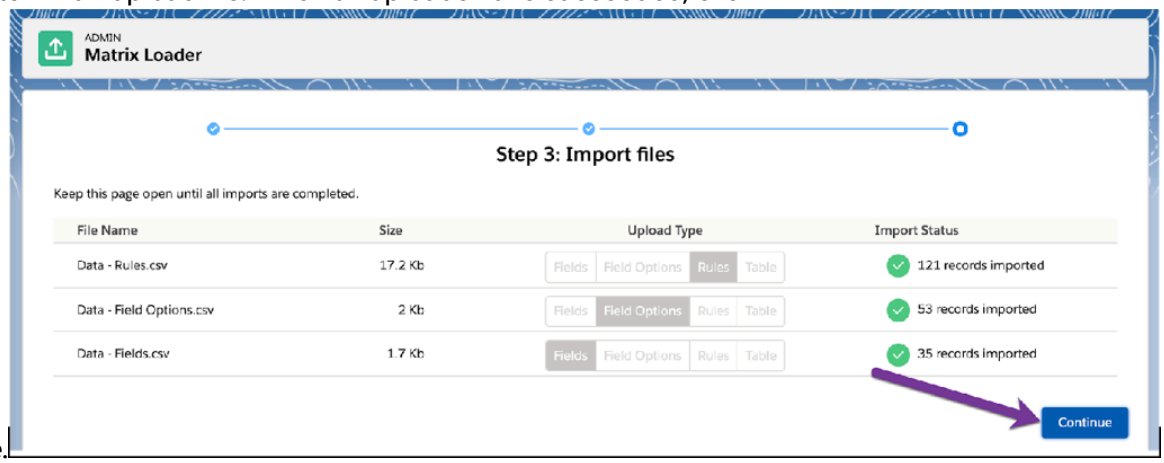
5. Confirm that all the uploads succeeded. Most errors originate in a mistake or mismatch in an upload file. When all uploads have succeeded, click **Continue**.



6. In the appropriate administration areas (fields and rules, if you uploaded these files), check and confirm the elements that were created as a result of this Matrix Loader upload.

Related topics

Matrix Loader

Matrix Loader CSV fields and field options upload and export

Use the Matrix Loader to bulk create, edit, and export fields, field options, and product pickers in CPQ. Define data in CSV files with supported columns and formats, then upload or download them for faster configuration management and environment migration.

CSV fields upload

All field types can be added and edited via the Matrix Loader. This section assumes the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then export the result to a CSV file for upload to the Matrix Loader. This topic outlines the columns and data that the Matrix Loader accepts in the field upload.

CSV file columns

Column name	Description	Valid values	Notes
field_type	Defines the data type of the field	text | textField boolean | booleanField number | numberField picklist | pickListField	Required
name	The name that the admin sees on field list Admin page	Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # " !	Required

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CSV file columns (continued)

Column name	Description	Valid values	Notes
variableName	Distinct string used to reference the field	Valid field variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or number.	Required; must be unique
required	Not currently used by the application	TRUE | FALSE <empty>	Optional; not currently used by the application
defaultValue	Provide an initial value in field when config experience starts	[See note]	Optional; relevant to textField, booleanField, numberField, and single pickListField only. Multi pickListFields set defaults in the fieldOptions upload file.
minLength	Minimum number of characters accepted	<number>	Optional; relevant to textField only
maxLength	Maximum number of characters accepted	<number>	Optional; relevant to textField only
precision	Define digits of precision to the right of the decimal	<number>	Optional; relevant to numberField only
minValue	Minimum numeric value accepted	<number>	Optional; relevant to numberField only
maxValue	Maximum numeric value accepted	<number>	Optional; relevant to numberField only
selectType	Define whether pickListField is single-select or multi-select	single multi <empty>	Optional; relevant to pickListField only. If <empty>, assumes single

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Note: When a field has defined values, the default value must conform to one of the defined values. For example:

- Valid Boolean field default values are TRUE and FALSE.
- If a number field has minValue or maxValue defined, the specified default value must conform to the definition.
- The default value of a single pickListField must match an option value defined for the field. This option value can be defined in a field option CSV file that is processed by the Matrix Loader in the same batch as the field CSV file.
- Text field values are limited to 2000 characters.

The order of columns is not fixed. For convenience, admins can rearrange the columns in their spreadsheet and the resulting CSV file.

The fields upload explainer file shows the variety of fields and field parameters accepted by the Matrix Loader. Cells with gray backgrounds denote that the cell is not relevant to the context of the row. To download the explainer file, in the Matrix Loader, click the Fields link in the Sample Files section.

Note: This file#s content is not intended to be uploaded to a environment as is. Instead, use the format examples to build an upload file that meets the requirements of your current project, export it to CSV format, and upload it to your environment by using the Matrix Loader.

Just as fields added via the Admin UI must be associated with one or more blueprints, so must fields that are added in bulk via the Matrix Loader. For instructions, see Associate a field with a blueprint.

CSV fields export

For convenience, admins can export a CSV file of fields and field options defined in the environment via the following steps:

1. In the Admin navigation pane, click **Fields**.

   You see a list of all defined fields.

2. (Optional) Enter a search string and press <enter> to narrow the list of fields.
3. Click **Export**. A message temporarily appears at the bottom of the page.
4. Click the notification center in the lower left corner.



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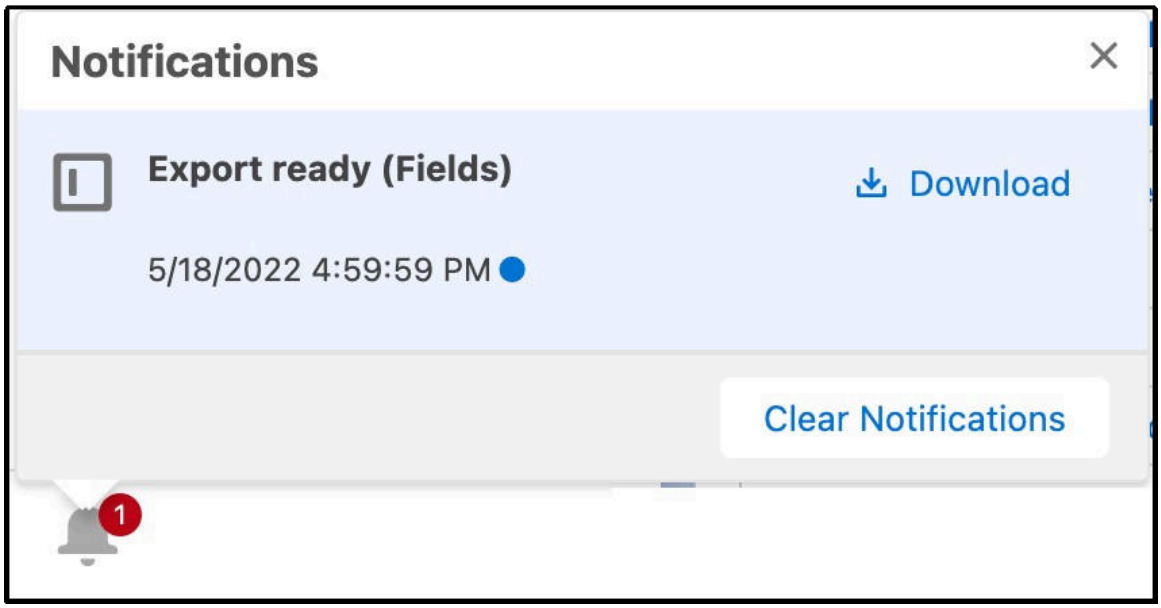
5. Click **Download** to download the CSV file.



The resulting ZIP file contains the fields CSV file and the field options CSV file.

CSV field options upload

The field options upload defines pickListField options and attribution. This section assumes the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then download/export the result to a CSV file for upload to the Matrix Loader. The following outlines the columns and data the Matrix Loader accepts in the field option upload.

CSV file columns

Column name	Description	Valid values	Notes
variableName	The variable name of the field for which this row#s option will be added	<field variableName>	Required
name	Option name visible to end- user	Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ’ & % $ # ” !	Required
value	Distinct string will use to reference the field option	Valid field option variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or	Required

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CSV file columns (continued)

Column name	Description	Valid values	Notes
		number. Field option variable names must be unique in the scope of the same field.	
defaultValue	Provide an initial value in field when config experience starts	TRUE FALSE <empty>	Optional; relevant to multi pickListFields only
extendedDescri ption	Contextual description for Admin reference	Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: `{ } [ ] ( ) | \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " !`	Optional
imageUrl	Image will show end-user for this pickListField option	<URL>	Optional; for use with pickListField. Display type is defined as VisualPicker or MultiSelectVisua lPicker in layout

The fields upload explainer file shows the variety of field options and field option parameters accepted by the Matrix Loader. Cells with gray backgrounds denote that the cell is not relevant to the context of the row. To download the explainer file, in the Matrix Loader, click the Fields link in the Sample Files section.

Note: This file#s content is not intended to be uploaded to a environment as is. Instead, use the format examples to build an upload file that meets the requirements of your current project, export it to CSV format, and upload it to your environment by using the Matrix Loader.

Field options CSV export

Field options are exported in the same motion used to export fields from CPQ. For instructions, see the "CSV fields Export" section above.

CSV upload: product picker

This section outlines the steps to create a product picker named "My product picker", which will include the following products/options:

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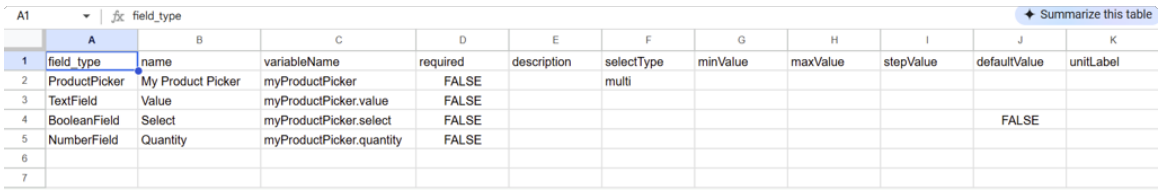
- Option1/Product1 - Product One
- Option2/Product2 - Product Two
- Option3/Product3 - Product Three

To create a product picker, follow these steps.

1. Extract a sample CSV file for fields from the Matrix Loader.

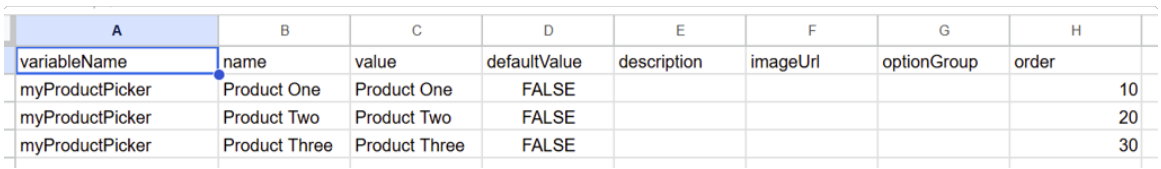
   This CSV file should contain the field information required for creating a product picker. Ensure that you add an extra line at the top of the sample file specifying the field type as product picker (this field type may not be present in the sample file).



	A	B	C	D	E	F	G	H	I	J	K
1	field_type	name	variableName	required	description	selectType	minValue	maxValue	stepValue	defaultValue	unitLabel
2	ProductPicker	My Product Picker	myProductPicker	FALSE		multi					
3	TextField	Value	myProductPicker.value	FALSE							
4	BooleanField	Select	myProductPicker.select	FALSE						FALSE	
5	NumberField	Quantity	myProductPicker.quantity	FALSE							
6											
7											

2. Extract a sample CSV file for field options from the Matrix Loader.

   This CSV file should contain the product names that will be displayed in the end-user UI for the fields created in the previous step.



	A	B	C	D	E	F	G	H
1	variableName	name	value	defaultValue	description	imageUrl	optionGroup	order
2	myProductPicker	Product One	Product One	FALSE				10
3	myProductPicker	Product Two	Product Two	FALSE				20
4	myProductPicker	Product Three	Product Three	FALSE				30

3. Create a new .yaml file.

   This file should include the fields contained in the product picker, as defined in the CSV file in Step 1. The .yaml file will be used to link the two CSV files during the upload process in the Matrix Loader. Without it, the product picker will not be created.

   Example .yaml Syntax:

```
---
- variableName: myProductPicker
 fields:
 - variableName: myProductPicker.value
  target: ProductId
 - variableName: myProductPicker.select
 - variableName: myProductPicker.quantity
  target: ProductQuantity
```

4. Upload files to the Matrix Loader: Compress the two .csv files and the .yaml file from the previous steps into a zipped folder. Then, go to the Matrix Loader, upload the zipped folder, click **Import**, and then click **Continue**.

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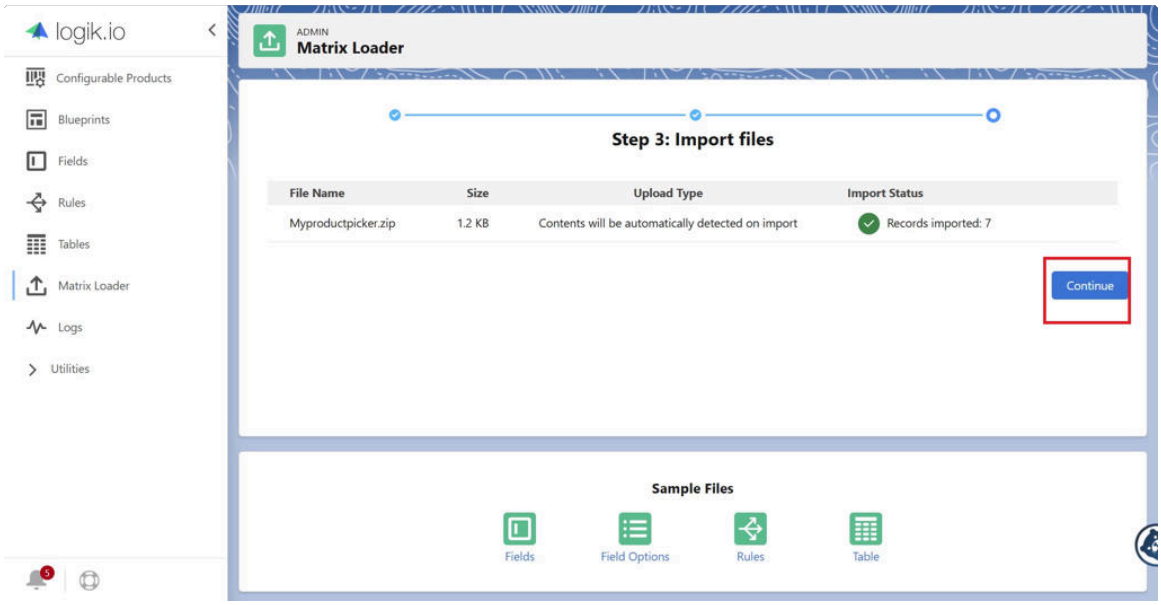
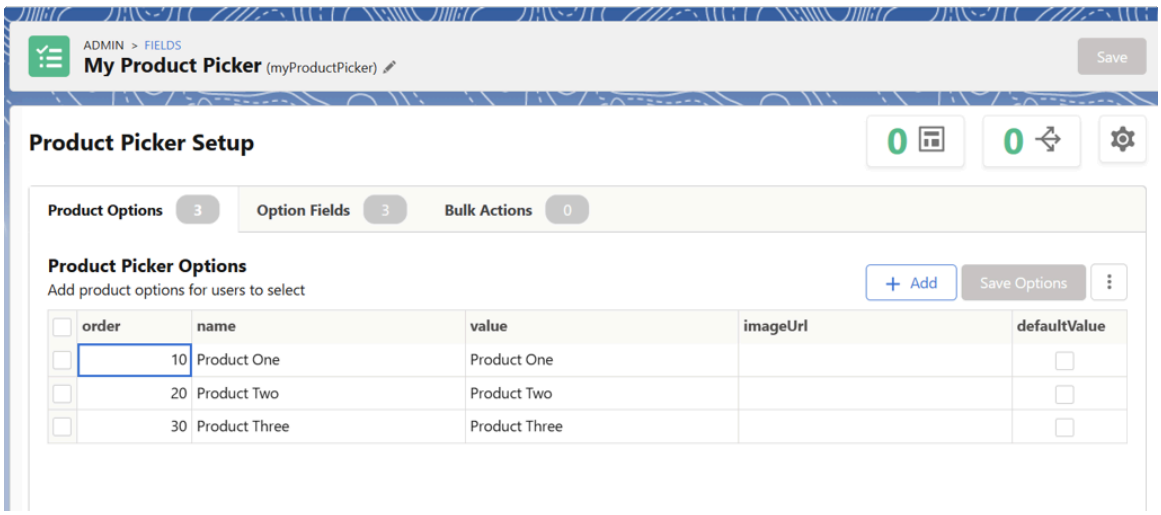


5. Validate in UI: The newly created product picker should be available in the CPQ Admin fields as shown below.



CSV export: product picker

To export a product picker, click fields in CPQ Admin. Click **Product Pickers**, select the product picker to export, and then click **Export**.

Related topics

Matrix Loader: CSV rules upload

Matrix Loader: CSV table upload

Matrix Loader: CSV rules upload

Use the Matrix Loader to bulk create, edit, and export rules in CPQ. Define rule conditions, actions, and logic in a CSV file to streamline configuration management and automate large-scale updates.

The the Matrix Loader enables administrators to efficiently upload and manage all rule types in CPQ. Instead of manually creating each rule in the Admin interface, you can define them in a spreadsheet, export the sheet to CSV format, and upload it directly into the environment. This

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enables faster configuration setup, easier testing, and simplified migration between sandbox and production environments.

Rules upload structure

Each row in the CSV file represents a rule record. The following table outlines the columns and data that the Matrix Loader accepts for rule uploads.

Accepted columns and data for rule uploads

Column Name	Description	Valid Values	Notes
record_type	Identifies this as a rule upload	rule	Required
rule_name	Name displayed on the rule list Admin page	Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " !	Required
rule_variable_name	Unique string used by CPQ to reference the rule	Valid field variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or number.	Required; must be unique
rule_description	Contextual description for administrator reference	Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " !	Optional
rule_status	Determines if the rule is active	active, inactive	Required; inactive rules are ignored by the engine
action_type	Defines the type of action executed when the rule runs	visibility, message, exclusion, inclusion, determination, product	Required
action_sub_type	Supplementary definition augmenting action_type	hide, info, warning, error, hidden, disabled, set, forceset, manufacturing, sales	Optional; depends on action_type
action_field	Field to which the action applies	<field variableName>	Required
action_value	Value applied to the action_field	Varies by action type	Required for message, exclusion, inclusion, or determination actions
action_product	Product reference for	SFDC Product Code, Product2 ID, or External ID	Required for product actions

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Accepted columns and data for rule uploads (continued)

Column Name	Description	Valid Values	Notes
	bill-of-material (BOM) actions		
action_quantity	Quantity of the product added to the BOM	<positive float> or <positive integer>	Required for product actions
action_mandatory	Specifies whether a BOM product is optional or mandatory	TRUE, FALSE, <empty>	Optional; defaults to TRUE
grouping	Defines how conditions are grouped and evaluated	any, all, custom, always	Required
resource / operator / value	Defines condition tuples forming the rule logic	<field variableName>, operator, value	Resource, operator, and value together define the condition expression

Condition groupings

Condition groupings determine how rule conditions are logically combined. Supported options include:

- any: ORs all conditions defined in the row.
- all: ANDs all conditions defined in the row.
- custom: Allows complex logic expressions, such as (1 OR 2) AND 3.
- always: Applies the rule unconditionally.

Valid operators

The following operators are supported for condition evaluation:

- equals (=, ==, equals)
- not equals (!=)
- less than (<)
- less than or equal
- greater than (>)
- greater than or equal (>=)
- contains / not contains
- in / not in

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General guidelines

- Always verify variable names match the field references exactly.
- Keep rule descriptions concise but descriptive to aid troubleshooting.
- Use inactive status for testing new rules before enabling in production.
- Validate grouping logic (any/all/custom) carefully to avoid unintended outcomes.
- Ensure product references (Product2 ID or External ID) align with your Salesforce configuration.

Exporting rules to CSV

Administrators can export all rule definitions from the CPQ environment to CSV format for review or migration. The resulting ZIP file contains a single CSV file of all exported rule definitions.

1. In the left Admin navigation pane, click **Rules**.
2. Optional: enter a search string and press Enter to narrow results.
3. Click **Export**. A message confirming export appears at the bottom of the page.
4. Open the Notification Center (bottom left) and click the **Download** link.

Additional information

- Valid strings may include letters, numbers, spaces, and special characters: `{ } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # "`
- Rule variable names can contain up to 255 alphanumeric characters and underscores. They must begin and end with a letter or number.
- Cells with gray backgrounds in sample files denote irrelevant fields for the current context.
- Use the provided sample files (Admin → Matrix Loader → Sample Files → Rules) as a template for formatting.

Related topics

Configure the Matrix Loader

Matrix Loader: CSV rules upload

Matrix Loader: CSV table upload

Use the Matrix Loader to import and manage table data in CPQ. Define table schemas, prepare matching CSV files, and upload them to populate or update tables for use in rules, lookups, and configurations, with no redeployment required for data updates.

Before you begin

Note: All table data can be added to CPQ via the Matrix Loader. This section assumes that the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then download or export the result to a CSV file for upload to the Matrix Loader.

In order to upload data to a table, you must first manually define the schema for the table by creating columns. Columns include a name, data type (either number or text), and a description (optional).

Limits and boundaries:

- Rows in a table: no practical limit
- Columns in a table: no practical limit

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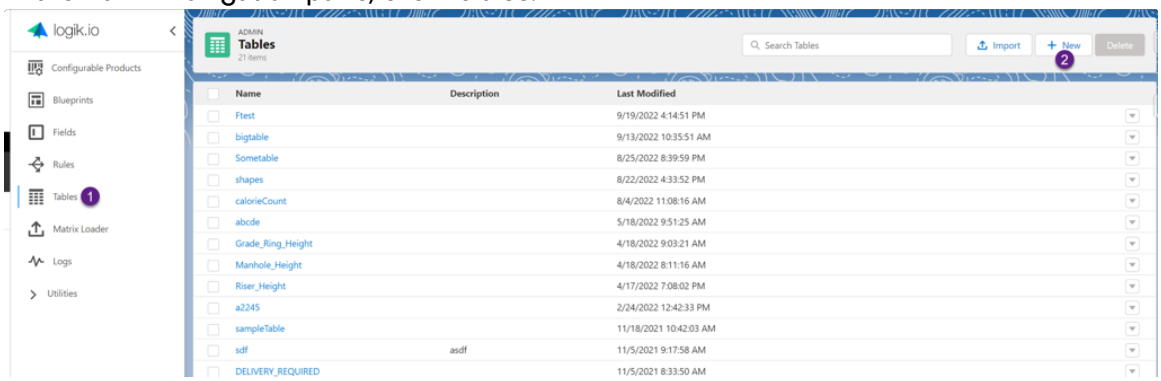
- Length of value stored in a text-type column cell: 2000 characters
- Length of value stored in a number-type column cell: extremely high (unlikely to reach in practice)
- Scripting: lookup returns a maximum of 10,000 rows from a table

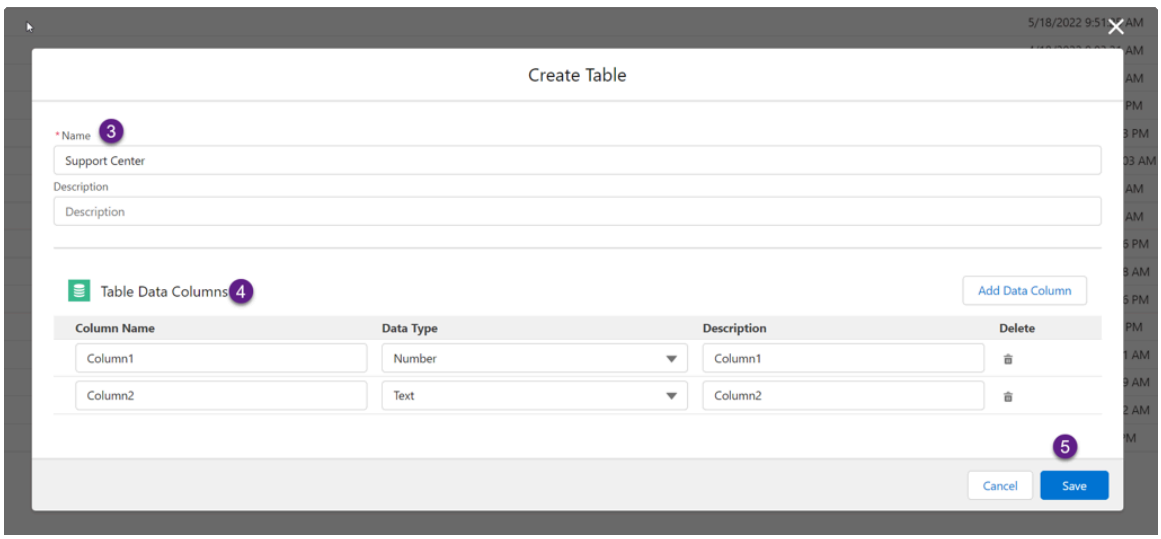
Role required: Admin

Procedure

1. In the Admin navigation pane, click **Tables**.



2. In the upper right, click **+ New**.
3. Name the table.



4. Name the columns, select their table type, and add a description.
5. Click **Save**.
6. Create a spreadsheet with your data.
   Name the columns exactly as named in the table that was created in the previous steps, and save the data in CSV format. Note that the name of the CSV file must exactly match the name of the table you created in order for the data to be correctly mapped to the table.
7. In CPQ Admin, click **Matrix Loader** in the navigation pane.

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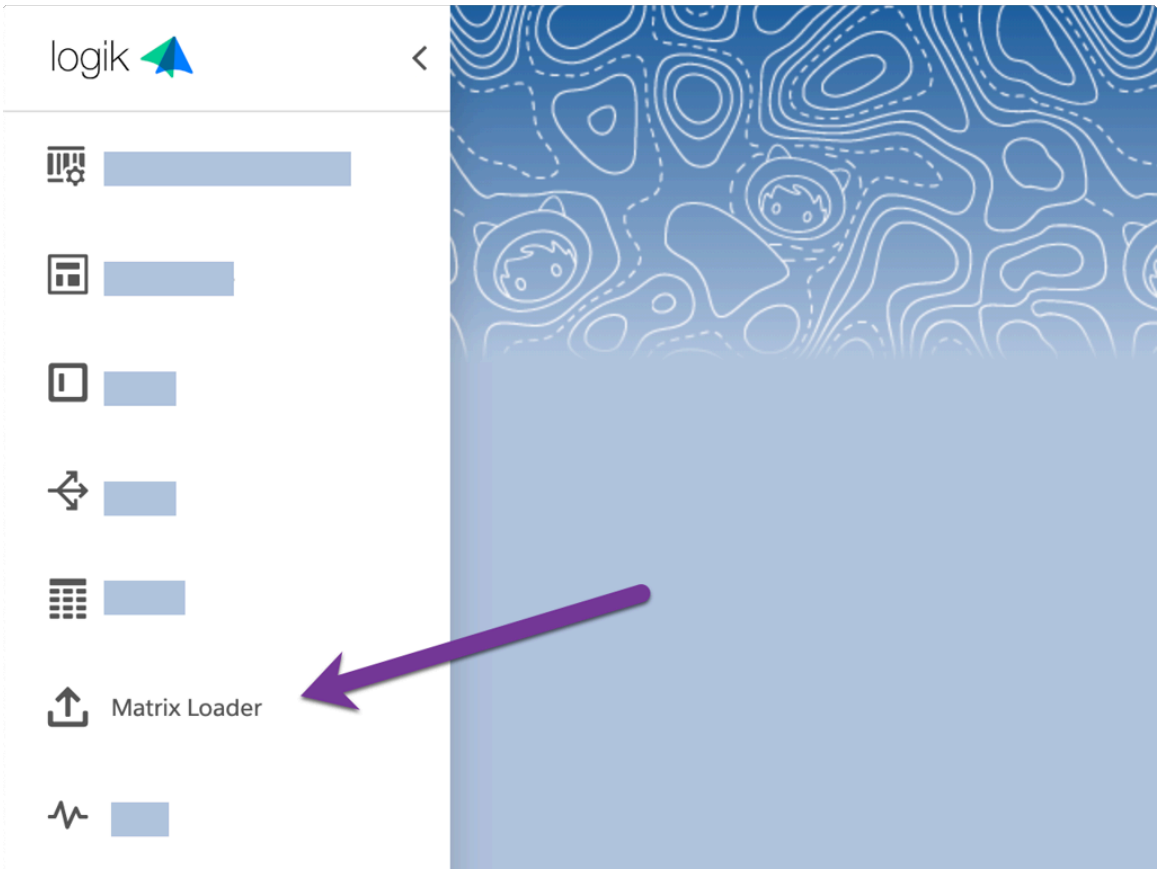
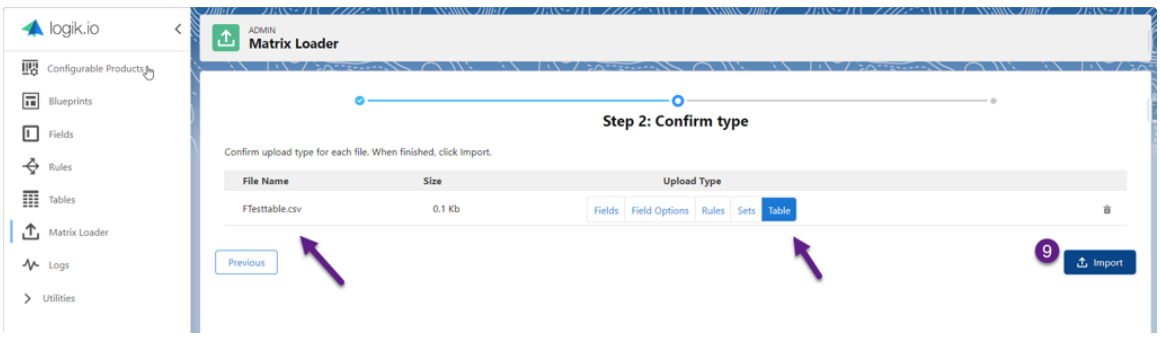
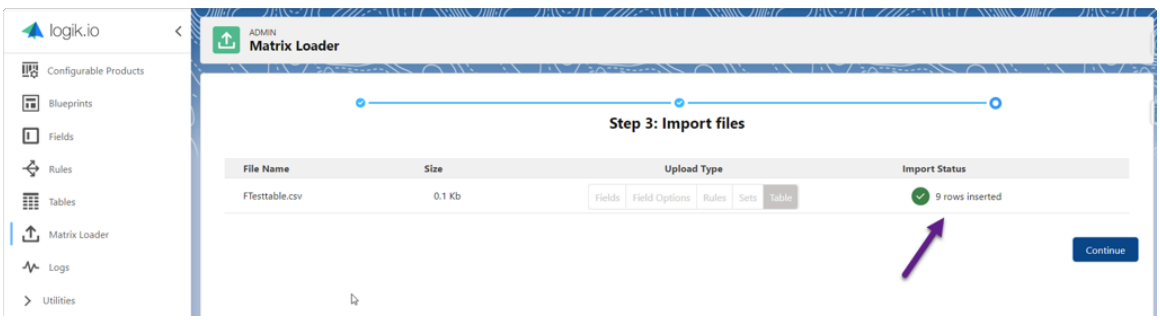


8. Upload the CSV file to the Matrix Loader.



Note that if the name of the table and CSV file contains the word "table," the Matrix Loader will automatically select the Upload Type as "table." Otherwise, you will need to manually select the Upload Type.

9. Click **Import**.
10. To confirm that the import was successful, check the import status.



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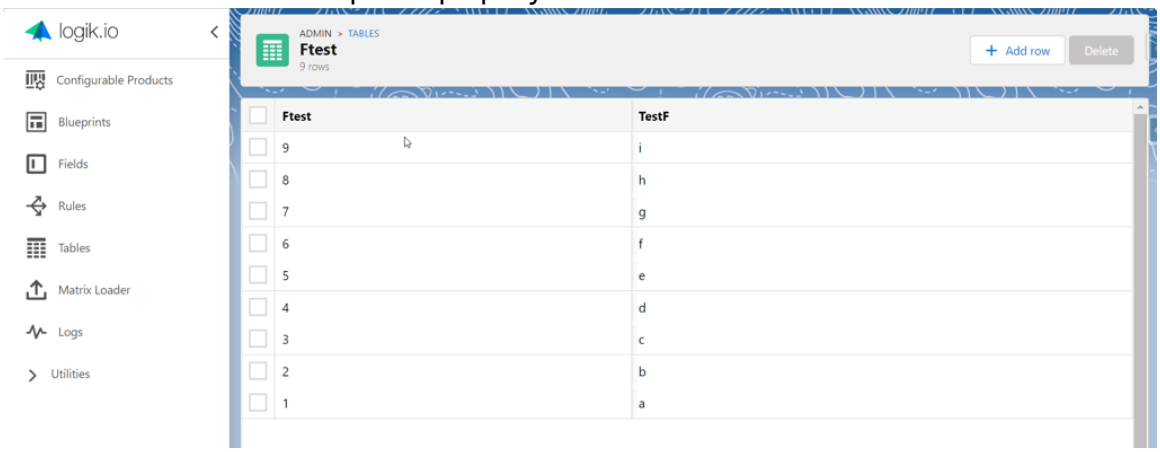
If there are error messages, confirm that the CSV file name and table name are the same, and that the column names in the table and the CSV file match exactly. Then upload the corrected CSV.

11. In the Tables section of the Admin navigation pane, click the table, and view the table to confirm that column data imported properly.



Result

You are now ready to create queries using the new table. Updates to managed tables do not require a redeployment to take effect. However, updates to rules with lookups to those tables require a redeployment.

Related topics

Configure the Matrix Loader

Matrix Loader: CSV rules upload

Indexes and natural keys for managed tables

Use indexes and natural keys to improve rule engine performance and speed up table lookups.

CPQ supports the integration of natural keys and indexes for faster table lookups and heightened rules engine performance.

This enhancement to CPQ's table management system introduces compatibility with up to three natural keys per table and the addition of two indexed columns.

- A natural key provides a means of unique identification for data in a table.
- Indexed columns quickly locate data without having to search every row in the table every time the table is accessed.

Note: All columns designated as natural keys undergo automatic indexing, optimizing the efficiency of query operations. Indexed columns are not required to be unique, and can work alongside natural keys for multiple data retrieval options.

Lookup functions that reference a column in their SELECT clause can benefit from the addition of indexing the column, as searches can be performed faster with no changes needed to the script.

These features can be added to a column by editing the table schema. (The schema editor opens automatically when you create a new table.)

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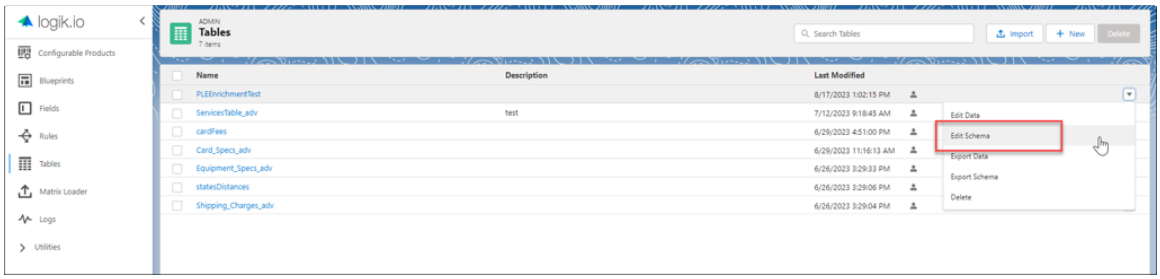
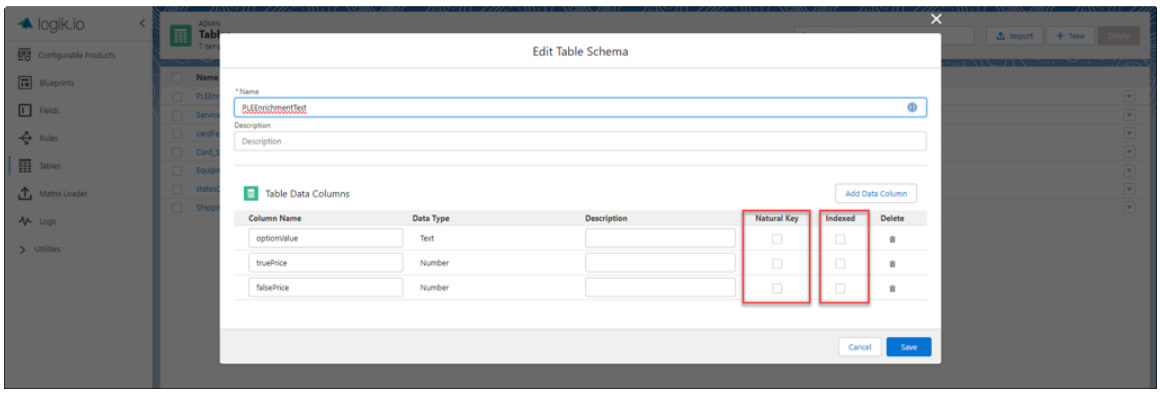
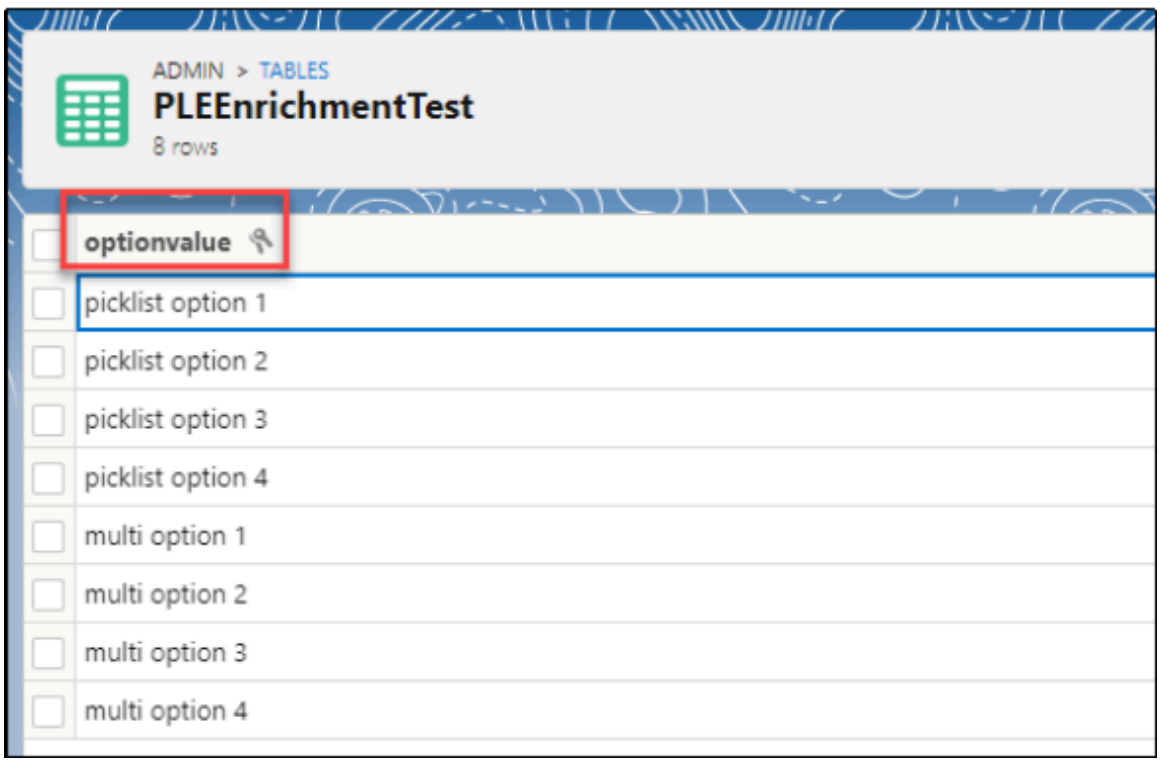




Because all natural keys are also indexed, checking the column does not allow the user to also check the Indexed column.



When the Natural Key column is checked, a keys icon displays in the table.



Another icon indicates which columns are indexed.

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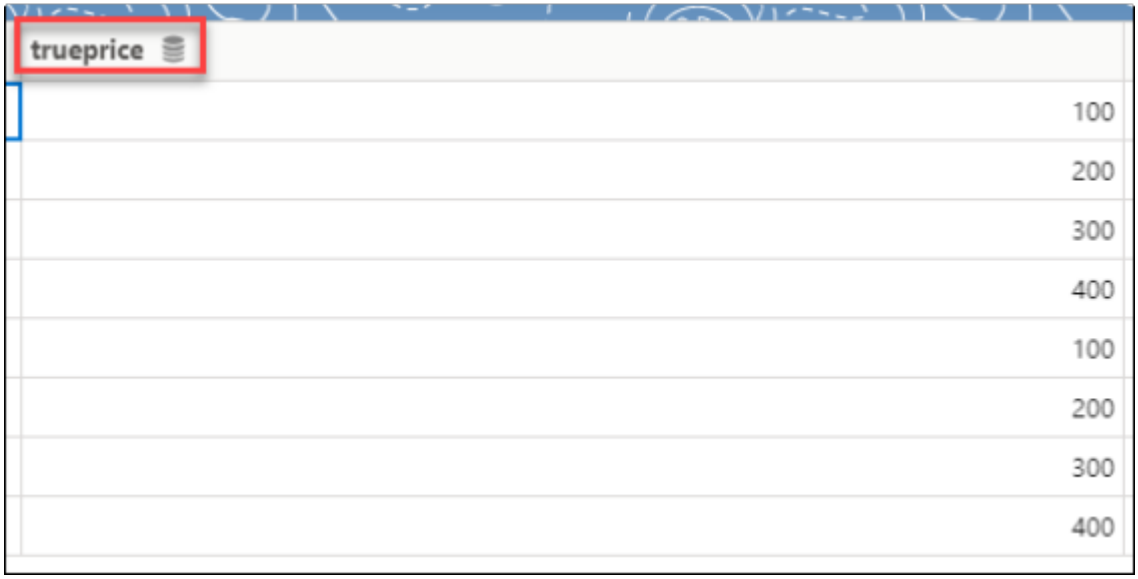

Since natural keys act as unique identifiers in the table, internal validation makes sure that each column in the table is unique.

When adding a natural key to a column with duplicate rows, the table does not allow the schema to save.

When exporting a table, the schema file indicates whether a column is indexed or is a natural key, so when the user imports the table to another environment, the schema's column settings are saved.

Reasons an import might fail

Some factors associated with natural keys and Indexes might hamper table import. These factors include:

- There are more than three columns set to be natural keys in the schema
- There are more than two columns set to be indexed in the schema
- A column set to be a natural key contains duplicate rows

Related topics

Minimizing table queries

The lookup function: commands and syntax

Using external connections with OAuth support

External connections allow enrichments to retrieve data from third-party systems to enhance configurations. When security requires OAuth, you can set up an OAuth handshake using client credentials to authenticate and access external APIs. This approach ensures secure data exchange for tasks such as pricing updates or attribute population during configuration.

Enrichments are scripts that run outside the rules engine and affect configurations in CPQ. There are five types of enrichments that can be enabled in a CPQ environment:

- On configure/reconfigure
- On BOM response
- Validation

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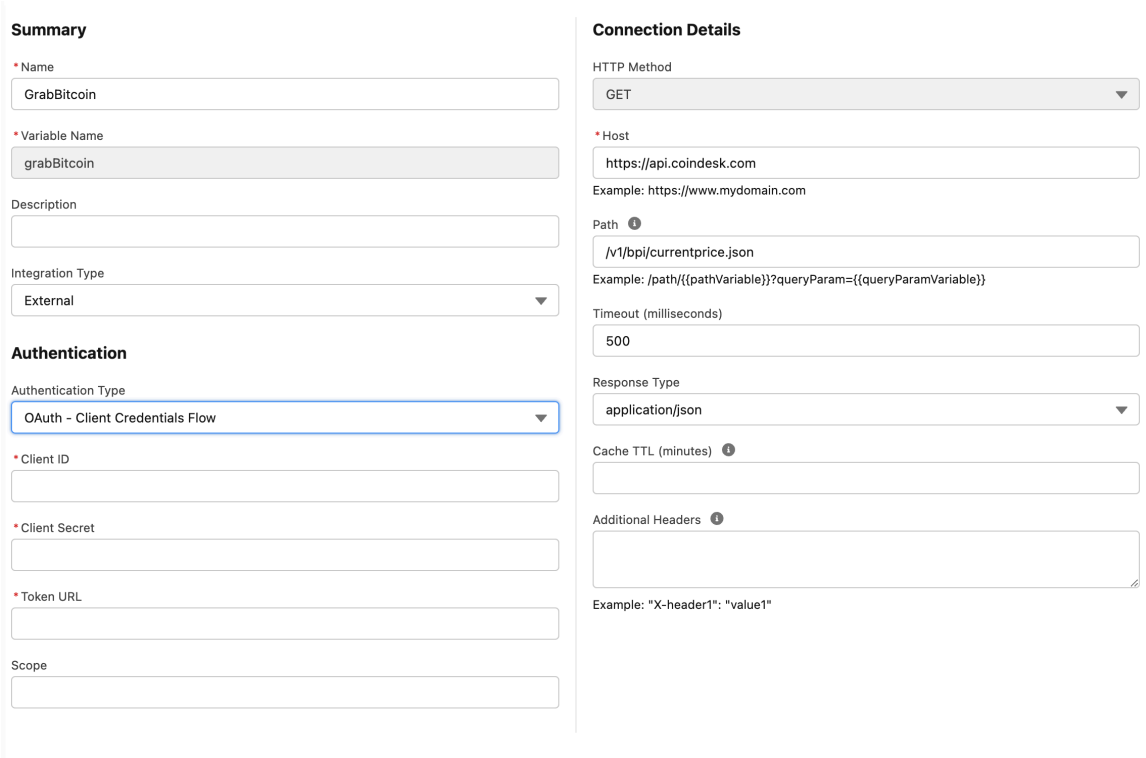
- Picklist extension pricing
- On request

External connections get data for a CPQ configuration from something outside CPQ. External connections can only be called from an enrichment.

Occasionally, an external connection requires an OAuth handshake for security purposes. For example, you may need to populate a field or an enrichment script with data from a third-party application, such as pricing or other attributes.

To set an OAuth external connection, follow these steps:

1. Define the external connection by visiting Admin > Utilities > External Connections.



2. Define your authentication token.

- If the external connection calls an open API, no authentication token is needed.
- If the external connection is Salesforce, CPQ takes care of the authentication token for you.
- If the authentication supports a bearer token, insert the bearer token provided by the external service for the purposes of authentication.
- If the authentication requires OAuth authentication:

  a. Select OAuth - Client Credentials Flow

  b. Insert the client ID

  c. Insert the client secret

  d. Insert the token URL field

  Required OAuth inputs:

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Required OAuth inputs

Field	Type	Description	Validations
Client ID (Required)	varchar (unlimited)	Holds the client ID created for CPQ with the authorization server	Not empty
Client secret (Required)	varchar (unlimited)	Holds a tokenized reference to the client secret The actual value is stored in the GCP secret store, except in dev environments, where the value is stored directly	Not empty
Token URL (Required)	varchar (unlimited)	The URL of the authorization server to exchange the client ID/secret with for a token	Not empty
Scope (Optional)	varchar (unlimited)	Optional - can be used to specify the scopes sent with the token request	None

3. Specify the parameters that need to be passed to the destination server in the Path input.

   Parameter variables can be used to dynamically define the path. An example path is `/v4/latest/{{inputVariable}}`, where `{{inputVariable}}` is the section of the path that is used as the parameter variable.

   If a path is using a parameter variable, use `encodeURIComponent()` in your enrichment script when you define the variable. For an example, see the following code.

```
let inputs =
 {"inputVariable":encodeURIComponent(cfgRequest.baseCurrency.va
lue)};
let results = External.exchangeRatesAPI(inputs);
var resultsMap = results.body.rates;
```

   Line 1 defines the variable, referencing the parameter variable from our external connection “inputVariable”. A CPQ field that stores the data we want is wrapped in encodeURIComponent and completes the inputVariable path.

   Line 2 and 3 then trigger the external connection `exchangeRatesAPI` using the defined input. Additional scripting is required for the call to be narrowed down to retrieve the desired data and set a field, if that is a desired use case.

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A timeout limit is needed. We suggest 500 milliseconds as a starting point. If you find that the external connection regularly exceeds this limit, you can increase this value. However, this may slow the performance of the end-user configuration.

The following enrichment script uses an external connection. This bill of materials (BOM) enrichment queries a powerPricing API with customer data. With the customer-specific rate date retrieved from the service, the enrichment adjusts the pricing of existing ProductList records.

```
var powerInputs = {"membershipCode":cfg.eCMembershipCode,
 "icp":cfg.eCICPNumber}; let powerResponse =
 External.powerPricing(powerInputs);

let dailyCharge = 0; let ratesArr = [];

if(powerResponse.status == 200) {

for(var record of powerResponse.body) { if(record.chargeType ==
 cfg.expectedUsage) {

dailyCharge = record.dailyCharges; ratesArr = record.rates;

}

}

for(var prod of ProductList)
 { if(prod.id=="electricBillEstimator") {

let addedPrice = dailyCharge * cfg.serviceDurationInDays;
 prod.price = addedPrice;

}

if(prod.id=="Standard Rate" || prod.id=="Low Rate")
 { prod.price = dailyCharge;

}

}

for(var rateVal of ratesArr) {

ProductList.id = "Additional Charge Per KWH: " + rateVal.name;
 ProductList.quantity = 1;
ductList.bomType="Manufacturing"; ProductList.orderNumber = 2;

ProductList.price = rateVal.rate; ProductList.notes =
 rateVal.measure;
ductList.parentProduct="electricBillEstimator";
 ProductList.next();

}

}
```

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```
return ProductList;
```

The test frame

Use a test frame to quickly validate the behavior of a configurator without creating a web page or running the full quoting flow. This lightweight test page lets you load a product and pass key parameters to preview the configuration in an iframe, either from on-page inputs or directly from URL parameters.

The test frame streamlines testing by providing a lightweight interface to preview configuration behavior before deploying changes.

Accessing the test frame

To access the test frame page in CPQ, navigate to the appropriate URL, replacing `{tenant}` and `{sector}` with values for your instance:

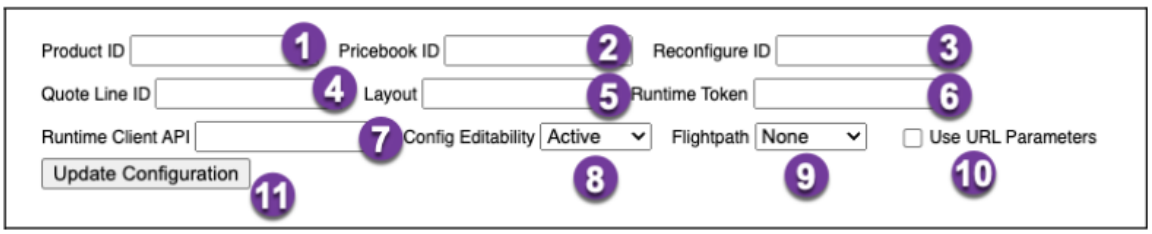
```
https://{tenant}.{sector}.logik/ui/configure/testFrame.html
```

Typically, the value of `{sector}` is `test` for sandbox or `prod` for production.

Note: If the test frame page displays CPQ administration, clear your browser cache.

Using the test frame

The testFrame HTML provides easy inputs to a variety of parameters that can be sent to the CPQ configurator.



1. Product ID: Product ID of the configurable product to load
2. Pricebook ID: Salesforce Pricebook ID
3. Reconfigure ID: Logik UUID of existing configuration to load for reconfiguration
4. Quote Line ID: Salesforce Quote Line ID
5. Layout: Name of the Layout to load from the Blueprint of the Configurable Product
6. Runtime Token: Runtime Token from Logik Admin Setup
7. Runtime Client API: Needs to be encoded and URL-safe. Highly recommended if using the Runtime Token parameter
8. Config Editability: Control the ability to save a configuration
   - Active: Displays the Quote button on the configuration page
   - Available: Displays the Save button on the configuration page
   - None: No Save or Quote button is displayed. End user cannot save configuration
9. Flightpath: Determines whether the execution of CPQ Rules is logged

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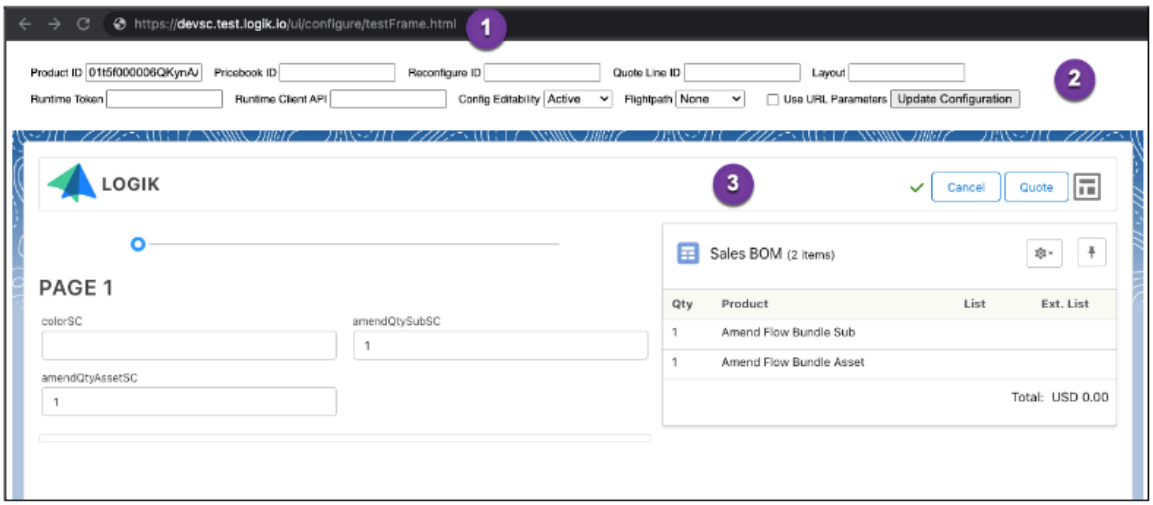
- Active: Displays Flightpath controls and automatically starts recording
- Available: Displays Flightpath controls and does not start recording
- None: No Flightpath controls are displayed

10. Use URL Parameters: if checked, use parameters from the URL instead of values in inputs.
11. Update Configuration: On click, this will send the parameters to the CPQ Configuration iframe and update.
    - If using the HTML inputs, parameters are passed via easyXDM
    - If Use URL Parameters is checked, the src of the iframe will be set using the URL parameters

Example: test frame page



- URL to access the test frame page
- Parameter inputs
- Configuration iframe

For more information, see Use case: Embed CPQ UI in an HTML page.

The Admin Logs utility

Learn how the Admin Logs utility helps you diagnose, monitor, and resolve configuration issues efficiently in your CPQ environment.

The Admin Logs utility provides administrators with centralized visibility into system activities, configuration errors, and integration issues. It enables quick diagnosis and resolution of problems by capturing key runtime details, error messages, and contextual data about the environment. Designed with usability and precision in mind, Admin Logs helps administrators identify issues, understand their cause, and act swiftly to maintain system stability.

Whether accessed through the Admin UI or via API, Admin Logs helps provide insights admins can use to optimize configurations and keep users productive.

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Key benefits

Key benefits of Admin Logs

Benefit	Description
Centralized visibility	Monitor configuration, runtime, and integration errors in one location.
Real-time monitoring	Quickly refresh and filter logs to focus on the most recent or relevant time frames.
Faster troubleshooting	Review detailed error codes, contextual messages, and user IDs for precise diagnostics.
API accessibility	Retrieve log data programmatically for automation or custom dashboards.
Continuous improvement	Access enhanced error reporting and contextual details to help streamline ongoing maintenance and user support.

Accessing Admin Logs

Administrators can access Admin Logs from the CPQ Admin interface or via API, depending on their preferred workflow and use case.

In the new Admin experience, access Logs in the Utilities menu. In the legacy Admin experience, click **Logs** in the navigation bar. Both experiences provide the same real-time logging capabilities and enable filtering, refreshing, and viewing detailed error information.

Refreshing and filtering

The Logs interface supports real-time filtering and refresh options. Choose a time range that best suits your analysis needs:

- Past 15 minutes
- Past hour
- Past 24 hours
- All logs

Note: Use the refresh button to update the view with the latest events without leaving the Logs page.

Log details format

Each log entry is displayed in a structured format, making it easy to scan and understand issues. This structure enables administrators to efficiently filter, correlate, and resolve errors across different sessions and components. The log data includes the following columns:

- Date and time: User-friendly date display and exact time in milliseconds (added February 2025).
- Error message: A descriptive summary of the issue encountered.
- Error code: CPQ unique identifier for quick cross-referencing and support requests.
- User ID: The user who encountered the error (added February 2025).

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Accessing logs via API

Administrators who prefer to query logs programmatically can access the Admin Logs API using a GET request. This is especially useful for environments with large data sets or for integrating logs into external monitoring systems. This flexibility allows admins to retrieve specific log intervals for audit or performance review without loading all historical records.

Example cURL command:

```
curl --location '<logikURL>/api/logs/v1/logs' \
--header 'Content-Type: application/json' \
--header 'Origin: localhost' \
--header 'Authorization: <Admin API Key>'
```

You can refine results by specifying *before* and *after* parameters in ISO 8601 date/time format:

```
curl --location
 '<logikURL>/api/logs/v1/logs?after=YYYY-MM-
DDThh%3Amm%3AssZ&before=YYYY-MM-DDThh%3Amm%3AssZ' \
--header 'Content-Type: application/json' \
--header 'Origin: localhost' \
--header 'Authorization: <Admin API Key>'
```

Continuous improvements

Admin Logs continually evolves to provide deeper insights and improve usability. Enhancements introduced in February 2025 include:

- Enhanced error messages: Save errors now include related configuration errors for faster issue identification.
- Contextual information: For enrichment script errors, logs now capture the specific enrichment area, affected blueprint, and revision ID for precise debugging.
- Detailed external connection errors: “Method not supported” HTTP errors now include the path and method used in the external call.
- Performance metrics: Metrics for external integrations are now tracked and available upon request through CPQ support.

General guidelines

- Use short time filters when troubleshooting real-time configuration issues.
- Export relevant log data regularly for long-term tracking or compliance review.
- Leverage the API to automate log retrieval or integrate with your organization’s monitoring tools.
- Report unclear error codes or missing context to CPQ support for analysis and improvement.

Flightpath

Flightpath keeps a record of rule engine activity and field changes in real time, helping administrators analyze system behavior and troubleshoot complex configuration flows with pause and restart options.

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Flightpath helps administrators understand how the rules engine responds to end-user inputs. When recording, Flightpath keeps track of:

- Rules engine responses (rules run and fields changed) to end-user input
- Computation time for each rules engine run

To help troubleshoot long user flows, the administrator can pause Flightpath and reinitiate recording any number of times.

Demonstration

The following video demonstrates the Flightpath feature tracking rules engine responses.

Flightpath

Prerequisites

- Salesforce-integrated use cases:

  CPQ environment Explorer 07.22 or later.

  Salesforce Logik.io Managed Package version 1.2 or greater. Navigation in Salesforce: Admin Setup > Apps > Packaging > Installed Packages > CPQ Managed Package

  The Salesforce administrator must add the `LGK FlightPath_c` field to the Quote Line Editor field set (Salesforce: Admin Setup > Object Manager > Quote > Field Sets > Line Editor). Place the Flightpath field in the field set. Limit its visibility to the appropriate administrator roles.

- Headless/eCommerce use cases:

  Your CPQ environment must be Explorer 07.22 or later.

  Append the following text to your configure API call to CPQ: `?logExecution=<value>`. Example: `https://<siteURL>.<sector>.logik.io/c?logExecution=<value>`

  Valid values for <value> are:

  - true: CPQ configuration returns Flightpath controls. Should be shown only to administrative users.
  - false: CPQ returns no Flightpath controls. Suitable for non-administrative users such as partners, customers, and direct sales.

- End-user UI:

  Append the following to your configure URL: `&log=<value>`

  Examples:

  - Configurator:

    ```
    https://<siteURL>.<sector>.logik/ui/configure/<product id>?v=1&<other parameters>&log=<value>
    ```

  - Transaction management:

    ```
    https://<siteURL>.<sector>.logik.io/ui/transact/<transaction id>?v=1&log=active
    ```

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For transaction management, valid values include:

- none
- available
- active

Setting up enrichments and rules scripting

Learn how to set up enrichments and write rules scripts to control product behavior, automate calculations, and enhance configuration logic in your application.

The On Request enrichment

Information about an enrichment you shouldn't use.

Important: The On Request enrichment is almost never a recommended pattern. This enrichment type can make configuration performance dependent on outside systems and result in a less than ideal end user experience. Consult Customer Success about other ways to achieve your desired outcome.

The On Request enrichment enables the same capabilities as the On Configure/Reconfigure Enrichment, except that it is called after each field change to any field in the enrichment.

There is a 5 second API timeout for all external API calls in this enrichment.

General guidelines:

- Wrap external APIs in validation logic to ensure that they are only called when absolutely necessary.
- Always validate all data required to run an API before you directly call the API.
- Use ogic to limit running external APIs.
- Make sure that any API called in an on request enrichment is able to fully run and respond quickly.

```
// Here we use a boolean field to delay the running of
 additional code
if (cfgRequest.runOnRequest == true) {
  cfgRequest.onRequestTextField.value = "On Request Ran";
}p
cfgRequest.runOnRequest = false;
```

- Avoid non-performant or long-running APIs.

The On BOM Response enrichment

You can use this enrichment to work with ProductList items whenever there is an update to the bill of materials.

The On BOM Response enrichment is enabled by default in environments and can be used to manipulate items in the ProductList whenever there is an update to the bill of materials (BOM).

Note: The CPQ environment must include rules with product actions, or there will be nothing for the enrichment to loop through.

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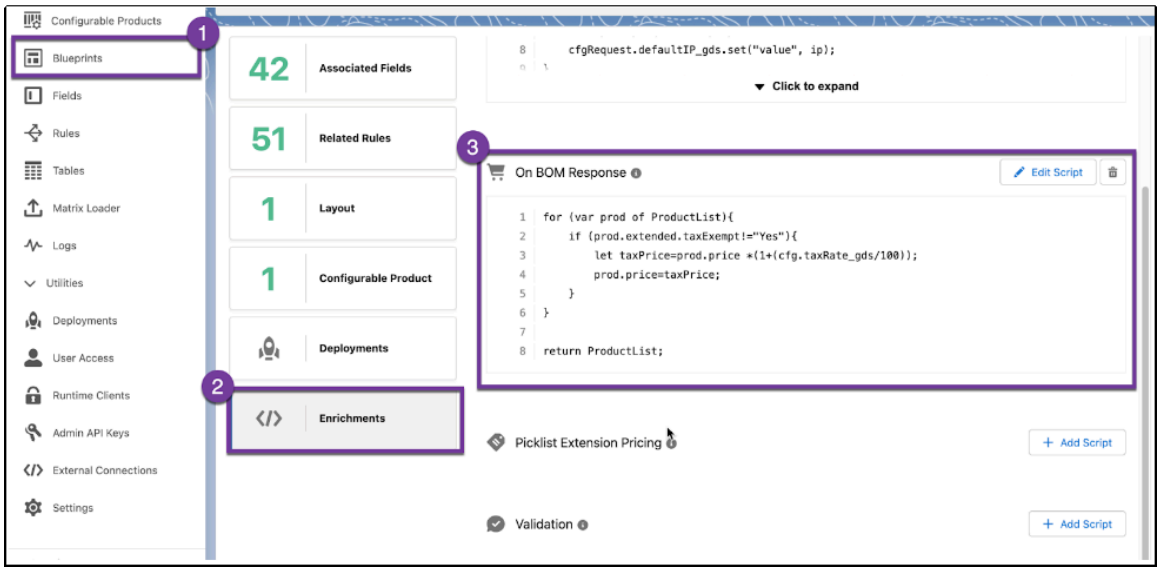

In the following sample, the On BOM Response enrichment loops through products and changes the price of a product.

```
//Loop over products and change price of a product
let dealProduct = cfg.blueMoonSelected;
if (dealProduct == true) {
        for(var prod of ProductList) {
                let price = prod.price * .8;
                prod.price = price;
        }
}
```

On BOM Response enrichments may request external REST services via GET or POST.

In the following sample script, the On BOM Response enrichment uses an external connection to query a powerPricing API with customer data. With the customer-specific rate data retrieved from the service, the enrichment adjusts the pricing of existing ProductList records.

```
var powerInputs = {"membershipCode":cfg.eCMembershipCode,
 "icp":cfg.eCICPNumber};
let powerResponse = External.powerPricing(powerInputs);
let dailyCharge = 0; let ratesArr = [];

if(powerResponse.status == 200) {
 for(var record of powerResponse.body) {
  if(record.chargeType == cfg.expectedUsage) {
   dailyCharge = record.dailyCharges;
   ratesArr = record.rates;
  }
 }
 for(var prod of ProductList) {
  if(prod.id=="electricBillEstimator") {
   let addedPrice = dailyCharge * cfg.serviceDurationInDays;
   prod.price = addedPrice;
  }
   if(prod.id=="Standard Rate" || prod.id=="Low Rate") {
   prod.price = dailyCharge;
  }
 }
 for(var rateVal of ratesArr) {
```

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```
  ProductList.id = "Additional Charge Per KWH: " + rateVal.name;
  ProductList.quantity = 1;
  ProductList.bomType = "Manufacturing";
  ProductList.orderNumber = 2;
  ProductList.price = rateVal.rate;
  ProductList.notes = rateVal.measure;
  ProductList.parentProduct = "electricBillEstimator";
  ProductList.next();
 }
}

return ProductList;
```

The difference between the rules engine BOM and the enriched BOM

There are two versions of the BOM during runtime: the rules engine BOM, which is based on the results of product rules during runtime, and the enriched BOM, which is the result of the BOM enrichment.

The BOM enrichment's ProductList object (referenced in the script) is the result of the rules engine BOM, not the enriched BOM. This is to make sure there are no infinite loops. Suppose that the script were to reference its own ProductList that it returns, and the script were set up to increase the price of certain objects by a percentage on BOM update. In this case, the next time the contents of the BOM were updated, the price increase would happen again and again.

To prevent this situation, the enriched BOM is not referenced by any rule or enrichment other than the validation enrichment's ProductList. While this makes sure that the BOM enrichment can function outside the rules engine, it also means that if a condition is met in the BOM enrichment, those conditions can be met again the next time the BOM is updated, because any change to the BOM in the BOM enrichment script that stops that condition will not be referenced.

With external connections, this is not a problem as long as the response is consistent. However, if the response changes when fired multiple times, such as when generating a string or saving a certain time, it will update each time the BOM is updated.

The BOM Response enrichment might be used to:

- dynamically change the price of products in the BOM. This can be either a static or dynamic change rate, such as a shipping fee being static and taxes being dynamic.
- change attributes of products in the BOM that are reliant on some condition in the BOM, such as the quantity of free stickers given out once $100+ of tax has been quoted.
- remove a line item from the BOM.

Passing array variables using Salesforce external connection

You must use single quote strings when making a SOQL query to Salesforce.

Salesforce supports only single quote strings in a SOQL query. Therefore, the following inputs would not be recognized by Salesforce.

```
let inputs = { "productsArray": '("Tablet10", "Laptop13",
 "Laptop15")' }
```

Instead, use single quotes as in the following snippet.

```
let inputs = { "productsArray": "('Tablet10', 'Laptop13',
 'Laptop15')" }
```

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The following sample script pulls Salesforce IDs.

```
// Array of Salesforce IDs
const idList = ['0066e00001pGlTUAA0', '0066e00001pGlTTAA0',
 '0066e00001pGlTPAA0'];

// Create a string to pass to the SOQL IN query
// first part: "('" = opening parenthesis and single quote
// middle part: idList.join("','") = join all the Salesforce Ids
 with single quote, a comma and single quote
// last part: "')" = single quote and closing parenthesis
const soqlIn = "('" + idList.join("','") + "')";

// inputs to the SOQL query and calling SF connection
const inputs = {"idList": soqlIn};
const response =
 Salesforce.<yourExternalConnectionVariableName>(inputs);
```

Related topics

- Using external connections with OAuth support
- Passing data from Salesforce to CPQ fields

Create scripts

Learn how to create advanced functions using the scripting interface.

Some use cases require an advanced condition or action. Other times, the administrator may prefer script versus leveraging simple rules. For these occasions, CPQ offers the ability to write scripts in key areas.

Scripting is available in rule actions and conditions, behind the Advanced menu choice or toggle.

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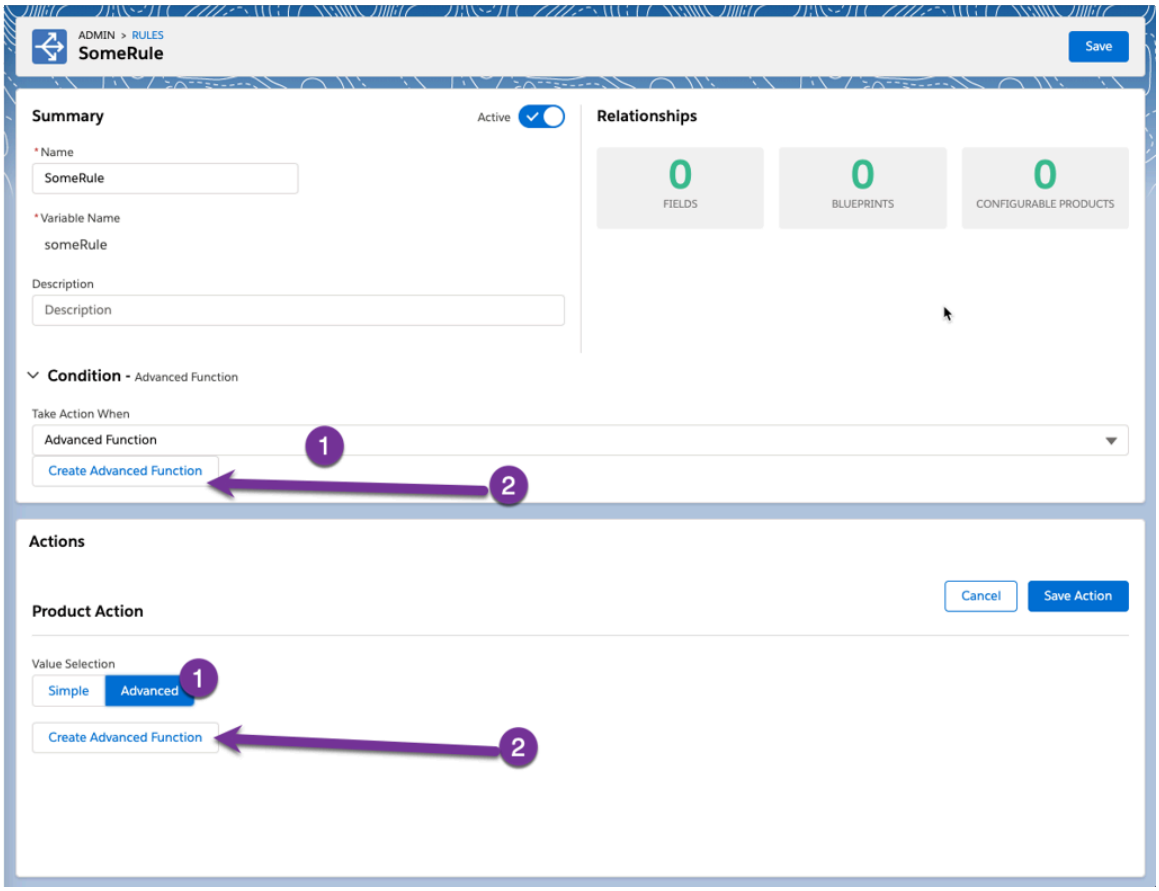

When you click **Create Advanced Function**, the script editor opens, including the tools you need to write a script.

When the script editor first opens, it provides the expected return format of the script.

- Advanced conditions return true or false.
- Advanced hiding rules return a text string.
- Advanced determination rules return the type of the field that they are setting.
  - A determination rule that sets a number returns a number.
  - A determination rule that sets a multi-select picklist returns an array.
- Advanced inclusion and exclusion rules return an array.
- Product rules return ProductList.

For more details and a script sample, review the "Advanced product actions" section of Rules.

The **? Help** button opens a menu of available functions. Each entry includes a description of the function, the parameters it accepts, its output, and an example that can be inserted at the current location of the cursor in the script.

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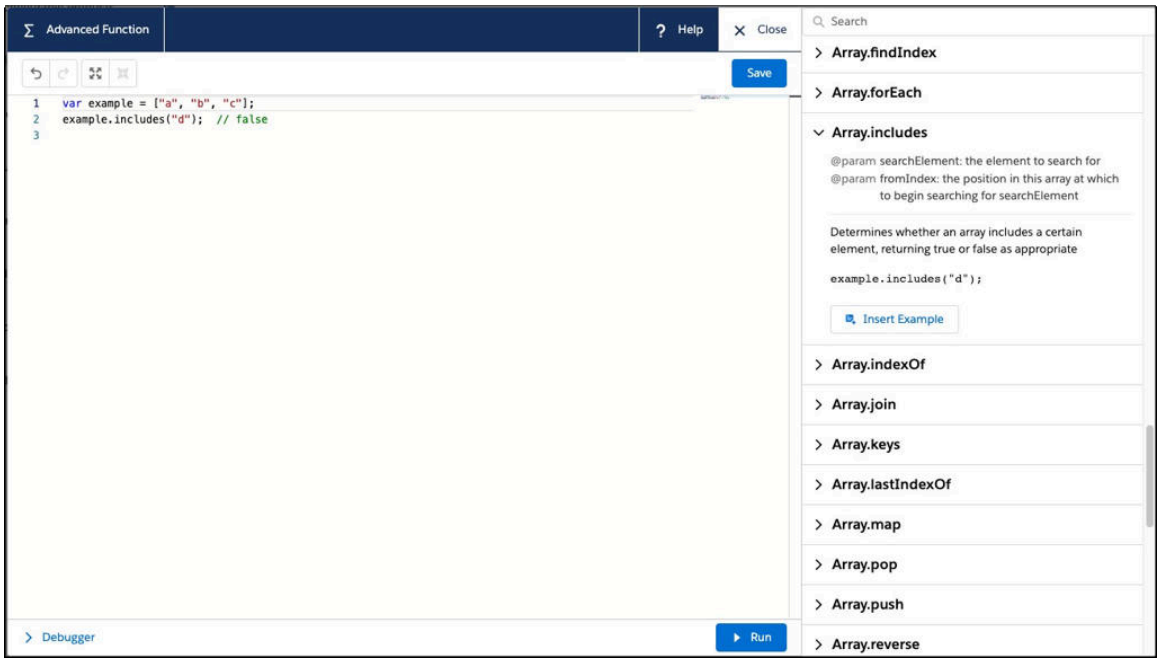
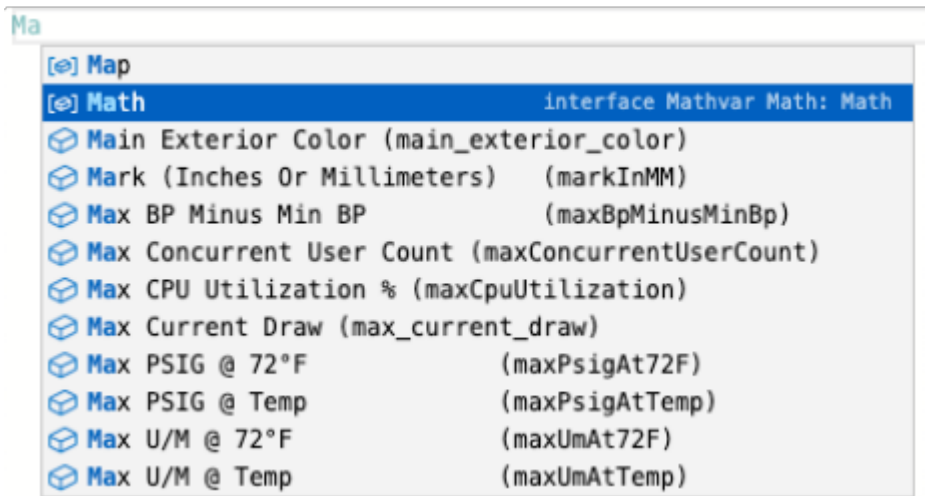


As you type in the script editor, suggestions are provided, including functions, configurable field variable names, and local variables. Using this feature helps eliminate mismatched variable names and typing errors. In the screenshot below, typing `Ma` gives the user two available functions (Map and Math) and a list of all matching fields. Additional inputs narrow the list of matching options.



At the bottom of the scripting interface, the debugger lets you test your script by defining values for the variables (fields) that it references. Debugger input is provided in JSON format. For your convenience, review field-specific formats in the fields information help (arrow).

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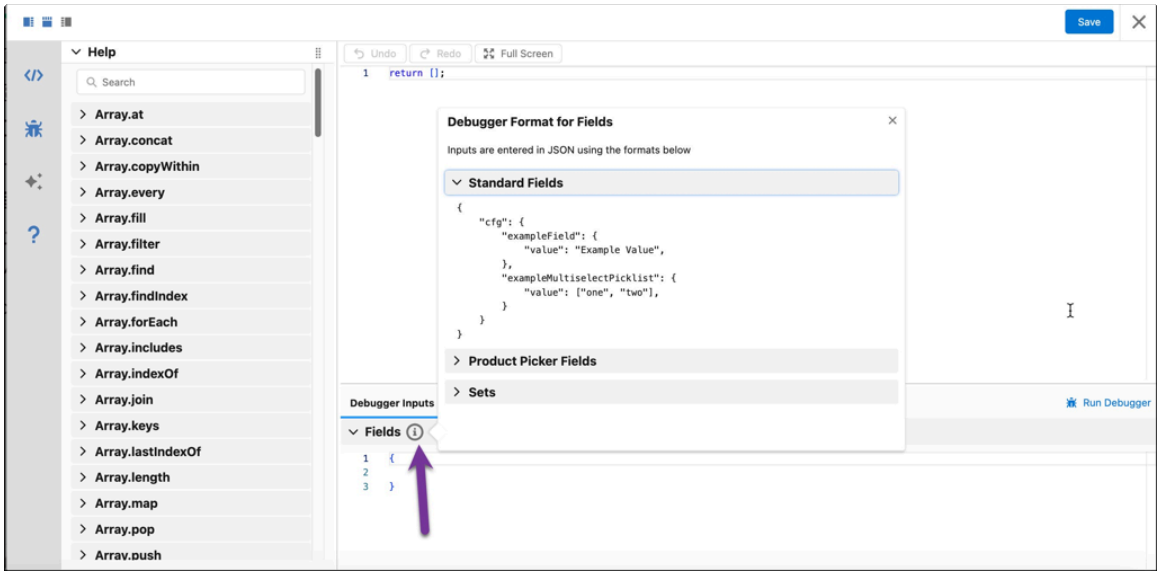

It can be helpful to save your debugger inputs as comments in your script for easy pasting into the debugger when you need to test the script.

Calls to `console.log()` in the script are returned in the debugger output.

Also see the following sample scripts:

- Sample Message Script - Array and Map Function
- Sample Number Field Determination
- Sample Product Rule Scripts
- Sample Product Rule Script With For Loop
- Sample Text Field Determination

Related topics

CPQ scripting language reference

Sample scripts

Using comments and the console to debug scripts

Scripting: Checking for first and subsequent configurations

Scripting: How to populate set values

CPQ scripting language reference

View the operators, objects, and keywords that CPQ supports, together with information about type conversion, type checking, alternative scripts for unsupported operations, and accessing object properties.

CPQ uses a JavaScript-like language to dynamically change the value of fields and BOM data via rules and enrichments. JavaScript is a complex language built over almost thirty years, and while we are unable to replicate every piece of functionality that a developer would normally expect while coding, CPQ scripting remains a powerful tool to assist in the dynamic configuration of products.

The capabilities of CPQ scripting are always expanding. Check back to see the most up-to-date features.

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Supported operators

Arithmetic operators:

+
: Addition

-
: Subtraction

*****
: Multiplication

/
: Division

%
: Modulus

++
: Increment

--
: Decrement

String operators:

+
: Concatenation

+=
: Addition assignment

Assignment operators:

=
: Assignment

+=
: Addition assignment

-=
: Subtraction assignment

Comparison operators:

==
: Equal to

===
: Equal value and equal type

!=
: Not equal to

!==
: Not equal value nor equal type

>
: Greater than

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<
: Less than

>=
: Greater than or equal to

<=
: Less than or equal to

Logical operators:

&&
: And

||
: Or

Supported objects

Each object supported can be declared with the following:

[ ]
: Array

" "
: String

( )
: Number

true | false
: Boolean

{ }, new Map( )
: Map

new Date( )
: Date

`undefined`, NaN, and `null` are unsupported.

Note: Date objects cannot be returned, but they can be referenced and manipulated with the Date APIs in the Help menu.

Supported keywords

- `var`
- `let`
- `const`
- `new`
- `if`
- `else if`
- `else`
- `for`

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- `for/of`
- `return`

We do not support `while` or unconditional `for` loops with `break`, because of the risk of infinite loops halting performance.

We do not support functions, as the script itself should be small enough to be considered one function. If your script is long with many conditions and variables, consider creating a managed table and using a table query. For more information about using managed tables and table queries, see Matrix Loader: CSV table upload and Minimizing table queries.

Alternative scripts for unsupported operations

Assignment multiplication and division (/= or *=): `number = number * otherNumber;`, `number = number / otherNumber;`

Exponentiation (x**y): `Math.pow(x, y);`

Type conversion

Convert arrays to strings: `Array.toString()`

Convert numbers to strings: `[number] + ""`

Convert numeric strings to numbers: `[string] - 0`

Note: Strings cannot be treated as arrays, but `.length` does work for strings.

Type checking

The following returns a Boolean value indicating whether an input is a number: `LGK.isNumber(123)`

Accessing object properties

You can access the properties of map objects such as `cfgRequest` in two ways.

```
objectName.propertyName
//or
objectName["propertyName"]
```

This is helpful in order to replace large amounts of repetitive code with results from a Table Lookup, since the “propertyName” text could instead be replaced by a variable.

For example, consider a blueprint with the following fields associated with it, and a managed table named shipstatebooleantest.

- shipState
- boolean1
- boolean2
- boolean3
- quantity1
- quantity2
- quantity3

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shipstatebooleantest

id	shipState	trueBoolean	quantityTest	rowQuantity
1	Arizona	boolean1	quantity1	1
2	Maine	boolean2	quantity2	2
3	California	boolean3	quantity3	3

Instead of having an identical `if` statement check what `shipState` is and setting the Boolean values and quantities accordingly, you could instead replace it with only one `if` statement that sets the values based on the results of a table lookup.

In the following On Configure/Reconfigure script, if the `shipState` field has a value, the fields that are returned by the lookup function are set. If the `shipState` field is blank, then all Boolean and quantity fields are set.

```
if (cfgRequest.shipState.value != "" &&
 cfgRequest.shipState.value != null){
 var fieldMapping = lookup("Select
 trueBoolean,quantityTest,rowQuantity from
 shipstatebooleantest where shipState = :value", { "value":
 cfgRequest.shipState.value });
 console.log(fieldMapping);
 if (fieldMapping != []){
  cfgRequest[fieldMapping[0].trueBoolean].set("value",true);

 cfgRequest[fieldMapping[0].quantityTest].set("value",fieldMappi
ng[0].rowQuantity);
 }
}
else{
 var fieldMapping = lookup("Select
 trueBoolean,quantityTest,rowQuantity from
 shipstatebooleantest");
  console.log(fieldMapping);
  for (var row of fieldMapping) {
   cfgRequest[row.trueBoolean].set("value",true);
   cfgRequest[row.quantityTest].set("value",row.rowQuantity);
  }
}
```

If your instance of CPQ needs functionality not described here, contact support@logik.io with your use case.

Related topics

- Sample scripts
- Using comments and the console to debug scripts
- Scripting: Checking for first and subsequent configurations

Sample scripts

View a selection of commonly requested sample scripts.

This article shows some commonly requested sample scripts. If you would like to see more examples, please send a message to documentation@logik.io with your suggestions.

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Sample number field determination:

```
var count64 = 0;
var count32 = 0;
var perCoreProcessing = 40; //assuming 8 processors with 5
 TFlops compute
var cpu64Processing = 64*perCoreProcessing;
var cpu32Processing = 32*perCoreProcessing;
var cpu16Processing = 16*perCoreProcessing;
var remainingCompute = cfg.estPeakOps;
if(cfg.allowCPU64 == true) { //64 core allowed so divide by that
 count64 = remainingCompute/cpu64Processing;
 remainingCompute = remainingCompute%cpu64Processing;
}
if(cfg.allowCPU32 == true) {
 count32 = remainingCompute/cpu32Processing;
 remainingCompute = remainingCompute%cpu32Processing;
}
return count32;
```

Sample text field determination:

```
var retStr = "";
retStr = retStr + "64 vCPUs: " + Math.round(cfg.cpu64Count);
retStr = retStr + "\\n32 vCPUs: " + Math.round(cfg.cpu32Count);
retStr = retStr + "\\n16 vCPUs: " + Math.round(cfg.cpu16Count);
retStr = retStr + "\\n8 vCPUs: " + Math.round(cfg.cpu8Count);
retStr = retStr + "\\n1 vCPUs: " + Math.round(cfg.cpu1Count);
return retStr;
```

Sample product rule script:

```
//Base Product
var baseProductP2ID = "BP_ID";
var inputs = {"g2BaseProduct": cfg.g2BaseProduct};
var resultSet = lookup("SELECT Product2Id, ProductName FROM
 Dummytable WHERE ProductCode = :g2BaseProduct", inputs);
for (var row of resultSet) {
 ProductList.id = row.get("Product2Id");
 ProductList.quantity = cfg.orderQty;
 ProductList.bomType = "SALES";
 ProductList.uom = "EA";
 ProductList.level = 1;
 ProductList.notes = row.get("ProductName");
 ProductList.parentProduct = "01t5f000000uJgoAAE"; //parent
 product identifier. In this case top product being configured
 from SFDC
 baseProductP2ID = row.get("Product2Id");
 ProductList.uniqueIdentifier = baseProductP2ID; //Parent
 ...SF ProductID; not req'd if this has no other children
 ProductList.next();
 break;
}
```

Sample product rule script with `for` loop:

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```
//var timesReplicate = cfg.numberOfComputeClusters; //this
 doesn't work yet.. If it does, we will replicate that many
 times easier
var timesReplicate = [1,1,1,1,1,1,1,1,1,1]; //dummy 10 times
 loop based on 10x boolean true, Double loop for 100
for (var parentStep of timesReplicate) {
 for (var step of timesReplicate) {
  if(cfg.cpu16Count > 0) {
   ProductList.id = "01t5f000000v50CAAQ";
   ProductList.quantity=Math.round(cfg.cpu16Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu16Count) + " number of 16 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu8Count > 0) {
   ProductList.id = "01t5f000000v50DAAQ";
   ProductList.quantity=Math.round(cfg.cpu8Count);
   ProductList.notes="Provisioning " + Math.round(cfg.cpu8Count)
 + " number of 8 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu32Count > 0) {
   ProductList.id = "01t5f000000v50BAAQ";
   ProductList.quantity=Math.round(cfg.cpu32Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu32Count) + " number of 32 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu64Count > 0) {
   ProductList.id = "01t5f000000v50JAAQ";
   ProductList.quantity=Math.round(cfg.cpu64Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu64Count) + " number of 64 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
```

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```
   }
   ProductList.next();
  }
  if(cfg.cpu1Count > 0) {
   ProductList.id = "01t5f000000v50SAAQ";
   ProductList.quantity=Math.round(cfg.cpu1Count);
   ProductList.notes="Provisioning " + Math.round(cfg.cpu1Count)
 + " number of 1 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
 }
}
console.log("Added line items 100 times");
return ProductList;
```

Sample array and map functions:

```
var productidArr = ["test123", "chtest123"];
var inputs = {"productids": productidArr};
var resultSet = lookup("SELECT uniqueidentifier, bomtype FROM
 bominformation WHERE productid IN (:productids)", inputs);

var prodTypeMap = new Map();
for (var row of resultSet) {
 prodTypeMap.set(row.get("uniqueidentifier"),
 row.get("bomtype"));
}
var itemTypeManuf = productidArr.every((value) => {return
 prodTypeMap.get(value) != "Manufacturing";});
if (isGood == false) {
 return "Sales type item found";
}
var summary = "";
productidArr.forEach((item, index) => {summary += index + " " +
 item + ". ";});
return summary;
```

How to pull multi-select picklist values from SFDC to twinned multi-select picklist field in CPQ in the On Configure/Reconfigure enrichment:

```
let x = (cfgRequest.yourTwinnedLogikField.value).split(";");
cfgRequest.yourTwinnedLogikField.set("value", x);
return cfgRequest;
```

How to concatenate field values into a string:

```
stringVar = "";
stringVar = stringVar.concat(cfg.varible1, cfg.variable2,
 cfg.variable3);
return stringVar;// returns selected values of
 "variable1variable2variable3"
```

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How to imitate a CONTAINS function:

```
var yourVariable = "Field Value"; // Replace with your actual
 Field value
if (yourVariable.includes("CU")) {
 // Code you wish to execute when Field Value contains "CU"
} else if (yourVariable.includes("AL")) {
 // Code you wish to execute when Field Value contains "AL"
} else {
 // Code you wish to execute when Field Value doesn't contain
 "CU" or "AL"
};
```

Related topics

CPQ scripting language reference

General guidelines for scripting

Write efficient scripts using a JavaScript-like language. Follow these general guidelines for naming, variables, and table access.

This guide will walk you through the general guidelines for writing efficient and reliable scripts in CPQ using a JavaScript-like language. Following these guidelines will help you create maintainable, readable, and well-performing code.

Quick summary

- Place declarations at the top
- Comment thoughtfully
- Indent brackets
- Use descriptive variable names
- Name variables consistently
- Avoid "new"
- Avoid loose equality ("==")
- Use "const" before "let" and "let" over "var"
- Minimize table lookups

Place declarations at the top

Placing variable and function declarations at the top of your script improves readability and prevents unexpected variable hoisting issues.

```
1 // Declare and initiate at the beginning
2 let firstName = "";
3 let lastName = "";
4 let price = 0;
5 let discount = 0;
6 let fullPrice = 0,
7 const myArray = [];
8 const myMap= {};
```

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Comment thoughtfully

Use comments to explain complex logic, assumptions, or any non-obvious behavior in your code. Avoid redundant comments that merely repeat the code.

Indent brackets

Properly indenting your code improves its visual structure and makes it easier to understand, especially when dealing with nested blocks.

```
1 // Good
2 if (condition) {
3 // ...
4 if (nestedCondition) {
5 // ...
6 }
7 }
8
9 // Bad
10 if (condition) {
11 // ...
12 if (nestedCondition) {
13 // ...
14 }
15 }
```

Use descriptive variable names

Choose names that are meaningful and describe the purpose of the variable or function. This makes your code self- documenting and easier for others to understand.

```
1 //Good
2 let quoteId = cfgRequest.partner.quote.id.value;
3 let lineID = cfgRequest.partner.quote.lineId.value;
4 let currencyISO =
 cfgRequest.partner.quote.currencyIsoCode.value;
5 let priceBookID = cfgRequest.partner.quote.pricebookId.value;
6
7 if (quoteId != null) {
8 cfgRequest.quoteIDTest.set("value", quoteId);
9 }
10
11 if (lineID != null) {
12 cfgRequest.lineIDTest.set("value", lineID);
13 }
14
15 if (currencyISO != null) {
16 cfgRequest.currencyISOCodeTest.set("value", currencyISO);
17 }
18
19 if (priceBookID != null) {
20 cfgRequest.pricebookIDTest.set("value", priceBookID);
21 }
22
23 //Bad
24 let x1= cfgRequest.partner.quote.id.value;
25 let x2= cfgRequest.partner.quote.lineId.value;
```

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```
26 let x3= cfgRequest.partner.quote.currencyIsoCode.value;
27 let x4= cfgRequest.partner.quote.pricebookId.value;
28
29 if (x1 != null) {
30 cfgRequest.quoteIDTest.set("value", x1);
31 }
32
33 if (x2 != null) {
34 cfgRequest.lineIDTest.set("value", x2);
35 }
36
37 if (x3 != null) {
38 cfgRequest.currencyISOCodeTest.set("value", x3);
39 }
40
41 if (x4 != null) {
42 cfgRequest.pricebookIDTest.set("value", x4);
43 }
```

Name variables consistently

Consistent naming conventions enhance code readability and maintainability. Choose either camelCase or snake_case and stick to it. Logik field variable names use camelCase, so most organizations stay with this convention for readability.

```
1 // camelCase
2 let firstName = "JohnDoe";
3
4 // snake_case
5 let last_name = "Smith";
```

Avoid the "new" keyword

Using the `new` keyword can use more resources, lead to memory leaks, and cause unintended behaviors. Instead, use the literal notation for object creation if possible.

- Use `" "` instead of `new String( )`
- Use `( )` instead of `new Number( )`
- Use `false` instead of `new Boolean( )`
- Use `{ }` instead of `new Map( )`
- Use `[ ]` instead of `new Array( )`

Avoid loose equality ("==")

The loose equality operator can lead to unexpected type coercion. For accurate comparisons, use the strict equality operator (`===`).

```
1 // Good
2 if (count === 5) {
3 // ...
4 }
5
6 // Bad
7 if (count == "5") {
```

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```
8 // ...
9 }
```

Use "const" before "let" and "let" over "var"

Choose variable declaration based on scope and mutability requirements. Use `const` for variables that won't be reassigned and `let` for variables that will change. `var` is also acceptable but is a holdover from previous versions of JavaScript.

```
1 // Using const for unchanging values
2 const TAX_RATE = 0.15;
3
4 // Using let for mutable values
5 let itemCount = 5;
```

Minimize table lookups

Excessive table queries can impact performance. Minimize queries by fetching necessary data once and storing it in variables.

To learn about general guideliines for using the `lookup` function, see Minimizing table queries.

Related topics

Create scripts

CPQ scripting language reference

Scripting: How to populate set values

View a detailed example of how to use an On Configure/Reconfigure blueprint enrichment script to load field values into a set.

This article demonstrates how to use an “On Configure/Reconfigure” blueprint enrichment script to load field values into a set.

This example shows making a SOQL call to Salesforce using an external connection to get the last names of all of the account contacts and preloading them into a set for further configuration.

Prerequisites

To complete this example you need:

- Enrichments enabled in your CPQ instance
- External connections enabled in your CPQ instance
- A set created and associated with the blueprint
- A text field associated with the set

External connection: SOQL call

In the CPQ Admin screen, find the external connections under Utilities.

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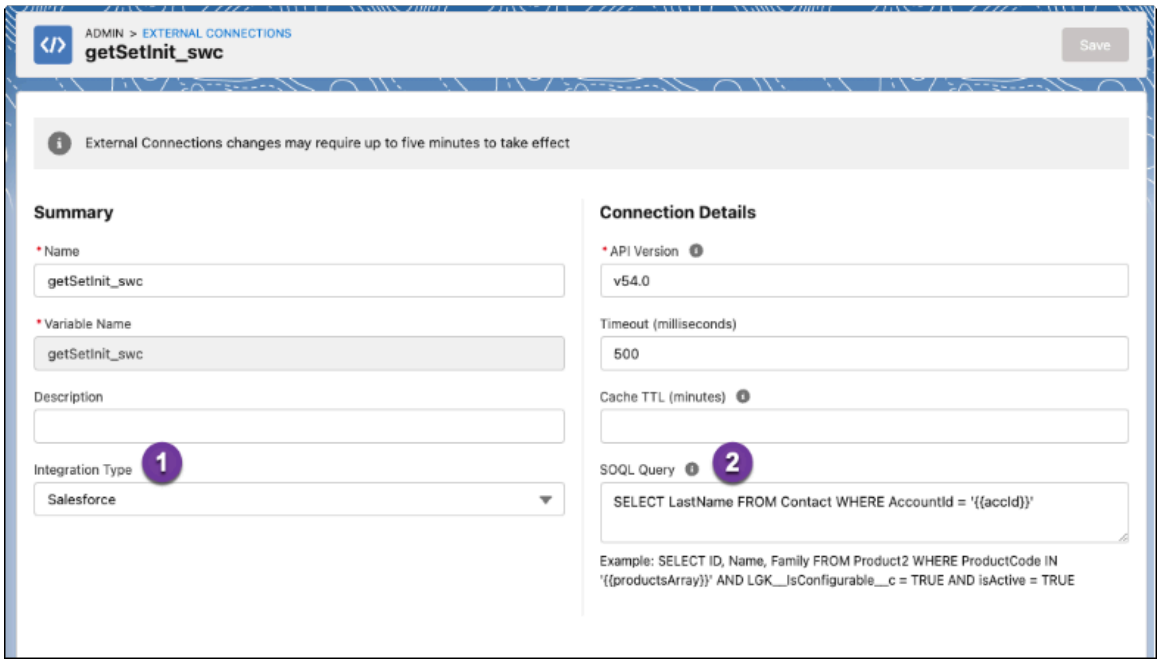

1. Set the integration type to Salesforce.
2. Define the SOQL query to make. In this example, we are retrieving all the contacts that are associated with a particular account and storing the last name.

SOQL query:

```
SELECT LastName FROM Contact WHERE AccountId = '{{accId}}'
```

On Configure/Reconfigure script

In the blueprint, navigate to the enrichments area, and add the script to the “On Configure/Reconfigure” enrichment.

```
let setData = []; // initialize the set data as an empty array

//if initializing, default in setData
if (cfgRequest.demoset_swc.data == []) {
 const inp = {"accId":"0015f0000061RKcAAM" }; // Hardcoded
 accountId, could be mapped in from a field
 const response = Salesforce.getSetInit_swc(inp); // SELECT
 LastName FROM Contact WHERE AccountId = '{{accId}}'
 const contactList = response.body.records;
 if (contactList.length > 0) {
  for (var contact of contactList) {
   let elem = {"textTest_swc":{"value": contact.LastName } }; //
 set the field value
   setData.push(elem); // add to the setData array
  }
  // after looping through all the contacts/previous set data,
 add them to the set
  cfgRequest.demoset_swc.set("data",setData);
 }
}

return cfgRequest;
```

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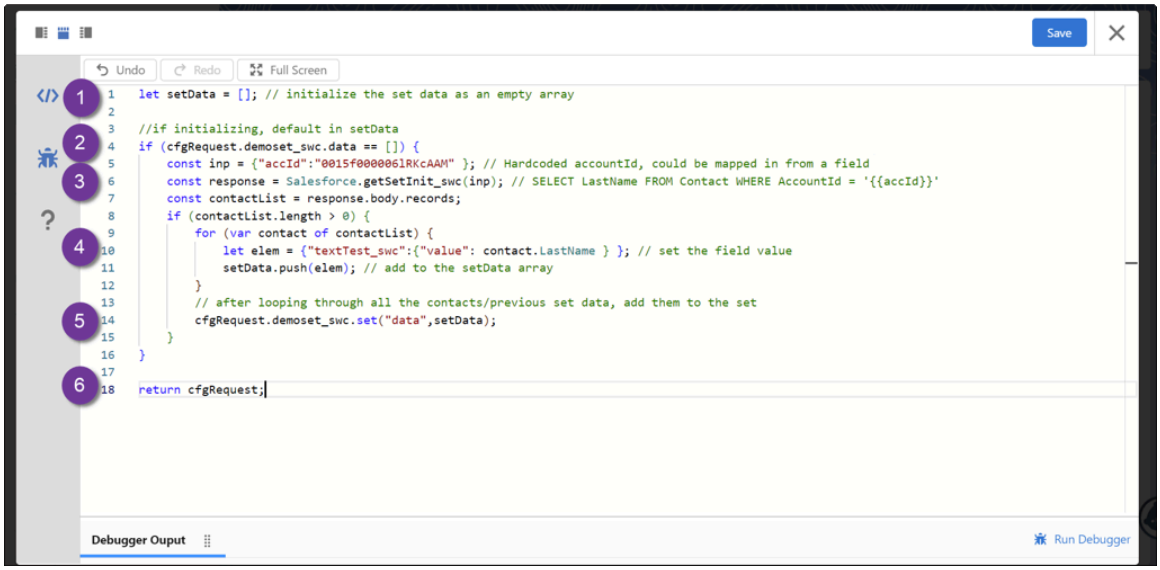
Script walkthrough



1. The setData array is initialized as an empty array (line 1).
2. Check whether the set already has data in it, either from the API payload or from a previous configuration (line 3).
3. Define the inputs for the query to Salesforce (line 5). In this example, the account ID is hard coded but could be passed from a field or mapped from a twin field on the quote. Make the SOQL query to Salesforce by using the external connection that was defined, then save the response (line 6) and get the records array (line 7).
4. If the call returned records (line 8), loop over the records (line 9) and set the field value of “textTest_swc” to the contact LastName (line 10). Finally, add the new set element to the setData array (line 11).
5. After looping through the contacts, add all of the setData to the set, “demoSet_swc”, in the configuration request (line 14).
6. Finally, return the updated configuration request (line 18).

To reuse this script, make changes to the following lines:

1. Line 5: Update the account ID (0015f000006IRKcAAM) to a new value, or twin a field from the quote.
2. Line 6: Update the name of the Salesforce connection.
3. Line 10: Update the field name (textTest_swc) to a field in the set that you are using.
4. Line 16: Update the set name (demoset_swc) to the name of the set that you are using.

Setting data from an external connection each configuration

If instead you want defaulted data to overwrite whatever the user had entered in the previous configuration, delete the `if` clause in line 4.

If you want only certain fields in the set to overwrite user-edited fields, but you want to keep other fields between configurations, you must reference the set indexes explicitly:

```
cfgRequest.[setName].data[i].set("fieldName",{"value":"fieldValue"});
```

Replace the following to use in your enrichment:

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- `setName`: The variable name of your set
- `fieldName`: The variable name of your field
- `i`: An existing index at which you would like to determine the field's value
- `fieldValue`: The value you would like to set for the field

Note: To ensure that you are not referencing an empty data array, this call must occur after the set default code in the enrichment script. Otherwise, it will cause a null reference error upon initialization.

You also must guarantee that the index you are referencing in the data exists. Including a check for the length of the set data array is a good way to guarantee that it exists. See the following example.

```
if (cfgRequest.setTest.data.length >= 1) {

 cfgRequest.setTest.data[0].set("setTestNumberField",{"value":ca
rdNumber});
     cfgRequest.setTest.data[0].set("setTestSingleSelect
 picklist",{"value":"set option 1"});
}
```

Notice that while the `length` function returns "1", the index is "0", because indexes are referenced starting at 0 as the first index.

Configuration experience

Use Case: Using the Init enrichment to Populate set values

The Picklist Extension Pricing enrichment

Use the Picklist Extension Pricing enrichment to adjust pricing according to location or other factors.

The Picklist Extension Pricing enrichment can be used to dynamically change the pricing of Field Options in designated picklist extension fields.

Prerequisites

Submit a support case through the CPQ Support site or by emailing support@logik.io requesting the enrichment be enabled for your environment. Please provide a use case for using the enrichment.

Picklist extension fields need to have the "Enable for enrichment" toggle turned on to be affected by the enrichment.

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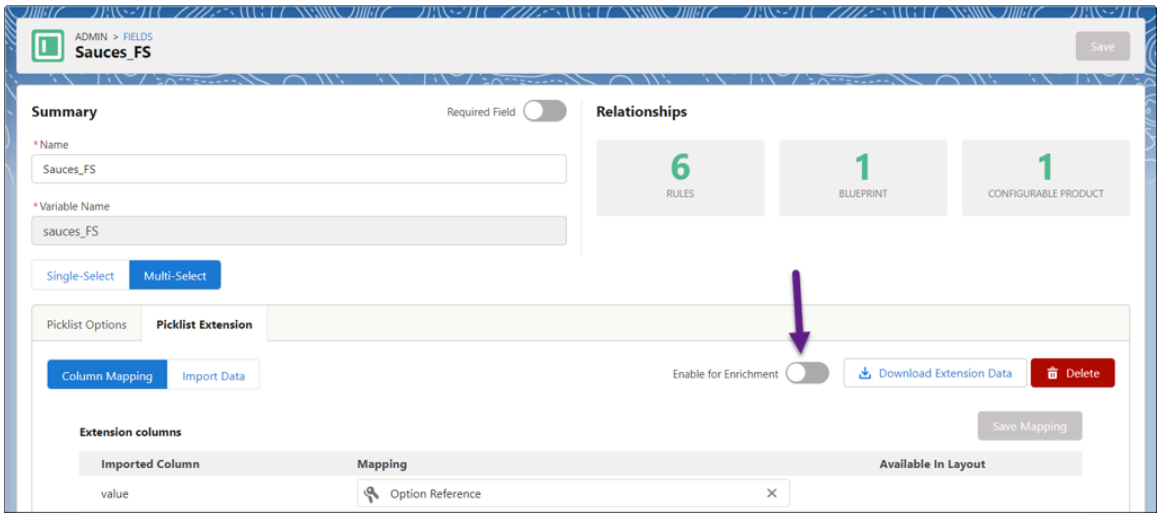
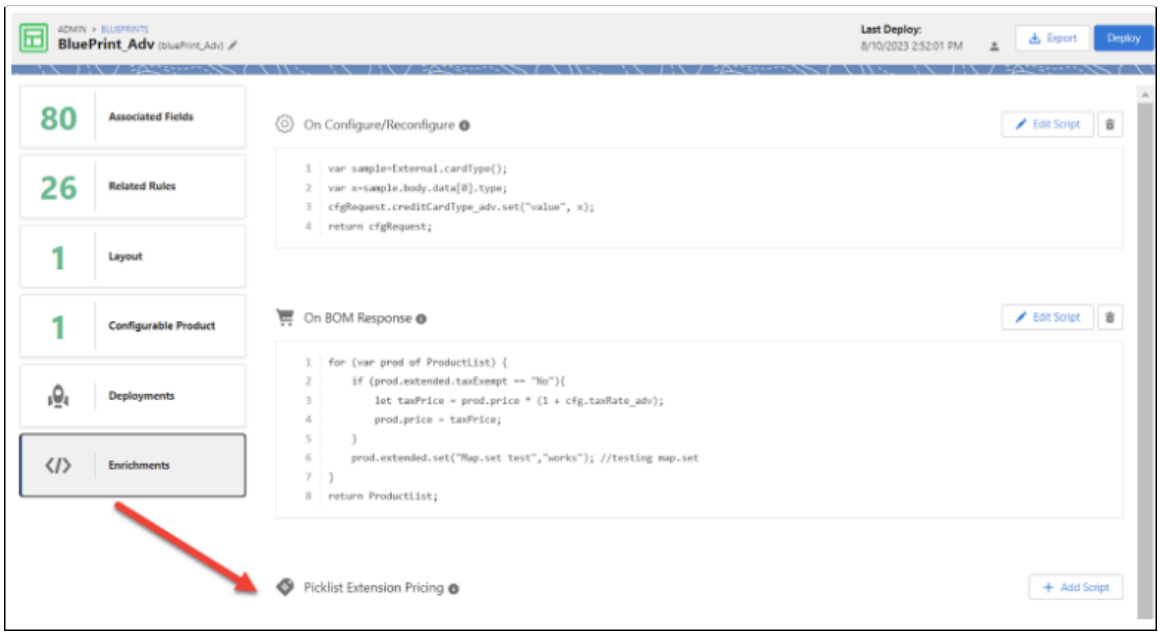


The enrichments tab will be shown when navigating to a blueprint in the CPQ Admin.



Watch this demonstration of the Picklist Extension Pricing enrichment in action.

PLE enrichment Script Demo

Demonstration script

The following script was used in the demonstration video.

```
let sourcesArr = [];
let componentArr = [];
let accessoryArr = [];

pleRequest.forEach(o => {
    if(o.fieldVariableName == "alternateEnergySources") {
        sourcesArr.push(o.optionValue);
        //o.price = "1000";
    }
    if(o.fieldVariableName == "alternateEnergyComponents") {
        componentArr.push(o.optionValue);
```

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```
        //o.price = "900";
    }
    if(o.fieldVariableName == "alternateEnergyAccessory") {
        accessoryArr.push(o.optionValue);
        //o.price = "800";
    }
});

var sourceMap = new Map();
if(sourcesArr != null && sourcesArr.length != 0) {
    var sourceRows = lookup("Select Energy, BasePrice from
 AlternateEnergyPricing where Zip = :zip and Energy IN
 (:value)", { "zip": cfg.zipCode, "value": sourcesArr });
    for (var row of sourceRows) {
        sourceMap.set(row.get("Energy"), row.get("BasePrice"));
    }
} else {    //source PLE not part of request. So populate this
 map for other PLEs
    console.log("Entered non PLE in request case");
    sourcesArr = ["Solar", "Wind", "Nuclear"];
    var sourceRows = lookup("Select Energy, BasePrice from
 AlternateEnergyPricing where Zip = :zip and Energy IN
 (:value)", { "zip": cfg.zipCode, "value": sourcesArr });
    for (var row of sourceRows) {
        sourceMap.set(row.get("Energy"), row.get("BasePrice"));
    }
    console.log(sourcesArr);
    console.log(sourceMap);
}

var multiplierMap = new Map();
if(cfg.alternateEnergySources != "") {
    var multiplierRows = lookup("Select Group, Factor
 from AlternateEnergyMultiplier where Zip = :zip and
 Energy = :energyVal", { "zip": cfg.zipCode, "energyVal":
 cfg.alternateEnergySources });
    for (var row of multiplierRows) {
        multiplierMap.set(row.get("Group"), row.get("Factor"));
    }
}
let sourcePrice = sourceMap.get(cfg.alternateEnergySources);
if(sourcePrice != null) {
        pleRequest.forEach(o => {
        if(o.fieldVariableName == "alternateEnergySources") {
            o.price = sourceMap.get(o.optionValue);
        }
        if(o.fieldVariableName == "alternateEnergyComponents") {
            let compPrice = multiplierMap.get("Component");
            if(compPrice != null) {
                o.price = sourcePrice*compPrice;
            }
        }
        if(o.fieldVariableName == "alternateEnergyAccessory") {
            let multA = multiplierMap.get("Accessory");
            if(multA != null) {
                o.price = sourcePrice*multA;
            }
```

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```
        }
    });
}

console.log(sourcesArr);
console.log(componentArr);
console.log(accessoryArr);
console.log(sourceMap);
console.log(multiplierMap);

return pleRequest;
```

Sample design, use cases, and pleRequest elements

Sample enrichment script design:

1. Loop through picklist options and store them for reference later (pleRequest.forEach())
2. Get prices for options and store them (either via table lookup or in the function itself)
3. Set the price for the right option (pleRequest.forEach())

Use cases:

- ZIP code dependent pricing
- Price multipliers and discounts
- Delta pricing
- Independent component pricing subtraction

pleRequest elements:

- pleRequest.fieldVariableName: variable name of the picklist field
- pleRequest.optionValue: picklist options defined in the field
- pleRequest.productId: ID of the product in the PLE mapping
- pleRequest.price: price to be set in the extension

Referencing elements in the `pleRequest` object is similar to referencing objects such as `ProductList`, `cfg`, and `cfgRequest`. If a variable is substituted into `pleRequest` (either in a `for` loop or using the `forEach` function), the element is still referenced after the variable, followed by a period.

Related topics

CPQ scripting language reference

Library functions

Library functions can speed implementation and reduce maintenance costs by enabling code reuse across rules.

Library functions enable efficient code reuse across rules and enrichments. They are designed to minimize redundant logic, speed up implementation, and reduce maintenance costs, especially in complex scenarios that involve high-SKU or physics-driven configurations.

Attributes and capabilities

Centralized management: Search and manage library functions through a dedicated UI.

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Reusable and namespaced: Define a library function once and invoke it using `fn.functionName(params)`.

Configurable parameters: Define input parameters with data types and default values. Parameter schemas can be modified post-creation, allowing flexibility in managing function inputs.

Customized output: Specify return types.

Callable across modules: Library functions are callable in both the configurator and Transaction Manager.

Managed table queries: Library functions support managed table lookups.

Enabling library functions

Submit a support ticket to enable library functions. Once the support ticket is completed, enable the new UI by navigating to **Utilities** > **Settings** > **Admin Version** > **New**, and clicking **Save**.

This setting can be toggled at any time.

Supported input/output data types

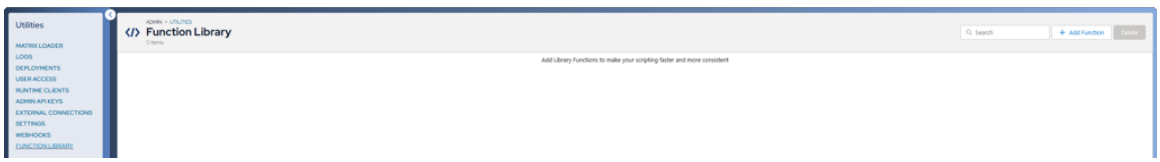
Supported input/output data types

Type	Description
TEXT	Plain text strings
NUMBER	Numeric values
BOOLEAN	Logical true/false values
DATE	Dates (without time component)
JSON OBJECT	JSON formatted objects
ARRAY	Ordered collections of values

Note: Empty MAP or ARRAY types are not supported. Unsupported types default to TEXT.

Usage examples

Library functions can be found in the function library (in the Utilities section).



To add a function:

1. On the Function Library tab, click **Add Function**.
2. Name the function, specify the return type, and enter a description.

Script content:

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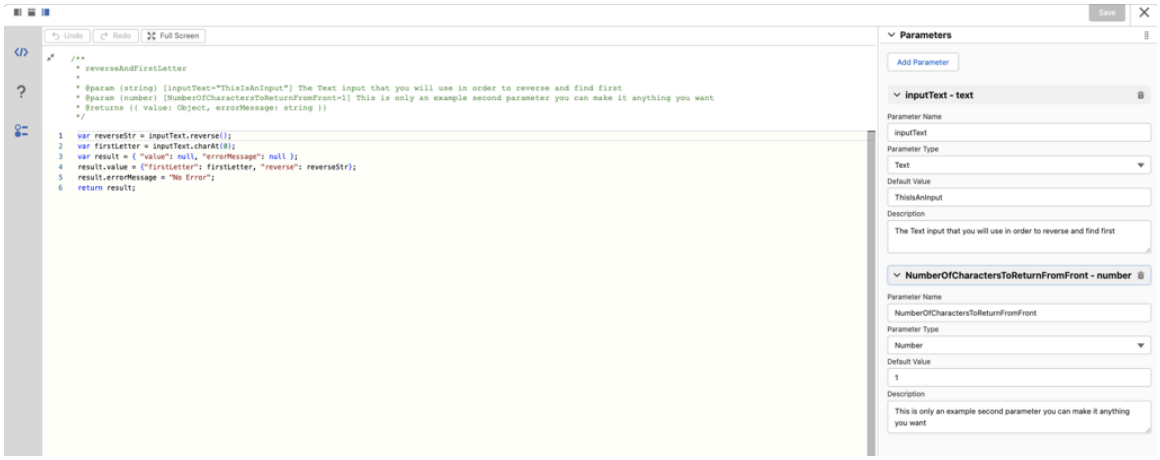
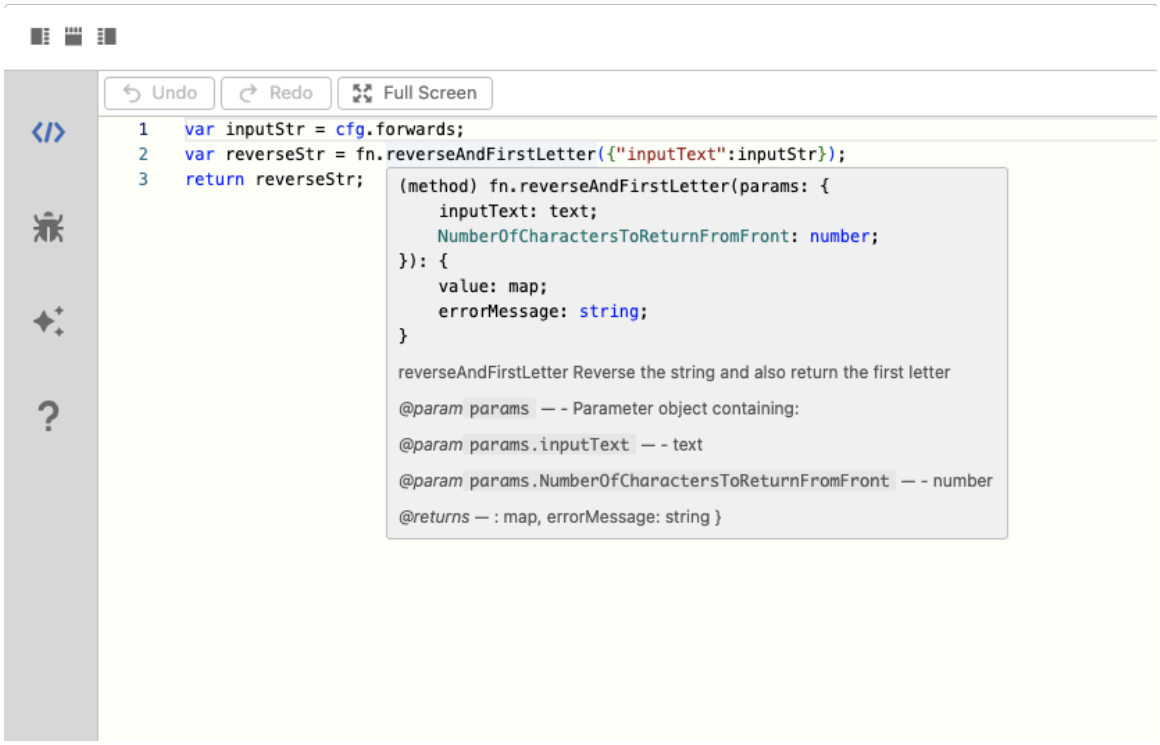


Calling the function:



Limitations

- Recursive calls are not supported.
- External API calls and async operations are not supported.
- Parameters are passed by copy, not by reference.
- Functions must be free of side effects, external calls, and Logik field references.

General guidelines

- When a library function changes, redeploy the affected blueprints.
- When defining a function, name and describe its inputs to provide visibility into its usage.

The lookup function: commands and syntax

Use the lookup function to return information from a user-managed table.

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CPQ uses a SQL-based query language to look up user-managed tables.

The lookup function returns up to 10,000 rows from a table and times out after 30 seconds if the search is still querying. For information about uploading CSV files into managed tables, see Matrix Loader: CSV table upload.

To learn about general guidelines for using the lookup function, see Minimizing table queries.

Supported commands

- SELECT selects columns from a table (separated by ",")
- FROM selects the table that the query will take data from
- WHERE sets the conditions where the other columns will be searched from
- AND conjoins two WHERE conditions (both must be true)
- OR conjoins two WHERE conditions (either can be true)

Syntax

Example query:

```
var tableResults = lookup("SELECT column1, column2 FROM
 tableName WHERE column3 = :key1 OR (column4 != :key2
 AND column5 IN :list)", {"key1": "value",
 "key2":cfg.[singleFieldName], "list":cfg.[multiFieldName]});
```

The first parameter is the SQL-based command string used to query the managed table.

The second parameter is the key-value map to be inserted into the query. The values can be constants, variables, or fields.

The tableResults variable holds the resulting array. This variable cannot be returned itself. Results must be referenced by index (`tableResults[0], tableResults[1]...`) and can contain any number of results, or none.

If you receive the error "...Index '0' is out of bounds..." when working with table lookup, you are probably trying to reference an empty array. We recommend running a null check on your table results.

Comparators:

=
: Is equal to

!=
: Is not equal to

>
: Is greater than

<
: Is less than

>=
: Is greater than or equal to

IN
: Is equal to any (in a set)

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The format for IN works for any collection in the following format:

```
lookup("SELECT column1 FROM table WHERE column2 IN
 (:options)",{options = cfg. [multi picklistField]});
```

Related topics

Minimizing table queries

Indexes and natural keys for managed tables

Minimizing table queries

Learn how to minimize queries to maximize performance.

The more queries you have, the more they impact performance. This article discusses two ways to minimize queries to help keep performance as fast as possible.

Implementing rules

When you create a configuration, consider how you might implement it to minimize queries.

For example, suppose you have a table of the length, width and height of various components. Once you select a part number, you want to query those values to calculate the volume. The best way to query that information depends on the use case and where the values are needed downstream of the query.

If the configuration only uses the total volume, the best approach is to put the query in the advanced determination rule for the volume, similar to this simplified code:

- Query L,W and H from table
- Var vol = L*W*H
- Return vol

Total queries: 1.

However, if you are writing a volume rule and you know you will need to use the length, width and height values elsewhere, the above code is not appropriate. Instead, you should write your determination rule as follows:

- Var vol=L*W*H
- Return vol

You should have the queries in the determination rules. Determination rules can only define one field at a time, so this would need three determination rules—one rule each for length, width and height—and three queries. Doing this prevents running a fourth query (one in each length, width and height rule, and one in the volume determination rule).

Another way to reduce queries is to be aware of the fields associated with a rule. Suppose you have a query in a rule that references a lot of fields. The rule runs every time one of the fields associated with that rule changes. Therefore, the query runs every time.

Let's say you need to calculate the volume and then multiply that volume by density (which could change based on material the user selects) to get the total weight. The user does not need to use volume anywhere else downstream. Here is a sample script:

- Query L,W,H from table
- Var vol= L*W*H

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- Var mass = vol * cfg.density
- Return mass

The problem is that every time the density changes, the rule runs and then the query runs. But the values of L, W and H do not change. Therefore, the processor has to go to the table, find the values for L, W and H, and redefine the variable `vol` to the same value it was before. A better approach is to calculate volume as a separate field with a separate rule. Then, write the mass rule as follows:

```
var mass = cfg.volume * cfg.density;
return mass;
```

Mass still recalculates every time, but it is intended to. No processing time is wasted doing unnecessary querying and redefining values.

Querying a list

As seen above with L,W and H, you can pull multiple columns from a table in a single query. At other times, you might want to query the table on multiple values. For example, suppose you have a multiselect picklist (field name `selectedColors`) of different colors. You also have a "hues" table that has a red, blue and green column to tell you the ratios.

If you wanted to query the table for all the selected options of the multiselect picklist, there are two options.

```
for (color of cfg.selectedColors){
        var tableResults=lookup("Select blue, red, green from
 hues where value := value", {"value": color});
        //more code
```

This `for` loop means that the number of queries is based on the number of selected options for the `selectedColors` field. Alternatively, the following code queries the table once.

```
var tableResults=lookup("select blue, red, green from hues where
 value in (:list)", {"list": cfg.selectedColors});
```

This method is better.

For more information on what is supported in a query, see The lookup function: commands and syntax.

Debugging in CPQ

How to use the debugger to perfect your scripts before deployment.

When you need to fix a script in CPQ, the debugging tool in Advanced Functions and Enrichment Scripts can help. This guide shows you how to write debug JSONs to isolate and test your scripts before deployment. By following these best practices for debugging faulty scripts, you can help ensure your blueprints run flawlessly.

General guidelines for debugging

Using `console.log()`: When coding a complex behavior, you may have to check whether certain values are set or manipulated the correct way. Instead of seeing only what is returned by the rule, use the `console.log([variableName])` function in a script to show the value of the variable at that line when run in the debugger.

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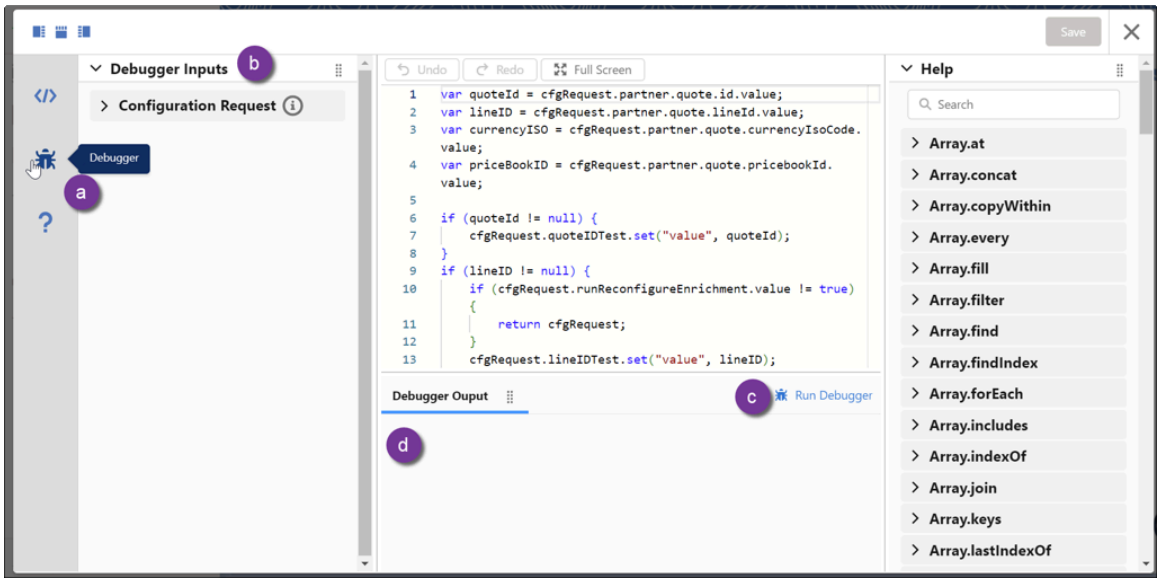
Comment out blocks of codes: When a script becomes long, it may be necessary to comment large sections of code to see where the behavior originates. This can usually be done by using `//` or `/* */` and then debugging.

Comment out debug JSON for future use: If you are continually updating a rule during implementation, it's a good idea to save your debugging JSON either at the top or bottom of the script inside a comment block. That way, when the script is saved, the JSON can also be saved for future reference.

For more tips on these features, see Using comments and the console to debug scripts.

How to use the debugger



When in the script editor:

- Toggle the dubugger options by clicking the bug icon (a).
- Enter your JSON in the Debugger Inputs section (b), as it would appear when your rule runs during configuration.
- Run your rule with the debugger inputs by clicking **Run Debugger** in the Debugger Output panel.

  Note: The script does not have to be saved in order to run the debugger. The state of the script when the button is clicked is used when testing.

- Returned objects and console.log information appear in the Debugger Output panel (d).

The CPQ debugger uses JSON format, which is written using attribute-value pairs. The attributes are the variable names of the fields used in the rule, and the value is the field's data in its object format.

Note: As long as a field is referenced in the rule or enrichment, it must have a corresponding attribute in the JSON, or the script cannot be run in the debugger.

Also note:

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- The JSON package is wrapped using curly brackets ({ })
- Each field is separated by a comma (,).
- Each attribute-value pair is separated by a colon (:).

The structure of the JSON you use depends on the object type of each field, as well as whether the script is being used for a rule or an enrichment.

Field-specific JSON formatting

- Text, numbers, Boolean values, and single-select picklists fields are the easiest fields to debug, as they correspond to simple, singular-value objects such as strings, numbers, and Boolean values.

```
{
 "cfg":{
  "textField": "value",
  "singleSelect picklist": "value",
  "numberField": 123,
  "booleanField": true
 }
}
```

- Date fields use the ISO-8601 international standard to hold date information. If a field inputs dates in the debugger, the data should be a string in the format `YYYY-MM-DDThh:mm:ss.sssZ`.

```
{
 "cfg":{
  "dateField": "2024-01-01T00:00:00.000Z"
 }
}
```

- Multi-select picklists are in the form of an array that contains strings. Even with only one option selected, the strings should be in an array format when debugging, wrapped by square braces ([ ]) and separated by commas (,).

```
{
 "cfg":{
  "multiSelect picklist": [
   "option 1",
   "option 2"
  ]
 }
}
```

- Product pickers are unique to reference in a rule or enrichment, since they have their own type of simple rules, bulk actions. They can be referenced only by their picklist option, treating them as a single-select or multi-select field. Or, the debugger can reference a product picker subfield or aggregate using the key `pkr`.

```
{
 "cfg": {
  "productPickerSS": "selectedValue",
  "productPickerMS": [
   "selectedValue1",
   "selectedValue2"
```

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```
  ]
 },
 "pkr": {
  "productPicker2": {
   "value": "productPicker2_option1",
   "select": true,
   "quantity": 100,
   "exampleSubfield": "Example Value",
   "aggregates": {
    "quantity_max": 100
   }
  }
 }
}
```

Note that when you reference a product picker subfield in a rule, you need to use the `pkr` object and not `cfg`.

```
let x = pkr.productPickerName.subFieldName
```

- Sets cannot be referenced by advanced functions, but the fields contained in them can. Due to the nature of the set field, a set's rows can be determined and referenced only in the On Configure/Reconfigure enrichment. However, you can test for when a field such as optionValue is in a rule.

```
{
 "set": {
  "exampleSet": {
   "index": 1,
   "optionValue": "product1",
   "selectOption": true,
   "size": 2,
   "aggregateExample1": 1
  }
 }
}
```

To learn more about defaulting a set's fields, see Scripting: How to populate set values.

Context-specific JSON formatting

Field inputs are entered in JSON format, using the field variable name as the key and the intended value as the value.

```
{
  "cfg": {
    "exampleField": "Example Value"
  }
}
```

On configuration and reconfiguration, inputs are entered in JSON format, using the field variable name as the key. The value is an object consisting of two properties: *`value`* and *`userEdited`*. *`value`* should be set to the intended field value. *`userEdited`* is a Boolean value.

Context-specific JSON formatting: fields

```
{
 "cfgRequest": {
```

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```
  "exampleField": {
   "value": "Example Value",
   "userEdited": false
  },
  "exampleMultiselect picklist": {
   "value": [
    "one",
    "two"
   ],
   "userEdited": false
  }
 }
}
```

For more information about how to use the *userEdited* property, see Scripting: Checking for first and subsequent configurations

Context-specific JSON formatting: product pickers

```
"cfgRequest": {
 "pkr": {
   "productPicker1": {
     "data": [
      {
       "value": {
        "value": "productPicker1_option1",
        "userEdited": false
       },
       "select": {
        "value": true,
        "userEdited": false
       },
       "quantity": {
        "value": 100,
        "userEdited": false
       },
       "exampleSubfield": {
        "value": "Example Value",
        "userEdited": false
       }
      }
     ],
     "aggregates": {
      "quantity_max": {
       "value": 100
      }
     }
    }
   },
   "productPicker2": {
    "value": "productPicker2_option1",
    "userEdited": false
   }
 }
}
```

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Context-specific JSON formatting: sets

```
{
 "cfgRequest": {
  "set": {
   "exampleSet": {
    "data": [
     {
      "index": {
      "value": 1
      },
      "optionValue": {
       "value": "product1",
       "userEdited": false
      },
      "selectOption": {
       "value": true,
       "userEdited": false
      },
      "textField": {
       "value": "a",
       "userEdited": false
      }
     }
    ],
    "size": {
     "value": 1,
     "userEdited": false
    },
    "aggregateExample1": {
     "value": 1
    }
   }
  }
 }
}
```

Context-specific JSON formatting: product pickers in sets

```
 "cfgRequest": {
  "set": {
   "exampleSet": {
    "data": [
     {
      "index": {
       "value": 1
      },
      "optionValue": {
       "value": "product1",
       "userEdited": false
      },
      "selectOption": {
       "value": true,
       "userEdited": false
      },
      "productPicker1InSet": {
       "value": [
```

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```
        "option1_Of_productPicker1InSet",
        "option2_Of_productPicker1InSet"
       ],
      "userEdited": false
      },
      "pkr": {
       "productPicker2InSet": {
        "data": [
         {
          "value": {
           "value": "option1_Of_productPicker2InSet",
           "userEdited": false
          },
          "select": {
           "value": true,
           "userEdited": false
          },
          "quantity": {
           "value": 100,
           "userEdited": false
          }
         }
        ],
        "aggregates": {
         "quantity_max": {
         "value": 100
         }
        }
       }
      }
     ],
     "size": {
      "value": 1,
      "userEdited": false
     },
     "aggregateExample1": {
      "value": 1
     }
    }
   }
  }
}
```


On BOM Response enrichment:

Product List: Inputs are entered as an array of objects in JSON format, using the property variable name as the key, and the intended value as the value.


```
[
 {
  "id": "test product",
  "quantity": 2
 },
 {
  "id": "test product2",
  "quantity": 5,
```


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```
  "bomType": "MANUFACTURING"
 }
]
```

Picklist extension Pricing enrichment:

picklist extension Request: Inputs are entered as an array of objects in JSON format, using the property variable name as the key, and the intended value as the value. In the example, “set” and “index” are only needed if using a set.

```
[
 {
  "fieldVariableName": "myField1",
  "set": "mySetVariableName1",
  "index": 1,
  "optionValue": "Option 1",
  "productId": "myProduct1",
  "productUniqueIdentifier": "myId"
 }
]
```

If the debugger’s behavior is different from runtime behavior

In almost every case, the debugging JSON needs to match exactly what would normally be entered during runtime as valid values for the fields. Make sure that you are using the correct data type or structures described above.

In other cases, similar rules may be acting on the same field. In this case, the debugger will not be helpful, as it can only show the behavior of one rule at a time. It might be necessary to inactivate entire rules and redeploy in order to rule out the undesired behavior.

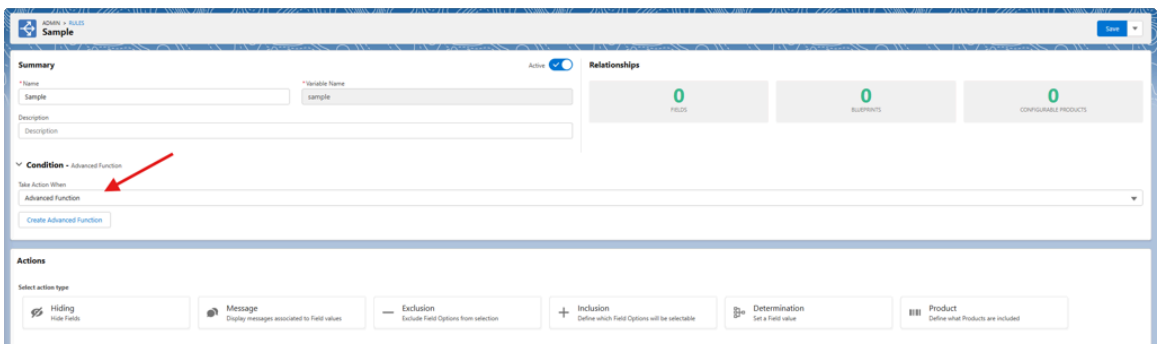
If all else fails, please open a case with our support team, or email us at support@logik.io.

Using comments and the console to debug scripts

Learn how comments and the console can help you debug your scripts.

CPQ has several areas where the admin can use scripts to define behavior. These include advanced conditions for rules, advanced actions for rules, and enrichments.

Advanced conditions for rules



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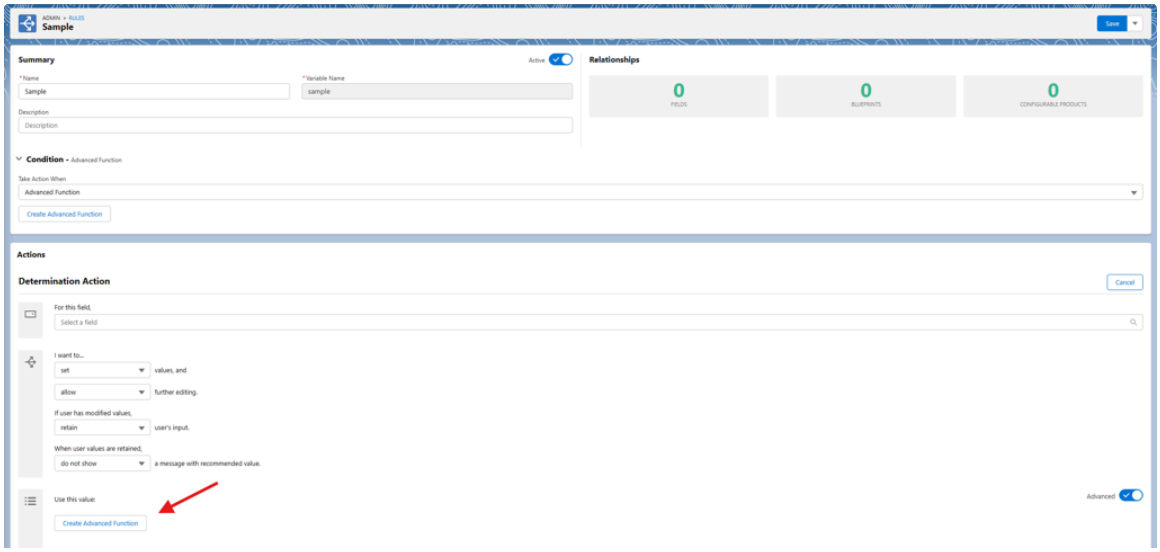
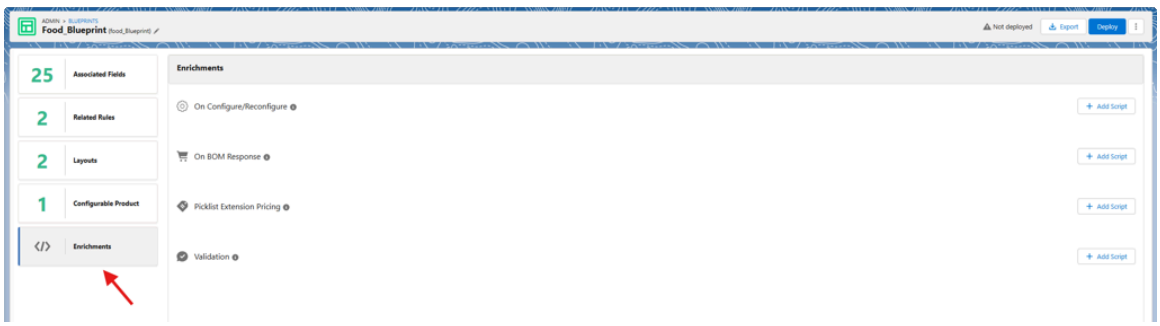
Advanced actions for rules



Enrichments

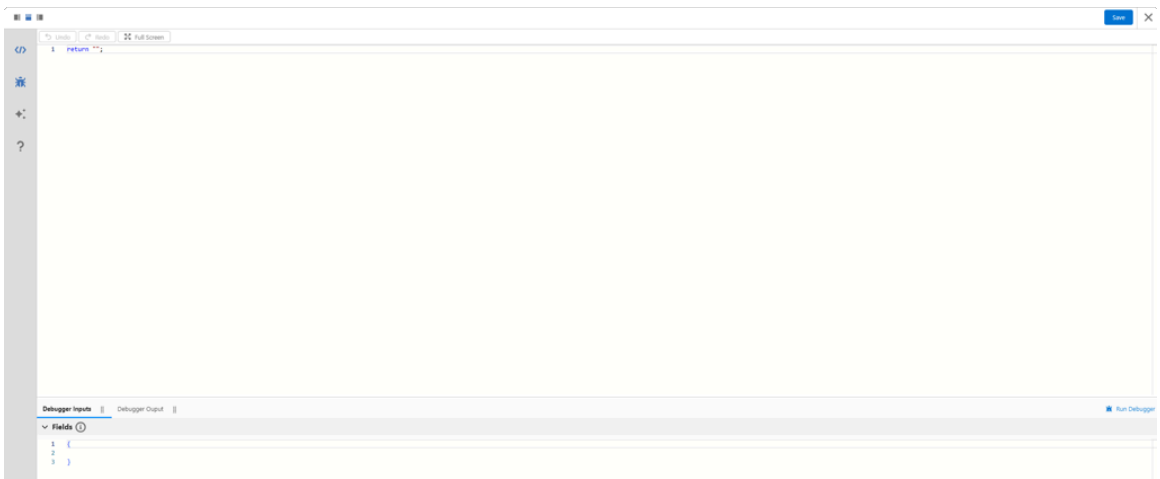


This article highlights a few key features to help you test and prepare your code before you deploy it in a blueprint.

Note: The scripting language in CPQ is JavaScript-like, meaning it follows JavaScript-style syntax but lacks the full capabilities of JavaScript.

Console.log

When the admin starts to write a script, the CPQ Admin looks like this:



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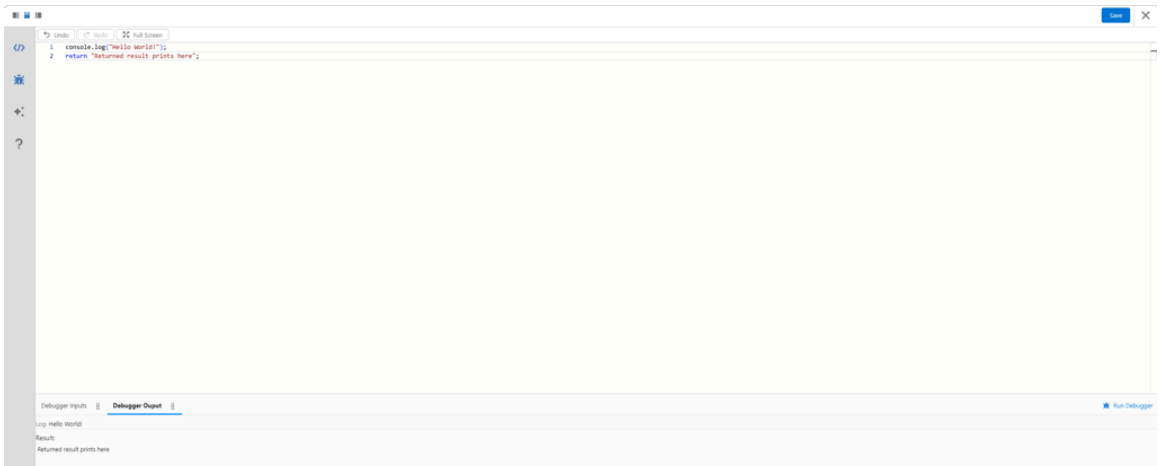
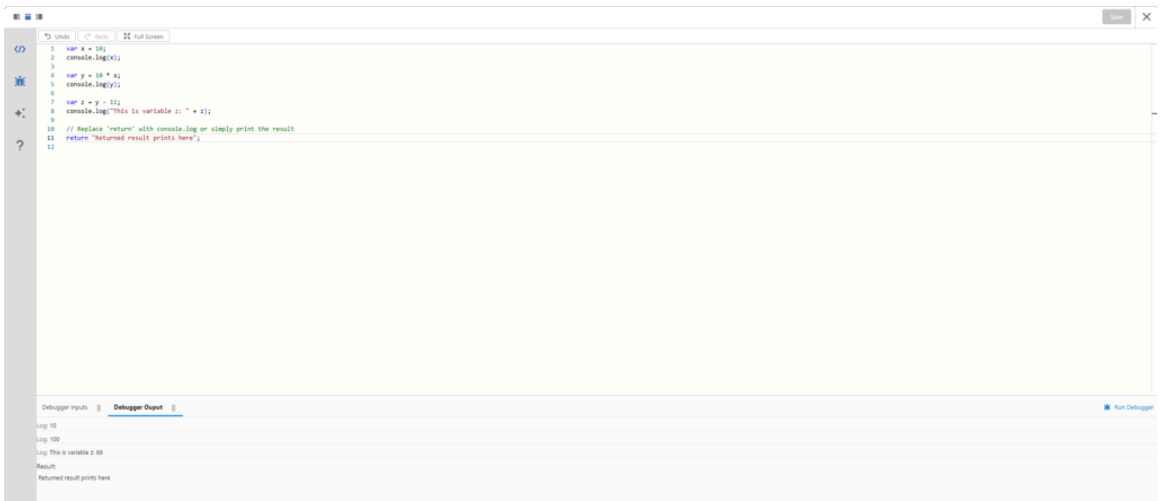
Clicking **Run Debugger** in the lower panel raises the debugger and the Debugger Output section. This section is also called the console.

This box shows the output of the script based on the script and the inputs added to the debugger (if applicable). For example, the BOM enrichment script shows the updated BOM based on the enrichment and inputs put in the debugger.

Lines of code can be logged to the console. So, you can send text to the console, as in the following:



You can also log variables, which is helpful to make sure your script is working correctly. You can add text to the log to help the lines of code stand out:



Comments

Comments are lines of code that the script ignores. Comments have a few uses. First, it is very helpful to future coders (and to you, when you revisit the code much later) if you have commented on how and why you coded lines of the script as you did. Commenting can also be used to save code to use again. And if you do not use a block of code but may want to use it later, you can comment it so it does not affect your current work.

You can write comments on a single line or across multiple lines.

To add single-line comments, use two slashes. Anything written after the slashes on the same line is ignored by the script.

```
// This comment is ignored by the script
```

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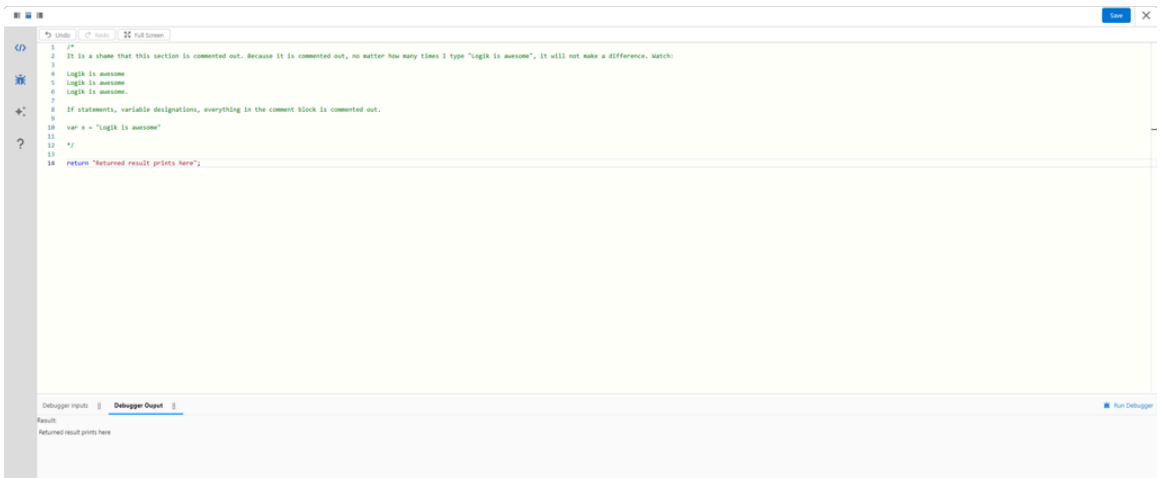
However, any code before the slashes is still executed. For example, in the image below, the variable `be4comment` remains 12345, as the script ignores the comment "67890" following the slashes.



To create a multiline comment, add a slash and an asterisk before the comment. Add an asterisk and a slash after the comment.

```
/*
Your comment goes here.
It can span multiple lines.
*/
```

When you add a multiline comment, be careful not to comment out important elements such as closing brackets, parentheses, or return statements.



When you frequently revisit or modify a rule that takes inputs from many other fields, it can be helpful to paste the input into the debugger section as a multiline comment. This way, when you return to work on the rule later, you won't need to rewrite the inputs.

```
/* inputs
{"Field1": "testValue1",
    "Field2Quantity": 2,
      "Field3": "testValue3"
    },
*/
```

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Test a CPQ configuration

Two ways to test a CPQ configuration without creating a quote in Salesforce

Assuming that you have a layout for your blueprint, there are two ways to test your CPQ configurations without creating a quote in Salesforce. You can access all the capabilities of your configuration and see how your layout appears to an end user.

For more information, see the following topics:

The test frame

Use case: Displaying the CPQ native UI via direct URL

Referencing a product picker

You can reference a product picker in the On BOM, Pricing, and Validation enrichments by modifying your enrichment script.

Product pickers are available for reference in On BOM, Pricing, and Validation Enrichments.

When referencing a product picker in any of these scenarios, use the `pkr.<Product Picker varname>` notation in your enrichment script. As an example, the following snippet iterates over the options in `somePicker` and creates a map where each record's option value and quantity are stored.

```
var quantityMap = new Map();
pkr.somePicker.data.forEach((row) => {
 quantityMap.set(row.value, row.quantity);
 }
);
```

If you intend to use the Pricing enrichment to dynamically set prices for the product picker options, be sure to enable this feature on the product picker. To do this, in the product picker administration page, click the cog to open the Product Picker Settings dialog. Then, turn on **Enable for Pricing Enrichment**.

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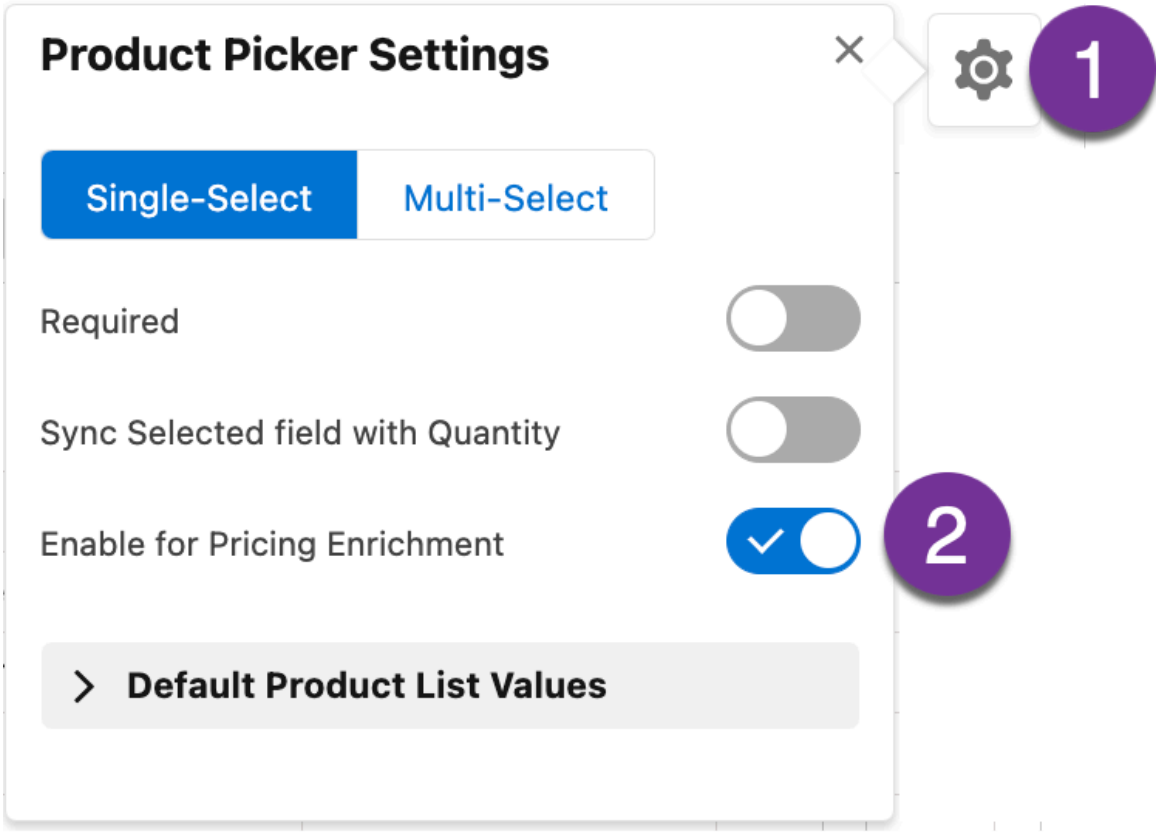

In the related blueprint's Picklist Extension Pricing enrichment, your script will work as follows:

```
pleRequest.forEach((option) => {
 if (quantityMap.has(option.optionValue)) {
  option.productId = option.optionValue;
  option.price = blah; // complete this to suit your use case
 }
});
```

Scripting: Checking for first and subsequent configurations

You can test whether a configuration is being initialized or being reconfigured, and set code to execute based on the result.

Sometimes it is necessary to execute code only when the configuration is being initialized, or only when it is being reconfigured. For example, you might want to set a field to its default values at the beginning of a configuration, but keep the user's selection during any future edit.

The methods below can be combined without interfering with one another and can lead to flexible and unique code behaviors for your configurable products.

userEdited: running only when a field was not edited

Two field properties can be accessed in the On Configure/Reconfigure enrichment: *`value`* and *`userEdited`*. While the *`value`* property holds the data contained in the field and is usually what will be accessed when scripting, *`userEdited`* contains a Boolean value that stores whether the field has been changed by the end user.

This can be used in if statements to write a default value only when the field has not been changed by the user. For example:

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```
if (cfgRequest.[fieldVariableName].userEdited == false) {
      //code to run
}
```

All fields will have the *userEdited* property set to false when the configuration is initialized, but when reconfiguring, some will be set to true based on the changes made by the user. If you'd like a behavior to occur only when a field has or hasn't been edited, write the code to execute after one of these checks.

The lineId partner field

Alternatively, if you'd like to make only one check in the On Configure/Reconfigure enrichment script, and have Salesforce integration, the *lineId* partner field will only be populated with the Salesforce ID of the parent configurable product's quote line when reconfiguring. It will not be populated when a configuration is initialized.

This is because when a CPQ configuration is initialized, this ID does not yet exist, because the configuration has yet to be saved. Only after a CPQ configuration has been created and the quote line editor saved are any quote lines created in Salesforce. So, when we see that the *lineId* partner field is present, we can be sure that the current session is due to a reconfiguration, not a new configuration.

Script writers can take advantage of this distinction by putting any code that must be run only on initialization or reconfiguration under a check for this value.

Here is how the field can be referenced in the On Configure/Reconfigure enrichment:

```
cfgRequest.partner.quote.lineId.value;
```

If the behavior should only happen when the configuration is initialized, you could add the following check:

```
if (cfgRequest.partner.quote.lineId.value == null) {
      //code to run
      return cfgRequest;
}
```

Adding the `return cfgRequest;` line in the check guarantees that any code after the check for the line ID will not be executed.

Similarly, if the behavior should happen only when the configuration is reconfigured, add the inverse check:

```
if (cfgRequest.partner.quote.lineId.value != null) {
      //code to run
      return cfgRequest;
}
```

For more information on partner fields, see CPQ fields, system fields, and partner fields.

isInitial: creating a text field

Another way to guarantee that a distinction is present (regardless of whether Salesforce is used as an entry point into the configurator) is to create a field that checks whether the current configuration is due to an initialization or a reconfiguration.

Create a text field with the variable name `isInitial`. Associate the field with your blueprint. Then, in the On Configure/Reconfigure enrichment, add the following lines:

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```
if (cfgRequest.isInitial.value === "Yes" ||
 cfgRequest.isInitial.value === "No") {
      cfgRequest.isInitial.set("value","No");
}
else
{
c fgRequest.isInitial.set("value","Yes");
}
```

On initialization, the `isInitial` field will be blank. Therefore, the script will set the value of `isInitial` to Yes in the `else` clause.

On the first reconfiguration, `isInitial` will be Yes. Therefore, the script will set the value of `isInitial` to No in the `if` clause.

On every subsequent reconfiguration, `isInitial` will be No, and will remain No.

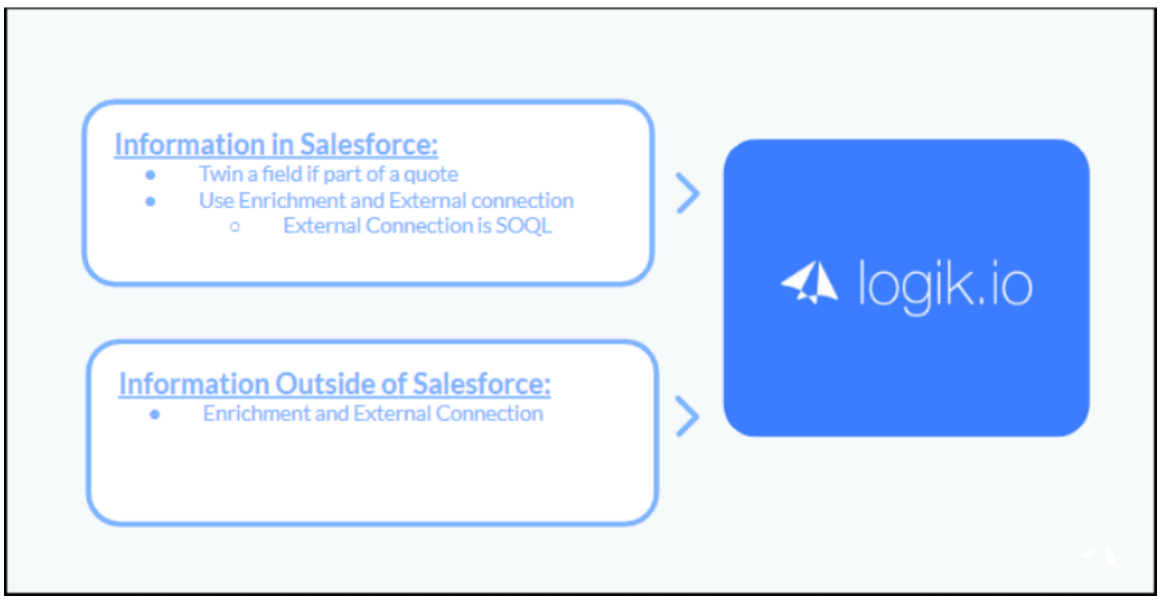
This method has the added benefit of not having to save the entire QLE in SFDC in order to make the distinction between an initialization or reconfiguration. The method immediately detects when the user enters the configurator a second time.

This method also includes the ability to reference the new field as a condition in rules, such as making a rule fire specifically on initialization or reconfiguration. It does not require the behavior to exist only in the On Configure/Reconfigure script. However, to keep the configuring experience similar from the end user's perspective, you should be wary of making too many behavioral differences between initialization and reconfiguration.

Passing data from Salesforce to CPQ fields

Learn how to pass information from Salesforce into CPQ using the On Configuration/Reconfigure enrichment.

Sometimes a CPQ configuration needs information from outside the configuration passed into the configuration on initialization. There are several ways to do this.



If the information can be found on the Salesforce quote, use the twinning method of data transfer. External data would be assigned to a field in CPQ.

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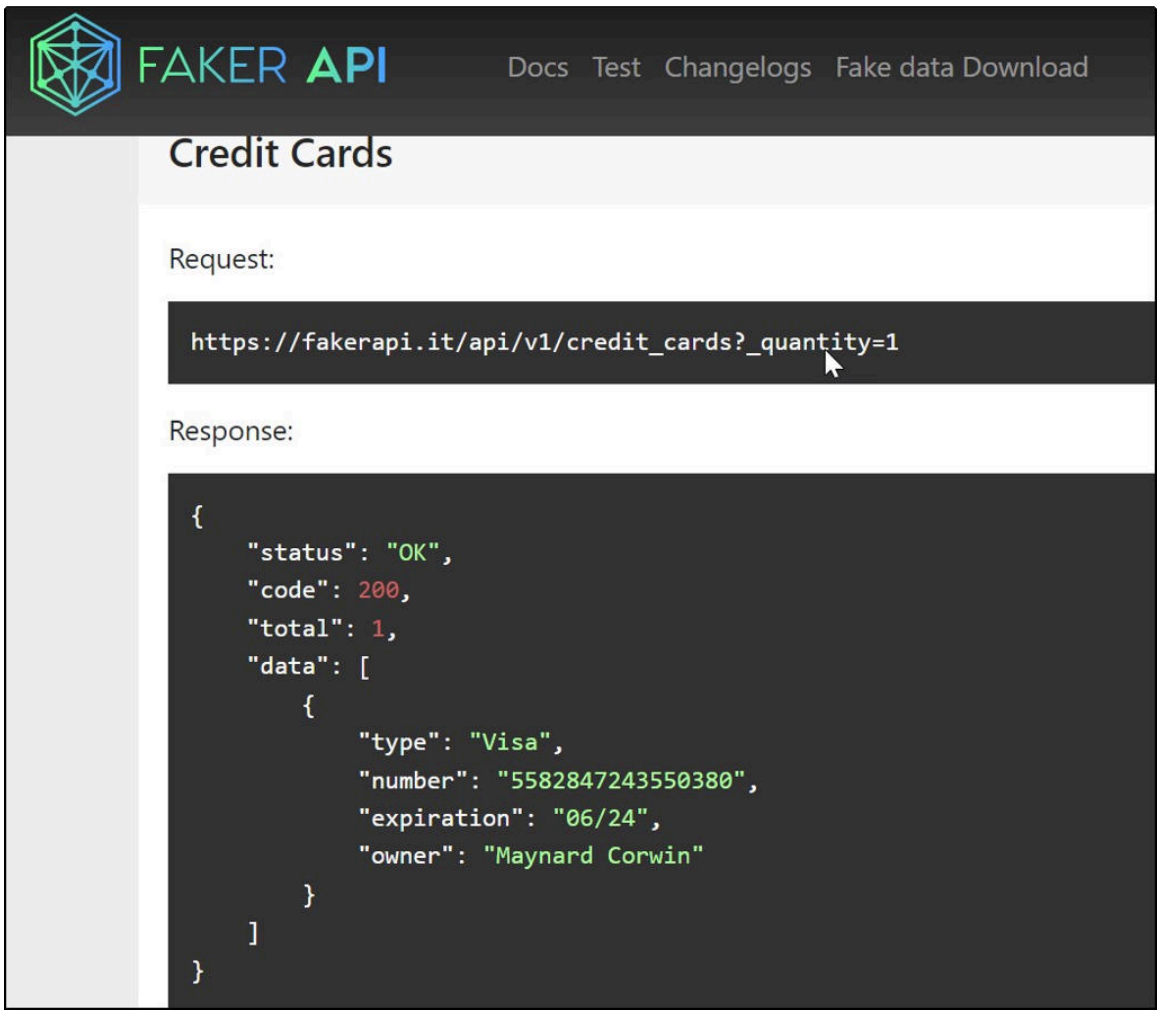
In this example, CPQ uses the On Configuration/Reconfigure enrichment (called "Init enrichment" here) to send an API call to the website "FakerAPI.it". This website sends an API response with fake credit card information.



Our goal is to populate a field in CPQ with the credit card type (Visa, MasterCard, or other).

Setup

The first step of using an enrichment and external connection is to set it up. For instructions, see Using external connections with OAuth support. (Note that the examples in this link focus mostly on the On BOM Response enrichment. This article complements the other because it focuses more on the Init enrichment.)

The following information is used for our external connection to FakerAPI.it.

Parameter	Value
Name	CardType
variableName	cardType
host	https://fakerapi.it
path	/api/v1/credit_cards?_quantity=1
Authentication Type	None

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Parameter	Value
timeout	500

Next, the field in CPQ must be created and associated with the blueprint that uses the enrichment. All four CPQ field types can be assigned data from the enrichment. The data assigned to the field from the API response just needs to match the field.

Scripting the Init enrichment

The final step is to write the script for the Init enrichment. The enrichment's language is based on JavaScript, and users are encouraged to look at the Help section of the advanced function editor for most of the sample scripts needed. The following lines of code are not in the Help section, so are documented here.

To reference an external connection in an enrichment, use the following:

```
Var {varName} =
 External.{externalConnectionVariableName}(inputs)
```

If calling to Salesforce, change `External` to `Salesforce`.

```
Var {varName} =
 Salesforce.{externalConnectionVariableName}(inputs)
```

If there are no inputs, use empty parentheses.

In the Init enrichment, the Fields item changes to Configuration Request, which is referenced in the script as `cfgRequest`. This item is used to define fields in the CPQ configuration that is being initialized. Therefore, if external data is passed to CPQ, it is assigned from the `cfgRequest` JSON object and values have to be programmed into it. That can be scripted two ways (Items in curly braces ({ }) and in italics are determined by the user):

```
cfgRequest.{LogikVariableName}.set(“value”, “{value}”) ;
```

```
cfgRequest.{LogikVariableName}.value = “{value}” ;
```

For example, suppose the company Solar Fare Well sells and installs solar panels. They want to assign two external values to their configurator: which way the roof faces and the square footage of the roof. Their Init enrichment might have the following lines of code:

```
cfgRequest.roofDirection.value= “North”;
cfgRequest.sqft.set(“value”, 500);
```

Notice that the number does not need quotes around it.

The Configuration Request item contains all the requests on the configuration. This includes fields that are twinned into CPQ. Moreover, `cfgRequest` is populated with the twinned fields before the Init enrichment script runs. This means that twinned fields can be used as variables (inputs) for the enrichment script and external connection, which can affect the output from the script and external connection. The following snippet shows the formatting options when getting values from `cfgRequest`.

```
var x = cfgRequest.{varName}.get(“value”);
```

```
x= cfgRequest.{varName}.value;
```

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Sample script solution

When implementing the above code, the first step is to look at the JSON response from the external connection call.

Using the external connection defined above, the following enrichment script returns an API response similar to the one that follows just below.

```
var sample=External.cardType();
return sample;
```

```
"body": {
 "total": "1",
 "code": "200",
 "data": [
  {
   "owner": "Mercedes Emmerich",
   "number": "2410279364686428",
   "expiration": "04/25",
   "type": "American Express"
  }
 ],
 "status": "OK"
}
```

Note that this is not the entire API response, and that card data changes with each API call. As expected, this matches the API response from the website.

Next, we need to parse down to the card type. The formatting examples in the Advanced Function Help section can help you identify how to parse the JSON object response.

The following enrichment script returns the result that follows.

```
var sample=External.cardType();
var x=sample.body.data[0].type;
cfgRequest.cardType_adv.set("value", x);
return cfgRequest;
```

```
{
  "cardType_adv": {
    "userEdited": false,
    "value": "American Express"
  }
}
```

So in CPQ, the cardType_adv field is defined as “American Express”.

Query data from Salesforce (SOQL)

As mentioned earlier, data that is in a Salesforce quote can be twinned into CPQ. However, if the data is found elsewhere in Salesforce, the Init enrichment has Salesforce as the external connection, and you perform a query using Salesforce Object Query Language (SOQL). If you are unfamiliar with the SOQL language, you can find out more at Salesforce’s Trailhead site.

To use SOQL in the enrichment, the only difference from the examples above is a change to the external connection. In CPQ Admin, click **Utilities**, click **External Connections**, and then click **New**. This is how you normally create an external connection.

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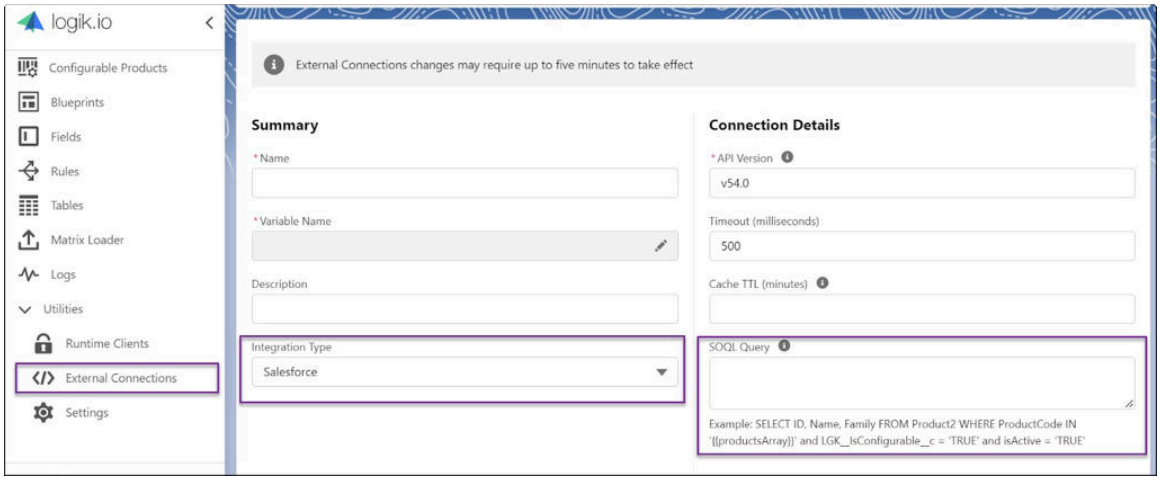
For the field integration type, select **Salesforce**. This provides a box for you to enter your SOQL query.



Related topics

Twinning: pulling Salesforce CPQ quote information into CPQ

API overview and resources

Learn about the APIs that are available in CPQ to manage configurations.

CPQ provides APIs for both the end user (runtime) for configurations and the administrative side for setup and management.

The runtime APIs support the standard create, read, update, and delete functions for CPQ configurations, along with the ability to retrieve bill of materials (BOM) data from CPQ. These APIs can be used to build a headless or custom UI for end users to create CPQ configurations.

Administrative APIs can be used to work with blueprints, fields, sets, product pickers, rules, managed tables, and the Matrix Loader for imports and exports. The admin APIs can be integrated or automated to perform routine tasks like data migration.

API resources

The following resources can help you get started with CPQ APIs.

To view a Github repository with OpenAPI specifications and Postman collections for CPQ APIs, see:

API Documentation

For interactive and explorable API documentation with code examples for both runtime and admin APIs, see:

CPQ API Reference

Authenticating API calls

Runtime API calls are authenticated using runtime client tokens defined in CPQ Admin. For more information about runtime API calls and runtime client tokens, see:

Intro to runtime API calls

Administrative API calls are authenticated with admin API tokens that are also set up in CPQ Admin. For more information about admin API tokens and permissions, see:

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Intro to admin API keys

Related topics

- Runtime APIs
- Authenticating CPQ API calls
- Additional configuration APIs
- Admin APIs: Blueprint import and export
- Admin APIs: Managed tables

Intro to runtime API calls

Runtime, or buyside, APIs are used to create, update, and save configurations.

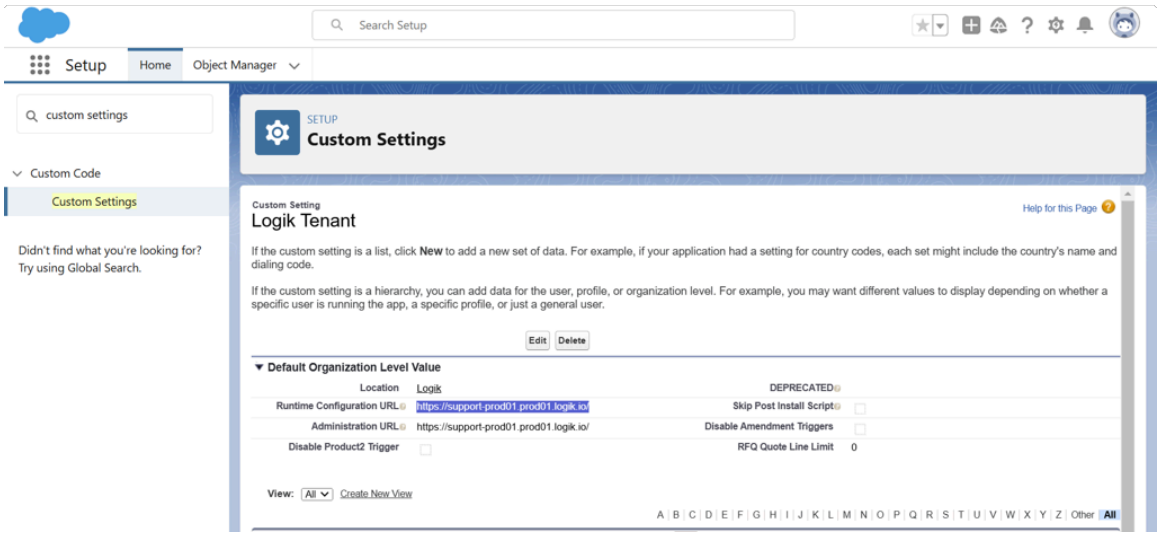
CPQ APIs are divided into two categories: runtime APIs and admin APIs. In this article, we introduce the runtime APIs.

Runtime APIs are used to create, read, update, and delete configurations, and are the same APIs that are used in the CPQ End User Configurator. They are also commonly referred to as the "buyside" APIs.

Note: For the most updated information on sample codes and other details, see API Documentation.

All API calls follow this base URL format: `https://<yourTenant>.<sector>.logik.io/api/`. In this URL, yourTenant represents your unique listed CPQ tenant name, and sector is the sector where your CPQ environment is located.

If you are a Salesforce user, you can find your tenant URL by clicking **Setup** in your Salesforce account. In the Quick Find box, search for or click **Custom Settings**, and then click **Manage**. Your tenant URL will be displayed.



All runtime API calls require bearer token authentication using a unique token that is available in the runtime client. They also require that the origin URL configured in the runtime client appears in the request header.

To authenticate, collect the bearer token and the origin URL from CPQ Admin → Utilities → Runtime Client. For each API call in a Postman, add the following header:

```
Key: Origin
Value: <yourOrigin>
```

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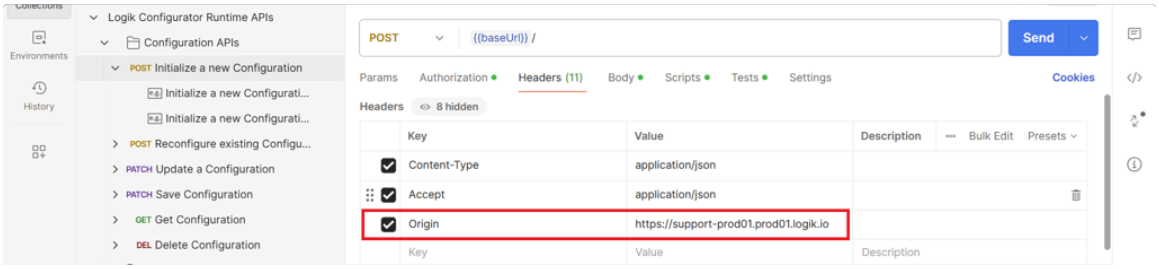
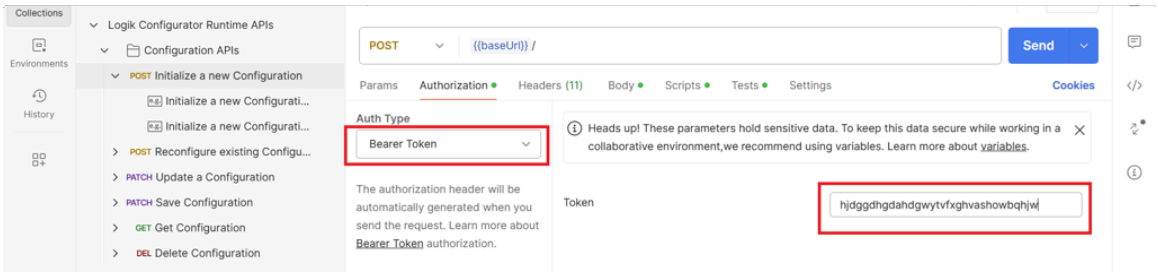


In the Authorization tab of Postman or your API tool, select **Bearer Token**, and then input the unique token you copied from CPQ Admin.



Note: The token in the image is a dummy value that does not correspond to any actual environment. It appears only for illustrative purposes.

Basic runtime API calls

- The initial configure call starts the configuration process by passing the ID of the configurable product, and returns a configuration UUID for later use.

  Example (cURL):

```
curl -X POST https://<yourTenant>.<sector>.logik.io/api/ \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{
    "sessionContext": {
        "stateful": true
    },
    "partnerData": {
        "product": {
            "configuredProductId": "{{configProductId}}",
        }
    },
    "fields": []
}'
```

  Example (response):

```
{
  "configurationId": "{uuid}"
```

  You also use this API call for reconfiguring, providing a previously saved configuration UUID in the POST body.

  Example reconfigure (cURL):

```
curl -X POST https://<yourTenant>.<sector>.logik.io/api/ \
-H "Authorization: Bearer <yourBearerToken>" \
```

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```
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{
    "sessionContext": {
        "stateful": true
    },
    "partnerData": {
        "product": {
            "configuredProductId": "{{configProductId}}",
            "configurationAttributes": {
                "LGK__ConfigurationId__c": "{{uuid}}"
            }
        }
    },
    "fields": []
}'
```

- The update configuration call updates an existing configuration by passing the configuration UUID and desired field values, and returns all possible fields and their values.

  Example (cURL):

```
curl -X PATCH https://<yourTenant>.<sector>.logik.io/api/{uuid}
 \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{ "fields": { "color": "blue", "size": "large" } }'
```

  Example (response):

```
{
  "fields": {
    "color": "blue",
    "size": "large",
    "price": "$100"
  }
}
```

- The get BOM call passes the configuration UUID and retrieves the Bill of Materials (BOM) for the configuration. It returns the current BOM for the configuration.

  Example (cURL):

```
curl -X GET
 https://<yourTenant>.<sector>.logik.io/api/{uuid}/bom \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>"
```

  Example (response):

```
{
  "bom": [
    { "item": "componentA", "quantity": 2 },
    { "item": "componentB", "quantity": 1 }
  ]
}
```

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- The save call saves the configuration in CPQ. This ensures that the configuration UUID can be used and reconfigured in the future.

  This process asynchronously populates our custom objects, configuration field data sets, and configuration line items in Salesforce.

  Example (cURL):

```
curl --location --request PATCH
 'https://mpanigrahi-demo.demo01.logik.io/api/6d0ef6fd-4c88-44
f3-a296-b03421c369c6' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Origin: https://mpanigrahi-demo.demo01.logik.io' \
--header 'Authorization: <<RUNTIME TOKEN>>' \
--header 'Cookie:
 LGKSESSION=NDA5OWJmNmEtNDhhOS00YTc4LTk3ODktZTg0OGYyOGIwMjZk' \
--data
 '{"fields":[{"variableName":"name_d1","value":"megha","dataTyp
e":"text"}],"responseState":{"setPagination":{"collections":{"p
ageSize":10,"pageNumber":0},"fields":{"pageSize":10,"pageNumber
":0},"componentTypes":{"pageSize":10,"pageNumber":0}},"defaultP
agination":{"pageSize":10,"pageNumber":0},"searchValues":{}}}'
```

  For more details on the sample code, refer to the full API reference documentation:

  https://api-docs.logik.io/#introduction

JSON sample

```
info:
_postman_id: e8370e58-ff12-4662-adac-3e35052b59ba name: Sample
 Runtime Calls
schema:
 https://schema.getpostman.com/json/collection/v2.1.0/collection
.json item:
name: 'Logik: Initial Configure' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
pm.collectionVariables.set("configId", jsonData.uuid); type:
 text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: POST header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: " {\r\n \"sessionContext\": {\r\n \"stateful\":
 true\r\n },\r\n \"partnerData\": {\r\n \"product options:
raw:
language: json
url:
```

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```
raw: '{{logik}}' host:
- '{{logik}}' response: []
name: 'Logik: Update Configuration' request:
auth:
type: bearer bearer:
key: token
value: '{{logikAccessToken}}' type: string
method: PATCH header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: "{\r\n \"fields\": [\r\n
 {\"variableName\":\"juBool1\",\"value\":\"True\"},\r\n
 {\"variableName\":\"juBool2\",\"value options:
raw:
language: json
url:
raw: '{{logik}}{{configId}}' host:
- '{{logik}}{{configId}}' response: []
name: '(Optional): Logik: Retrieve BOM' request:
auth:
type: bearer bearer:
key: token
value: '{{logikAccessToken}}' type: string
method: GET header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
url:
raw: '{{logik}}{{configId}}/bom' host:
'{{logik}}{{configId}}' path:
bom response: []
name: 'Logik: Save' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
"pm.collectionVariables.set(\"logikTotal\", jsonData.total);\r"
pm.collectionVariables.set("logikLineItems", jsonData.products);
 type: text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: PATCH header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: "{\r\n \"fields\": []\r\n}" options:
raw:
language: json
url:
raw: '{{logik}}{{configId}}?save=true' host:
'{{logik}}{{configId}}' query:
```

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```
key: save value: 'true'
response: []
name: '(Optional): Logik: Reconfigure' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
pm.collectionVariables.set("configId", jsonData.uuid); type:
 text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: POST header:
key: Origin
value: '{{logikOriginHeader}}' type: default
key: Authorization
value: Bearer Armqrz8jv-1C05mcWmcrDnXZlV9bbOTmGg type: default
disabled: true body:
mode: raw
raw: "{\r\n \"sessionContext\": {\r\n \"stateful\":
 true\r\n },\r\n \"partnerData\": {\r\n \"product\": {\r\n
 \"configuredProductId\" options:
raw:
language: json
url:
raw: '{{logik}}' host:
- '{{logik}}' response: []
```

For more information about CPQ APIs, see the following eight-slide presentation:

Logik.io APIs.

Authenticating CPQ API calls

Secure CPQ API calls with admin API keys, JWT tokens, session cookies, or Google IdP for runtime and Admin tasks.

Authenticating runtime API calls

When using CPQ in a headless manner, you authenticate your configuration session by using a runtime client. To create a runtime client, navigate to the CPQ Admin UI, click **Utilities** in the sidebar, and then click **Runtime Clients**. From here, specify the origin of your call, whether it is an external URL or an origin specified in the header of your call. You can also give your client an expiration date. After you save your client, you can copy the token and use it as the bearer token in other runtime API calls.

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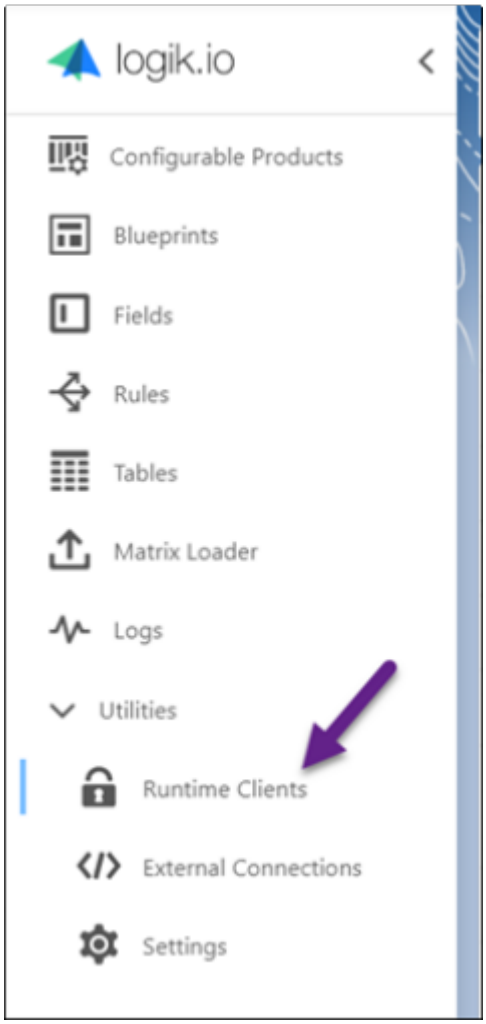

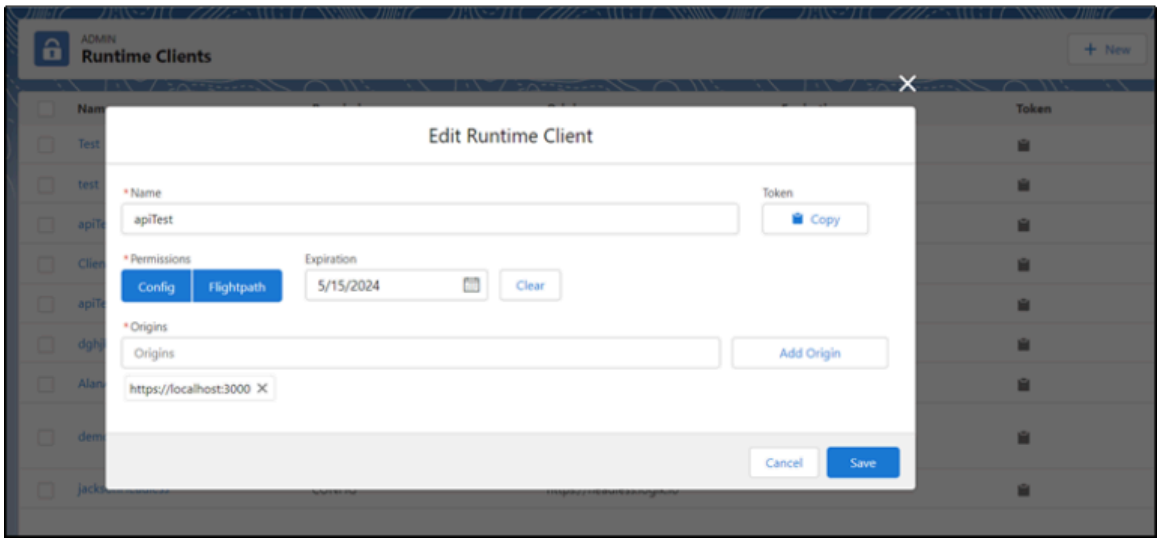

For more information on CPQ runtime calls, see Intro to runtime API calls.

Authenticating admin API calls

There are four ways to authenticate your admin API calls:

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- Admin API keys

  Admin API keys are the recommended way of authenticating admin API calls. For information about setting up admin API Keys, see:

  CPQ: admin API Keys.

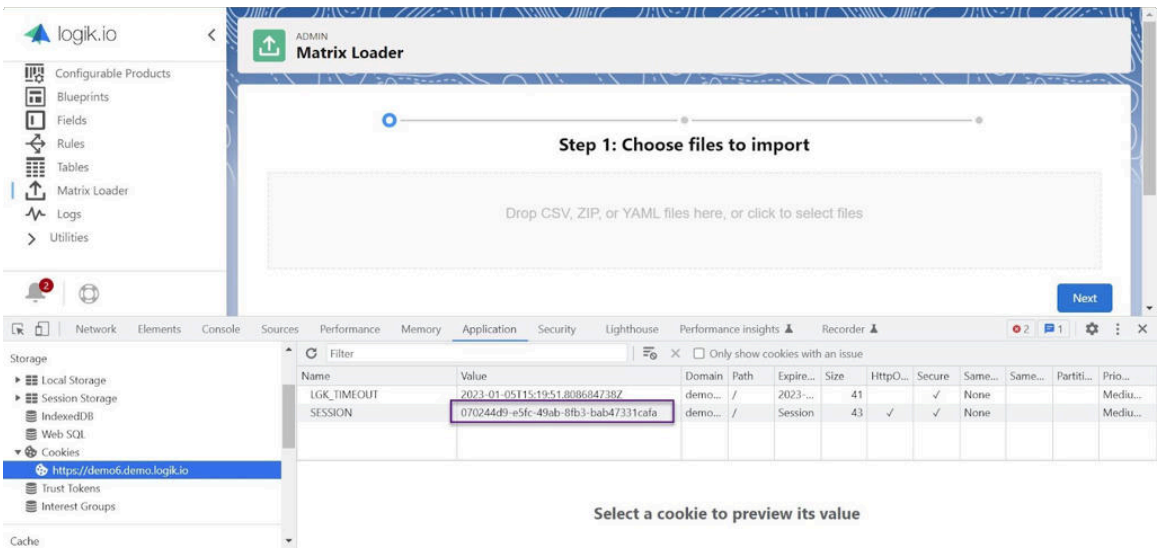
- JWT token

  To ensure tighter security for long-term admin API authentication, we leverage the Salesforce JWT web token. For steps to initialize this access flow, see:

  Admin APIs: Authentication using a Salesforce-connected app

- Session cookies

  To authenticate a short term admin session, you can leverage your browser's session cookie. Navigate to the cookies in your browser's console, and take the session cookie. Enter the cookie in your request header as a keyed pair: `"Cookie":"SESSION=<yourSessionCookie>"`



- Google IdP

  If you are not connected to a Salesforce environment and choose not to use admin API keys, you can use Google IdP to authenticate. If you do not use Google IdP, open a support case or email support@logik.io to discuss options for admin API authentication.

  For information on setting up a Google IdP JWT token, see:

  Setting up a Google IdP JWT Token for Headless admin API Authentication

Intro to admin API keys

You can use admin API calls to access Admin functionality without using the Admin UI interface and a browser.

CPQ provides admin API keys that you can use to access admin functionality via API calls instead of using a browser and the CPQ Admin interface.

For an introduction to CPQ admin API keys, view the following video:

Admin API keys

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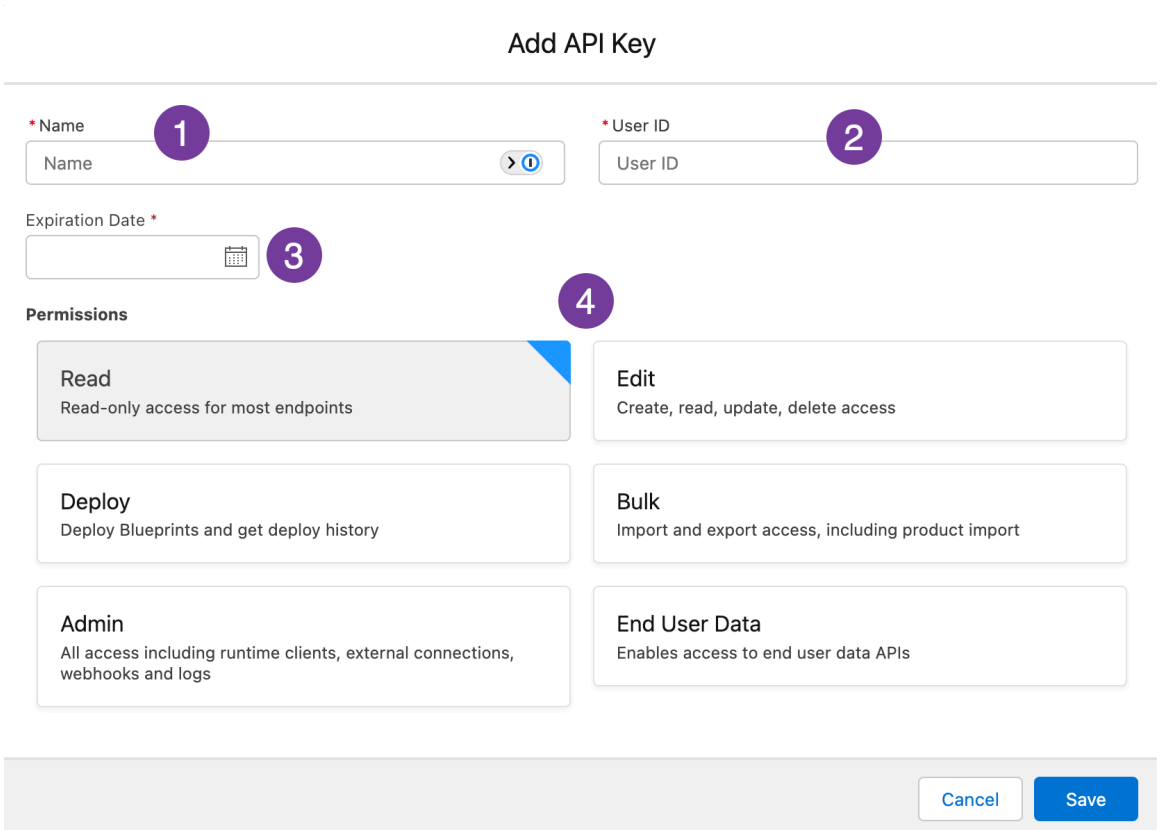
Admin API keys page

To get to the Admin API Keys page in CPQ, click the arrow to expand the Utilities section in CPQ Admin. The Admin API Keys tab appears in the menu.



Add a new admin API key

To add a new admin API key, click **New** at the top of the screen.



All parameters are required.

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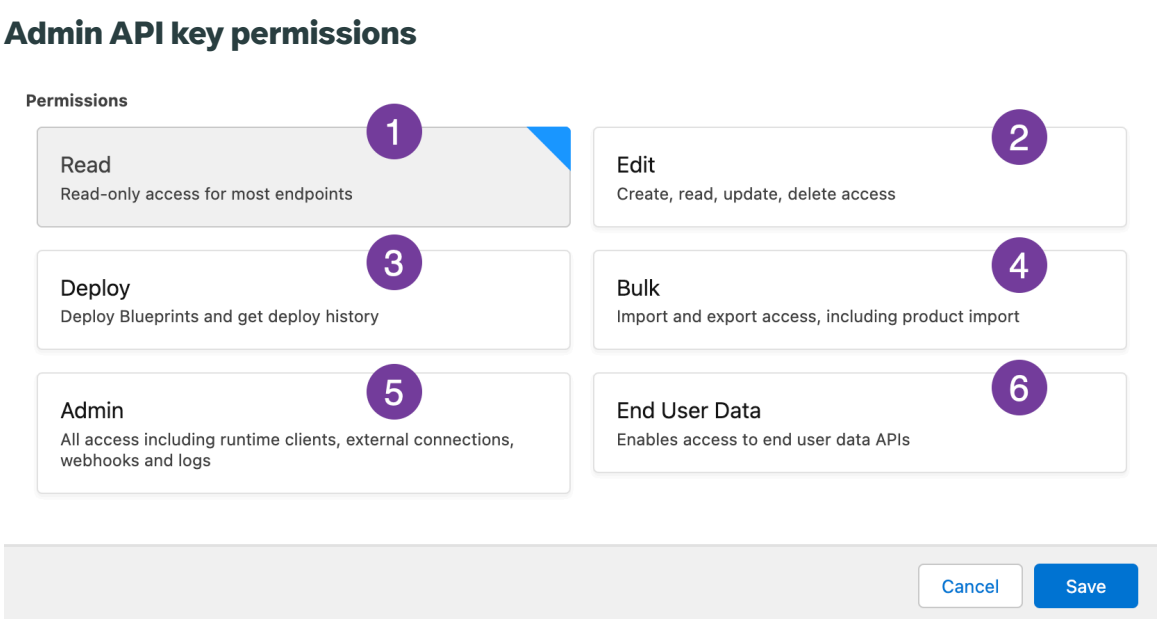
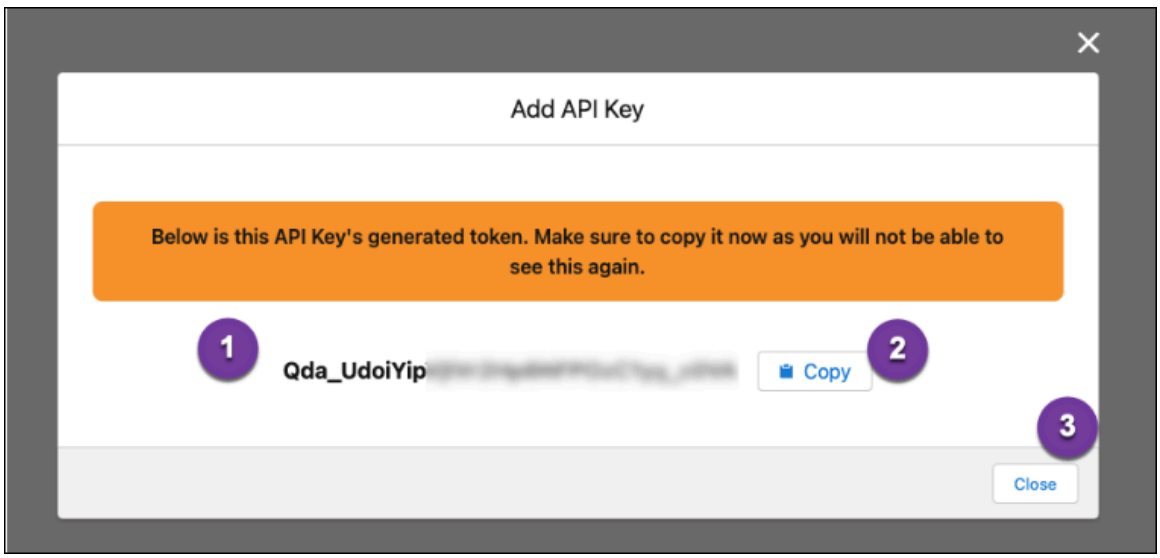
1. Name: the name of the admin API key
2. User ID
3. Expiration Date: the expiration date of the key
4. Permissions: the permissions assigned to the key

Choose the permissions that fit your use case before clicking **Save**.



1. Read (required, default): read-only access, typically for GET requests
2. Edit: create, read, update, and delete access for most objects, including fields and rules
3. Deploy: allows the deployment of blueprints and access to deployment history
4. Bulk: allows importing and exporting data, such as managed tables, to and from CPQ
5. Admin: full permissions to all Admin functionality
6. End User Data: access to end user data APIs

When you are finished assigning permissions, click **Save**. The dialog box updates to show the new admin API key.



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1. View the admin API key
2. Copy the key to the clipboard
3. Close the dialog box

Important: You can copy an admin API key only when it is created. Make sure to copy and store the key.

Accessing admin APIs by using API keys

To use an admin API key in API requests, use the API key with Bearer Token authentication.

- Header: Authorization Header
- Key: authorization
- Value: Bearer <Admin API key>

Example header:

```
authorization: Bearer Qda_UdoiYipb15Le11En8axEuN71FA6Vt_cw
```

When you use an admin API key, you use different endpoints to access the admin APIs.

- For general Admin endpoints (`/a/Admin/...`) the endpoint to use is (`/api/Admin/...`).

  For example (retrieving a list of rules):

  - API call in Admin UI: `/a/Admin/v3/rules?page=0&size=100&sort=modified%2CDESC`
  - API call using Admin Keys: `/api/Admin/v3/rules?page=0&size=100&sort=modified%2CDESC`
- For managed table endpoints (`/a/managed_tables/...`) the endpoint to use when accessing with an API key is (`/api/managedTables/...`)

  For example (retrieving the schema of a managed table):

  - API call in Admin UI: `/a/managed_tables/v1/managedTables/{tableName}/metadata`
  - API call using Admin Keys: `/api/managedTables/v1/managedTables/{tableName}/metadata`

Related topics

https://logikio.atlassian.net/wiki/spaces/CS/pages/1614479620/Setting+up+a+Google+IdP+JWT+Token+for+Headless+Admin+API+Authentication

Admin APIs: Authentication using a Salesforce-connected app

Admin APIs: Authentication using a Salesforce-connected app

We recommend that you use admin API keys to authenticate admin API calls. An older method is documented here.

CPQ administration APIs are useful to facilitate new product introduction, data transfer, test-to-production operations, and so on. For use cases in which CPQ leverages Salesforce for user authentication, this article walks you through the steps required to build a Salesforce connected app and retrieve a JSON web token [JWT] that can be used to authenticate calls to CPQ administration APIs.

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Note:

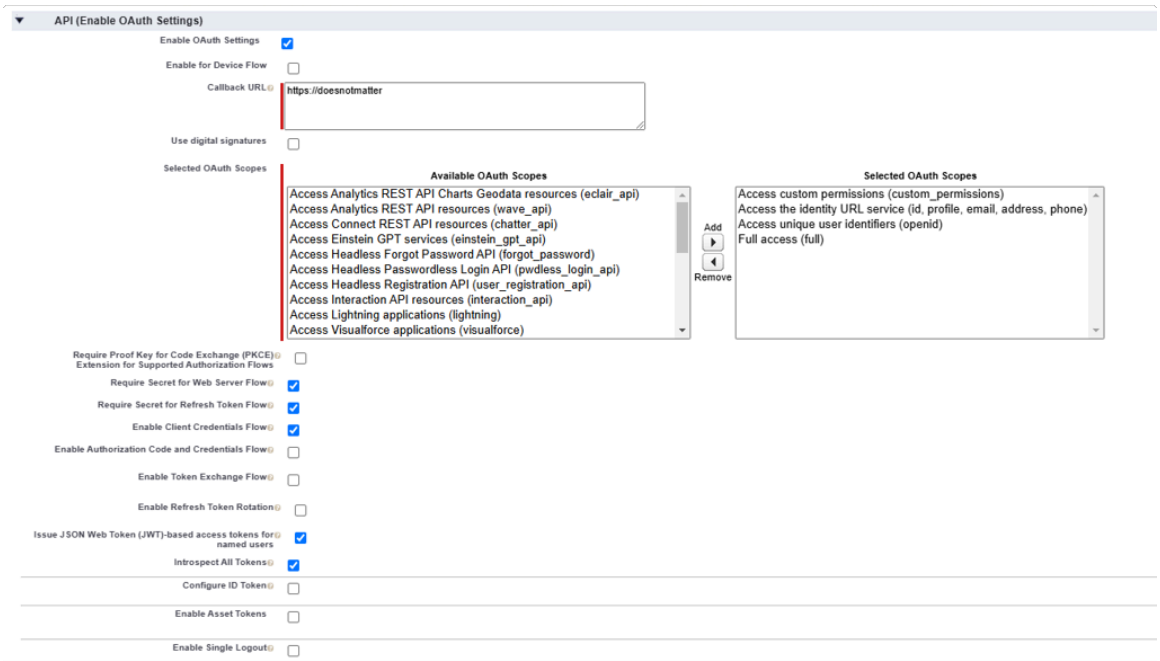
- The release of admin API Keys has made this setup unnecessary and is now the recommended method of authentication of admin API calls. See Intro to admin API keys.
- The JWT method that was recommended before February 2025 has been deprecated by Salesforce. Instead, follow the updated steps in this article.

The JWT can be used as a bearer token to authenticate CPQ administration APIs to manipulate managed tables, write rules, deploy blueprints, and more.

Creating or updating a connected app for JWT authentication

If you're updating an existing app, these instructions assume that you've created a connected app following the instructions in the legacy asset token flow.

1. Go to Salesforce Setup, Apps → App Manager.
2. Create a new connected app, or update your existing JWT app to match the image below.



3. Click **Manage** in your JWT connected app.
4. Edit policies.
   - There will be a new section labeled Client Credentials Flow. Select your integration user in the **Run As** option.
   - There will be a second new section labeled JWT-Based Access Token Settings for Named Users. Check **Issue JSON Web Token (JWT)-based access tokens**, and select a default timeout.

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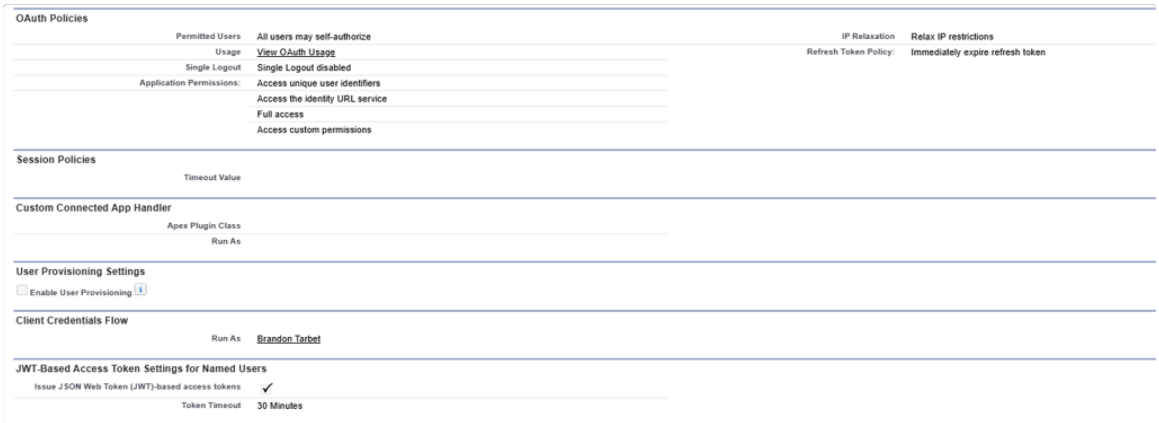
- Click **Save**. Your policies should resemble the following:



Generating the JWT

The following Postman collection can be used to generate a JWT for your instance:

https://logikio.atlassian.net/wiki/spaces/CS/pages/1615036449/Admin+APIs+Authentication+via+Salesforce+Connected+App

For in-depth instructions, see:

OAuth 2.0 Client Credentials Flow for Server-to-Server Integration

You can find the client ID and secret by viewing the Consumer Key and Secret → Manage Consumer Details field in the connected app you created above.

Note that a single call to Salesforce generates a token. Based on the **Issue JSON Web Token (JWT)-based access tokens for named users** setting in your connected app, the access token returned here is a JWT that you can use as a bearer token for CPQ APIs.

Admin APIs: Blueprint import and export

You can export a blueprint to back it up, or export and import a blueprint to move it from one CPQ environment to another.

The CPQ blueprint admin APIs provide the import and export API calls for working with blueprints. Common use cases include migrating blueprints across CPQ environments and backing up blueprints. To view the CPQ blueprint admin APIs, see:

CPQ blueprint admin APIs

For a comprehensive list of all CPQ APIs, see the CPQ API Reference:

https://api-docs.logik.io/#introduction

You can also view the CPQ open source API documentation on Github:

https://github.com/logikioopensource/API-Documentation

To learn how to set up admin API keys for calling blueprint APIs, see:

Intro to admin API keys

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Blueprint export APIs

To export a blueprint via the APIs, the Export blueprint call passes the variable name of the blueprint to start the export job. In response, the call receives a Job ID that can be queried to retrieve the status and to download the blueprint as a ZIP file.

The sequence of API calls to export and download a blueprint is:

1. Export the blueprint

   Use the blueprint variable in the payload to initiate the export. The Job ID can be polled for the status of the export.

2. Check the job status

   To check the status, use the Job ID that is returned after the export call. When the status is COMPLETED, proceed to step 3.

3. Download the export

   Use the same Job ID to download a ZIP file that contains the blueprint.

To view the source code for the Export blueprint call, see:

Export blueprint call

Blueprint import APIs

To import a blueprint, the Import blueprint call passes a ZIP file of the blueprint to begin an import job.

The sequence of API calls to import a blueprint is:

1. Import the blueprint

   Select the ZIP file that includes the blueprint. The Job ID can be polled for the status of the import.

2. Checkthe job status

   To check the status, use the Job ID that is returned after the import call. When the status is SUCCESS, the job is complete.

To view the source code for the Import blueprint call, see:

Import blueprint call

Admin APIs: Managed tables

Legacy information about APIs that interact with managed tables

We highly recommend leveraging Admin API keys to interact with the CPQ APIs for managed tables. Bulk-level permissions are necessary for your admin API key to authenticate calls related to managed tables. For more information on these APIs, see the full API documentation:

CPQ API documentation

The following Postman collection demonstrates how to retrieve and manipulate table metadata and data using the deprecated JWT authorization noted below:

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Postman Collection_Logik managed tables APIs

The following operations are demonstrated in this collection:

- Retrieving a list of all tables defined in an environment
- Manipulating table metadata (schema)
  - Retrieving table metadata
  - Uploading table metadata
  - Adding table metadata
  - Deleting table metadata
- Manipulating table data
  - Retrieving table data
  - Adding a table data row
  - Updating a table data row
  - Deleting a table data row
  - Uploading table data via CSV
  - Exporting table data to CSV
  - Getting the status of an export job
  - Replacing a table

All calls leverage JWT authorization. The bearer token is stored in the global variable `{{logik_admin_BearerToken}}`. For instructions for generating JWT, see:

Admin APIs: Authentication using a Salesforce-connected app

Runtime APIs

Runtime APIs

CPQ provides a set of APIs for building front-end applications and manipulating configurations. These are commonly referred to as buyside or runtime APIs and are used by customers or end users to create, update and save CPQ configurations.

Runtime APIs support the standard create, read, update, and delete functions for CPQ configurations, along with the ability to retrieve bill of materials (BOM) data from CPQ.

Note: These APIs are legacy APIs. For the most updated information, see the complete CPQ API reference:

Logik.io API Reference

To make CPQ runtime APIs accessible and provide a quick start to end developers, see our open source repositories for API collections that can easily be imported and used to start testing:

API-Documentation/runtime/Logik Configurator Runtime APIs.postman_collection.json

Runtime API setup

The base URL format for all runtime API calls is `https://<tenant>.<sector>.logik.io/api/`, where `<tenant>` is the listed tenant name and`<sector>` is the appropriate sector that the environment is located on (usually `test` or `prod`).

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In Salesforce, you can find the CPQ tenant URL by going into Setup, searching for Custom Settings in the Quick Find box, and then clicking **Manage** next to CPQ Tenant.

Runtime API calls are authenticated through a combination of a bearer token and the defined origin in the runtime client. The origins of the runtime application are specified when a runtime client is created in the CPQ Admin settings.

To authorize these API calls, you must add two headers to the each runtime API request:

Mandatory headers for runtime API requests

Header	Key	Value
Origin Header	origin	<runtimeClientOrigin>
Authorization Header	authorization	Bearer <runtimeToken>

Sample headers:

- origin: localhost
- authorization: Bearer vEqzz4BVkb15Le11En8axEuN71FA6Vt_cw

Create a configuration

To start a new configuration via the APIs, the create configuration call passes the ID of the configurable product. In response, it receives a CPQ configuration ID that can be used to specify this configuration in later calls.

POST

HTTP method	POST
URL	https://<tenant>.<sector>.logik.io/api/
Path parameters	N/A
Query parameters	N/A

The two key pieces of the payload are:

- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.Logik/api/`

Sample payload:

```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
```

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```
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
    }
  },
  "fields": []
}
```

Note: The configuration can also be initialized by passing field values to the fields array in the following format:

```
{
  “variableName”: “<Field Name>”, “value”: “<Field Value>”
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "08176434-9b1e-4fc8-b2c4-8aba2c35fda3",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

Reconfigure a configuration

The reconfigure API call is similar to the create configuration call. The reconfigure call passes the ID of the configurable product and an existing CPQ configuration ID, and in return receives a new Configuration ID with the same field data as the prior configuration but allowing for changes to be made.

Note: The UUID field in the response payload contains the new CPQ configuration ID. The new configuration ID should be used for all operations going forward in the reconfiguration process, including update, save, and retrieve BOM.

POST	
HTTP method	POST
URL	https://<tenant>.<sector>.logik.io/api/
Path parameters	N/A
Query parameters	N/A

The two key pieces of the payload are:

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- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.Logik/api/`

Sample payload:

```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
      "configurationAttributes":
      {
        "LGK__ConfigurationId__c": "<uuid>"
      }
    }
  },
  "fields": []
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "d98d60cd-9379-4b7b-86fd-de828c340f80",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

Update a configuration

Updating a configuration requires a configuration to be loaded using either the create configuration or reconfigure API calls. The Update Configuration call passes a CPQ Configuration ID and any desired field values, and in response receives the updated configuration from CPQ.

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PATCH

HTTP method	PATCH			
URL	https://<tenant>.<sector>.logik.io/api/			
Path parameters	N/A			
Query Parameters	Name	Allowed Value	Required?	Default if not specified
	delta	true | false	optional	true
	save	true | false	optional	false

Query parameters:

delta

If delta=true, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If delta=false, CPQ sends back the entire configuration and BOM data in response.

save

If save=true, CPQ saves this configuration and (depending on the settings) performs additional actions such as sending the data to a webhook or writing the data into custom objects in Salesforce. This is the behavior of the save configuration call.

If save=false, CPQ updates this configuration and sends the updated data back in the response. This is the default behavior, and this is the behavior of the update call.

Sample URL:

`https://dev1.test.logik.io/api/fbc3d32c-7f86-4461-b144-986a0e8a5768`

Sample payload:

```
{
  "fields":
  [
    {
      "variableName": "orderQty",
      "value": 3
    }
  ]
}
```

Sample response:

```
{
  "fields": [],
  "uuid": "fbc3d32c-7f86-4461-b144-986a0e8a5768",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
```

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```
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": null
}
```


Save a configuration

Saving a configuration is a subset of the update configuration. It requires a configuration to be loaded using either the create configuration or reconfigure API calls. The save configuration call passes a CPQ configuration ID and any desired field values, and in response receives the updated configuration from CPQ.

Note: The only difference between a normal update call and a save call is the addition of the query parameter *save=true* in the URL. If set to false or excluded, this is a normal update call.

If you are using Salesforce as a backend, when the save API is called, CPQ asynchronously creates and populates the CPQ custom objects Configuration Field Data Sets and Configuration Line Items with the appropriate data.

If your CPQ instance has a webhook configured, when the save API is called, the data is sent to the endpoint specified in the webhook setting. See Webhooks.

Note: This ends the configuration session. Further edits or updates to the configuration must be started from the create configuration or reconfigure API calls.

PATCH

HTTP method	PATCH			
URL	https://<tenant>.<sector>.logik.io/api/			
Path parameters	N/A			
Query Parameters	Name	Allowed Value	Required?	Default if not specified
	delta	true | false	optional	true
	save	true | false	optional	false

Query parameters:

delta

If delta=true, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If delta=false, CPQ sends back the entire configuration and BOM data in response.

save

If save=true, CPQ saves this configuration and (depending on the settings) performs additional actions such as sending the data to a webhook or writing the data into custom objects in Salesforce.

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If save=false, CPQ updates this configuration and sends the updated data back in the response. This is the behavior of the update call.

Sample cURL request:

```
curl --location --request PATCH
 'https://mpanigrahi-demo.demo01.logik.io/api/6d0ef6fd-4c88-44
f3-a296-b03421c369c6' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Origin: https://mpanigrahi-demo.demo01.logik.io' \
--header 'Authorization: <<RUNTIME TOKEN>>' \
--header 'Cookie:
 LGKSESSION=NDA5OWJmNmEtNDhhOS00YTc4LTk3ODktZTg0OGYyOGIwMjZk' \
--data
 '{"fields":[{"variableName":"name_d1","value":"megha","dataType
":"text"}],"responseState":{"setPagination":{"collections":{"pag
eSize":10,"pageNumber":0},"fields":{"pageSize":10,"pageNumber":0
},"componentTypes":{"pageSize":10,"pageNumber":0}},"defaultPagin
ation":{"pageSize":10,"pageNumber":0},"searchValues":{}}}'
```

Sample response:

```
{
"fields": [<ARRAY OF FIELD OBJECTS>],
"uuid": "8817655d-7a11-41ef-a9fd-59c2855a3e4b",
"revision": 1,
"valid": true,
"messages": [],
"productChange": false,
"products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
"total": 0
}
```

BOM APIs

The BOM APIs are useful for retrieving the final output of configuration. The BOM APIs can be used to retrieve the entire BOM, or specific subsets, such as sales or manufacturing BOMs.

The Get BOM call passes a CPQ Configuration ID and in return receives the current BOM generated by the current state of the configuration. There are 3 built in BOM types: “all”, “sales” and “manufacturing”. Additional BOM types can be dynamically added by setting the bomType field on the product.

Note: If the BOM type is not included, the API returns the entire BOM.

GET

HTTP method	GET		
URL	https://<tenant>.<sector>.logik.io/api/<uuid>/bom/<bomType>		
Path Parameters	Name	Allowed Value	Required?
	<uuid>	32 character CPQ configuration UUID	required
	<bomType>	name of the BOM to retrieve	optional

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GET (continued)

Query parameters	N/A

Sample response:


```
{"products": [
        {
            "id": "01t5f000006QKysAAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 10,
            "type": "accessory",
            "name": "Amend Flow Bundle Sub",
            "partnerId": "01t5f000006QKysAAG",
            "productCode": "AFBC-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 5,
            "extPrice": 5,
            "level": 0,
            "rollUpPrice": 5
        },
        {
            "id": "01t5f000006QKz2AAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 20,
            "type": "accessory",
            "name": "Amend Flow Bundle Asset",
            "partnerId": "01t5f000006QKz2AAG",
            "productCode": "AFBC2-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 25,
            "extPrice": 25,
            "level": 0,
            "rollUpPrice": 25
        }
    ]}
```


For information about additional configuration APIs and sample scenarios, see Additional configuration APIs.

Additional configuration APIs

These CPQ configuration APIs let you retrieve or delete an existing configuration. They complement the runtime APIs and are useful for viewing full configuration details and for removing configurations no longer needed. Use them alongside the standard create, update, reconfigure, and BOM APIs to support end-to-end configuration workflows.

This article is a followup to Runtime APIs. For more information on authentication and setup,see that article.

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These API endpoints to get a configuration and delete a configuration from CPQ are included for completeness.

Get configuration

CPQ configurations can be retrieved from the CPQ servers by sending a GET request, which will return the entire configuration in the response. If you only need the product data of the outputs, consider using one of the GET BOM API calls.

Note: This does not load a configuration into the CPQ rules engine for updates to fields and re-running of rules. If you need to make updates to an existing configuration, use the Reconfigure API call.

The GET request

HTTP method	GET		
URL	https://<tenant>.<sector>.logik.io/api/<uuid>		
Path parameters	<uuid>	32 character CPQ configuration UUID	required
Query parameters	N/A		

Sample URL:

https://dev1.test.logik.io/api/71e62fe7-e59b-4a91-94af-64718e0d4eae

Sample response:

```
{
"fields": [<ARRAY OF FIELD OBJECTS>],
"uuid": "08176434-9b1e-4fc8-b2c4-8aba2c35fda3", "revision": 0,
"relatedChanges": [
{
"key": "products",
"type": "PRODUCT"
}
],
"valid": true, "messages": [], "productChange": true,
"products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
"total": 30,
"layouts": [<ARRAY OF LAYOUTS>]
}
```

Delete configuration

CPQ configurations can be deleted, but it is not typically necessary. This API deletes the configuration from CPQ and will not be available for future retrieval of the configuration, BOM, or updates to the configuration.

Note: This API will only delete the configuration from the CPQ servers. If the configuration has been persisted in another application (i.e. Quotelines have been created in Salesforce, Orders have been placed in Ecommerce), no changes will be made to that data.

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The DELETE request

HTTP method	DELETE		
URL	https://<tenant>.<sector>.logik.io/api/<uuid>		
Path parameters	<uuid>	32 character CPQ configuration UUID	required
Query parameters	N/A		

Sample URL:

https://dev1.test.logik.io/api/71e62fe7-e59b-4a91-94af-64718e0d4eae

Sample response:

```
{ }
```

Sample use cases

A new customer comes to a website, configures a product, and checks out.

1. Start a new configuration → Create New Configuration API call
2. Make updates to the configuration → Update Configuration API call
3. Save the final configuration back to CPQ → Save Configuration API call

A customer returns and wants to place an order for a product similar to one that they have purchased before.

1. Perform a reconfiguration, using an existing CPQ Configuration Id → Reconfigure API Call
2. Save back to CPQ → Save Configuration API call

An order for a complex manufactured product is placed, and the engineering team needs to know what parts they need and which sub-assemblies to build.

Retrieve the “Manufacturing” bill of materials for an existing configuration → Get BOM API call.

The RFQ (Request for Quote) API

CPQ adds additional functionality to the Salesforce CPQ package APIs. This functionality lets you add products and data to an existing Salesforce CPQ quote.

As part of the CPQ integration package with Salesforce CPQ, CPQ provides an API to add a CPQ configured product, sales BOM products and BOM data to a new or existing Salesforce CPQ quote (`SBQQ__Quote__c`). This provides CPQ functionality in addition to the Salesforce CPQ package APIs.

Salesforce CPQ package APIs

View a video about the Request for Quote API:

https://youtu.be/e0nxElTIzq8

URL and endpoint

Two HTTP methods are exposed for the endpoint:

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- POST for creating a new quote and adding a product and configuration
- PATCH for adding a new product and configuration to an existing quote

This API is exposed as an Apex Rest Service in the Salesforce org with a path of `/services/apexrest/LGK/request-quote`: for example, `https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote`, where `<yourInstance>` is the personal domain of your Salesforce org.

Setup and authorization

This API is exposed in the Salesforce org and requires authorization with Salesforce to be accessed and called. See Salesforce Help on Authorization options for making API calls. This API can also be tested using the Salesforce Workbench Application.

In CPQ, the only step is to ensure that in Admin settings, **Push BOM Data to Logik Salesforce Object** is enabled. CPQ uses the data stored in the Configuration Line Items (LGK__ConfigurationLineItem__c) to create any additional sales BOM lines on the quote and write the BOM Data field on the quote line.

Note: The API will also respect normal Salesforce user access levels, so if the authenticated Salesforce user (or a partner site itself, via sharing settings) does not have certain object or field level access, the API call may fail or not behave as expected. The user calling the API needs access to the standard Salesforce CPQ and related objects as well as the CPQ Configuration Line Item object and its fields.

A short list of necessary objects includes:

- Pricebook
- Product feature (for the “Dynamic” feature on the product)
- Quote
- Product
- Quote line
- Config Line Item

If there is an issue with the API, make sure the user not only has access to the object or fields, but also to the specific record. This is always true, but because partner profiles start off with less access to records, they are more susceptible to the problem.

To use these APIs, create and save a CPQ configuration, making note of the configuration ID that will be used for the calls. Also copy the product ID of the configurable product that was used to create the configuration demo.

Create new quote and add product

The create quote and add product API call can be very useful if CPQ is being used outside the traditional Salesforce CPQ context. This can enable an omni channel experience without exposing end users to the Salesforce CPQ Quote Line Editor.

POST

HTTP method	POST
URL	https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote

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POST (continued)

Path parameters	N/A
Query parameters	N/A

The required parameters in the request body are:

configurableProductId

The CPQ enabled configurable product ID

configurationId

The CPQ configuration UUID received after saving a configuration

pricebookId

The Salesforce ID of the Pricebook2 record that has a valid pricebook entry for the product

- –
- –
- –

If included, *accountId* and *opportunityId* are populated on the newly created quote.

Sample URL: `https://demoloik.my.salesforce.com/services/apexrest/LGK/request-quote`

Sample request payload:

```
{
  "configurableProductId": "01t5f000003w24zAAA",
  "configurationId": "eeec456c-a4f6-407a-94b1-03e8b6cf29ea",
  "pricebookId": "01s5f000000AsLDAA0" }
```

Sample response:

```
{
  "attributes" : {
    "type" : "SBQQ__Quote__c",
    "url" :
 "/services/data/v57.0/sobjects/SBQQ__Quote__c/a0q5f0000057YAYA
A2"
  },
  "Name" : "Q-00162",
  "Id" : "a0q5f0000057YAYAA2",
  "SBQQ__LineItemCount__c" : 3,
  "SBQQ__LineItems__r" : {
    "totalSize" : 3,
    "done" : true,
    "records" : [ {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r6AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
```

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```
      "Id" : "a0m5f000007ZYr6AAG",
      "Name" : "QL-0001001",
      "SBQQ__ProductName__c" : "AFB"
    }, {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r7AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
      "Id" : "a0m5f000007ZYr7AAG",
      "Name" : "QL-0001002",
      "SBQQ__ProductName__c" : "Simple Amend Child Subscription"
    }, {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r8AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
      "Id" : "a0m5f000007ZYr8AAG",
      "Name" : "QL-0001003",
      "SBQQ__ProductName__c" : "Simple Amend Child Asset"
    } ]
  },
  "SBQQ__Type__c" : "Quote"
}
```


Add product to quote

The Add Product to Quote API can be used when additional configurations are added to a single quote, either generated through the normal CPQ flow, through manual record creation, or through one that has already been created using the Create New Quote API above.

PATCH

HTTP method	PATCH
URL	https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote
Path parameters	N/A
Query parameters	N/A

The required parameters in the request body are:

configurableProductId

the CPQ enabled configurable product ID

configurationId

The CPQ configuration UUID received after saving a configuration

quoteId

The Salesforce ID of the SBQQ__Quote__c record to add this configuration to

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If included, *quoteLineGroupId* adds the newly created quote line to the specified quote line group.

Sample URL: `https://demologik.my.salesforce.com/services/apexrest/LGK/request-quote`

Sample request body:

```
{
    "configurableProductId": "01t5f000002SwERAA0",
    "configurationId": "8978145d-35ba-4633-8139-e305ea4b9874",
    "quoteId": "a0q5f0000057YATAA2",
}
```

Sample response body:

```
{
    "attributes": {
        "type": "SBQQ__Quote__c",
        "url":
 "/services/data/v57.0/sobjects/SBQQ__Quote__c/a0q5f000005MNDhA
AO"
    },
    "Name": "Q-00286",
    "Id": "a0q5f000005MNDhAAO",
    "SBQQ__LineItemCount__c": 1,
    "SBQQ__LineItems__r": {
        "totalSize": 1,
        "done": true,
        "records": [
            {
                "attributes": {
                    "type": "SBQQ__QuoteLine__c",
                    "url":
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f00000Ahs
ZsAAJ"
                },
                "SBQQ__Quote__c": "a0q5f000005MNDhAAO",
                "Id": "a0m5f00000AhsZsAAJ",
                "Name": "QL-0003664",
                "SBQQ__ProductName__c": "Cloud Workload
 Configurator"
            }
        ]
    },
    "SBQQ__Type__c": "Quote"
}
```

Logik Salesforce CPQ Extension APIs Postman Collection :

```
{
 "info": {
  "_postman_id": "2562674d-051d-4663-b3ed-482e6be1b78f",
  "name": "Logik Salesforce CPQ Extension APIs",
  "schema":
 "https://schema.getpostman.com/json/collection/v2.1.0/collectio
n.json""
 },
```

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```
 "item": [
  {
   "name": "Salesforce Authentication",
   "item": [
    {
     "name": "Salesforce Authentication",
     "event": [
      {
       "listen": "test",
       "script": {
        "exec": [
         "var jsonData = pm.response.json();",

 "pm.collectionVariables.set(\"salesforce_access_token\",
 jsonData.access_token);"
        ],
        "type": "text/javascript"
       }
      }
     ],
     "request": {
      "method": "POST",
      "header": [],
      "body": {
       "mode": "formdata",
       "formdata": []
      },
      "url": {
       "raw":
 "{{salesforce_domain}}/services/oauth2/token?username={{salesfo
rce_username}}&password={{salesforce_password}}&grant_type=passw
ord&client_id={{salesforce_client_id}}&client_secret={{salesforc
e_client_secret}}",
       "host": [
        "{{salesforce_domain}}"
       ],
       "path": [
        "services",
        "oauth2",
        "token"
       ],
       "query": [
        {
         "key": "username",
         "value": "{{salesforce_username}}"
        },
        {
         "key": "password",
         "value": "{{salesforce_password}}"
        },
        {
         "key": "grant_type",
         "value": "password"
        },
        {
         "key": "client_id",
         "value": "{{salesforce_client_id}}"
```

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```
        },
        {
         "key": "client_secret",
         "value": "{{salesforce_client_secret}}"
        }
       ]
      }
     },
     "response": []
    }
   ]
  },
  {
   "name": "Logik CPQ Extension APIs",
   "item": [
    {
     "name": "Create New Quote",
     "request": {
      "method": "POST",
      "header": [
       {
        "key": "Content-Type",
        "value": "application/json",
        "type": "default"
       }
      ],
      "body": {
       "mode": "raw",
       "raw": "{\n    \"configurableProductId\":
\"{{configurableProductId}}\",\n    \"configurationId\":
\"{{configurationId}}\",\n    \"pricebookId\":
\"{{pricebookId}}\",\n    \"accountId\": \"{{accountId}}\",\n
 \"opportunityId\": \"{{opportunityId}}\"\n}",
       "options": {
        "raw": {
         "language": "json"
        }
       }
      },
      "url": {
       "raw":
"{{salesforce_domain}}/services/apexrest/LGK/request-quote",
       "host": [
        "{{salesforce_domain}}"
       ],
       "path": [
        "services",
        "apexrest",
        "LGK",
        "request-quote"
       ]
      }
     },
     "response": []
    },
    {
     "name": "Add to Existing Quote",
```

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```
    "request": {
     "method": "PATCH",
     "header": [
      {
       "key": "Content-Type",
       "value": "application/json",
       "type": "default"
      }
     ],
     "body": {
      "mode": "raw",
      "raw": "{\n    \"configurableProductId\":
\"{{configurableProductId}}\",\n    \"configurationId\":
\"{{configurationId}}\",\n    \"quoteId\": \"{{quoteId}}\",\n
 \"quoteLineGroupId\": \"{{quoteLineGroupId}}\"\n}",
      "options": {
       "raw": {
        "language": "json"
       }
      }
     },
     "url": {
      "raw":
"{{salesforce_domain}}/services/apexrest/LGK/request-quote",
      "host": [
       "{{salesforce_domain}}"
      ],
      "path": [
       "services",
       "apexrest",
       "LGK",
       "request-quote"
      ]
     }
    },
    "response": []
   }
  ],
  "auth": {
   "type": "bearer",
   "bearer": [
    {
     "key": "token",
     "value": "{{salesforce_access_token}}",
     "type": "string"
    }
   ]
  },
  "event": [
   {
    "listen": "prerequest",
    "script": {
     "type": "text/javascript",
     "exec": [
      "let sfToken =
pm.collectionVariables.get('salesforce_access_token');",
      "if(sfToken == null) {",
```

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```
      "    console.error('Run Salesforce Authentication
first')",
      "}"
     ]
    }
   },
   {
    "listen": "test",
    "script": {
     "type": "text/javascript",
     "exec": [
      ""
     ]
    }
   }
  ]
 }
],
"event": [
 {
  "listen": "prerequest",
  "script": {
   "type": "text/javascript",
   "exec": [
    ""
   ]
  }
 },
 {
  "listen": "test",
  "script": {
   "type": "text/javascript",
   "exec": [
    ""
   ]
  }
 }
],
"variable": [
 {
  "key": "salesforce_domain",
  "value": "https://demologik6.my.salesforce.com"",
  "type": "default"
 },
 {
  "key": "salesforce_username",
  "value": "",
  "type": "default"
 },
 {
  "key": "salesforce_password",
  "value": "",
  "type": "default"
 },
 {
  "key": "salesforce_client_id",
  "value": "",
```

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```
    "type": "default"
   },
   {
    "key": "salesforce_client_secret",
    "value": "",
    "type": "default"
   },
   {
    "key": "salesforce_access_token",
    "value": ""
   },
   {
    "key": "configurableProductId",
    "value": "",
    "type": "default"
   },
   {
    "key": "configurationId",
    "value": "",
    "type": "default"
   },
   {
    "key": "pricebookId",
    "value": "",
    "type": "default"
   },
   {
    "key": "accountId",
    "value": "",
    "type": "default"
   },
   {
    "key": "opportunityId",
    "value": "",
    "type": "default"
   },
   {
    "key": "quoteId",
    "value": "",
    "type": "default"
   },
   {
    "key": "quoteLineGroupId",
    "value": "",
    "type": "default"
   }
  ]
}
```


The CPQ Reconfigure API

The CPQ Reconfigure API headlessly invokes CPQ services to reconfigure a quote bundle.

The CPQ Reconfigure API is a custom Salesforce API that invokes CPQ services headlessly. Unlike RFQ, this API is used to reconfigure an existing quote bundle.

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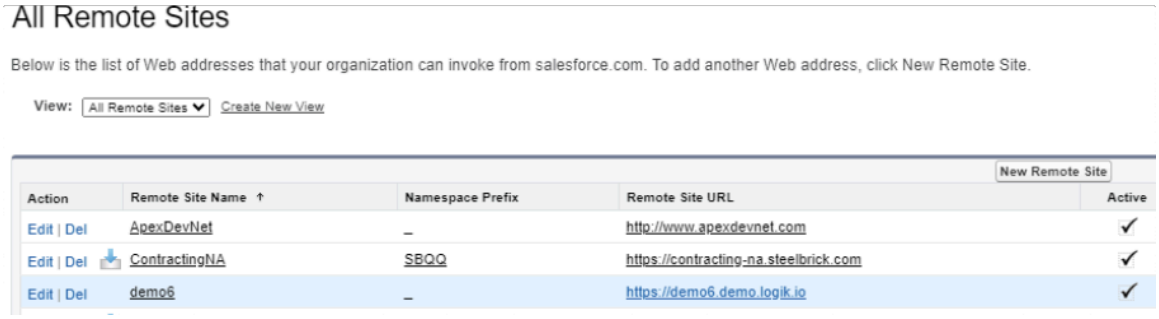
Prerequisites

The Runtime Client Token must be set in the Admin Custom Settings page in Salesforce. The token must include an origin that matches the CPQ URL, which cannot include a trailing slash (/) character.

The Runtime Configuration URL must also be set in the Admin Custom Settings page. In most cases, this should match the administration URL on the same page.

In Salesforce Setup, go to Security, and then to Remote Site Settings. Add a new remote site with your CPQ domain as the URL.



Important: This API relies on *uniqueIdentifier* to match child lines. If you don't have unique *uniqueIdentifier* values for products, child lines may update incorrectly.

API details

Endpoint: `/services/apexrest/LGK/cpq-quote-lines/reconfigure`

Note: Request endpoints and parameters are case sensitive.

Methods: Receives and returns `application/json`.

PATCH: The method currently only supports two fields, `configurationId` and `configurableQuoteLineId`.

Response: A quote (`SBQQ__Q__c`) record.

Note: The quote info returned will include info on all quote lines, not just the ones being added by the request. For example, if the configuration with three line items gets added to a quote that already had two lines on it, the quote info returned will included all five lines.

Request example:

```
{
 "configurationId":"86ec190e-cba8-4b1d-a2dc-ba47714a22b5",
 "configurableQuoteLineId":"a137d00000977oWAAQ"
}
```

Response example:

```
{
"attributes": {
"type": "SBQQ__Quote__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__Quote__c/a0zR0000003f3GLI
AY"
},
```

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```
"Name": "Q-00090",
"Id": "a0zR0000003f3GLIAY",
"SBQQ__LineItemCount__c": 4,
"SBQQ__LineItems__r": {
"totalSize": 4,
"done": true,
"records": [
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
RxIAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPRxIAO",
"Name": "QL-0000122",
"SBQQ__ProductName__c": "LGK Machine"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
RyIAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPRyIAO",
"Name": "QL-0000123",
"SBQQ__ProductName__c": "Analytics Software"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
S2IAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPS2IAO",
"Name": "QL-0000124",
"SBQQ__ProductName__c": "Extended Warranty"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
S3IAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPS3IAO",
"Name": "QL-0000125",
"SBQQ__ProductName__c": "Scanner"
}
]
},
```


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```
"SBQQ__Type__c": "Quote"
}
```

Requests can be made directly through Apex. The argument is a `Map<String,Object>` with the same fields used in the REST API. For example:

```
Map<String, Object> requestBody = new Map<String, Object>{
  'configurableQuoteLineId' => '01t8a000005hldvAAA',
  'configurationId' => '79a3ffdd-7dd0-41f6-8700-4bd7506407c7'
};
String result =
 LGK.CpqReconfigureApiController.reconfigure(requestBody);
```

The response is a JSON formatted string representing the quote object, similar to the response in the REST APIs.

Custom field mapping

If a field on the Quote Line object in Salesforce has a name that matches, custom values can be written from the `extended` or `pricing` information in a CPQ product.

API calls for navigating sets in ServiceNow CPQ

Understand how to use sets in a headless environment using API calls.

Setup

The following set and fields were created for this example:

- Field: Example set field 1
  - Picklist with options A, B, C
  - Field variable: exampleSetField1
- Field: Example set field 2
  - Boolean
  - Field variable: exampleSetField2
- Set: Example set
  - Contains Fields exampleSetField1 and exampleSetField2
  - Variable name: exampleSet (therefore, size field is set.exampleSet.size)

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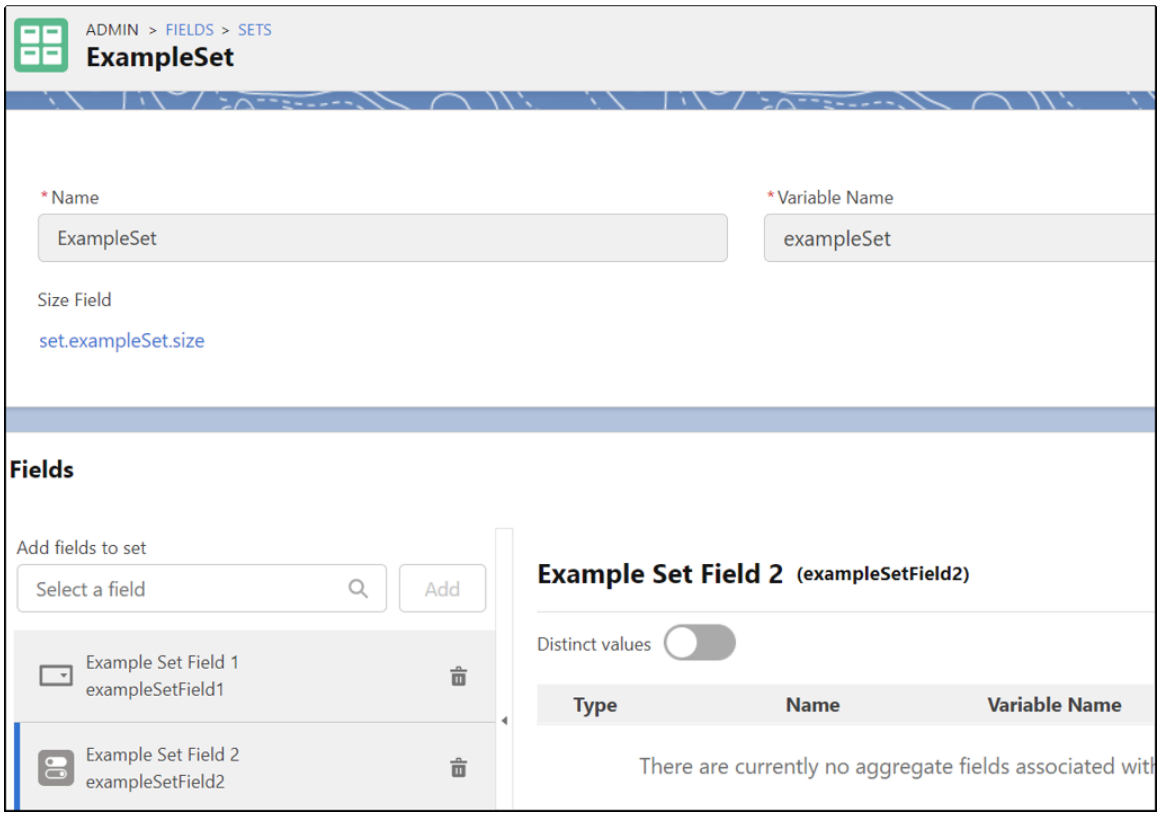

Row identifier and row index

Every time a set is expanded to include a new row, the new row has a row identifier and a row index assigned to it. These are how you change the set.

- The row identifier starts at 1 and increases incrementally by 1. This number is used to add or remove rows from the set.
- The row index starts at 0 and increases incrementally by 1. This number is used to adjust values of Fields in the set.

After every API call that changes the set, the rows are organized. Due to the reorganization, the row index and row identifiers are reassigned. This is explained in greater detail in the examples below.

Changing the set size

There are two ways to change the number of rows in a set: by sending a single number, and by sending specific values for the row identifiers.

The first way to change the number of rows in a set is to send a single number (the number of rows) as the value of the size variable in the API call. This method offers less control, but is useful if you know the total number of rows in the set you want to build. In the following example, the number 6 is set as the value of the size and it creates row identifiers 1-6. To edit the fields in these rows, you would use the row index numbers of 0-5.

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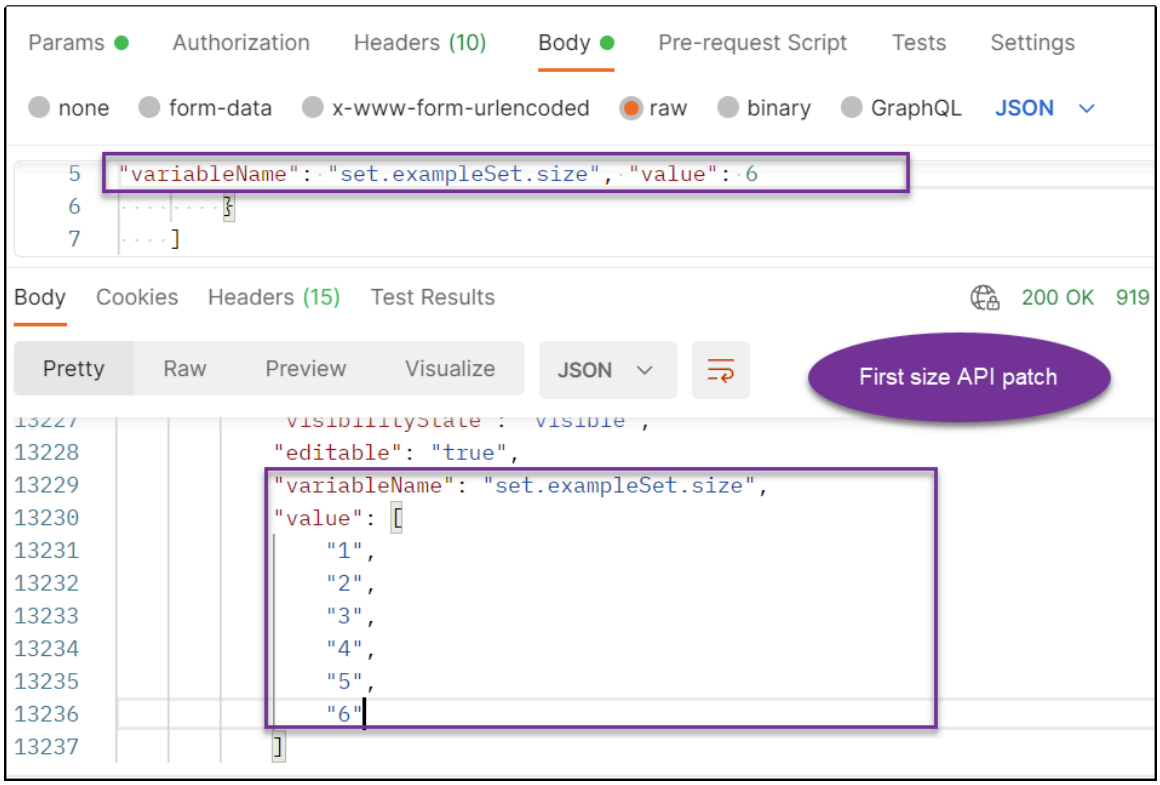
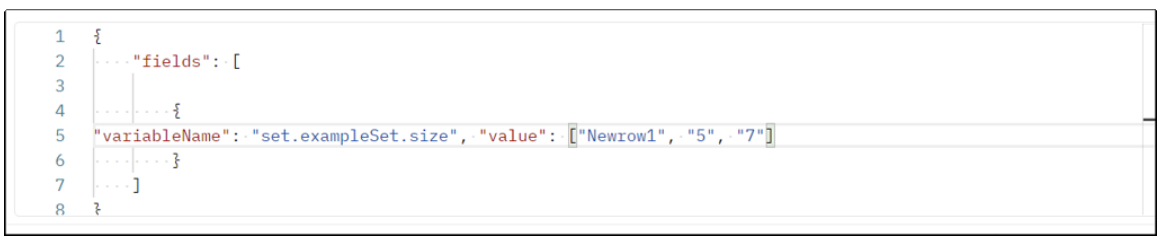


The second way to edit the size of the array is to send values in the placeholder for each row of the array. This is useful for adjusting the rows of the array with precision. Depending on what values are added to the API call and their order, a combination of the following three changes will occur:

- If the API call references a value that is not among the current row identifiers, it will create a new row in the position of the new value.
- If the API call does not reference any value that is among the current row identifiers, the row will be deleted from the array.
- If the API call references a value that is among the current row identifiers, it will put that array row in the position of the row identifier in the API call.

Previously, the size of ExampleSet was set to 6, which resulted in the row identifiers [“1”, “2”,”3”,”4”,”5”,”6”].

Now, the following API call is sent to the same environment:



When this call is sent, the following occurs:

- No row identifier is called “Newrow1”. Therefore, a new row (with the fields in the row set to defaults) is inserted before any known row identifiers. (This is the first change listed above.)
- A row identifier is called “5”. In the API call, it is in the second position (after NewRow1). Therefore, it will move to the second row position. (This is the second change listed above.)

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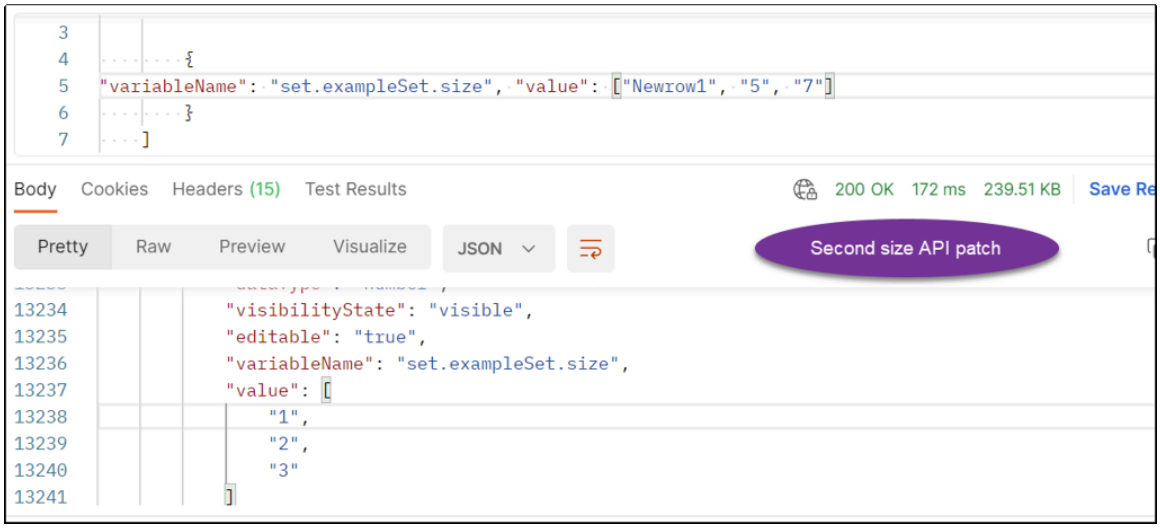
- No row identifier is called “7”. Therefore, a new blank row is inserted in position 3. (First change.)
- The row identifiers “1”, “2”, “3”, “4”, and “6” are not referenced in the API call. Therefore, they are deleted. (Third change listed above.)

When all changes from the API call are complete, the row identifiers are reset.



The following table shows this in greater detail, including the index values, which will be discussed in the next section.

Array size modification example

Size field new identifier	Value sent in API call	Old row identifier	New index	Old index
1	Newrow1	Did not exist	0	Did not exist
2	5	5	1	4
3	7	Did not exist	2	Did not exist
{deleted rows}	1,2,3,4 and 6 were not sent in API call defining size	1,2,3,4 and 6	Deleted	0,1,2,3 and 5

Important details to note:

- After this API call, the row with row identifier 5 (and index 4) now has the row identifier 2 (and an index of 1) that need to be used for all future API calls.
- Once a row is deleted from the array, it is deleted completely. So a new API call that references row identifier 6 would be referencing a new row. All earlier data and changes to fields in row identifier 6 are no longer relevant and cannot be referenced.
- This is helpful for changing the order of rows.

One final note: If the API patch call "variableName": "set.exampleSet.size", "value": ["Newrow1", "5", "7"] is sent more than once, the three old rows are deleted and three new rows are created. This would lose the data that was previously in 5.

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Changing set fields

The next step is to define values for the fields in the set. Assume that the following call occurs after the first size API patch sets the size to six rows. To change Example Set Field 1 and Example Set Field 2 for several rows, the following code would be added to the fields section of an API call:

```
{{
            "set": "exampleSet",
            "index": 0,
            "variableName": "ExampleSetField1",
            "value": "A"
        },
        {
            "set": "exampleSet",
            "index": 4,
            "variableName": "ExampleSetField1",
            "value": "B"
        },
{
            "set": "exampleSet",
            "index": 4,
            "variableName": "ExampleSetField2",
            "value": "True"
        },
{
            "set": "exampleSet",
            "index": 5,
            "variableName": "ExampleSetField1",
            "value": "C"
        },
```

This would result in the following:

Set field change example 1

Row Identifier	1	2	3	4	5	6
Index	0	1	2	3	4	5
example SetField 1	A				B	C
example SetField 2					True	

If the second size API patch from above is sent, the following would result:

Set field change example 2

Size Field New Identifier	1	2	3
Size Field Old Identifier	{new row, see above}	5	{new row, see above}

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Set field change example 2 (continued)

Old Index	{new row}	4	{new row}
New Index	0	1	2
exampleSetField 1		B	
exampleSetField 2		True	

Webhooks

Webhooks are endpoints that can receive a POST request whenever a configuration is saved.

CPQ supports webhooks: endpoints that can receive a POST request when a configuration is saved. Once a webhook has been configured, it is called on every save configuration action.

To enable webhooks, log a case with support. Only one webhook can be created per CPQ environment.

Webhook use cases

Webhooks can be used to integrate data from CPQ to other downstream systems. Use cases include:

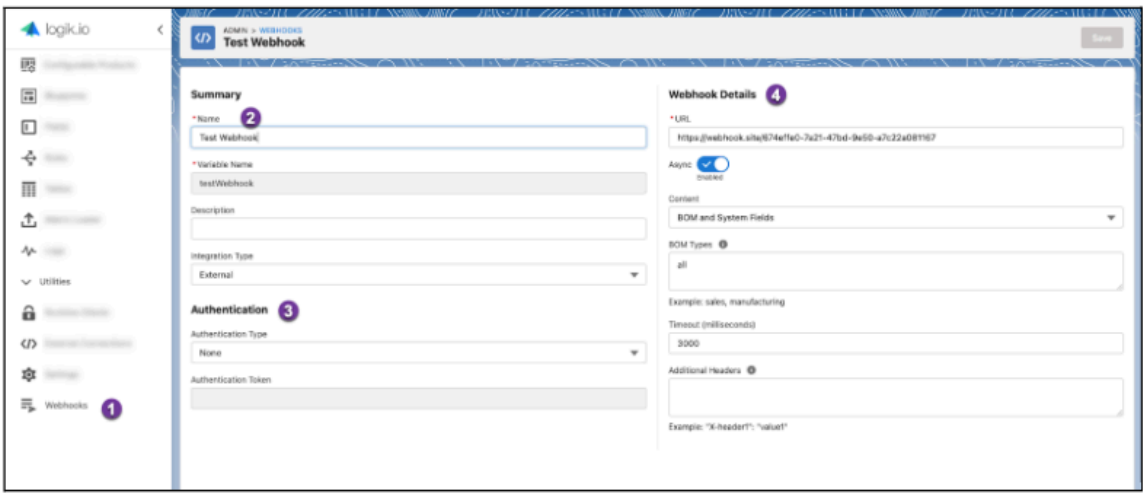
- Displaying the CPQ native UI via direct URL and sending the config result, via webhook, to a third-party destination. See:

  Use case: Displaying the CPQ native UI via direct URL

- Sending config data directly to a quoting or order management system
- Pushing the configuration result to middleware that can manipulate the data and pass it along to downstream systems

Webhook demo

Webhook setup



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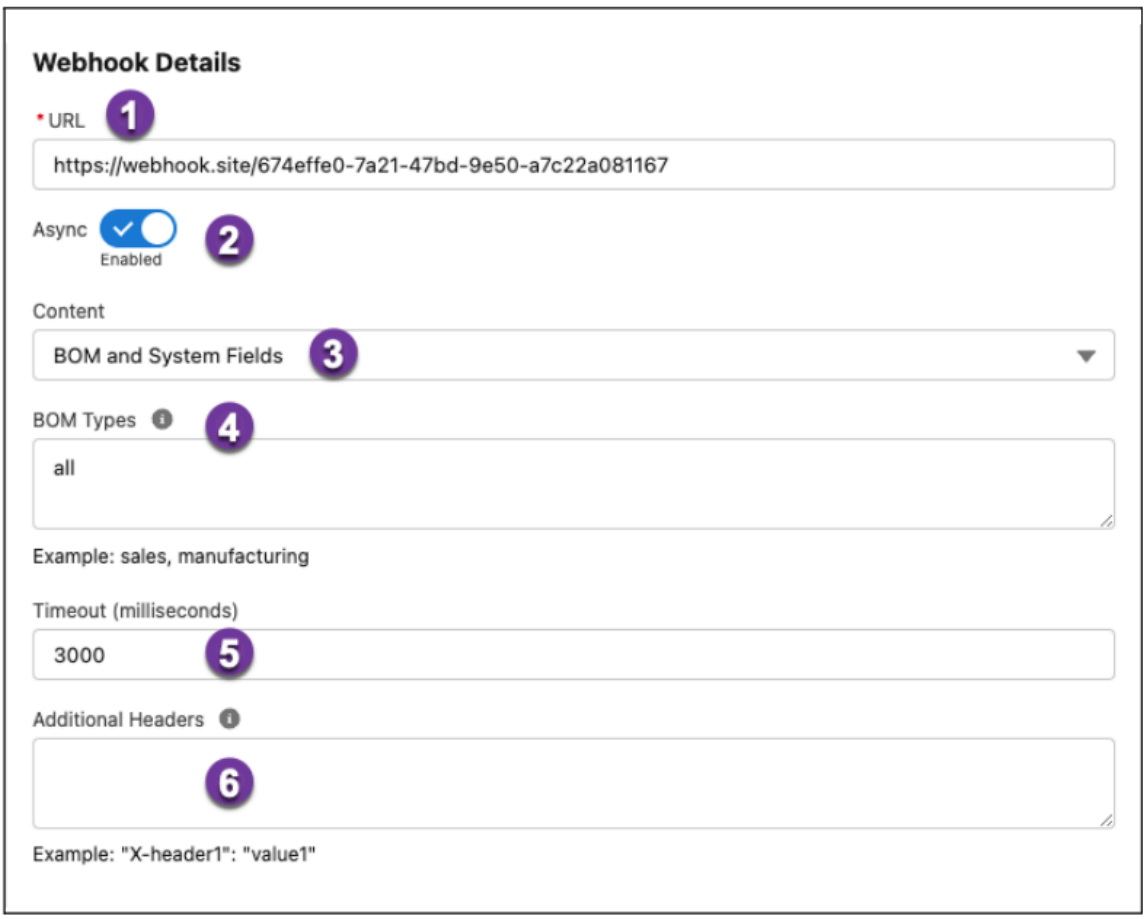
- When webhooks are enabled, they can be found in the Utilities menu in the CPQ Admin screen.
- Summary: Webhook configuration is similar to external connections. The Name, Description and Integration type can all be defined.
- Authentication: Webhooks support both no authentication (None) as well as bearer token authentication (Bearer Token).
- Webhook Details: Additional details of the webhook can be specified as well to control the behavior.

Webhook details



1. URL: The endpoint to receive the data from Logik on save of a configuration. Must be able to receive an HTTP POST request.
2. Async: When enabled, ensures that the end user is redirected immediately when a configuration is completed and does not wait for a response from the server before exiting. The save process is asynchronous.

   When disabled, this ensures that the webhook process is resolved before the user is redirected. The save process is synchronous.

3. Content: The data that CPQ should send to the endpoint.
   - Config Data: all admin-created configuration fields and their input values
   - BOM and System Fields: all system configuration fields and their values; the bill of materials (as specified in the BOM Types input immediately below)
4. BOM Types: The BOM types to be sent in the request.

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5. Timeout: The timeout value in milliseconds
6. Additional Headers: Additional headers that should be sent along with the request, entered as quoted key value pairs. For example, `"X-header1": "value1"`

Example webhook body

The body that the webhook sends to the external resource looks like the following. This example covers product pickers and the built-in system fields from an environment.


```
{
  "uuid": "8014a955-49c4-4d63-a15a-8c91cef6f6f4",
  "fields": [
    {
      "userEdited": false,
      "dataType": "array",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "pp",
      "uniqueName": "pp",
      "value": ["alpha"],
      "optionSet": {
        "selectedOptions": [
          {
            "label": "alpha",
            "state": "visible",
            "value": "alpha",
            "imageUrl": null,
            "orderNumber": 10
          }
        ],
        "options": [
          {
            "label": "alpha",
            "state": "visible",
            "value": "alpha",
            "imageUrl": null,
            "orderNumber": 10
          },
          {
            "label": "beta",
            "state": "visible",
            "value": "beta",
            "imageUrl": null,
            "orderNumber": null
          }
        ]
      },
      "rows": {
        "content": [
          {
            "index": 0,
            "fields": [
              {
                "userEdited": false,
                "dataType": "text",
                "visibilityState": "visible",
```


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```
            "editable": "false",
            "variableName": "pp.value",
            "uniqueName": "pp-0-pp.value",
            "value": "alpha",
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": true,
            "dataType": "boolean",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.select",
            "uniqueName": "pp-0-pp.select",
            "value": true,
            "optionSet": {
              "options": [
                {
                  "label": "true",
                  "state": "visible",
                  "value": "true",
                  "imageUrl": null,
                  "orderNumber": null
                },
                {
                  "label": "false",
                  "state": "visible",
                  "value": "false",
                  "imageUrl": null,
                  "orderNumber": null
                }
              ]
            },
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": false,
            "dataType": "number",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.quantity",
            "uniqueName": "pp-0-pp.quantity",
            "value": 1,
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": false,
            "dataType": "text",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.data",
            "uniqueName": "pp-0-pp.data",
            "value": "",
            "set": "pp",
            "index": 0
```


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```
            }
          ],
          "label": "alpha",
          "state": "visible",
          "value": "alpha",
          "imageUrl": null,
          "orderNumber": 10,
          "productDetails": {}
        },
        {
          "index": 1,
          "fields": [
            {
              "userEdited": false,
              "dataType": "text",
              "visibilityState": "visible",
              "editable": "false",
              "variableName": "pp.value",
              "uniqueName": "pp-1-pp.value",
              "value": "beta",
              "set": "pp",
              "index": 1
            },
            {
              "userEdited": false,
              "dataType": "boolean",
              "visibilityState": "visible",
              "editable": "true",
              "variableName": "pp.select",
              "uniqueName": "pp-1-pp.select",
              "value": false,
              "optionSet": {
                "options": [
                  {
                    "label": "true",
                    "state": "visible",
                    "value": "true",
                    "imageUrl": null,
                    "orderNumber": null
                  },
                  {
                    "label": "false",
                    "state": "visible",
                    "value": "false",
                    "imageUrl": null,
                    "orderNumber": null
                  }
                ]
              },
              "set": "pp",
              "index": 1
            },
            {
              "userEdited": false,
              "dataType": "number",
              "visibilityState": "visible",
              "editable": "true",
```


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```
                "variableName": "pp.quantity",
                "uniqueName": "pp-1-pp.quantity",
                "value": 0,
                "set": "pp",
                "index": 1
              },
              {
                "userEdited": false,
                "dataType": "text",
                "visibilityState": "visible",
                "editable": "true",
                "variableName": "pp.data",
                "uniqueName": "pp-1-pp.data",
                "value": "",
                "set": "pp",
                "index": 1
              }
            ],
            "label": "beta",
            "state": "visible",
            "value": "beta",
            "imageUrl": null,
            "orderNumber": null,
            "productDetails": {}
          }
        ],
        "pageable": "INSTANCE",
        "last": true,
        "totalPages": 1,
        "totalElements": 2,
        "size": 2,
        "number": 0,
        "sort": { "empty": true, "sorted": false, "unsorted":
true },
        "numberOfElements": 2,
        "first": true,
        "empty": false
      }
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productCode",
      "uniqueName": "sys.productCode",
      "value": "CC-LGK"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.pricebookId",
      "uniqueName": "partner.quote.pricebookId",
      "value": ""
    },
```


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```
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.currencyIsoCode",
      "uniqueName": "partner.quote.currencyIsoCode",
      "value": "USD"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productFamily",
      "uniqueName": "sys.productFamily",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productDescription",
      "uniqueName": "sys.productDescription",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.id",
      "uniqueName": "partner.quote.id",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productUOM",
      "uniqueName": "sys.productUOM",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "number",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productPrice",
      "uniqueName": "sys.productPrice",
      "value": 0
    },
    {
      "userEdited": false,
      "dataType": "text",
```


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```
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productName",
      "uniqueName": "sys.productName",
      "value": "CheckConfig"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.lineId",
      "uniqueName": "partner.quote.lineId",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "number",
      "visibilityState": "visible",
      "editable": "false",
      "variableName": "pp.aggregates.quantity_sum",
      "uniqueName": "pp.aggregates.quantity_sum",
      "value": 1
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productId",
      "uniqueName": "sys.productId",
      "value": "CC-LGK"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.actionContext",
      "uniqueName": "sys.actionContext",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.currentDate",
      "uniqueName": "sys.currentDate",
      "value": "2023-08-04"
    }
  ],
  "products": [
    {
      "id": "alpha",
      "quantity": 1,
      "bomType": "SALES",
```


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```
      "type": "accessory",
      "extended": { "data": "" },
      "pricing": {
        "productSellingModelId": "OneTime_OneTime_2023_07_05",
        "endDate": null,
        "startDate": null,
        "ProductId": "01tHr000007i4B5IAI",
        "StartingUnitPriceSource": "System",
        "ListPrice": 99.99,
        "TotalLineAmount": 99.99,
        "ListPriceTotal": 99.99,
        "StartingPriceTotal": 99.99,
        "Quantity": 1.0,
        "PricingTermCount": 1,
        "NetUnitPrice": 99.99,
        "StartingUnitPrice": 99.99,
        "PricebookEntryId": "01uHr00000FYKDUIA5",
        "TotalAdjustmentDistAmount": 0,
        "TotalAdjustmentAmount": 0,
        "TotalPrice": 99.99,
        "SalesItemType": "Product"
      },
      "name": "alpha",
      "partnerId": "01tHr000007i4B5IAI",
      "productCode": "alpha",
      "externalId": "",
      "productFamily": "",
      "description": "",
      "uom": "",
      "price": 99.99,
      "extPrice": 99.99,
      "level": 0,
      "rollUpPrice": 99.99
    }
  ],
  "total": 99.99
}
```


The LocationLookup field

Any text type can be defined as a LocationLookup component display type, which lets you use Google's API to pull address data.

The LocationLookup field component display type leverages Google's Places API to pull address data that can be used for unique location configuration and pricing. Any text field type can be defined as a LocationLookup component display type by using the layout editor or by directly editing a layout CSV file.



To see it in action, view the following video:

Location Lookup Field Component Display Type

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To use a LocationLookup field, you first need to have a valid API key from Google with permission to access Google Places. The API key must be configured for both the Maps JavaScript API and the Places API.

The value of the field requires two properties: *key* and *fieldMapping*.

```
{
  "key": API-Key-string,
  "fieldMapping":
 {"[field1VariableName]":"[returnedPlaceType]","[field2VariableN
ame]":"[returnedPlaceType]"}
}
```

The key property refers to the API key.

Use the fieldMapping property to instruct the UI to map the returned place data to different fields in the configuration. This property can take either a string or an object of key:value pairs (both strings).

If a string is provided:

- The string should be the variable name of a field in the configuration
- The returned data from the API will be converted to a string and mapped to the field's value

If an object is provided:

- The keys will be the variable name of the field in the configuration
- The values will be the JSON path to the data from the API that should be mapped to the field

For more details on what that data looks like, see: Place Details

When you map address components, these come back as an array of the different component values, so there is no straightforward path. The UI expects something in the following format:

```
address_components.[component type]
```

Note that not every type listed is guaranteed to be returned by the place details API. To find the supported types, see the following Google website:

Place Types

Example field value:

```
{
    "key": "**********",
    "fieldMapping": {
        "formattedAddress": "formatted_address",
        "sublocality": "address_components.sublocality",
        "city": "address_components.locality",
        "stateForLocation":
 "address_components.administrative_area_level_1",
        "zipCode": "address_components.postal_code"
    }
}
```

This mapping also works in sets. Note that the location field, and all of the fields listed in the mapping, must also be part of the set. Cross-index or global fields are not supported in a set.

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Some common mappings from the Google Places API include:

- *formatted_address* (returns the whole address in human-readable form)
- *address_components.locality* (returns the city)
- *address_components.administrative_area_level_1* (returns the state)
- *address_components.country*
- *address_components.postal_code*
- *address_components.street_number*
- *address_components.route* (returns only the street name)

Solution configuration setup

Solution configuration lets CPQ admins manage multiple blueprints in a single configuration. Configurable product actions include a blueprint definition and can pass data between configurations via defined fields.

Solution configuration is an environment level feature that is off by default. To have it enabled in an environment, log a case with CPQ Support.

Configurable product actions are a new type of product action that can be added to rules. They are similar to standard product actions, but have a blueprint defined and can include field mapping to pass data between configurations. Advanced configurable product actions require that the product ID and the blueprint fields are defined outside of the script.

Benefits

- For administrators:
  - Independent deployment: Each blueprint can be deployed independently, which allows for finer granularity when making changes or updates to a blueprint.
  - Separation of concerns: Administrators can segment out logical components from a configuration and allow different groups to work on blueprints without conflicting.
  - Blueprint reusability: Blueprints can be reused both as part of a solution, multiple solutions, or as an independently configurable product. This leads to less duplication when a blueprint is needed for multiple contexts and less overhead for maintenance.
- For end users:
  - End users can seamlessly work through multiple configurations without needing to re-launch CPQ each time.
  - You can clone the child configuration if it is a set-based configuration. The original node in a set must be in the valid state. Cloned nodes are independent of the original edits to a cloned node do not affect the source node.
  - You can also add a blank node or remove node from the navigation sidebar.

The end user experience

- Launching a solution: Users launch the configurable product that they want to start from, just as they do normally. Whichever configurable product is launched becomes the root product for the solution.
- Adding configurable products: When any of the defined rules that have a configurable product action are triggered, a new child configuration is created if a valid configurable product with a deployed blueprint is found.

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- When additional configurable products are added to the configuration, solution navigation becomes available and shows a list of the current configurable products, including the root configurable product.
- Changing the condition of a configurable product action rule to false removes the configuration and configurable product, just as in a normal product action. This also removes changes to fields, products, nested children, or other items.
- Viewing the bill of materials: When a configuration becomes a solution, the default product list component is hidden and replaced by the **View Full Solution** button in all configurations. In a solution, **View Full Solution** displays the entire solution BOM. Additional product lists added as tiers reflect only the currently selected configurable product and any of the child configurations below it.

Potential errors with configurable product actions

Errors related to configurable product actions may include the following:

- The configurable product is not found
- The configurable product does not have a blueprint associated with it
- The configurable product does not have a deployed blueprint
- The blueprint does not exist
- The blueprint is not deployed
- The blueprint has changed

Field mapping

Field mapping defines which fields have data passed to or from them. Field mapping happens on creation of a child configuration or when a mapped source field is changed. Fields are only mapped a single level, to continue the mapping define the mapped fields on each blueprint. Fields can only be mapped to the same type of field: text to text, number to number, and so on.

Entire sets and product pickers cannot be mapped.

Node cloning for solution configurations

Node cloning lets you duplicate an existing, valid solution configuration node to use as the starting point for a new node. When you clone a node, both the fields and their values are copied — so you don't have to re-enter configuration data for each new node from scratch.

Cloned nodes are fully independent of the original. Changes you make to a cloned node don't affect the source node, and changes to the source node don't affect the clone.

Cloning is available from the solution configuration in a set using the navigation sidebar. A node must be in a valid state before you can clone it — this prevents incomplete configurations from being duplicated. When you clone a node that has a dependent set, a corresponding child node is created as part of the cloning operation.

Layout

Each solution component displays its own layout from the layouts associated with the current blueprint.

When in a solution, the header, background style, buttons and product list display comes from the solution root layout that is defined in the root blueprint.

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The solution navigation sidebar automatically appears when additional configurable products are added during a configuration.

Bill of materials (BOM)

The bill of materials shows the items from the currently viewed configuration and any child configurations below. The entire solution BOM can be viewed at the solution root.

The BOM hierarchy is still defined via the parent product and the unique identifier fields in product actions. It is independent of the solution hierarchy, and one does not necessarily reflect the other. A child configuration may add top level items to the bill of materials.

Other options

- Sets make it easy to handle large numbers of rows with potentially different configurations. They support cloning rows, while set repeater layout options provide visual similarity.
- Product pickers work well with lightly configurable products and can be customized with additional fields and bulk actions.
- Depending on the downstream system, making multiple independent configurations may provide more flexibility than a single solution configuration.

Related topics

Node cloning for solution configuration

Solution configuration terms and considerations

Understand terminology, design considerations, and limits associated with solution configuration, which lets CPQ admins manage multiple blueprints in a single configuration.

Solution configuration gives CPQ admins the ability to create and manage multiple blueprints that can work together in the end user side to provide a seamless configuration experience. For users familiar with other vendors, this is conceptually similar to “system configuration” and “nested bundles".

Terminology

Solution

The overall collection of blueprints (configurations) that are linked together. On the buyside, a configuration becomes a solution when at least one child configuration is added from a configurable product action.

Solution root

The topmost configurable product in a solution has one or more child configurations. This is the configurable product and blueprint that is started from (launched from eCommerce, CPQ, or other sources) on the buyside.

Parent (Source) blueprint

A blueprint that includes a rule with a configurable product action for another blueprint, hierarchically has at least one child blueprint, and may have parent blueprints itself.

Child (Target) blueprint

A blueprint that is used to create a child configuration, hierarchically has at least one parent, and may have children itself, if defined in rules. It must have a valid configurable product associated with it to be used.

Configurable product action

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An extension of the product action that defines the child blueprint, configurable product, and (optionally) field mappings.

Field Mapping

A field that has the data be mapped between blueprints. Part of the configurable product action.

Source field

The field on the parent blueprint that is used for the value in a field mapping.

Target field

The field on the child blueprint that has its value set from the field mapping.

Solution hierarchy

The relationship between configurable products (solution components) in a solution configuration. This does not determine how products appear in the BOM.

Solution BOM

The bill of materials as a rollup across all the configurations. This contains all the products that have been added across the solution, including children, grandchildren, and so on. The solution bill of materials is what is returned upon saving a solution.

Design considerations and limits

Solution configuration is still under active development.

- Field mapping:
  - Data can flow only from parent to child configurations.
  - Field values are only mapped down a single level at a time, such as parent to child, or child to grandchild.
  - Fields can only be mapped to the same type of field, such as picklist to picklist. You cannot map picklist to text, or perform other type conversions in the mapping.
  - Only number, text, Boolean, and picklist fields can be mapped.
    - Mapping of an entire Set or entire product picker is not supported.
    - Product picker subfields cannot be mapped to a field on the child.
    - Fields that are in a set can be mapped to a field on the child.
  - Any target fields are read only during configuration. The value is set to the same value of the source field.
  - A system field can be used as a source field, but cannot be set as a target field.
  - System fields always reflect the values of the source configuration that started the configuration.
- Layout and solution navigation:
  - Navigation in a solution is done using the Solution Navigation sidebar. No additional component or work needs to be done on a layout.
  - Solution navigation: Users can also navigate to configurations by clicking the configurable product in the solution BOM.
  - The header and header actions in the layout of the solution root are used across all configurations in a solution. This includes things like currency display settings and any custom branding.

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    - Save (Quote) and Cancel actions in the header are not scoped to the currently viewed blueprint. They apply to the whole solution.
    - Reset, Validate (if a validation enrichment exists on the blueprint), and Change Layout apply to the currently viewed blueprint.
- Configurable product actions:
    - Configurable product actions are limited to adding only a single configurable product per product action. If multiple configurable products are needed, use multiple product actions in a rule.
    - Once a product action has been marked as configurable, it cannot be changed back to a simple product action.
    - Configurable product actions are supported in simple and advanced product actions.

      Advanced functions still have the product ID and the blueprint set outside of the advanced script.
    - Configurable product actions triggering conditions are placed in a set and create multiple configurations.
- Limits
    - The solution hierarchy supports a maximum depth of 4 (including the root product). The bill of materials can have an arbitrary depth to the hierarchy.
    - The total number of configurations in a single solution configuration session is 20: the solution root, plus up to 19 active children across all depths.
    - No circular references are allowed in the solution hierarchy. For example, when BP1>BP2, BP2 cannot create another configuration of BP1.
- Product list and bill of materials:
    - Bill of material: BOM hierarchy is still controlled via the *`parentProduct`* and *`uniqueIdentifier`* properties in the product action. Therefore, different configurations in a solution can add products at other levels in the BOM hierarchy.
    - When using the *`parentProduct`* and *`uniqueIdentifier`* attributes for product hierarchy, if two child products have the same parent product and product ID but should both be displayed as separate in the BOM, each requires a unique identifier. This ensures that the UI treats them as unique products when listing them.
    - Product list: When a configuration becomes a solution, the default product list in the layout goes away and is replaced by a **View Full Solution** button at the bottom of the Solution Navigation sidebar.
        - This behavior can be customized in the default product list component of the solution root, in the Solution Settings section.
        - Columns displayed in the solution BOM follow the settings in the default product list of the solution root.
        - To display an additional product list, add it in a tier in the layout of the blueprint. This product list is scoped to that configuration and any child configurations.

Node cloning for solution configuration

Node cloning lets you duplicate an existing solution configuration node in a set, producing an independent copy that you can modify without affecting the source.

In solution configuration, a set groups related configuration nodes. When you need a new node that resembles an existing one, cloning that node is faster and less error-prone than building a

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new one from scratch. The cloned node starts as an exact copy of the source, then diverges as you edit it.

Cloning is available from the solution configuration navigation sidebar. You can clone any node in the set that is in a valid state. Nodes in an invalid state cannot be cloned.

When you clone a node, the following are copied to the new node:

- All field values, including set-based fields, boolean fields, number fields, picklists, product fields, and text fields.
- Child configurations associated with the source node, preserving their structure and field values.
- Nested child configurations, so that the full hierarchy of the source node is reproduced in the clone.

The cloned node is independent of the source. Changes you make to the clone do not affect the source node, and changes to the source do not affect the clone.

Relationship to existing set repeater controls

Cloning is an additional option in the solution configuration navigation sidebar. It does not replace the existing set repeater controls. The following controls continue to be available alongside Clone and Delete:

- Add row above
- Add row below
- Copy row
- Delete row

Note: Adding a blank node remains available as it was before this capability was introduced. Use Clone when you want a pre-filled copy of an existing node. Use Add when you want to start from an empty node.

Node hierarchy and recursive cloning

A cloned node can itself be the parent of child and grandchild configurations. When you clone a parent node, the full hierarchy beneath it is reproduced in the new node. This means you do not need to rebuild nested configurations manually after cloning. The depth of the hierarchy that can be cloned depends on the configuration design. Solution configuration supports cloning up to four levels deep.

Customizing CPQ with themes

Custom themes let you customize your layout. You can enable custom themes by submitting a feature enablement request.

CPQ admin users can edit a custom theme to customize the look and feel of their layout.

To access the custom theme options in the layout editor, submit a CPQ Feature Enablement Request to enable themes.

Getting started

From the blueprint page, select a layout, and then click the Customize Theme tab at the top of the page.

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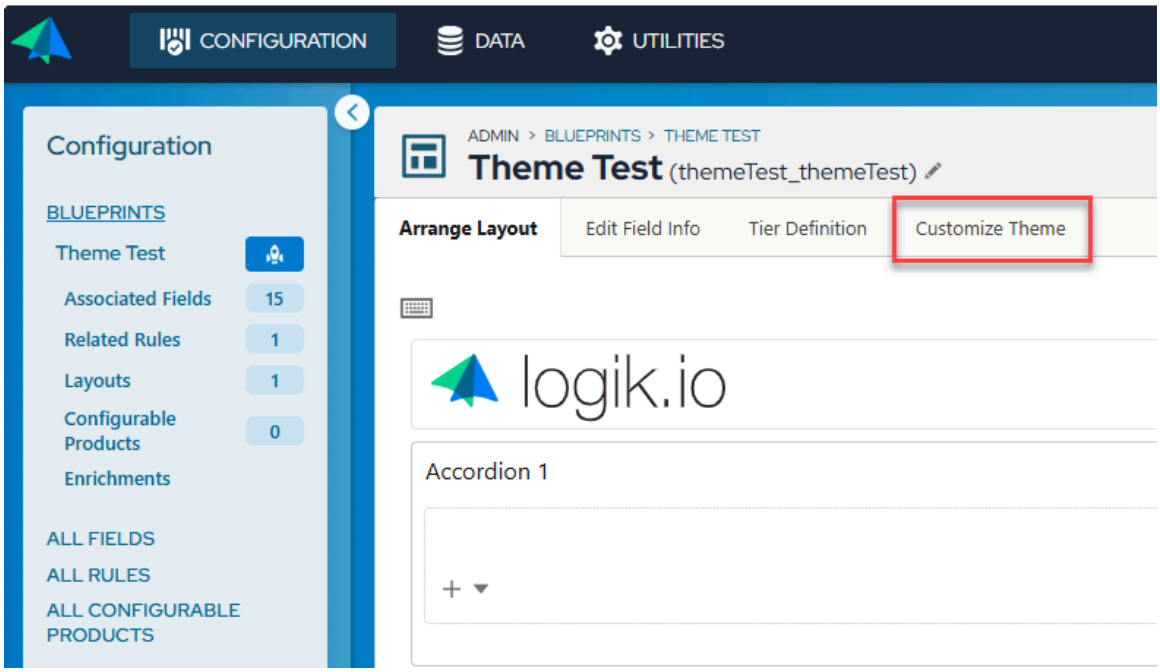
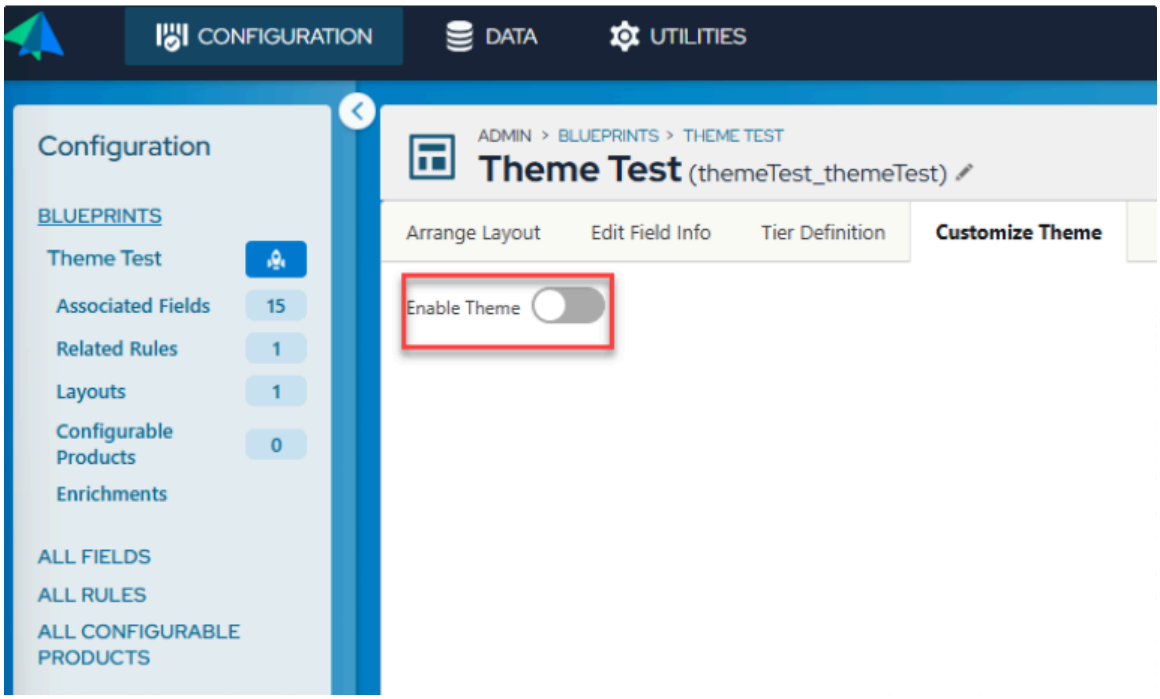
Note: This tab appears only if the theme feature is enabled for your tenant.



On the Customize Theme tab, click to turn on **Enable Theme**. (By default, this option is off.)



When this option is turned on, you see the full Theme Editor screen.

The visual editor

The visual editor includes five sets of options and an interactive preview. The standard CPQ theme is applied by default, but you can modify any fields to start customizing your theme.

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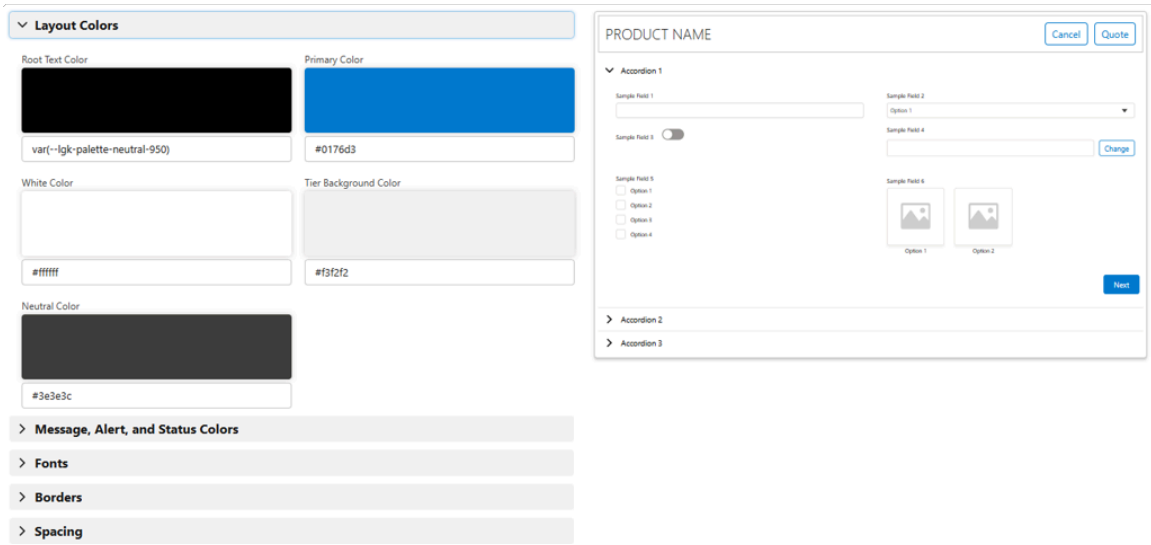

The following options are available in the visual editor.

Visual editor options

Option	Description
Root Text Color	Default font color used in the layout
Primary Color	Color used most often for buttons and selections
Primary Background Color	Default color used for the background and containers
Secondary Background Color	Default color used for tier items such as expandable section backgrounds
Neutral Color	Secondary color used for fields such as hint text
Success Color	Background color for success message banners
Info Color	Background color for neutral message banners
Warning Color	Background color for warning message banners
Error Color	Color for error messaging and field validation
Font Size	Default font size; small, medium, large
Border Radius	Determines border shape for fields where 0 = Square and 16 = Round
Border Width	Determines overall size of the border for fields; none, normal, thick
Spacing	Determines overall padding for the layout; tight, normal, loose

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The JSON editor

The JSON editor provides additional control by using overrides for any element included in the theme.

By default, the values for the current theme are shown, but a user can manually enter new key value pairs to modify the theme. The structure of the theme JSON is already provided in the editor. Clicking in the editor lets the user type in the code block. Any changes made in the visual editor are represented in the JSON editor, and vice versa.



A toggle hides or shows the standard CPQ theme as a reference for fields you may want to revert without discarding the entire theme.

If you want to overwrite a layout element that is not included in the sample data, you can inspect the layout to determine the field to change. Fields that begin with `--lgk-` are customizable in a theme.

The following example demonstrates inspecting a toggle.

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```
.toggle-input {                                                    constructed stylesheet
   --lgk-internal-Toggle-default-borderWidth: var(--lgk-Toggle-borderWidth, 0);
   --lgk-internal-Toggle-default-borderStyle: var(--lgk-Toggle-borderStyle, var(
      --lgk-root-borderStyle));
   --lgk-internal-Toggle-default-borderColor:
      var(--lgk-Toggle-borderColor, var(--lgk-palette-neutral-borderColor));
   border: ▸ var(--lgk-Toggle-border, var(
      --lgk-internal-Toggle-default-borderWidth) var(
      --lgk-internal-Toggle-default-borderStyle)
      var(--lgk-internal-Toggle-default-borderColor));
   appearance: none;
   display: flex;
   align-items: center;
   justify-content: center;
   -webkit-tap-highlight-color: transparent;
   margin: ▸ 0px;
   cursor: pointer;
   width: var(--lgk-internal-Toggle-width);
   height: var(--lgk-internal-Toggle-height);
   background-color:
      var(--lgk-Toggle-backgroundColor, var(--lgk-palette-neutral-500));
   border-radius: ▸ var(--lgk-Toggle-borderRadius, calc(var(--lgk-root-fontSize) *
      100));
   transition: ▸ var(--lgk-Toggle-transition, var(--lgk-root-transition));
}
```

To overwrite an element, add the field name and the modified value in the properties section of the theme override. The format should not include the `--lgk-` but should just be `"fieldname" : "value"`.

The following are example theme overrides.

Custom Theme Overrides

```
{
  "properties": {
    "palette-primary-50": "#f0f7ff",
    "palette-primary-100": "#eef4ff",
    "palette-primary-200": "#d8e6fe",
    "palette-primary-300": "#78b0fd",
    "palette-primary-400": "#1b96ff",
    "palette-primary-500": "#0176d3",
    "palette-primary-600": "#0b5cab",
    "palette-primary-700": "#014486",
    "palette-primary-800": "#032d60",
    "palette-primary-900": "#03234d",
    "palette-primary-950": "#001639",
    "palette-primary-color": "var(--lgk-palette-primary-500)",
    "palette-primary-backgroundColor": "var(--lgk-palette-primary-500)",
    "palette-primary-borderColor": "var(--lgk-palette-primary-500)",
    "palette-primary-hover": "var(--lgk-palette-primary-600)",
    "palette-primary-disabled": "var(--lgk-palette-primary-300)",
```

Using a custom font

A theme can support a custom font through a hosted URL entered in either the visual editor or the JSON editor. This font file needs to be hosted so that it is accessible to the theme. For a custom font, you need to provide a name and the font source URL.

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Setting up the Image Viewer

You can use the Image Viewer to add images to fields for viewing in a media carousel.

The image viewer allows a Logik Admin to add featured images to supported fields that can be viewed in a media carousel. This article covers how to set up the Image Viewer in the Logik Admin and how it displays on your layout.

Supported field display types

- Static Image
- MultiSelectProductPickerGrid
- MultiSelectVisualProductPicker
- ProductPickerGrid
- VisualProductPicker
- MultiSelect picklistGrid
- SingleSelect picklistGrid
- Multiselect Visual Picker
- Visual Picker

Static images

To display the Image Viewer for a Static Image field, follow these steps:

1. Open the layout where you want to add the Image Viewer.
2. Hover over the field and click the gear icon.
3. Open the raw value menu and add the following while including the required inputs in place of the placeholder text below.

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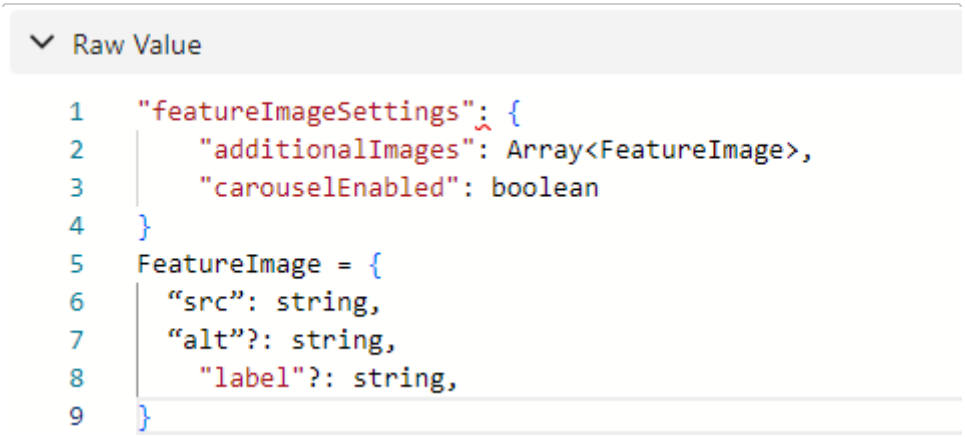

4. Click **Save**, and deploy the blueprint.

Raw value details for Image Viewer

Add the following to the “Raw Value” section of an image display component through the Admin UI, where `Array<FeatureImage>` is an array of your additional feature images in the Feature Image type format and `carouselEnabled` is set to true or false.

```
"featureImageSettings": {
      "additionalImages": Array<FeatureImage>,
      "carouselEnabled": boolean
  }
```

By default, `carouselEnabled` is false.

Defining a feature image

```
FeatureImage = {
  “src”: string,
  “alt”?: string,
  "label"?: string,
}
```

Product Pickers

To display the Image Viewer for a product picker field, follow these steps:

1. Select your product picker field.
2. Select the Option Fields tab.
3. Click **+ Add**.
   - Set the Field Type to Text.
   - Set the Product List Property to Product Extended.
4. Create one Text field for each image to include in the Image Viewer.

> **Note:** To display alt text or a label, additional fields for each type must be created. These fields are not required.

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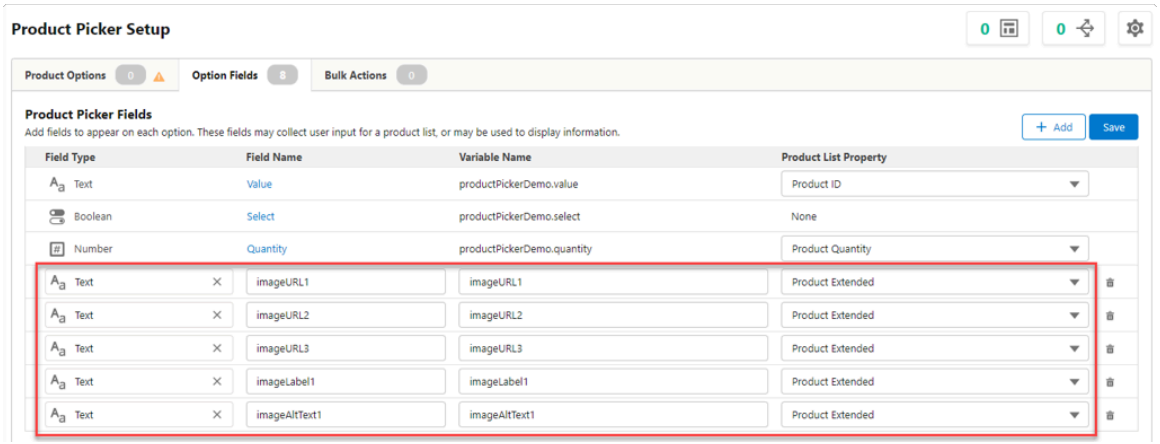
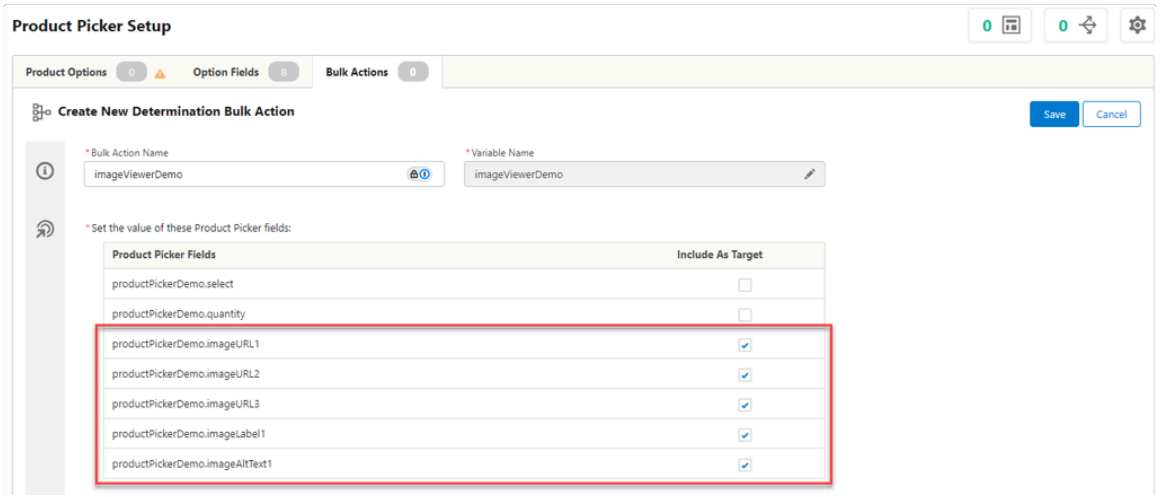
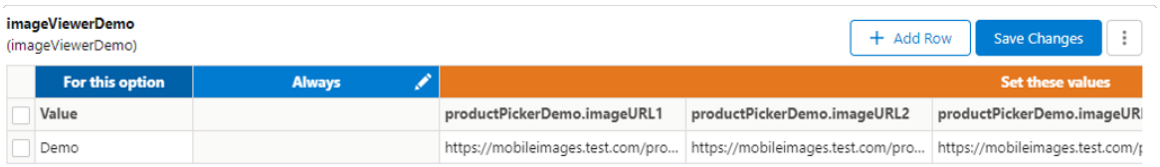


5. Select the Bulk Actions tab.
6. Click Add New Action.
7. Select type Determined Action.
8. Enter a Bulk Action Name.
9. Select all of the fields added for your Image Viewer.



10. Click **Save**.
11. On the Bulk Actions tab, provide the URL for each image as well as text for labels and alt text if desired.



12. Click **Save**
13. Open a layout that includes the product picker field.
14. Hover over the field and click the gear icon.
15. Toggle Enable Image Viewer to On.
16. Expand the Image Viewer Settings section.
17. Select the fields created from steps 3-4 that correspond to Image URL, Alt Text, and Label.

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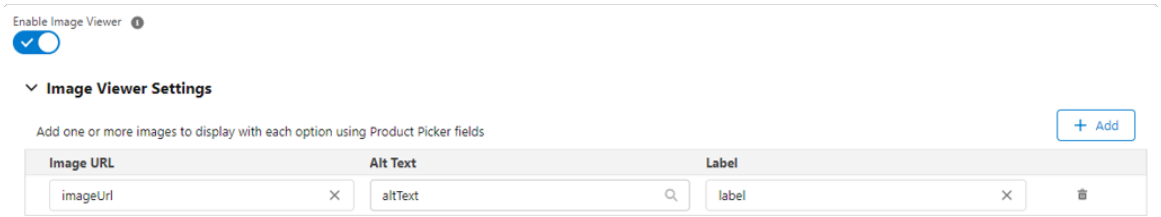
Alt Text and Label are optional.

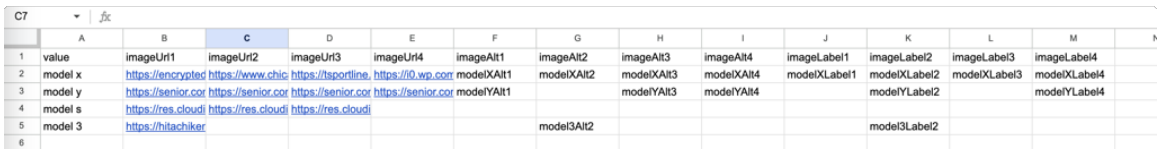
18. Click **+ Add** and repeat step 17 for each image that you want to include.



19. Click **Save**, and deploy the blueprint.

Picklists

1. Open the picklist field.
2. Click the Picklist Extension tab.
3. Click **Import Data**.
4. Create a CSV that includes the following columns:
   - value
   - imageUrl
     - Ensure this is a valid URL for the image to display.
     - Create an imageUrl column for each image to include in the Image Viewer.
   - imageLabel (optional)
   - imageAltText (optional)



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	value	imageUrl1	imageUrl2	imageUrl3	imageUrl4	imageAlt1	imageAlt2	imageAlt3	imageAlt4	imageLabel1	imageLabel2	imageLabel3	imageLabel4
2	model x	https://encrypted	https://www.chic	https://tsportline.	https://i0.wp.com	modelXAlt1	modelXAlt2	modelXAlt3	modelXAlt4	modelXLabel1	modelXLabel2	modelXLabel3	modelXLabel4
3	model y	https://senior.cor	https://senior.cor	https://senior.cor	https://senior.cor	modelYAlt1		modelYAlt3	modelYAlt4		modelYLabel2		modelYLabel4
4	model s	https://res.cloudi	https://res.cloudi	https://res.cloudi									
5	model 3	https://hitachiker					model3Alt2				model3Label2		
6													

5. Import the created CSV.
6. Click **Column Mapping**.
7. For each field added, select the mapping menu and select the column name under the Extension mapping section.

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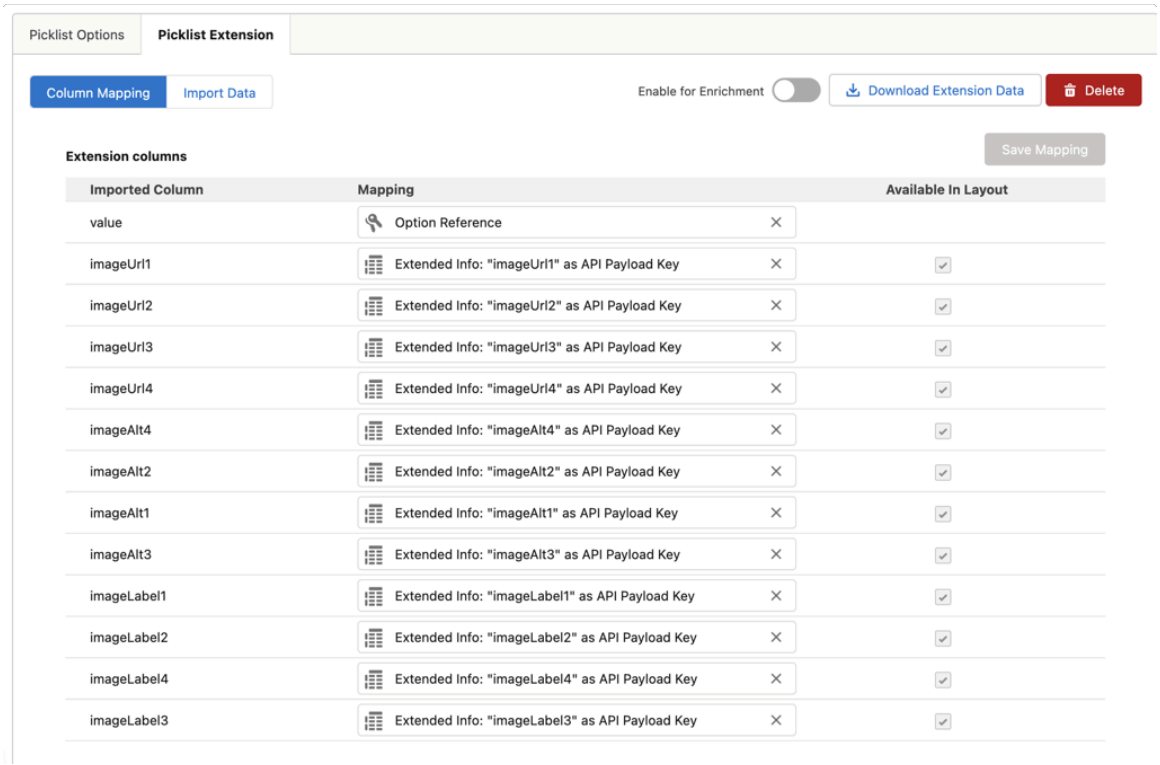

8. Click **Save Mapping**.
9. Open a layout that includes the product picker field.
10. Hover over the field and click the gear icon.
11. Toggle Enable Image Viewer to On.
12. Expand the Image Viewer Settings section.
13. Select the fields created from the picklist extension data that correspond to Image URL, Alt Text, and Label.

    Alt Text and Label are optional.
14. Click **+ Add** and repeat step 13 for each image that you want to include.

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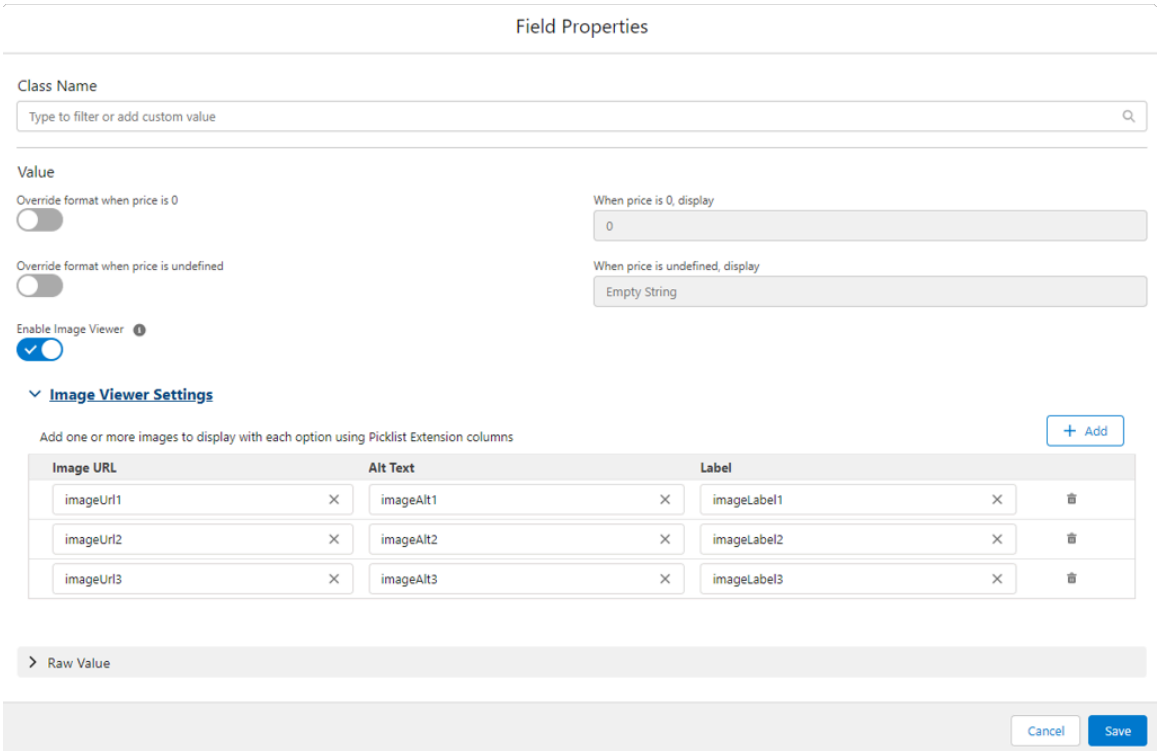

15. Click **Save**, and deploy the blueprint.

General guidelines

Ensure that the image sizes are the same for all images in a viewer. If they do not match, the thumbnails and featured image will not align properly.

Add images in the order you want them to display. Images will display from the Image Viewer settings from top to bottom. The name of the field does not affect the display order.

Use images with a high enough resolution to properly fill the window. Low resolution images will be expanded in size to fit the window and will not look good when select as the featured image.

For optimal performance, avoid large or high resolution images since that will impact the render time for the image viewer.

Image Viewer display

On a layout with a field that includes an image view, a user can hover over an image to see the expand icon.

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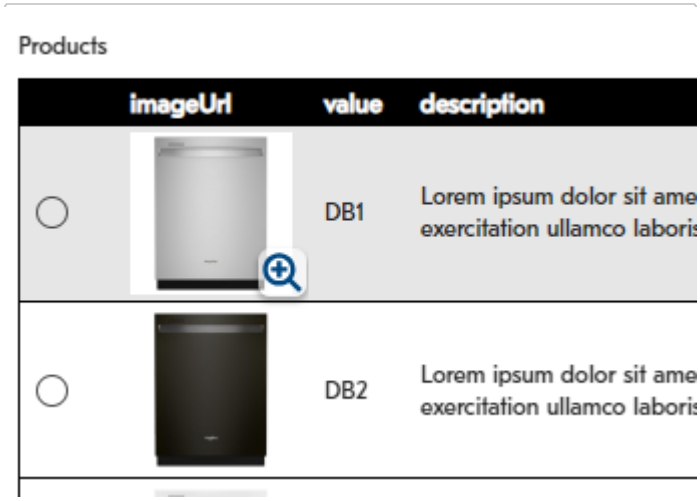

Once clicked, the image view will open in a dialog box.



A user can move between images with the arrow buttons or by clicking the thumbnails below the feature image. This carousel displays any label and alt text if provided. A user can close the dialog box by clicking outside it or by clicking **X** in the top right.

The calendar display component

Use the calendar display component in CPQ to present time-based configuration options in a monthly view. Configure sets, fields, and selection settings to let users view, select, and manage date-specific records directly in the configuration interface.

CPQ native UI allows the administrator to present a calendar display component to the user to aid in time-based configurations. The calendar displays in the context of a month. The data underlying the calendar display is a set, with each calendar day represented by one record in the set.

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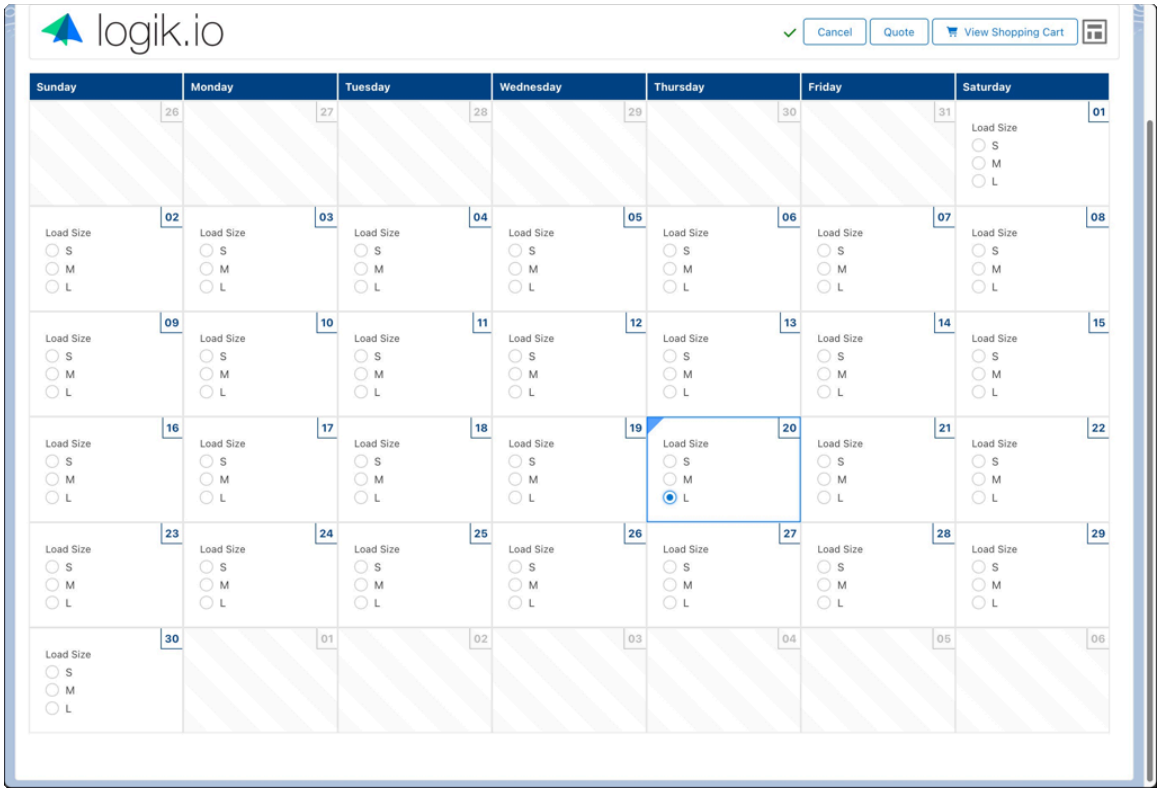
The example below shows a set with 30 records, one for each day, represented as a calendar display component.



Key elements that support this example include a set with the variable name `availableDates`. This set contains the following associated fields:

- `selectedDate` (Boolean): captures whether the user has selected one or more date/ records
- `rawDate` (Text): holds the raw date formatted for each set record
- `availableDate` (Text); holds the date in "MM/DD/YYYY" format for each set record. This is used to facilitate the human-readable date on the calendar display
- `loadSize` (Picklist): Options include S, M, and L. This picklist is displayed in each record (each day on the monthly calendar).

  Calendar records (days) can display any number of set-associated fields. The administrator should apply a practical limit to the number of fields defined, based on users' screen sizes and responsiveness provided by the application.

The On Configure/Reconfigure enrichment initializes the set with the appropriate size for the months to be displayed and a JSON element that contains field values for each record. The following is the output of the On Configure enrichment for the raw calendar above:

```
{
 "availableDates": {
   "data": [
   {
    "availableDate": { "value": "6/1/2024" },
    "rawDate": {
    "value": "2024-06-01T00:00:00.000Z"
    }
   }, //skipped interior records for brevity
   {
```

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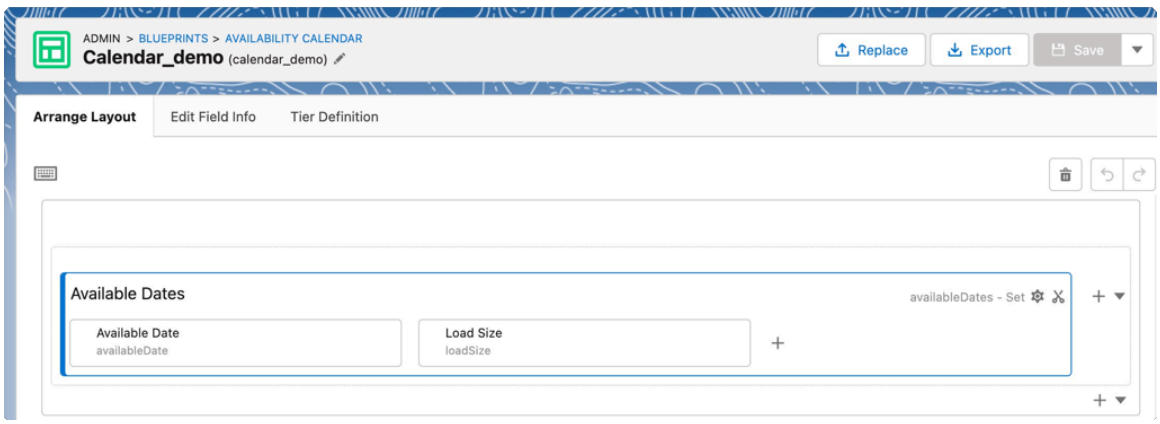
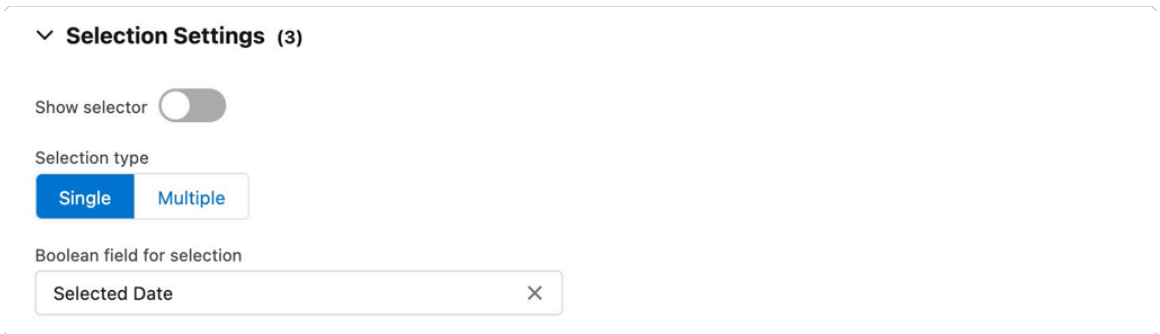
```
    "availableDate": { "value": "6/30/2024" },
    "rawDate": {
    "value": "2024-06-30T00:00:00.000Z"
    }
   }
  ],
  "userEdited": false
 }
}
```

Note that the loadSize field was left out of the set JSON because the administrator did not want to prepopulate the field.

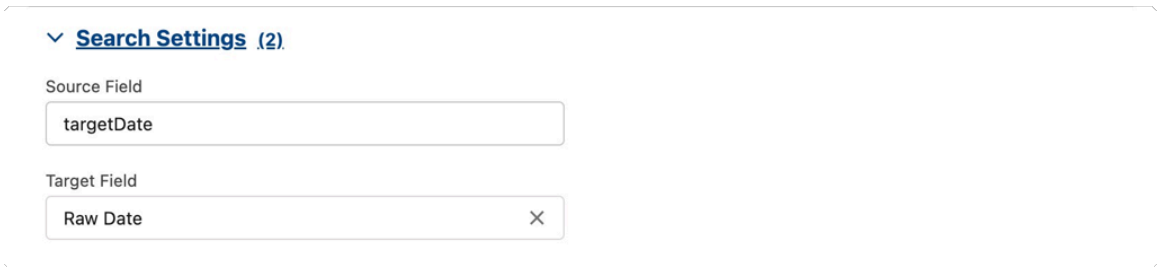
In the blueprint layout, the administrator defines where the set will be displayed and the subfields that will be displayed in each record/calendar day.



In the Set Properties > Selection Settings, the Admin defines whether the user should be allowed to select one or multiple days. The Boolean field for selection (in this case, selectedDate) stores whether a specific set record/calendar day is selected.



The Set Properties > Search Settings help you display the most relevant subset of days for the user when your calendar lets the user select from more than one month. For this purpose, Source Field is the day (record) that the Admin wishes to feature in the monthly calendar set. Target Field is the set-associated field that contains the full range of calendar dates.



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The Set Properties > Raw Value area contains the JSON output by the selections on the page above. However, as "calendar" is not currently selectable as a displayType, the administrator must edit the JSON to define it explicitly.



Multi-language translation

Implement multi-language translation for end-user interfaces. Enable languages and compile translation files.

CPQ can be set up to display configuration experiences in a user's preferred language. This article describes how to implement translations in CPQ.

Foundation and scope

CPQ multi-language capability is available on end-user user interfaces (buyside). The administration platform displays English only.

CPQ supports all left-to-right languages, including those with multi-byte character sets (e.g., Japanese, Korean).

Note: Right-to-left languages such as Arabic and Hebrew are not currently supported. If your implementation expects to require translation into a right-to-left language, please log a Support case and we will follow up with you.

The base language for all CPQ environments is English. As a result, translations of custom strings must be furnished with the corresponding English key. Example: If the administrator enables French and Finnish on an environment, they will need to provide English-to-French and English-to-Finnish translations.

When multi-language is enabled in CPQ, the app will attempt to serve a configuration experience according to the end-user's browser locale setting. If the language defined in the browser locale matches an enabled language in CPQ, the application will attempt to serve the strings in the requested language. However, if a string is not defined for the requested language, the application will display the corresponding English equivalent.

Terms used in this article

Static strings: Text CPQ displays to the user that is defined by the application. Examples include default button labels, basic error messages, text in confirmation boxes, and hovertext for set controls. Static strings are currently provided in English [en], Finnish [fi], French [fr], German [de], Italian [it], and Spanish [es]. CPQ will translate static strings into additional languages as needed.

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Custom strings: Field labels, field option labels, product name and description, layout tier headings, custom messages and similar strings defined by an administrator are "custom".

Base language: the foundational language in a CPQ environment. Choosing your base language is an important decision, as (1.) all configuration elements—including fields, field options, layout elements, and custom message text—must be defined in the base language; and (2.) all translations of custom strings key off of the base language. A CPQ environment can only have one base language. All environments in your dev stack need to have the same base language, to enable environment-to-environment migration.

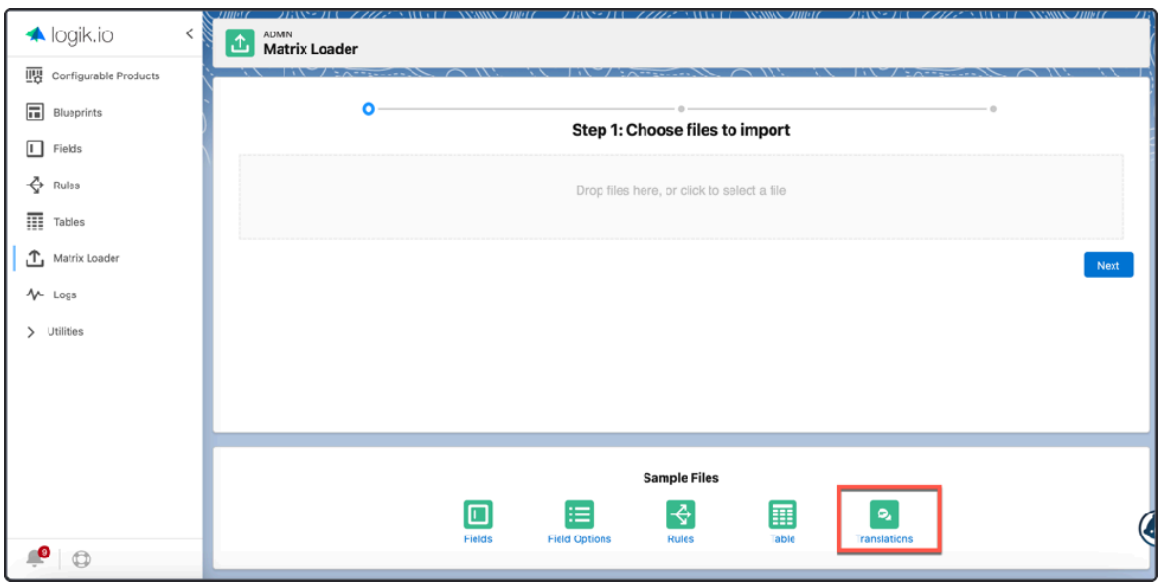
Enabled languages: in addition to the base language, these are the languages you want to support for your end-users coming to CPQ.

Implementation

1. Log a Support case that describes the languages you intend to translate configuration experiences into. Request that CPQ Support enable these languages on all relevant CPQ environments in your development stack. After the new languages are enabled, continue with step 2.
2. To understand how multi-language translation works in CPQ, we recommend that you try a small-scale proof-of-concept before embarking on a wholesale translation effort.
   - Select a picklist field displayed on the end-user layout. Example: In Blueprint1, we will translate Paint Color [paintColor]. paintColor has label "Paint Color" and options "Blue", "Yellow", "Green".
   - For the purposes of this experiment, assume we enabled Spanish [es] in step #1. You can customize this experiment for one of the languages you enabled in step #1. In a CSV file, define Spanish [es] translations for the field label and the picklist field options:

	A	B	C	D	E
1	**id**	**sourceText**	**sourceLanguage**	**translatedText**	**translatedLanguage**
2		Paint Color	en	Color de la pintura	es
3		Blue	en	Azul	es
4		Yellow	en	Amarilla	es

   The graphic above is a sample translation upload file. You can find another example on the Matrix Loader page.



3. Save the CSV file and upload via Matrix Loader.

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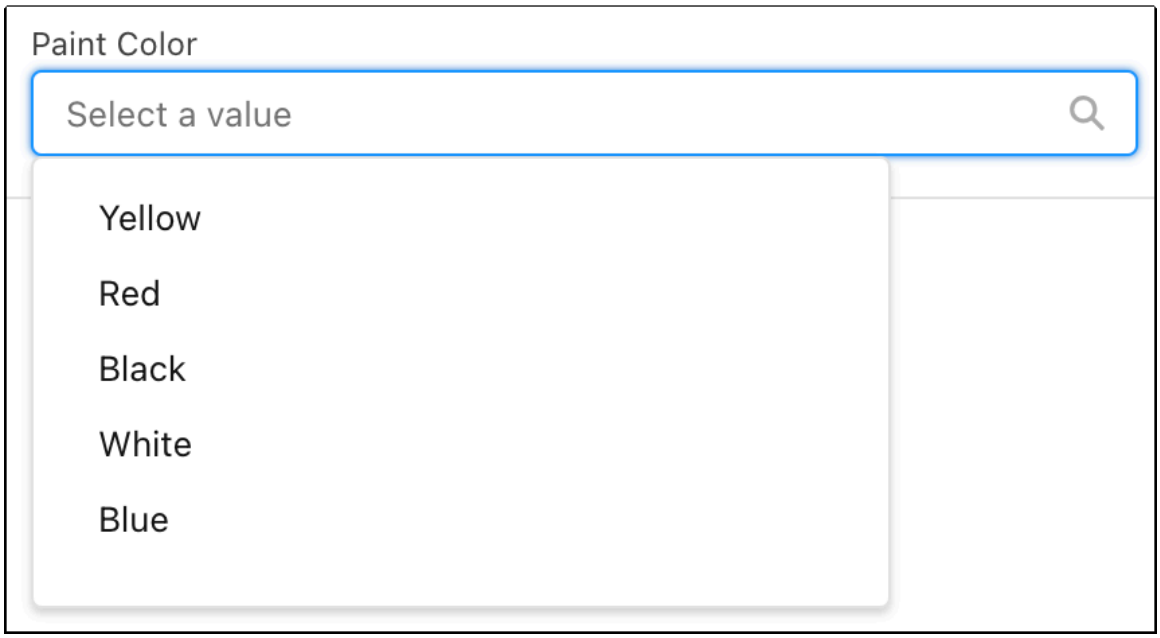
Note: If using a program like Microsoft Excel, you must export in UTF-8 format to support characters with diacritic marks, such as accent, cedilla, circumflex, diaeresis/umlaut, etc.

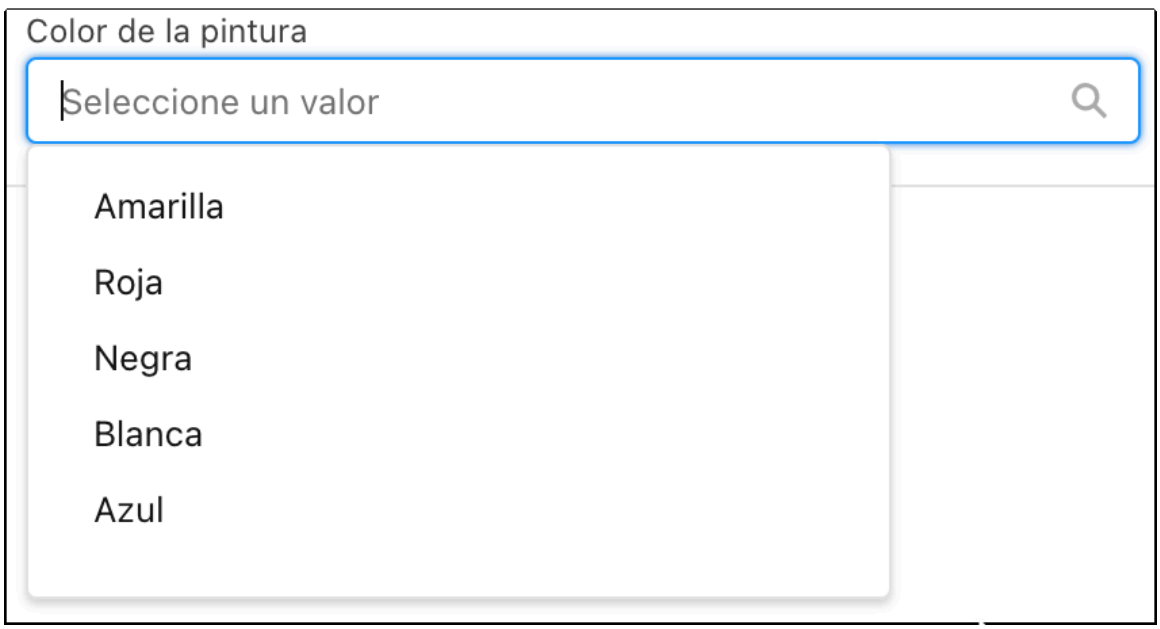
4. Deploy the blueprint.

To test the buyside user interface, we recommend using the Chrome browser with the https://chromewebstore.google.com/detail/locale-switcher/kngfjpghaokedippaapkfihdlmmlafcc?hl=en-US extension installed. This extension allows you to quickly switch the browser locale to test localization. Set Locale Switcher to Spanish [es] and open the Blueprint1 configuration. The paintColor field label and contents should be displayed using the custom translated strings in #2.

The following graphic shows the English version of the picklist on the buyside UI:



The following graphic shows the Spanish version of the picklist on the buyside UI:



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The following experiment demonstrates how various custom strings, including those defined in field options and layouts, are translated, uploaded, and deployed to accomplish an English-to-Spanish translation.

1. Compile a list of custom strings that require translation.
2. Export the following CSV files from CPQ administration:
   - Field Options: every field option label requires translation. In the Field Option CSV file, these are the strings defined in the name column
   - Picklist extensions: for each picklist extension that has Extended Information defined, export the Extension Data CSV file. A translation should be provided for every string in columns B and greater.
   - Product Pickers: strings defined in Determination-type Bulk Actions should be translated into the target language.
   - Rules:
     - When action_type = message, action_value requires translation
     - When action_type = determination and the action affects a text field, many use cases require translation of the string in action_value
   - Layout: Translations are needed for:
     - Tier headings
     - Columnset headings
     - Field labels
     - Help content
     - Product list column headings
3. Build your translation file. The file should be one of the following formats:
   - CSV: SampleTranslationUploadFormat_en_to_es.csv
   - XLIFF: SampleTranslationUploadFormat_en_to_fr.xlf
4. For each string identified in step 1, add an entry to your translation file.
5. Upload your file in the Matrix Loader.
6. Deploy the corresponding blueprints.

Downloading translated strings

To download the translated strings that are saved in a CPQ environment, open CPQ administration in a browser tab. In another browser tab, open the following URL:

```
https://{{baseUrl}}/a/translations/v1/translations?
fileType={{fileType}}&codes={{codes}
```

where {fileType} is either `csv` or `xml`, and {codes} is a comma-delimited list of the translated strings to retrieve. Use 2-letter language codes such as. 'en' and 'fr'. For example, `&codes=en,fr,de`

Note: Some characters in the rendered translated string may include diacritic marks (accents, etc.), and if the wrong character set is used these will appear as a replacement symbol for unknown character (square with a question mark). To avoid this problem, export CSV files using the UTF-8 format.

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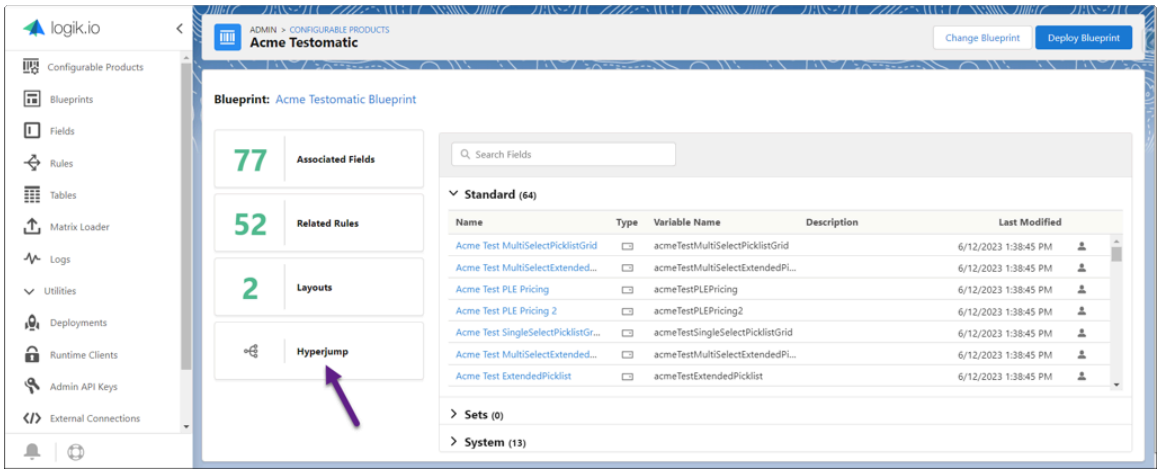
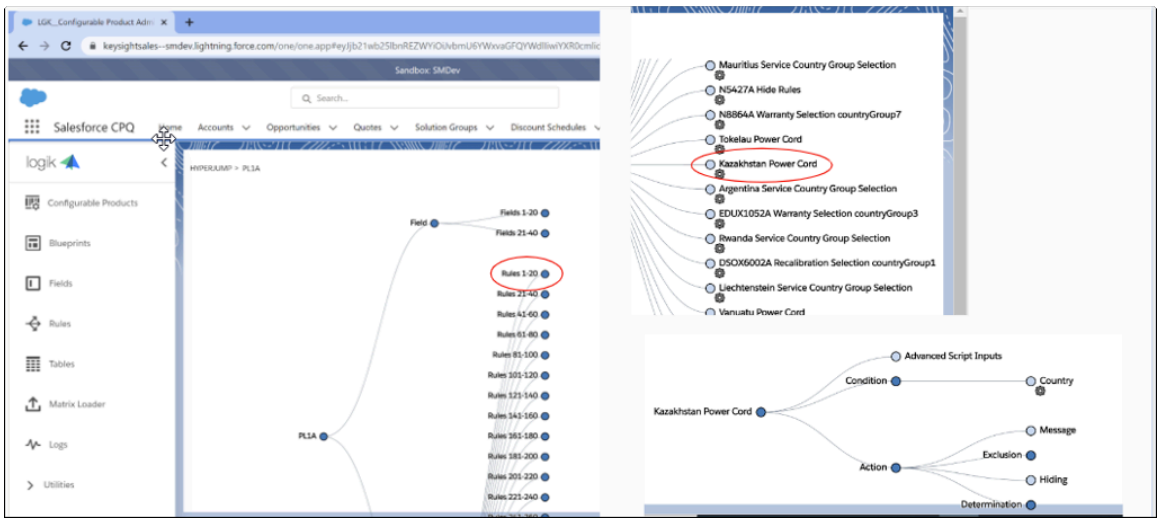
Hyperjump

Hyperjump shows you a configuration as a graphic diagram.

In a configurable product, you can access Hyperjump, which gives you a graphical view of the configuration.



The Hyperjump view enables you to expand individual rules.



It also lets you see field-related rules.

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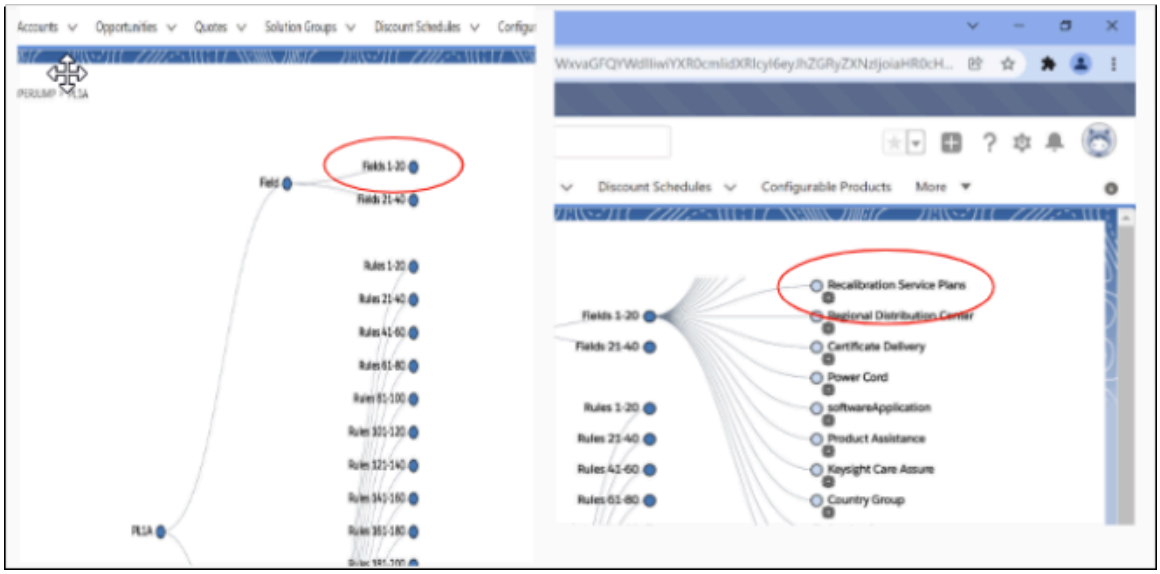

This view gives you a look at the picklist options along with the conditions and actions that the field is part of.

The following video demonstrates the Hyperjump feature for managing configuration data:

Logik.io Hyperjump Demo: Visually Manage Configuration Data

Required permissions for the integration user

The integration user, or refresh token user, must have the following permissions if it does not already have system administrator permissions.

The refresh token user (or integration user) is the user name that CPQ uses for API syncing of Configuration Line Data, Configuration Data, and to populate the caches of Product2, Pricebook, and Pricebook Entries in Salesforce. This sync occurs every 30 minutes for test and demo sites and every 15 minutes for production sites. Although using a system administrator as your refresh token user is the simplest and most common route to take when configuring CPQ, some CPQ customers prefer not to define their refresh token user with system administrator permissions (usually because of a company-wide security policy). The following list shows the necessary permissions for non-admin profiles to be set up as refresh token users when using CPQ with Salesforce CPQ:

- The user must be API enabled
- The LGKConfigurationLineItemc and LGK ConfigurationFieldDatac objects must have Create access
- The user must have permission to read all fields and objects that are referenced in the SOQL queries of Salesforce external connections
- The objects Product2, Pricebook2, and PricebookEntry must have Read/View access, including access to the following fields:

  Product2:

  - Name
  - Id
  - ProductCode
  - Description
  - IsActive

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- Family
- ExternalId
- SBQQ_ExternallyConfigurable_c
- QuantityUnitOfMeasure
- StockkeepingUnit

Pricebook2:

- Id
- Name
- Description
- IsActive
- IsStandard
- CreatedDate
- LastModifiedDate

PricebookEntry:

- Id
- Pricebook2Id
- Product2Id
- UnitPrice
- IsActive
- UseStandardPrice
- ProductCode
- CreatedDate
- LastModifiedDate
- CurrencyIsoCode (if using multicurrency)
- ProductSellingModelId

Installation and setup guide for environments linked to Salesforce orgs

Step-by-step instructions for setting up CPQ in an environment linked to a Salesforce org.

Before you begin

Provide the username of a user in the org who will serve as the first CPQ admin user. This user will need to grant other users access after they have attempted to access the CPQ Admin once and appear in the User Access list of users. For more information, see User access.

Provide CPQ Support with the following information:

- The Org ID of your org (found in Setup > Company Information)
- the My Domain URL of the org (found in Setup > My Domain)

The CPQ DevOps team will provision the environment. Once ready, Support will confirm with your CPQ custom URL.

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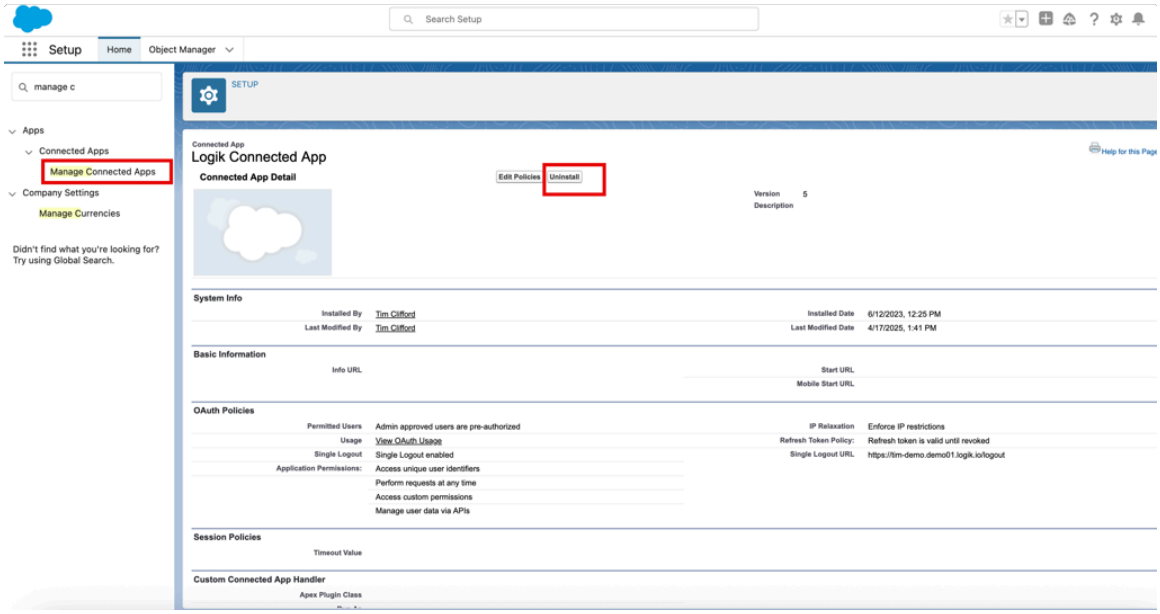
Note: If your Salesforce site was refreshed from another previously CPQ connected Salesforce site, uninstall the CPQ connected app before continuing. It holds metadata associated with the CPQ environment connected to the original Salesforce site. To uninstall, navigate to Setup > Manage Connected Apps > **Logik Connected App** > Uninstall.



Role required: Admin

About this task

If your environment has never had CPQ installed, start at step 1. If you are upgrading existing packages, start at step 7.

Procedure

1. Navigate to your CPQ custom URL, and click the Settings tab in the navigation menu.
2. Create a Refresh Token user name.
   The user name can be any user#s username, but CPQ recommends a user with a system administrator profile.
3. When prompted in the pop-up window, allow access for the CPQ API User connected app.
   If you are using an integration user that is not a system Admin, the following are the necessary requirements for the integration user (or a permission set associated with that user/profile):
   - The user must be API enabled
   - The user will need Create and Edit access for the following objects:
     - LGK__ConfigurationLineItem__c
     - LGK__ConfigurationFieldData__c
     - SBQQ__QuoteLine__c
   - The user will need Read/View All access to the following objects:
     - Product2
     - Pricebook2
     - PricebookEntry
   - For subscription management, the user with also need Read/View All access to the ProductSellingModel object.

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4. In a new browser, navigate to your CPQ custom URL again and confirm that the Refresh Token user name was updated correctly.
5. Click reset again to obtain a new refreshToken, or navigate to https://<YourLogikURL>/refreshToken.
6. Enter Salesforce setup, and search in the Quick Find box for Connected Apps oAuth Usage.
   a. Find the Logik Connected App and click **Install**.
   b. Click **Allow**.
   c. Edit oAuth policies.
   Permitted users should be set to **Admin approved users are pre-authorized**.
   d. Scroll to Manage Profiles, and link to the system administrator profile or any other profiles that will be using CPQ as an admin.
7. Click the gear icon in the upper right and go into the "Setup" page for your SFDC org.

   If you are upgrading the Logik Base Managed Package from one major version to a newer major version, (for example, from 1.x to 2.x), please submit a support case noting this. CPQ needs to update the package version for your environment in our database.
8. Navigate to Installed Packages.
   If you are only upgrading your existing CPQ packages, this is the only step you must complete.
   a. Install the Logik Base Managed Package and select **Install for All Users**.
      - If your org logs in through test.salesforce.com or has sandbox in the My Domain URL of the org, click here.
      - If your org logs in through login.salesforce.com, click here.

      The installation key is `Logik.io-2025!`
   b. If using with Salesforce CPQ, ensure that Salesforce CPQ is installed and is version 244.2 or later, install the CPQ Extension for Salesforce CPQ package.
      - If your org logs in through test.salesforce.com or has sandbox in the My Domain URL of the org, click here.
      - If your org logs in through login.salesforce.com, click here.

      The installation key is `Logik.io-2025!`
9. For CPQ usage, navigate to Installed Packages again.
   a. Find Salesforce CPQ and click **Configure**.
   b. In Additional Settings > External Configurator URL, update to `https://<YourLogikURL>/ui/configure`, and click **Save**.
   c. Check the box next to Third Party Configurator, and click **Save**.
10. Add your domain (https://<YourLogikURL>) to the 'Logik.io Admin Custom Settings' object in Salesforce.
    If needed, set a runtime client token to use Logik with the Salesforce Partner Community.
11. Click **Save**.
12. For CPQ usage: Navigate to "App Manager" and find Salesforce CPQ/CPQ/QuoteQuickly.
    This item can have different names depending on your org settings.

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a. Open the dropdown menu on the right and click `Edit`.

b. In Available Tabs, find “Configuration Line Items” and “Configuration Field Data Sets”, and add them to Selected Tabs.
If desired, adjust the order of Selected Tabs to make them more easily accessible.

c. Save.

13. Navigate to “Trusted URLs” and click **New Trusted URL**.
Give the new URL the following settings, and then click **Save**.
    - In the API Name section, give the URL a name, such as "ServiceNow CPQ." (It can be any name so long as you can reference it later.)
    - Add your domain to the URL section. (If you want to make sure this setting retain access after an SFDC refresh, enter `https://*logik.io` to ensure that any logik.io site is trusted.
    - Check `Active`.
    - Set the CSP Context to **All**.
    - In CSP Directives, check the **frame-src (iframe content)** and **img-src (images)** options.
14. Go to the Object Manager and use the Quick Find box in the top right to search for the Product object, and select the option whose API name is Product2.
    a. Navigate to Page Layouts and click **Page Layout Assignments**.
    b. Find the page layout assigned to system administrator or other profiles needing CPQ Admin access (as determined when setting up Logik Connected App above).
    c. Select the page layout assigned to the system administrator.
    d. Drag **View Logik.io Setup** and **Logik.io Enabled** to the desired section of the page layout (usually the top).
15. Navigate to Salesforce CPQ to confirm that the new tabs are visible.
16. In the Product tab, confirm that there is a new view called **Logik.io View**.
17. Test by creating or editing a product and checking **Logik.io Enabled** box, checking **Active Box**, and then saving and assigning it a Price Book entry.
    - On the new product’s detail page, follow the Click Here link under **View Logik.io Setup** to ensure access to CPQ Admin.
    - If you receive the error "Cannot get Configurable Product. Product <ProductId> is not available in cache" when you try to access a configurable product, you may have skipped the refresh token user setup at the top of this page. Create the user and try again.
    - If you are able, please grant CPQ a user with the email address of provisioning@logik.io and we can verify the setup once you have completed it.

Trouble?

- If you receive the error "Cannot get Configurable Product. Product <ID> is not available in cache" when you try to access a configurable product, you may have skipped step 2 to create a Refresh Token user name. Repeat step 2.
- If you receive an "OAuth Error" with the code OAUTH_APPROVAL_ERROR_GENERIC when you try to access your Logik URL, your user is blocked by recent changes Salesforce has made to connected apps. To resolve the problem, add the following text to your Salesforce My Domain URL, and then click **Allow**:

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- For the Logik Connected App:

```
/identity/app/AppInstallApprovalPage.apexp?app_id=0Ci5e000000
bn6b&app_org_id=00D5e000005AHE7
```

- For the Logik API User Connected App:

```
/identity/app/AppInstallApprovalPage.apexp?app_id=0Ci5e000000
L18c&app_org_id=00D5e000005AHE7
```

You are then able to follow the complete installation instructions.

Assigning non-Admin user permissions for CPQ in Salesforce

You need to apply certain user permissions in Salesforce in order to use CPQ properly.

To use CPQ, users need access to certain objects and fields in Salesforce. These can be assigned using permission sets or by going to Profiles > Select Desired Profile > Object Settings. Users need read/edit access in the Field Permissions section to the following objects:

For Configuration Attribute:

- Id
- Name
- Target Field Product
- Row Order
- Column Order
- Position (edited)

For Product Feature:

- Id
- Name
- Option Selection Method Configured SKU
- Number
- Min Option Count
- Position (edited)

For Product2:

- Configuration Type
- Has Configuration Attribute Externally Configurable

For QuoteLine:

- Configuration Id
- Committed Configuration Id BomData
- Product
- Incomplete
- DynamicOptionId Quantity

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- ListPrice
- OptionLevel

For Product Option:

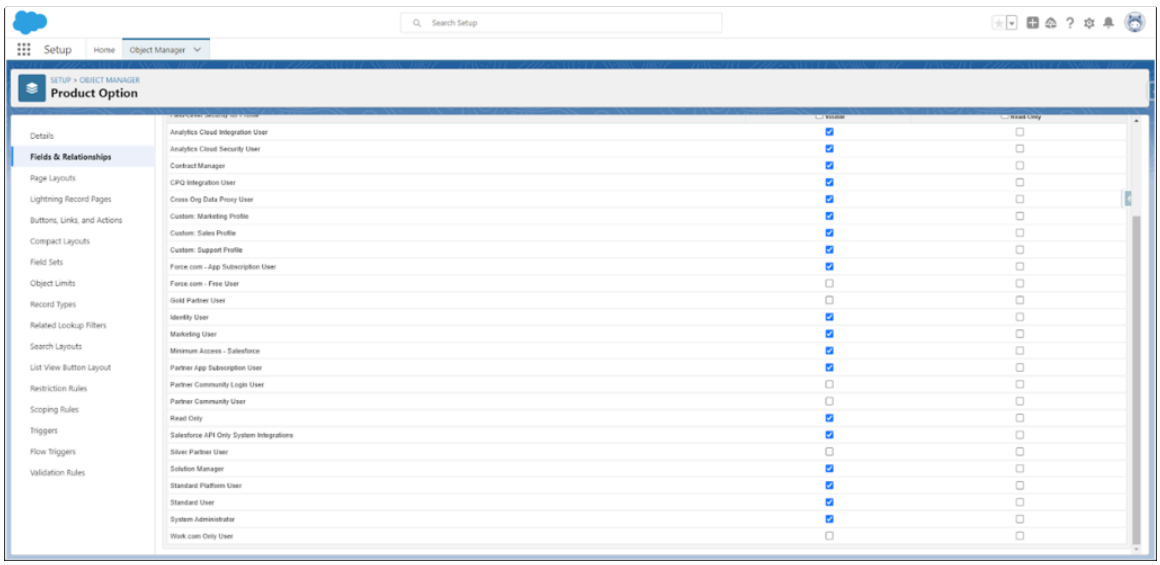
- Configuration Id
- Committed Configuration Id Bom Data

Note: Users will also need read/edit access in Object Permissions for the Product Option itself.

For issues specifically with reconfiguration, make sure that the user has the correct field level security for both the “Configuration Id” (CI) AND the “Committed Configuration Id” (CCI) fields from the object from which they are entering the configuration. We store the previous CI in the CCI in case the user cancels from their configuration and needs to revert their changes. These fields are part of the following objects:

- Configuration Line Item Quote Line
- Product Option

To check whether the user has the necessary permissions for these fields, go to Settings > Object Manager > [Object] > Fields & Relationships > [Committed Configuration ID/Configuration ID] > Set Field-Level Security and check whether the "Visible" checkbox is checked for Field-Level Security for Profile of the user.



The full list of objects and fields contained in the CPQ packages can be found by navigating to SFDC Setup and searching for "Installed Packages". "CPQ Managed Package" is used for parts of our SFDC Integration and custom objects, while CPQ Extension for Salesforce CPQ" contains the fields used in the standard user flow.

Selecting one of these packages and clicking "View Components" will show a list of SFDC objects and fields created by that package along with their name, type, and parent object (if any). Specifically, the fields in **Logik Extension for Salesforce CPQ** are the fields a user will need to have access to in order to properly configure and reconfigure CPQ - enabled products in Salesforce CPQ.

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Assigning access permissions to Salesforce objects and fields

Configure permissions for non-Admin users in Salesforce to enable configuration and reconfiguration with Logik.

To configure using CPQ, users need access to certain objects and fields in Salesforce. You can assign permissions by using permission sets or by navigating to Profiles > Select Desired Profile > Object Settings. Make sure that the user also has read or edit access for the product option itself (in the Object Permissions section).

Users must have read or edit access to the following objects. You can assign these permissions in the Field Permissions section.

Configuration attribute

- Id
- Name
- Target field
- Product
- Row order
- Column order
- Position (edited)

Product feature

- Id
- Name
- Option selection method
- Configured SKU
- Number
- Min option count

Product2

- Configuration type
- Has configuration attribute
- Externally configurable

QuoteLine

- Configuration Id
- Committed configuration id
- BomData
- Product
- Incomplete
- DynamicOptionId
- Quantity
- ListPrice
- OptionLevel

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Product option

- Configuration Id
- Committed configuration id
- BomData

Field level security

When reconfiguring, make sure that the user has the correct field level security for both the configuration ID (CI) and the committed configuration ID (CCI) fields for the object from which they are entering the configuration. CPQ stores the previous CI in the CCI in case the user cancels their configuration and needs to revert the changes. These fields are part of the following objects:

- Configuration line item
- Quote line
- Product option

To check whether the user has the correct permissions for both of these fields, go to Settings > Object Manager >[Object] > Fields & Relationships > [CI or CII] > Set Field-Level Security and confirm that the field-level security for the user's profile is set to Visible.

The full list of objects and fields contained in the Logik packages can be found by navigating to SFDC Setup and searching for "Installed Packages". "CPQ Managed Package" is used for parts of our SFDC Integration and custom objects, while CPQ Extension for Salesforce CPQ" contains the fields used in the standard user flow.

Selecting one of these packages and clicking **View Components** shows a list of SFDC objects and fields created by the package, along with their name, type, and parent object (if any). Specifically, the fields in "Logik Extension for Salesforce CPQ" are the fields a user must have access to in order to properly configure and reconfigure CPQ-enabled products in Salesforce CPQ.

Nested bundling in Salesforce CPQ

Enable nested bundling in Salesforce CPQ to support complex product hierarchies and configurations.

With some additional configuration, CPQ now supports sending back a nested bundle structure from CPQ to Salesforce CPQ. This allows you to take advantage of the BOM hierarchy built in CPQ and have it reflected in the Salesforce CPQ Quote Line Editor (QLE).

Setup in Salesforce

To enable support for nested bundles, additional setup steps must be completed in the Salesforce CPQ Package settings. These steps require Salesforce CPQ package version 242 (Spring 2023) or later.

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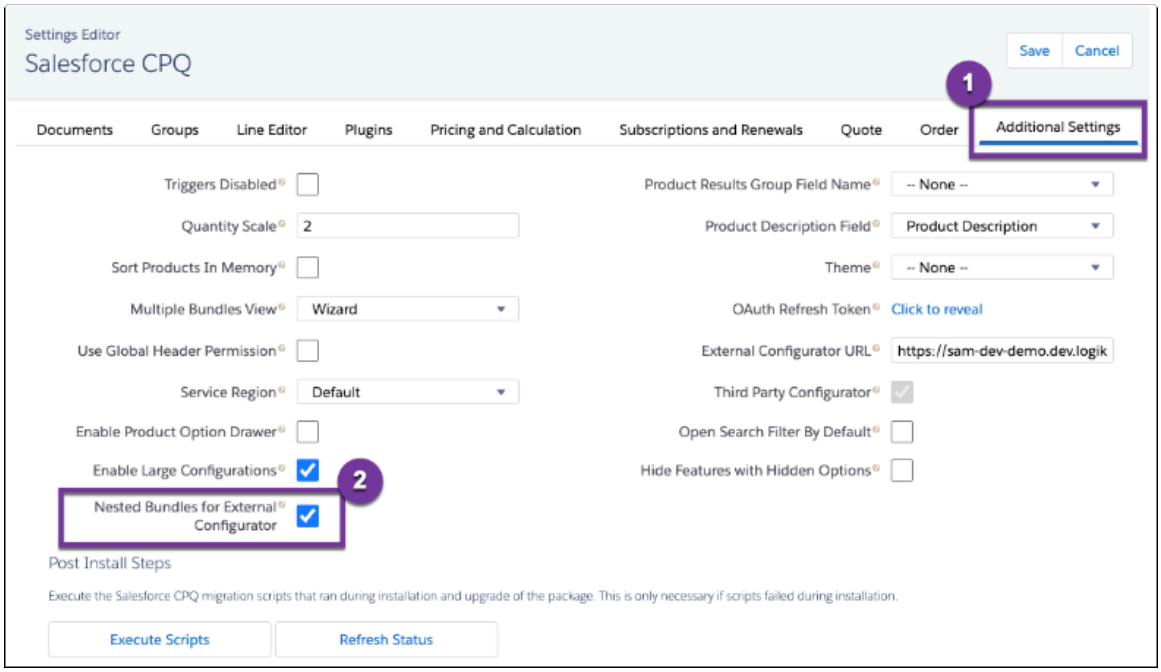
1. Navigate to Setup > Installed Packages > Salesforce CPQ, and then click **Configure**.



2. On the Additional Settings tab, check the box to enable **Nested Bundles for External Configurator**.
3. Click **Save** to save the changes.

Products that may have other products below them in the BOM hierarchy should be marked as Logik Enabled in the Product2 record in Salesforce. This is the same as setting up configurable products to work with CPQ. The products also need to have a pricebook entry in the pricebook used for the quote if they are going to be created as quote lines.

The following video explains setting up nested bundle structures in CPQ and Salesforce CPQ:

Nested Bundles Demo

Setup in CPQ

After completing the Salesforce CPQ package setting steps, reach out to CPQ support and log a case to have nested bundling enabled in your CPQ instance. As with any larger change, the recommendation would be to start in a dev or test environment and validate that it is working as expected before enabling it in production.

In CPQ, the BOM hierarchy is defined through the parentProduct and uniqueIdentifier fields on items in the bill of materials. This hierarchy in the product list is reflected in the Salesforce CPQ quote line editor.

Limitations

Nested bundles from external configurators are limited to four levels, including the topmost parent. This means you can nest products up to three levels deep inside a CPQ configuration.

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Note: Trying to add the same product to two dynamic nested bundles via an external configurator in Salesforce CPQ results in an "Attempt to de-reference a null object" error.

For example, suppose Product X is nested inside both the Nested Child 1 dynamic feature and the Nested Child 2 dynamic feature, when both are children of the Parent dynamic feature. This configuration results in the error.

Granting user access in CPQ

This outline briefly examines how to add or limit users to CPQ.

User management takes different forms, depending upon the implementation scenario.

CPQ is integrated with Salesforce CPQ

To add users, in Salesforce Admin, go to Setup, go to Manage Connected Apps, and then go to Logik Connected App.

- In the OAuth Policies section, confirm that Permitted Users input is set to **Admin approved users are pre-authorized**.
- In the Profiles section, click **Manage Profiles**. Select the checkboxes that correspond to the profiles you want to enable, and save.
- To assign specific permission sets access to the Logik Connected App, click **Manage Permission Sets**. Select the check boxes that correspond to the permission sets to enable, and save.
- New admin users must first access the CPQ Admin. Their admin access can then be toggled on by another admin user in the User Access section of Utilities. For more information, see User access

To limit prevent certain profiles from accessing CPQ Admin, in Salesforce Admin, go to Setup, go to Object Manager, Product, and then Fields & Relationships. Click the **View Logik Setup (LGK__ViewConfigurationSetup__c)** field, and then click **Set Field-Level Security**.

- Deselect the check boxes for the profiles you do not wish to enter.
- Admin users can also toggle user access in the CPQ Admin, in the User Access section of Utilities. Any sales users can have their admin access toggled off by selecting their name and clicking **Toggle Admin Access** in the upper right. If users have only END_USER assigned to their user, they cannot access the CPQ Admin.

CPQ is implemented headless (outside of a SFDC org)

When using a custom UI (such as React) that calls CPQ APIs, CPQ leverages your third-party IDP, such as Google or Salesforce. To add administration users, log a Support case. Include the name of the IDP and domain your company is using together with the first names, last names, and email addresses of the new users.

Additional permissions to check

Assigning non-Admin user permissions for CPQ in Salesforce

What to do if receiving and Insufficient Privileges or blank screen when launching a CPQ configuration

Related topics

CPQ: User Access Control

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Set up user-based or profile-based rules with Salesforce implementation

You can set up a message rule to control access to a field based on the user's role or ID.

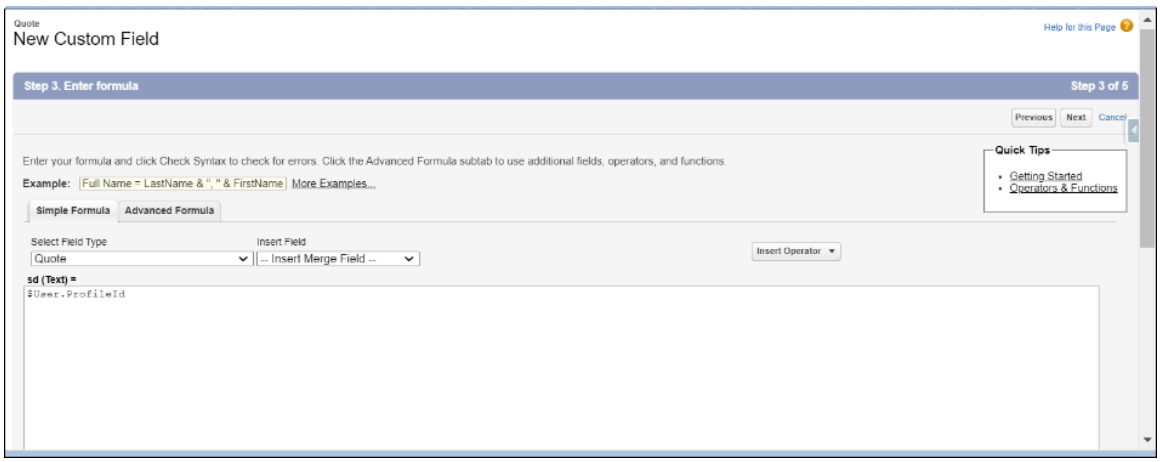
Sometimes, system administrators don't want to allow every sales representative to access a particular field. (For example, perhaps that field should be edited later on in the sales cycle by users with elevated permissions.) In this case, admins might want to lock down certain fields unless the user accessing the configuration is a Solution Manager or System Administrator. Or, maybe you'd want them locked down unless the config is accessed by Jane Doe, your company's VP of Sales. This article walks through how to set up such rules.

Step 1

First, you'll want to create a new field on your Quote object in SFDC. This field should be of type "Formula," and the Formula Return Type should be "Text." Make sure to append the "LGK" suffix to the end of the field name, as this field is going to be twinned into CPQ.

Step 2

When prompted to enter the formula, this is where you must make a design decision. If you want the rule to be dependent on profile type (for example, System Administrator), enter `$User.ProfileId` as the formula:



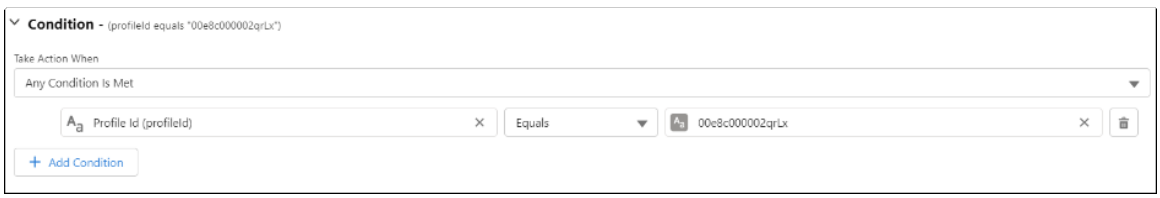
If you want the rule to fire on a specific user ID, replace `$User.ProfileId` with `$User.Id`.

Step 3

Add the formula field to the ReferencedFields field data set as you normally would to perform Field twinning.

Step 4

Write the rule in CPQ. For example, if you wanted a rule to fire on the System Admin profile, and the System Admin profile's ID is 00e8c000002qrLx, you might condition your rule like this:



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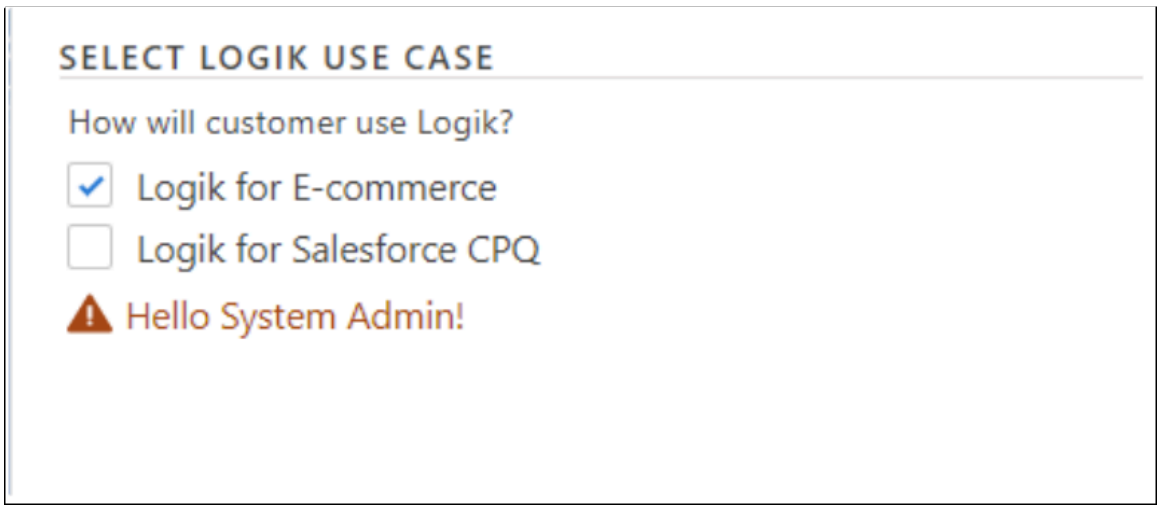
Result

In the following screen shots, there are two system administrator users and two rules. One rule is a message rule that fires when a System Administrator accesses a quote, and the other rule fires when Jane Doe accesses the quote. This is the output when a System Admin who is not Jane accesses the configuration:



This is the output when Jane Doe (who is also a System Admin) accesses the configuration:



Using CPQ and Salesforce CPQ with community users

When partner and community users cannot authenticate in Salesforce, they can use a Runtime Client Token to authenticate with CPQ. Follow these setup steps.

Community sites (also known as Digital Experience sites) require different user types than are normally used in Salesforce platform. Notably, these are for partner or community users that don't have the option to authenticate in Salesforce. Even if the community users have access to the CPQ Connected App, they need to use it through the Digital Experience site, so the login flow (which automatically redirects to Salesforce) won't work in this case.

These are the steps to use a Runtime Client Token, along with custom Visualforce pages that are included as part of the CPQ Extension package, to authenticate with CPQ instead of the normal login flow.

Audience

This article is for anyone that needs to use ServiceNow CPQ and Salesforce CPQ with a partner community or in a customer community environment. This page assumes that:

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- Basic setup of CPQ and Salesforce is complete.

  Note: The Visualforce pages referenced in this page are available only in CPQ Extension Package version 2.3 or later. CPQ Extension Package Version 2.3 itself requires the Base Managed Package version 2.2 or later.

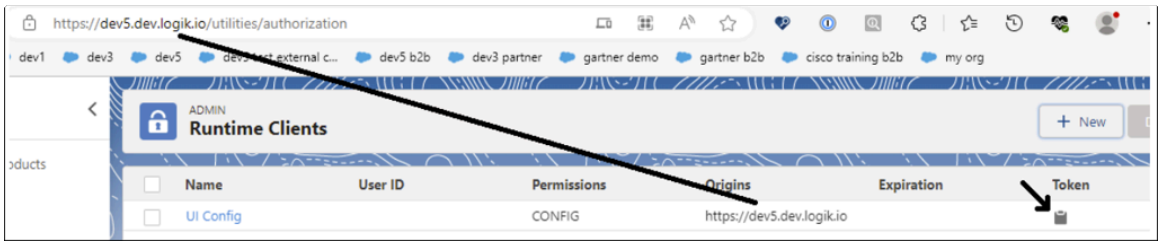
- A Digital Experience site that includes Salesforce CPQ quotes is available.
  - This guide is not necessary if only Salesforce profiles (such as System Administrator, Standard User, and so on) will be using this site instead of Partner or Community users.
  - If a Digital Experience site is not already available, note that at the time of this writing:
    - Salesforce CPQ is not compatible with LWR templates, and Quote objects are only available on Aura.
    - Partner/Customer users must have CPQ permission set licenses assigned to them.
    - Sharing Settings should be enabled to allow access to all the CPQ related objects, such as: Products, Opportunities, Price Books, Quotes, Product Option, Product Feature, and so on.

CPQ setup

A runtime client is required to authenticate community users. If a runtime client is not already available, follow these steps to create one:

1. In CPQ Admin, go to Utilities > Runtime Clients and click **+ New**.
2. Provide a name, make sure at least Config is selected under "Permissions", and add the CPQ site's URL to Origins.

   The Origin must be exact: it must include https://, and should have one origin with the trailing "/" and one without. On https://dev5.dev.logik.io, there should be an Origin of https://dev5.dev.logik.io and https://dev5.dev.logik.io/.



3. Save.
4. Copy the value using the clipboard icon under "Token" image.png.

   You will save this value to Salesforce Settings during Salesforce setup.

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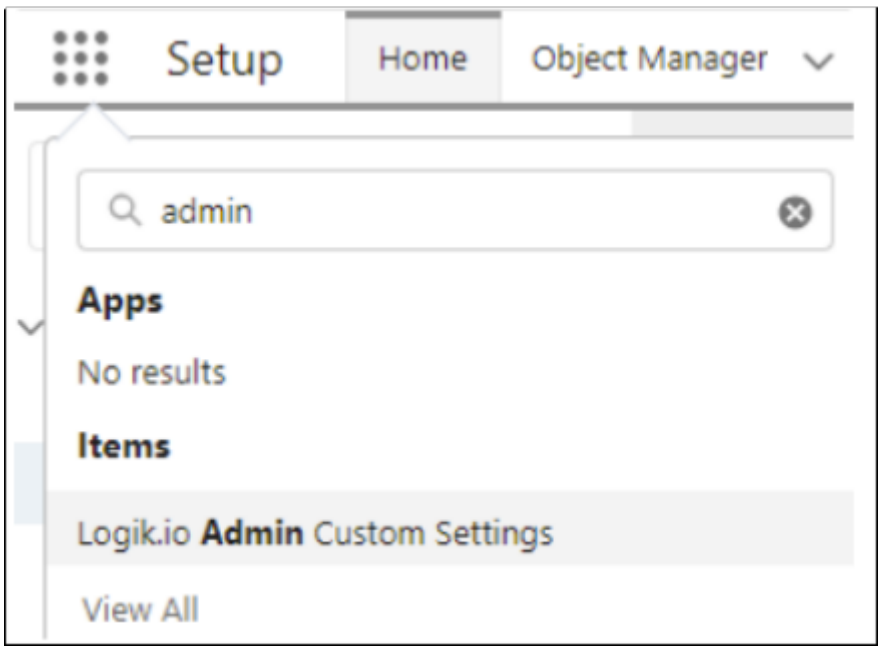
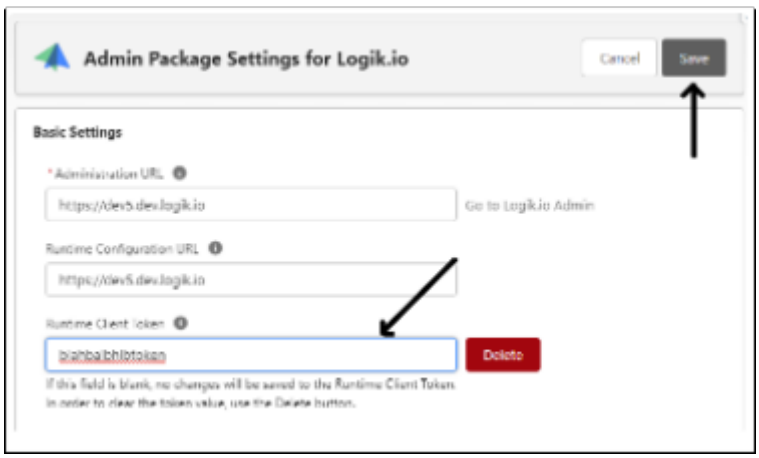
Salesforce setup

1. From the Salesforce App Launcher, search for and open the CPQ Admin Custom Settings page.



2. Next to the Runtime Client Token, click **Set**, paste the copied token from CPQ Admin, then Save.



3. Go to Security > Session Settings.
4. Under “Clickjack Protection”, select Enable clickjack protection for customer Visualforce pages with standard headers.
5. Under “Trusted Domains for Inline Frames”, add *.force.com. Set IFrameType to VisualforcePages.
6. From Setup home, go to Apps > Packaging > Installed Packages.
7. Next to the Salesforce CPQ package (not the CPQ extension for CPQ), click **Configure**.

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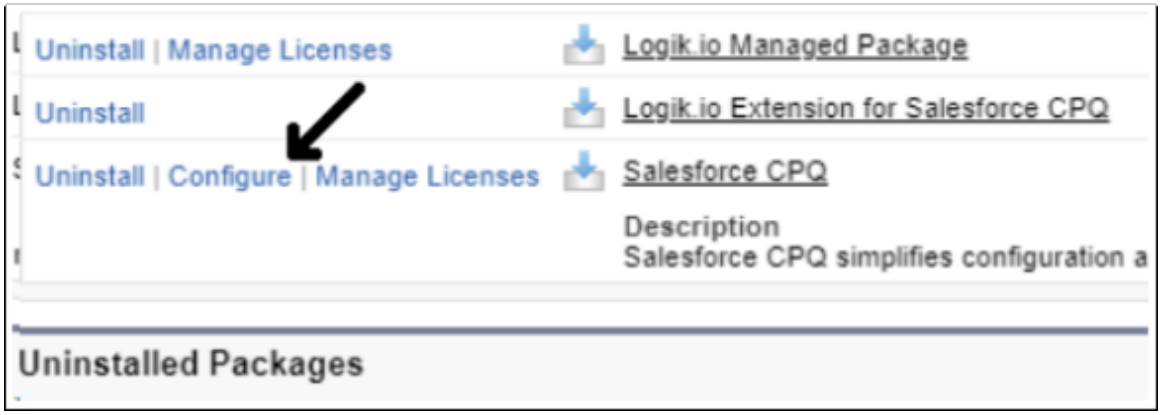


8. Under the Additional Settings tab, set the "External Configurator URL" to /apex/LGK__CpqConfiguration.

   This field may be set to a full URL in CPQ, such https://dev5.dev.logik.io/ui/configure. The new value /apex/LGK _CpqConfiguration is meant to be compatible with both Salesforce and Community users, so it can replace the CPQ URL.

Free storage space in a Salesforce org

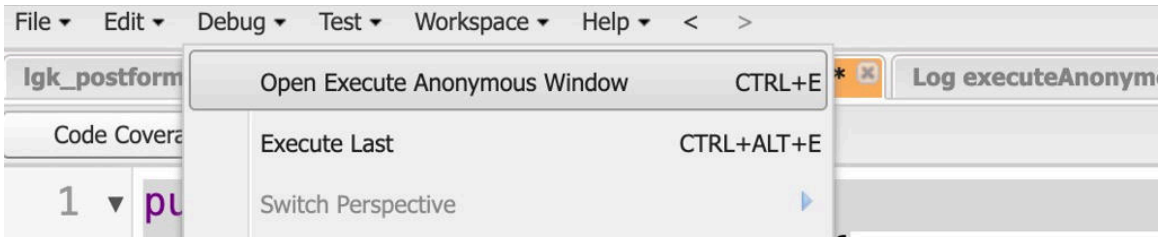
How to clear up space in a Salesforce test environment that is near its storage limit.

Occasionally, administrators work in a Salesforce test environment that is approaching its storage limit. If Salesforce complains that you are over your storage allocation, it's time to free up space.

One option is to remove records from the ConfigurationBOM table. For managed packages v1.0 or greater, remove Configuration Line Item and Configuration Field Data Sets instead.

Warning: These steps delete data. Follow them only in non-production environments.

1. Setup cog in SFDC → Developer Console → Debug [Open Execute Anonymous Window]



2. Paste and execute the following:

```
delete [SELECT id FROM LGK__ConfigurationBOM__c];
```

   For CPQ managed packages v1.0 or greater, run this delete instruction against the following objects:

   - LGK__ConfigurationLineItem__c
   - LGK__ConfigurationFieldData__c

   Note: Salesforce only allows DML statements such as these to run in batches of 10,000 or fewer records at a time. If the record has more than 10,000 records, modify the query in step 2 with the following, and run the modified query as many times as necessary.

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```
delete [SELECT id FROM LGK__ConfigurationBOM__c LIMIT 10000];
```

3. Use the following script to clear the Trash:

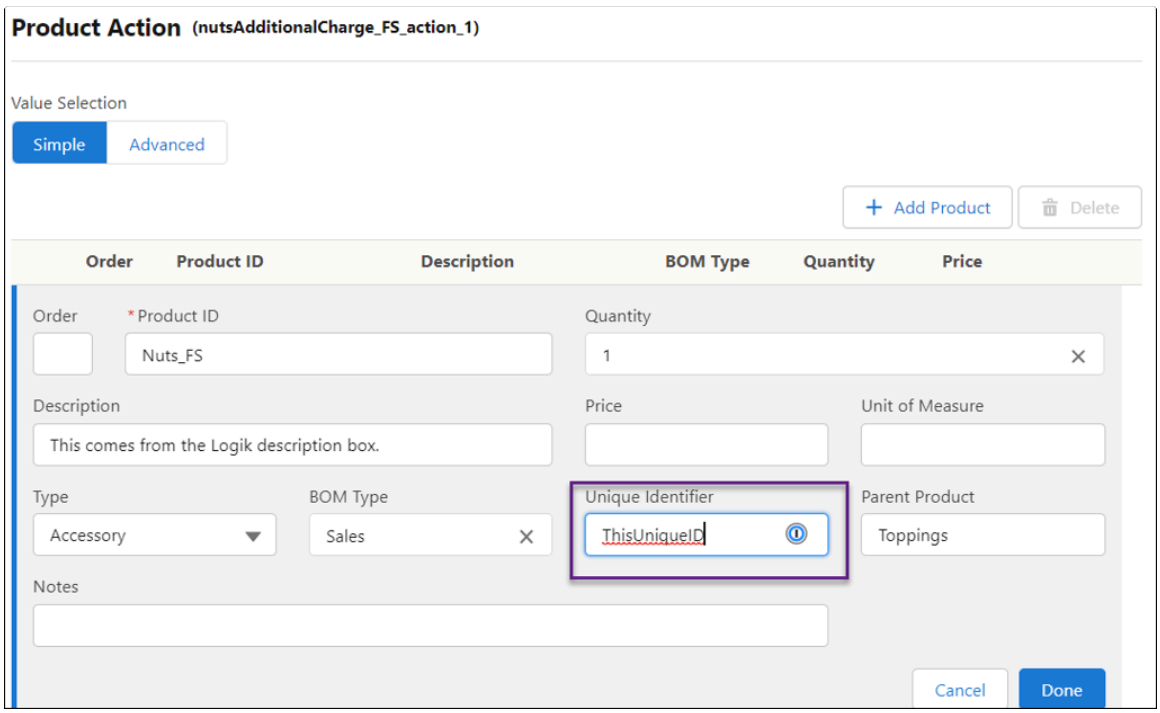
```
List<Id> delCLI = new List<Id>(new Map<Id,SObject>([SELECT Id
 FROM LGK__ConfigurationLineItem__c ORDER BY CreatedDate ASC
 LIMIT 10000]).keySet());
Database.delete(delCLI);
Database.emptyRecycleBin(delCLI);
List<Id> delCFD = new List<Id>(new Map<Id,SObject>([SELECT Id
 FROM LGK__ConfigurationFieldData__c ORDER BY CreatedDate ASC
 LIMIT 10000]).keySet());
Database.delete(delCFD);
Database.emptyRecycleBin(delCFD);
```

Alternately, in Salesforce Admin → 9 dot menu → search Recycle Bin, navigate to Recycle Bin → Empty Org Recycle Bin.

Quote line unique IDs

You can assign unique IDs to quote lines in Salesforce.

CPQ passes the unique identifier of a product in CPQ back to the Unique Line ID field on the quote line in Salesforce, allowing users to assign unique IDs to specific quote lines in Salesforce. This allows users to reference the Unique Line ID field (LGK_UniqueId_c) after the quote line has been created if a unique identifier was included in the product action in CPQ.



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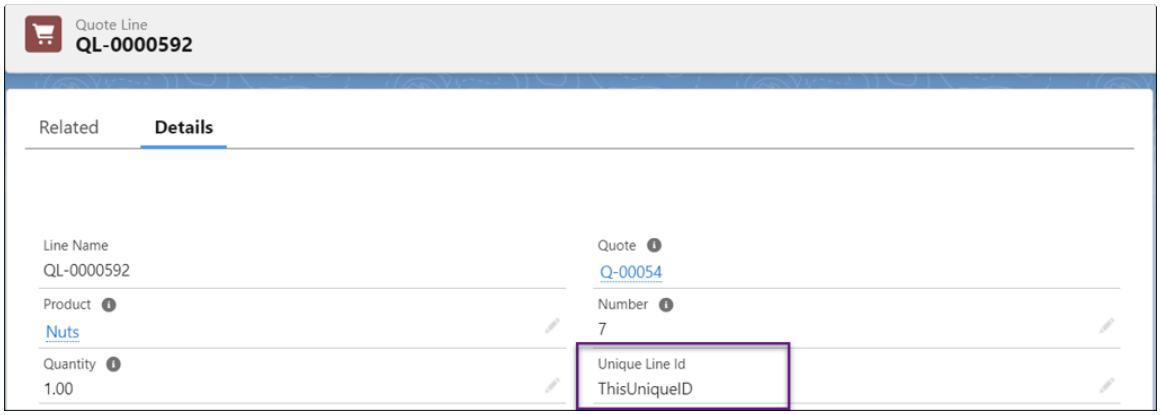

Prerequisites

Have the Logik Extension for CPQ package version 2.2 or later installed on the org.

Add the Unique Line ID field to the quote line page layout through Setup>Object Manager>Quote Line>Page Layouts.

Assign a unique identifier to a product in CPQ using a simple or advanced product action.

How to use

For simple product actions, assign the product unique identifier in the product action. (See the screenshot above.)

For advanced product actions, assign the ProductList.uniqueIdentifer in your product action script. For example, if using a set, you can leverage the set index in order to assign a unique ID to each product added from the set:

```
ProductList.id ="<yourProductCodeOrId>";
ProductList.uniqueIdentifier = cfg.<yourSetFieldForProduct> +
 set.<yourSetVariableName>.index;
return ProductList;
```

Use cases include ramping deals, such as subscription-based pricing that applies discounts based on the length of the contract. Although the same product, discounts are applied in year 2 or 3 with a unique ID for the same product name. Another use case would be multiple copies of the same product on quote, with different product extended data.

Use case: Adding extended data to identical product code products in SFDC using flows

Out of the box, the Configuration Line Item to Quote Line flow created by CPQ is set up to write the extended information of each product to its respective quote line in the BOM Data field.

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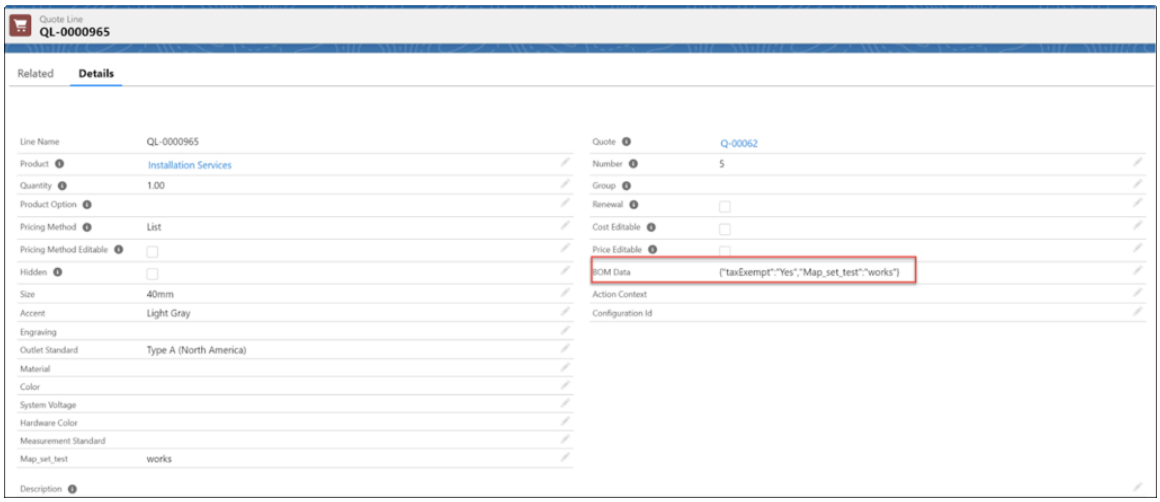

As configured, the flow checks only whether the configuration ID and the product ID match and return only the first record. This causes the BOM data for the child lines to be identical if the product IDs are identical.

If you are using the unique ID attribute, you can add another condition to the "Get Records" section of the flow that checks for the Configuration Line Item field "LGK_UniqueId_c" being equal to the unique line ID object on the quote line:

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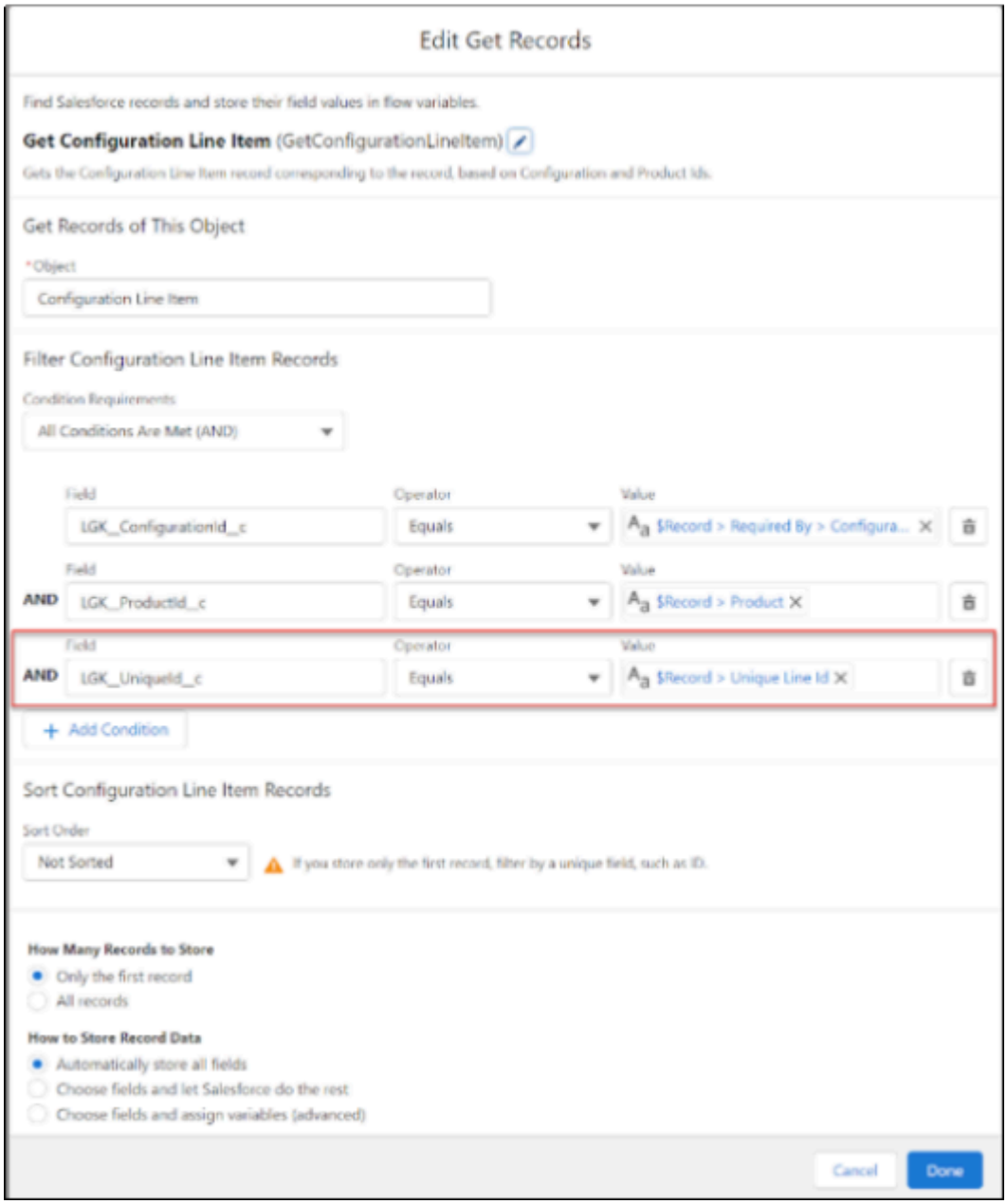

This correctly writes the BOM data to each unique child line with the correct extended information.

How to display a multi-level BOM in CPQ using simple and advanced product actions

Two ways to display a bill of materials that includes hierarchical relationships.

When a bill of materials (BOM) is represented with hierarchy (such as a parent-child relationship), some businesses prefer to display the sum of the prices of the children on the parent line.

For example, when you are building a laptop pricing configurator, you might want to display a parent product, with supplemental products listed as part of a grouped nested menu. Each of these components has an additional price and must be grouped together to arrive at the Total Price of the full BOM.

In the example screenshots below, the Laptop category can be expanded or folded to either display or hide the sub-products in the final price configuration of the laptop.

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Image 1: Multi-BOM of laptop hiding sub-products:

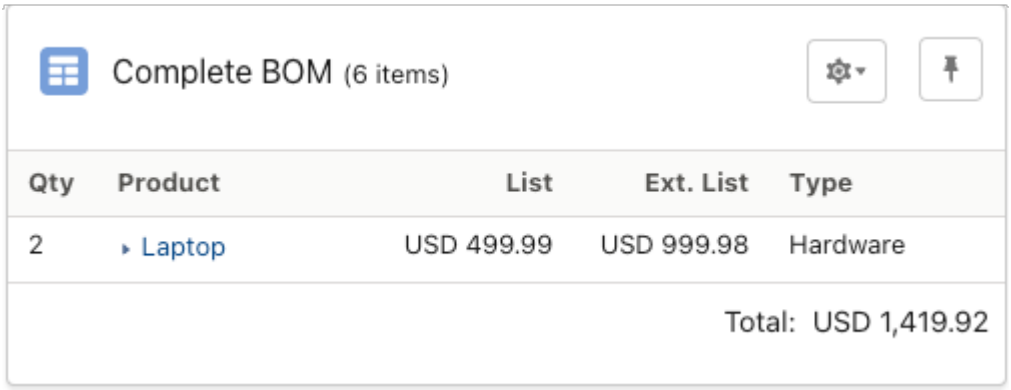
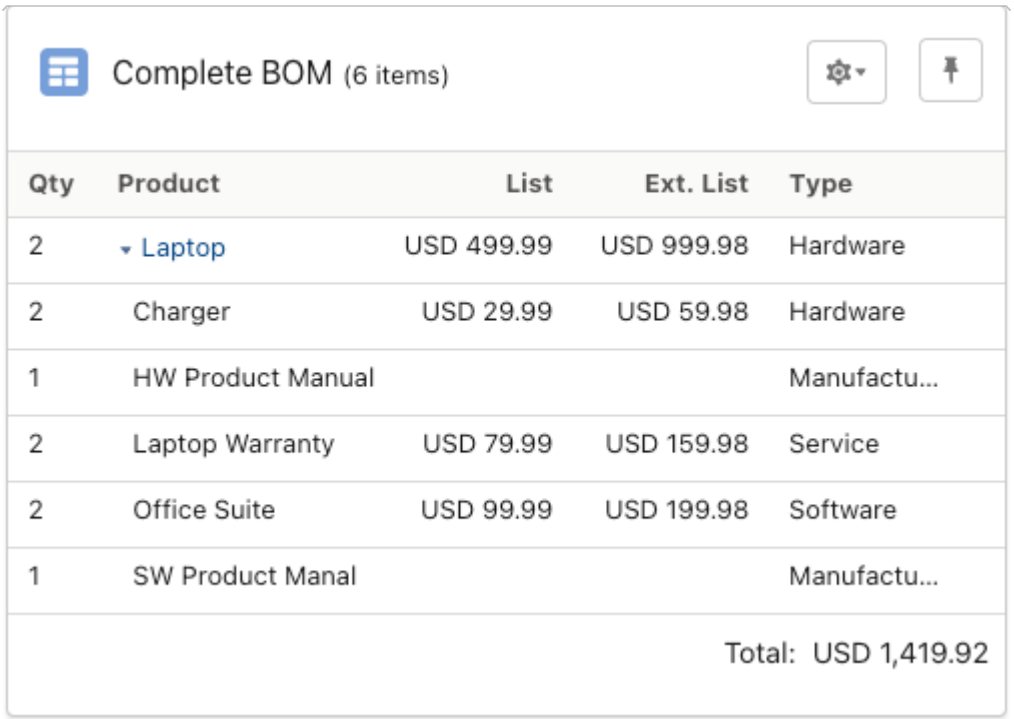


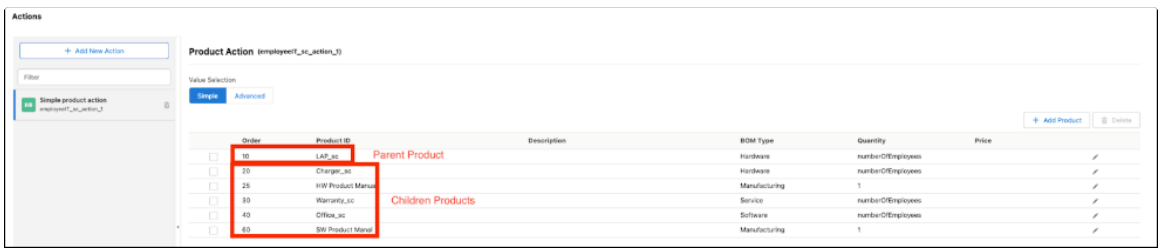
Image 2: Multi-BOM expanded to display all sub-products in the BOM:



Configuration

To begin building a bill of materials, navigate to the Rules section of your CPQ interface and build a new rule. In your rule, add a new product action. From here, add the products as you normally would when building a product action.

1. Add a simple product action rule.
2. Add your product list in order, as you would for a basic BOM.



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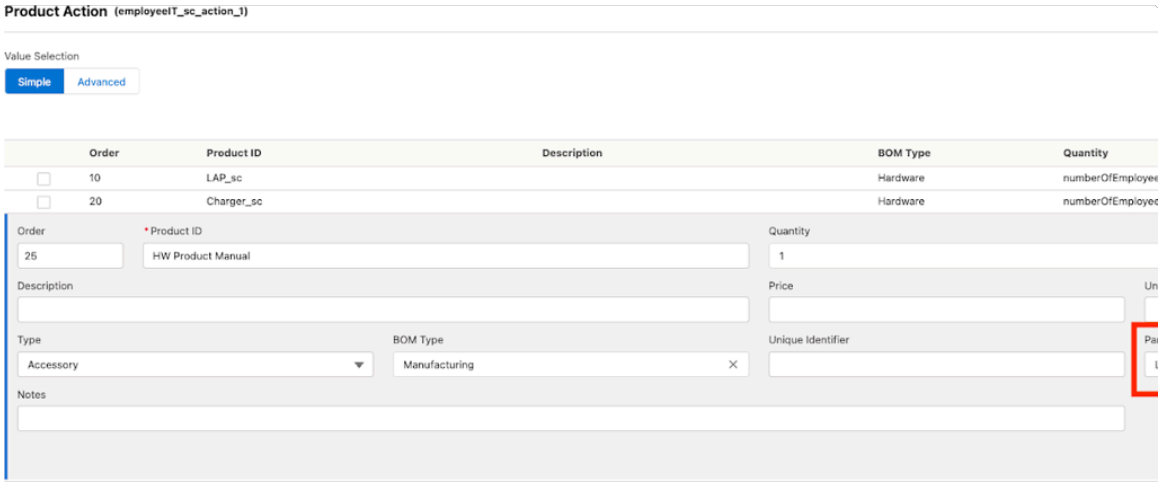
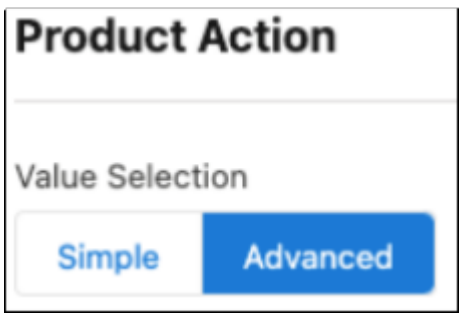
3. Set a unique identifier for the chosen parent field. This provides the capability to assign a parent ID and create nested products. In the above example, we have set the Laptop product.
4. For each child product, add the unique identifier for the parent product to the Parent Product field. For example, `LAP_sc_parent` is the unique identifier for our Laptop parent product. We would add `LAP_sc_parent` to the Parent Product field for our child products.



Advanced

When you have many products that require scripted configuration, you can use the CPQ Advanced Function layer to create a multi-BOM. For this, follow the same instructions as above until you begin building your list of products. If you have multiple SKUs and you need the hierarchy to be correct for each SKU on the BOM, use an Advanced Function to better scale your configuration.



1. Instead of choosing a simple product action, select the Advanced option and click **Create Advanced Function**.
2. In the Help bar, you can find a ProductList.parentProduct option on the right of the page. Click **Insert Example** to begin building your script. This lets you dynamically generate a unique identifier field for your parent products by leveraging the Set Index field.



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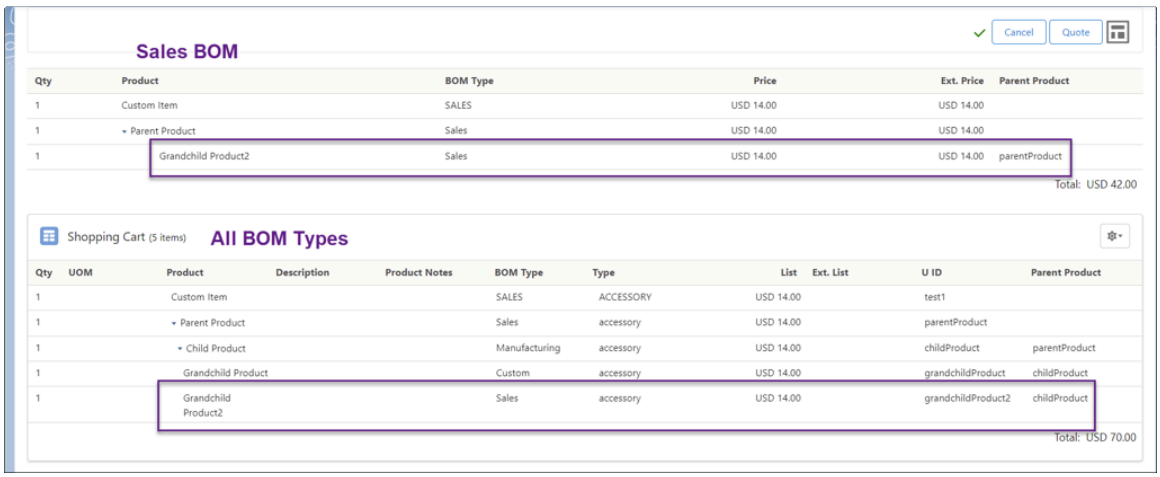
How parent/child relationships function when multiple BOMs are displayed

See how product relationships are displayed in a product list that includes more than one bill of materials.

If a parent or child product is not displayed in a BOM because it has a different BOM type than its parent or child product, an effectiveParent propertyis set to determine how to display the hierarchy.

Parent/child product relationships between products with different BOM types will appear in the product list similarly to the example below. Here, the parent of Grandchild Product2 is the child product. Child Product is a manufacturing item, while Grandchild Product2 is a sales item. Because Child Product is not shown in the sales BOM, Parent Product is shown as the parent (becoming the effective parent) of Grandchild Product2.



Setting a custom target for a message rule action

You can set a layout element as the target of a message action.

When you set a message action in a rule, you can enter the variable name of a layout element. The message will be displayed in that element.

Configuration linking overview

Learn how configuration IDs link Configuration Line Items and quote lines in Salesforce. When a configuration is saved, all related line items share the same configuration ID. The same ID is added to the parent quote line when the quote is saved, allowing admins to easily pull configuration details into quotes or related records.

Whenever a configuration session is saved, a collection of Configuration Line Item objects are created in SFDC that all share the same Configuration Id field.

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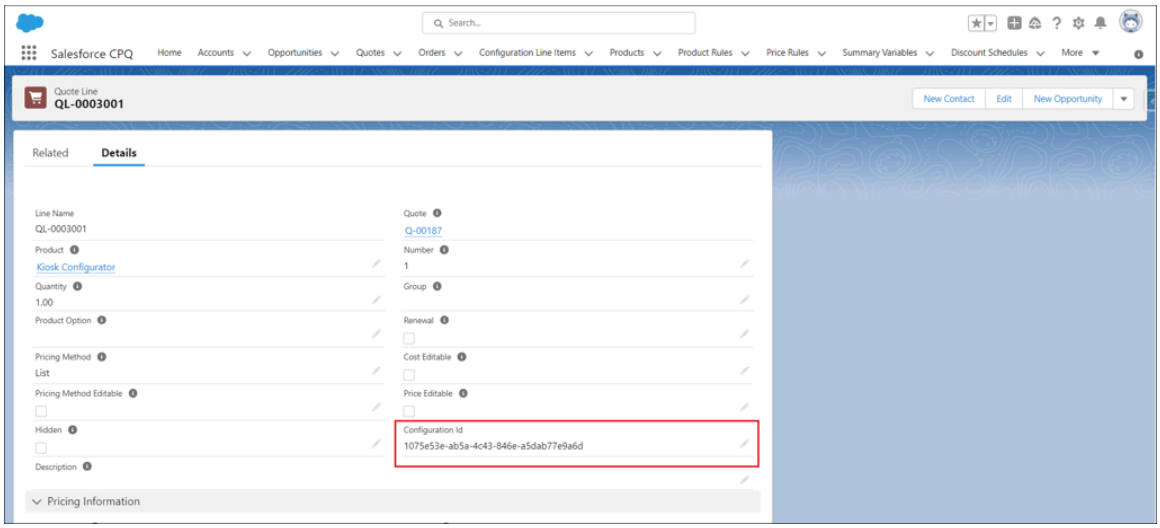
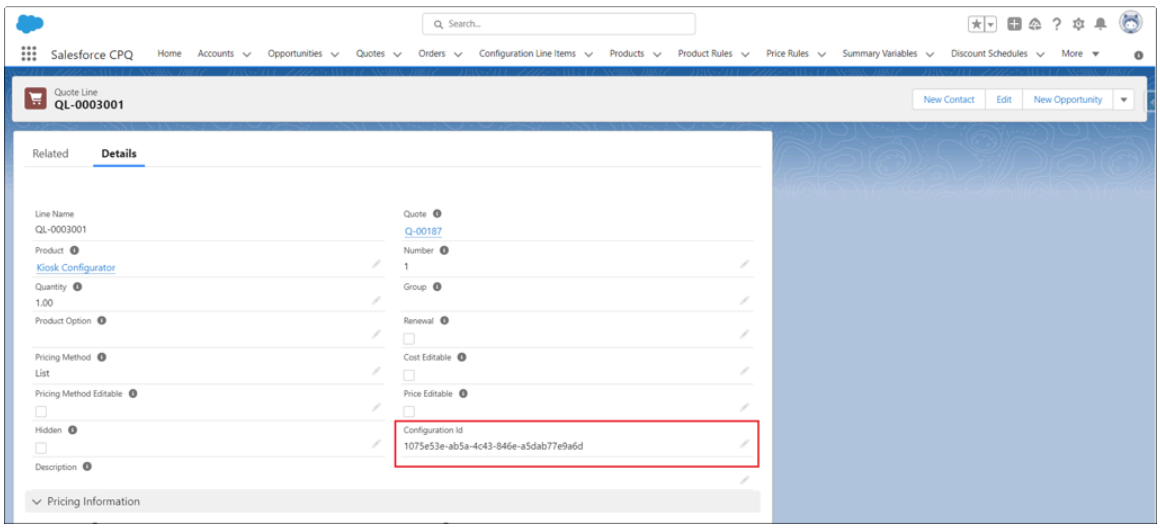


When you save the quote, the quote line for the parent level configurable product will have a similar Configuration Id field, which should be populated with the same value.



A Salesforce admin can leverage the fact that these values match to pull information from the Configuration Line Items to the quote (or its associated opportunity/account). For more information about pulling information to the quote line, see:

- Use case: Configuration line item to quote line flow (if your Logik Extension for Salesforce CPQ Package is version 1.8 or later)
- Use case: Using the Salesforce Quote Calculator plugin to integrate data from CPQ to Salesforce quotes and quote lines (for CPQ Extension Package version 1.7 or earlier)

Embedding the CPQ UI with the CPQ Web Component

By using the CPQ Web Component, you can embed the Logik UI in a web page without using an iframe. Because the component's UI is compatible with themes, users can easily edit the look of the UI.

The CPQ Web Component allows a user to embed the CPQ UI directly to a web page without an iframe. The UI of the Web Component is compatible with themes to allow users to easily edit the look of the UI.

To use the Web Component, you must have:

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- A configurable product associated to a deployed blueprint
- A CPQ runtime token that includes the destination URL as the origin Website URL whitelisted in the GCP properties

Contextual information on the page (such as a SKU in the page URL) is accessible to the Web Component with minimal customization. The Web Component also:

- Removes the need to use an iframe to embed Logik UI, avoiding security restrictions and issues inherent to iframes
- Dispatches native HTML events that can be listened for anywhere on a page
- Reduces integration complexity; for example, its Web component orchestrates API calls for UI display and configuration
- Provides greater control over Logik on your site with access to the HTML directly on the page, more seamlessly integrating with the parent page
- Is compatible with custom themes

Embedding the CPQ Web Component

The Web Component can be added to any page where you can add HTML. The only required fields to initialize the Web Component are the URL, the runtime token, and the configurable product ID.

Example

The following sample code includes comments to provide more details on how the Web Component works and provides examples for reference.

It includes minimal code that can be easily added to a container or embed components. A Product ID must be manually entered.

```
<script

 src="https://TENANT.SECTOR.logik.io/ui/wc-build/logik-wc.es.js"
  type="module"
  ></script>
  <logik-ui
  runtime-token="RUNTIME_TOKEN"
  tenant-api-url="TENANT.SECTOR.logik.io"
  product-id="PRODUCT_ID"
  >
  </logik-ui>
```

The following sample code represents a full-page example. It lets the user easily pass multiple parameters and read a product ID from the page.

```
<!DOCTYPE html>
<html lang="en">
  <head>
    <meta charset="UTF-8" />
    <title>Web Component Sandbox</title>
    <script
      type="module"

 src="https://
renderdraw02.demo01.logik.io/ui/wc-build/logik-wc.es.js"
```

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```
    ></script>
  </head>
  <body>
    <logik-ui></logik-ui>

    <script>
      // Type Definitions
      /**
       * @typedef {Object} BomProduct
       * @property {string} id - Product identifier
       * @property {number} price - Unit price of the product
       * @property {number} quantity - Quantity of the product
       * @property {('SALES'|'MANUFACTURING')} bomType - Type of
BOM
       * @property {string} type - Product type (e.g.,
'accessory')
       * @property {number} rollUpPrice - Rolled up price
including child products
       * @property {number} extPrice - Extended price (price *
quantity)
       * @property {number} level - Hierarchy level in the BOM
structure
       * @property {{ selected: boolean, disabled: boolean }}
selection - Selection state
       * @property {number} extList - Extended list price
       * @property {number} list - List price
       * @property {string} displayName - Display name of the
product
       * @property {string|null} parentProduct - ID of parent
product if nested
       */

      /**
       * @typedef {Object} BomData
       * @property {{
       *   products: Array<BomProduct>,
       *   total: number,
       *   totalPages: number,
       *   totalItems: number,
       *   errorMessage: string|null,
       *   incompletePricing: boolean
       * }} newProducts - Updated products in the BOM
       */

      /**
       * @typedef {Object} LogikConfigurationData
       * @property {string} configurationId - The unique
identifier for the configuration
       * @property {string} productId - The product identifier
       * @property {Object} fields - The current state of all
fields in the configuration
       * @property {BomData} [bomData] - Bill of Materials data
(only present in BOM events)
       * @property {Object} [quoteData] - Quote data (only
present in Quote events)
       */
```

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```
      /**
       * @typedef {Object} QuoteData
       * @property {Object} quote - Quote-specific data
       * @property {string} quote.SBQQ__PricebookId__c -
 Pricebook identifier
       * @property {string} quote.LGK__QueriedEditAccess__c -
 Edit access status
       * @property {Object} product - Configured product data
       * @property {string} product.configuredProductId - ID of
 the configured product
       * @property {Object} product.configurationAttributes -
 Configuration attributes
       * @property {string}
 product.configurationAttributes.LGK__Logik_Id__c - Logik
 configuration ID
       * @property {Object}
 product.configurationAttributes.LGK__Configuration_Data__c -
 Configuration data
       * @property {Array}
 product.configurationAttributes.LGK__Configuration_Data__c.it
ems - Configuration items
       * @property {Object} product.optionConfiguration - Option
 configuration data
       * @property {Array} product.optionConfiguration.Dynamic -
 Dynamic option configurations
       */

      // Configuration
      const logikUrl = 'https://renderdraw02.demo01.logik.io';
      const runtimeToken = 'YIFFIOdluM7ULhibRGR2GB_3F2npxSn_Zw';
      const productId = 'O1t8cOOOOORzlKoAAJ';

      const fields = [
        { variableName: 'exampleBooleanField', value: true },
        {
          variableName: 'exampleArrayField',
          value: ['alpha', 'delta', 'beta'],
        },
        { variableName: 'exampleStringField', value: 'left' },
        { variableName: 'exampleNumberField', value: 21 },
      ];

      /**
       * Initializes the Logik UI web component with the
 specified configuration parameters.
       * @param {string} productId - The unique identifier for
 the product. This is a configurable product id in the logik
 Admin
       * @param {string} runtimeToken - The authentication token
 for runtime access. This can be created in the logik Admin
 under Runtime Clients. The token must have include an origin
 matching the url of the page that is hosting the web component.
       * @param {string} tenantApiUrl - This
 should be set to the url of your logik tenant. eg
 https://example.demo01.logik.io
       * @param {string} [assetURL] - Optional URL for asset
 resources. If provided, sets the asset-url attribute. Defaults
```

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```
to the provided tenantApiUrl. You will most likely not need to
set this.
      * @param {Array<{
      *   variableName: string,
      *   value: string | number | boolean | Array<string>
      * }>} [fields] - A list of field values to set in the
initial state of the configuration.
      * @returns {void}
      */
     function initLogikUI(productId, runtimeToken,
tenantApiUrl, assetURL, fields) {
       const logikuiEl = document.querySelector('logik-ui');
       logikuiEl.setAttribute('product-id', productId);
       logikuiEl.setAttribute('runtime-token', runtimeToken);
       logikuiEl.setAttribute('tenant-api-url', tenantApiUrl);
       if (assetURL) {
         logikuiEl.setAttribute('asset-url', assetURL);
       }
       if (fields) {
         logikuiEl.setAttribute('fields',
JSON.stringify(fields));
       }
     }

     // Initialize the component
     initLogikUI(productId, runtimeToken, logikUrl, false,
fields);

     // Event Listeners
     /**
      * Event fired when the user cancels the configuration.
After this event is received,
      * the configuration will be terminated and the logik-ui
component should be unmounted.
      * @event logik-ui:cancel
      * @type {CustomEvent}
      * @property {Object} detail - An empty object indicating
the configuration was cancelled
      */
     window.addEventListener('logik-ui:cancel', function
(event) {
       console.log('Cancel event received', event);
     });

     /**
      * Event fired when the user generates a quote. After this
event is received,
      * the configuration will be terminated and the logik-ui
component should be unmounted.
      * @event logik-ui:quote
      * @type {CustomEvent}
      * @property {Object} detail - The event details
      * @property {QuoteData} detail.data - The quote data
      */
     window.addEventListener('logik-ui:quote', function (event)
{
       console.log('Quote event received', event);
```

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```
      });

      /**
       * Event fired when the BOM changes during configuration
       * @event logik-ui:bom
       * @type {CustomEvent}
       * @property {Object} detail - The event details
       * @property {LogikConfigurationData} detail.data - The
 configuration data with BOM information
       */
      window.addEventListener('logik-ui:bom', function (event) {
        console.log('BOM event received', event);
      });
    </script>
  </body>
</html>
```

Configure help popups for layouts

Implement buyside help popups in CPQ.

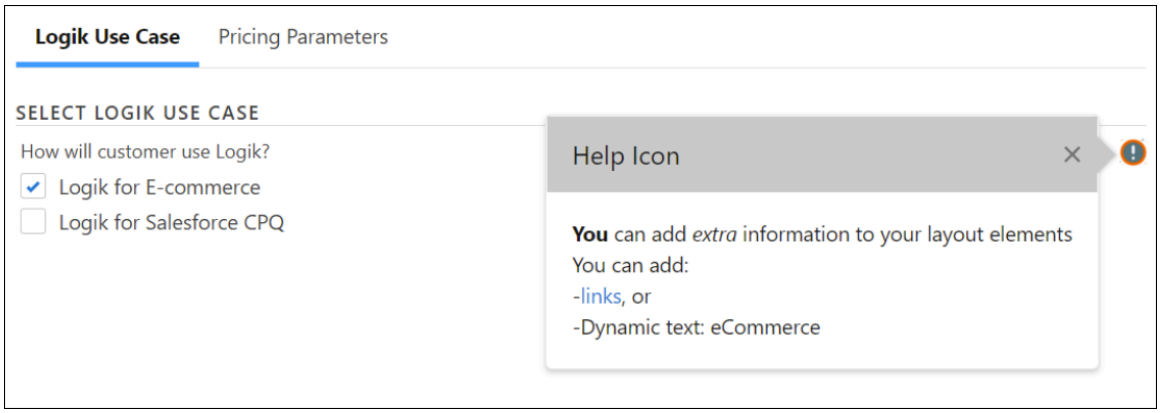
Help popups give the user more information about a field in a layout. They resemble the *tooltip* message display type, but differ in the following ways:

- Tool tips appear only when the condition of a message rule is met, whereas help popups are always present on the layout
- Tool tips display only plain text, whereas help popups can include hyperlinks, lists, italics, bold text, newlines, images, and dynamic text
- Tool tips appear on hover, whereas help popup icons must be clicked to display messages

Note: To learn how to display a message that appears as the result of a message rule, see Change how messages are displayed to the end user.

Popup appearance

The image below shows a popup message that appears when the user clicks its help icon. To illustrate dynamic text in a help popup, the second image shows additional text that appears as the result of a selected picklist option.



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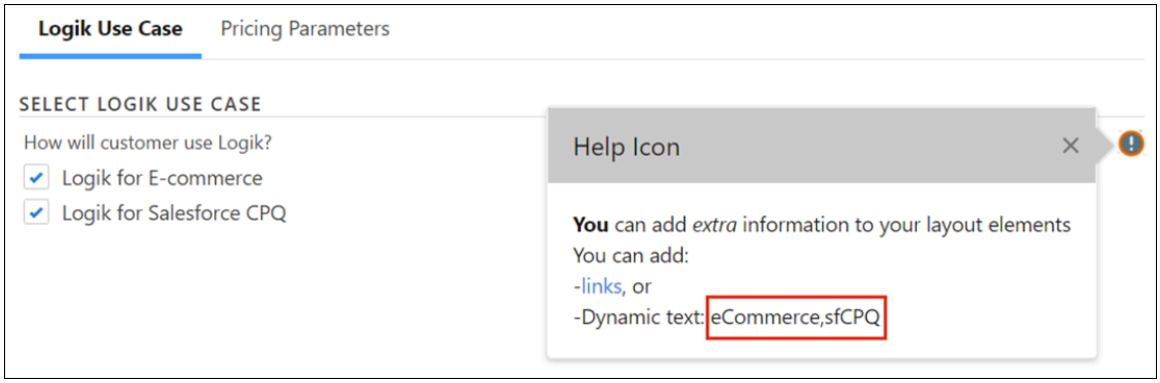

To implement a message popup, add a column header called "help" in cell K1 of your CSV layout.

For a tier, columnset, or field, the format for a help popup is as follows:

```
{"content":"<help body>","heading":"<help
 heading>","trigger":{"type":"icon","url":"<image.url>”,“label”:
 “<Label>”}}
```

To assign the popup a button instead of an icon, use "type":"button". The button resembles the following: Help

If you don't specify an image URL, a question mark will appear: ?

If you don't specify a label, the default value is "Help."

Formatting the popup contents

The following table shows how to control the formatting of the content of a message popup.

Message popup formatting options

Formatting option	Syntax	Output	Notes
Bold	Bold text	[text display in bold]	Can use underscores instead of asterisks
Italic	`Italic text`	[text displays in italics]	Can use underscore instead of asterisk
Unordered list	`Item\r- Item\r- Item`	• Item • Item • Item	
Ordered list	`1.Item\r2. Item \r3. Item`	**1.** Item **2.** Item **3.** Item	
Newline	`first line\nsecond line`	first line second line	

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Message popup formatting options (continued)

Formatting option	Syntax	Output	Notes
Link	`[link display text](https://www.google.com)`	[link display text appears as a clickable link]	Javascript will be sanitized
Image (GIF)	`![alt text](image url \"title text\")`		Quotes around the title text must be escaped
Dynamic text	`{{ fieldVariableName }}`		Outputs the value of the selected field in the text

Configuring the lead and opportunity management applications

Learn how to install and configure the lead and opportunity management applications to support pre-sales workflows.

Installing and configuring the following applications involve installing the application from the ServiceNow Store store, assigning appropriate roles to users and groups, and then configuring app-specific features such as lead assignment rules, opportunity stages, forecasting settings, and so on.

1. Install and configure Lead Management

   Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

2. Configuring Customer Engagement Sequences

   Install and configure Customer Engagement Sequences so that the sales representatives can receive predefined sequence steps for interacting with prospects and customers.

3. Install and configure Opportunity Management

   Install the Opportunity Management application to enable your sales agents and account executives to create and manage opportunities that identify and track potential sales based on identified customer needs.

4. Configure Sales Forecasting

   Activate and configure the Sales Forecasting plugin help your sales teams project future sales volumes and revenue based data from opportunities and pipeline analysis.

5. Configuring Sales Territory Management

   Install the Sales Territory Management application from the ServiceNow Store store. Configure the features and components that help distribute accounts, consumers, leads, and opportunities to manage sales territories.

Install and configure Lead Management

Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on

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customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Lead Management.

Configuration tasks for Lead Management

Task	Description	Role
Install Lead Management	Install Lead Management from the ServiceNow® Store Store.	Admin
Assign user roles in Sales Customer Relationship Management applications	Assign the user roles for Lead Management, Product Catalog Management, and Pricing Management.	Admin
Configuring product offerings and catalogs	Create the product offerings and catalogs, unless they've been previously defined.	Product catalog admin
Configuring needs analysis	Create the needs templates for questionnaires that sales agents complete to get product recommendations for leads.	Product catalog admin

Install Lead Management

If you have the admin role, you can install the Lead Management application. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Lead Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead Management application (sn_quote_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Lead Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Opportuni ty Management. **a.** Install Lead Management. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Lead Management data model (sn_l2c_lead_ mgmt_data_model) plugin. **d.** In the System **Plugin Lead Management da ta model** window, under Related Links, se lect **Install Demo Data Only**.

Configuring Customer Engagement Sequences

Plan and configure your implementation of Customer Engagement Sequences.

Configuration overview

Create multi-trigger, multi-step sequences using the Customer Engagement Sequences application so that sales representatives can engage with prospective leads or customers on outreach-related activities in an organized format. Build telesales workflows using schedule call activity and decision nodes. Integrate with platforms such as Amazon Connect to enable outbound calling from the sequence task.

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1. Install Customer Engagement Sequences

   You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

2. Grant delegated developer permissions for managing sequences

   Assign delegated developer roles to designated Customer Engagement Sequences users so they can create and manage sequences without needing a system admin role.

3. View feature availability and compatibility information

   Which features are supported in Customer Engagement Sequences is determined by combinations of the ServiceNow AI Platform, Playbooks in Workflow Studio, and the Customer Engagement Sequences app version. Review the feature availability and compatibility information to make informed decisions during upgrades or deployments and take advantage of optimal functionality.

What to do next

Create a customer engagement sequence

Drive personalized outreach by creating customer engagement sequences that automate timely, relevant interactions, ideal for nurturing leads, onboarding clients, or reengaging inactive customers.

Related topics

Using Customer Engagement Sequences

Components installed with Customer Engagement Sequences

Install Customer Engagement Sequences

You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Customer Engagement Sequences application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Customer Engagement Sequences:

- Roles
- Tables

For more information, see Components installed with Customer Engagement Sequences.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Engagement Sequences application (com.sn_crm_sequence) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Grant delegated developer permissions for managing sequences

Assign delegated developer roles to designated Customer Engagement Sequences users so they can create and manage sequences without needing a system admin role.

Before you begin

Role required: admin

Procedure

Assign the Manage Update Set delegate developer permission to the following users:

- sn_crm_sequence.admin
- sn_crm_sequence.writer
- pd_author or playbook.admin (for version 1.0.0.)

For more information, see Delegated development and deployment and Developer and deployment permissions.

Compatibility information for Customer Engagement Sequences

The features that are supported in Customer Engagement Sequences are determined by combinations of ServiceNow AI Platform, Playbooks in Workflow Studio, and the Customer Engagement Sequences app version.

The following versions of the Customer Engagement Sequences application are compatible with the ServiceNow® Xanadu, Yokohama, Zurich, and Australia releases:

- Customer Engagement Sequences 1.0.0
- Customer Engagement Sequences 2.0.1
- Customer Engagement Sequences 2.1.0

The following table provides a comparison of features available with two Customer Engagement Sequences version 1.0.0 and 2.0.1.

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Feature	Customer Engagement Sequences 1.0.0	Customer Engagement Sequences starting with version 2.0.1
Roles For more information, see Components installed with Customer Engagement Sequences.	• Sequence viewer • Sequence task read granular	• Sequence admin (granular admin role) • Sequence executor (renamed from Sequence viewer) • Sequence writer • Sequence reader Provides the ability to view the sequences in Playbooks starting with the Zurich release. • Sequence task read granular
Schedule call activity	Unavailable	Available starting with the Xanadu release.
Multi-trigger capability	Available starting with the Zurich release and Playbooks version 28.1.	Available starting with the Zurich release and Playbooks version 28.1.
Decision branches for stages Demo data	Available starting with the Zurich release and Playbooks versions 28.3.	Available starting with the Zurich release and Playbooks version 28.3.
Runtime permissions	Available starting with the Zurich release and Playbooks version 28.1.	Available starting with the Zurich release and Playbooks version 28.1.

Note: The click-to-call capability and activity picker options for the Schedule call activity in Workflow Studio vary by release.

- In Xanadu and Yokohama, only the **Schedule call** activity is available in the activity picker and does not include the click-to-call capability.
- Starting with Zurich and Customer Engagement Sequences 2.1.0, both **Schedule call** and **Schedule call - Deprecated** appear in the activity picker. Use the **Schedule call** activity to enable the click-to-call capability.

Configuring Buying Group

Learn how to configure Buying Group to organize multiple contacts within Sales CRM by account and product offering family, and link them to opportunities.

Activate Buying Group

As an admin, activate the plugin (sn_buying_group) to enable users to access Buying Group. For more information, see Activate a plugin.

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Buying Group plugin

Plugin	Description	Dependency
sn_buying_groups	• Represent collections of contacts involved in a purchasing decision. • Organize stakeholders by role or context and support associating multiple contacts with accounts, product families, and sales opportunities.	• Product Catalog Management Core - (com.sn_prd_pm) • Sales common - (com.sn_l2c_sales_common) • Customer service - (com.sn_customer_service)

What to do next

View buying group engagement metrics

View a buying group engagement metrics to track how individual members and the group as a whole interact across marketing and sales activities, providing a consolidated view of participation, engagement levels, and buying readiness throughout the buying group lifecycle.

Related topics

Using Buying Group

Install and configure Opportunity Management

Install and configure Lead Management

Assign user roles in Sales Customer Relationship Management applications

Create new buying groups

Create buying groups for an account and product family to capture the set of decision-makers, influencers, and evaluators involved in a purchase decision.

Before you begin

Role required: bg_admin; bg_writer

Procedure

1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select#**New**.
3. On the form, fill in the fields:

Create New Buying Groups form

Fields	Description
Buying Groups	
Number	A system#assigned, human#readable identifier for the Buying Group record.

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Fields	Description
Name	The name of the Buying Group. It identifies the buying decision being tracked, typically for a specific account and product family.
Account	The customer account to which the Buying Group belongs. The Buying Group is always associated with a single account.
Product Family	The product family associated with the Buying Group. Each Buying Group is created for a specific product family within an account.
Owner	The sales or marketing user responsible for managing the Buying Group, including maintaining its members, roles, and lifecycle status.
Stage	Represents the current lifecycle state of the Buying Group. Stages reflect the progress of the buying decision itself (for example, Identified, Qualified, In#sales motion, Successful, or Disqualified) and are independent of opportunity stages.
Description	Optional text that provides additional context about the Buying Group, such as the purpose of the buying decision or relevant background information.
Active	Indicates whether the Buying Group is currently active. Inactive Buying Groups represent completed or discontinued.
System Information	
Created	The date and time when the Buying Group record is created.
Created by	The user who created the Buying Group record.
Notes	
WorkNote	An internal notes field used to record observations, updates, and important context related to a Buying Group. It captures ongoing activities, signals, or decisions associated with the purchase and supports internal collaboration and tracking.

4. Select **Save**.
   The new buying group is created.

Add buying group member

Add buying group member to a buying group to represent decision participants, assign roles within the decision process, track active participation, enable opportunity synchronization, and support accurate assessment of decision structure.

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Before you begin
Role required: bg_admin; bg_writer

Procedure
1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select the Buying Group record where you want to add members.
3. Go to **Buying Group Members** tab.
4. Select **New** to create a new Buying Group Member.
5. On the form, fill in the fields:

Buying Group Member form

Fields	Description
Buying Group	Buying Group to which the member belongs.
Role	Defines the role or responsibility of the contact within the Buying Group, such as Business user, Decision maker, Economic buyer, Evaluator, Executive sponsor, or Influencer. The role indicates how the individual participates in the purchase decision.
Contact	References the qualified customer contact added as a member of the Buying Group.
Active	Indicates whether the member is currently participating in the buying decision. Inactive members remain associated for historical context but are not considered part of the active decision structure.

6. Select **Save**.
   The new buying group member is added.

Associate buying group to an opportunity

Associate a buying group with an opportunity to connect the opportunity to the set of decision-makers, influencers, and evaluators involved in the purchase.

Before you begin
Role required: Opportunity Writer

Procedure
1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select the Buying Group record where you want to associate an opportunity.
3. Go to **Opportunity - Buying Groups** tab.
4. Select **New** to create a new opportunity - buying groups association.
5. On the form, fill in the fields:

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Opportunity - Buying Groups form

Fields	Description
Buying Group	Buying Group being associated with the Opportunity. The selected Buying Group represents the set of stakeholders involved in the purchase decision for a specific product family and account.
Opportunity	Opportunity to which the Buying Group is associated. This field links the Buying Group to a specific sales opportunity and provides the context for the buying decision.

6. Select **Save**.
   The opportunity associates to the buying group.

Install and configure Opportunity Management

Install the Opportunity Management application, which enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Opportunity Management.

Configuration tasks for Opportunity Management

Task	Description	Role
Install Opportunity Management	Install Opportunity Management from the ServiceNow® Store Store.	Admin
Assign user roles in Sales Customer Relationship Management applications	Assign the user roles for Opportunity Management, Product Catalog Management, and Pricing Management.	Admin
Configuring product offerings and catalogs	Create the product offerings and catalogs, unless they've been previously defined.	Product catalog admin
Configuring product pricing	Define the price lists, pricing strategies, and other pricing features that you want to use, unless they've been previously defined.	Pricing admin
Configure needs analysis	Create the needs templates for questionnaires that sales agents complete to get product recommendations for sales opportunities.	Product catalog admin
Configure location-based transactions	Activate the system property for location-based	Admin and product catalog admin

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Configuration tasks for Opportunity Management (continued)

Task	Description	Role
	transactions and set up the rule entity and product eligibility decision rules.	
Create opportunity stages	Create sales cycle stages for an opportunity.	Opportunity setup writer
Create a sales cycle for an opportunity	Create a sales cycle type for an opportunity.	Opportunity setup writer
Associate a sales cycle with the opportunity stage	Link one or multiple opportunity stages with a sales cycle.	Opportunity setup writer

Install Opportunity Management

You can install the Opportunity Management application (sn_opty_mgmt) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Opportunity Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Opportunity Management:

- Roles
- Tables

For more information, see Components installed with Opportunity Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management application (sn_opty_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create opportunity stages

Create sales cycle stages for an opportunity.

Before you begin

Role required: sn_opty_mgmt_core.opportunity_setup_writer

Procedure

1. Navigate to **All** > **Opportunity Management** > **Opportunity Stages**.
2. Select **New** to create an opportunity stage or select an existing opportunity stage to make changes.
3. Fill in the fields in the Opportunity Stage form.

Opportunity Stage form

Fields	Descriptions
Name	Name of the opportunity stage. For example, Qualify or Develop or Propose or Negotiate.
Order	Number of orders that is in the opportunity stage.
Type	Type of the opportunity stages. For example, Open or Closed.
Active	When the checkbox is selected, the opportunity stage is active.

4. Select **Submit**.
   The sales cycle stage has now been created for the opportunity.

Create a sales cycle for an opportunity

Create a sales cycle type for an opportunity.

Before you begin

Role required: sn_opty_mgmt_core.opportunity_setup_writer

Procedure

1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select **New** to start a new sales cycle type or select an existing sales cycle type to make changes.
3. Fill in the fields in the Sales Cycle Type form.

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Sales Cycle Type form

Fields	Descriptions
Code	Type of sales cycle. For example, NEW RENEW or NEWCUST or UPSELL.
Short Description	More information about the new opportunity sales cycle.
Active	When the checkbox is selected, the sales cycle is active.

4. Select **Submit**.
   The sales cycle type has been created for the opportunity.

What to do next
Add sales cycle stages to your opportunity. To learn more, see Create opportunity stages.

Associate a sales cycle with the opportunity stage

Link one or multiple opportunity stages with a sales cycle.

Before you begin
Role required: sn_opty_mgmt_core.opportunity_setup_writer

Procedure
1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select an existing sales cycle type to make changes.
3. On the **Sales Cycle Stages** related list, select **Edit**.
4. Select and move one or multiple opportunity stages from Collection on the left to Sales Cycle Stages List on the right.
5. Select **Save**.
   The sales cycle and opportunity stages have been associated.

Configure allocation types

Create and activate allocation types to control how sales credits are split among multiple sales users when they work on the opportunity together.

Before you begin
Role required: sn_opty_mgmt_core.opportunity_setup_writer

Procedure
1. Navigate to **All** > **Opportunity Management** > **Opportunity Allocation Types**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Unique business identifier for the allocation type:

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Field	Description
	○ Revenue: Distributes the total opportunity amount across eligible participants for ownership, forecasting, and credit. ○ Overlay: Distributes product or line-level opportunity value for shared credit and forecasting. **Note:** By default, Revenue and Overlay allocation types are available.
Order	Determines order of display on UI and related lists wherever applicable.
Description	(Optional) Details about the opportunity allocation type. **Note:** Provides business context for administrators.
Allocation Table	The table or entity the allocation type applies to (Opportunity or Opportunity Line).
Allocation Field	The metric used for allocation (for example, Amount, Cumulative TCV).
Active	Determines if this allocations type is active and available for allocation processing.
Requires Full Allocation	Specifies whether all allocations under this type must sum to 100%.
Filter by	Allows to configure conditions on the Allocation object. Only records satisfying these conditions will be used for generating the final numbers.

Note:

You can only modify inactive allocation types.

You can't delete allocation types if it is in use in Opportunity allocations.

4. Select **Submit**.
   A new opportunity allocation type is created and added on the **Opportunity Allocation Types** page.

Associate allocation dimensions with allocation types

Associating allocation dimensions to allocation types enables consistent, transparent, multi-dimensional roll-ups for reporting and forecasting.

Before you begin
Role required: sn_opty_mgmt_core.opportunity_setup_writer

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About this task

An allocation dimension defines the attributes (for example, Territory, Product Offering Family) used to group records for allocation. Use this task to create a dimension that determines how an Opportunity Allocation Type groups records and allocates amounts during allocation processing.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the **Opportunity Allocation Dimension** table.
3. On the **Opportunity Allocation Dimension table** related links, select **Show List**.
4. Select **New** to create an opportunity allocation dimension record.
5. On the form, fill in the fields.

Field	Description
Allocation Type	Specifies the type of opportunity allocation.
Name	Unique display name of the allocation dimension.
Allocation Table	The table or entity the allocation type applies to (Opportunity or Opportunity Line).
Allocation Table Field	The field from the source entity that is used as the basis for the allocation (e.g., product family, territory).
Opportunity Allocation Table	The table used to store allocation records for opportunities.
Opportunity Allocation Field	The field in the allocation table that references the allocation basis from the source record.
Active	Indicates whether the allocation dimension is available for use.

6. Select **Submit**.
   A new opportunity allocation dimension is created and added on the **Opportunity Allocation Dimensions** page.

What to do next

- Managing allocations
- Add or edit opportunity allocations
- Split opportunity allocation

Revise existing opportunities after an upgrade

Run a scheduled job to modify older opportunities so they can support parent-child opportunity line items.

Before you begin

Role required: admin

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About this task

The scheduled job helps update opportunity lines on the opportunities created on or before the Yokohama Q1 release. From Yokohama Q2 release onward, the opportunity lines follow a hierarchical parent-child structure. The hierarchy is achieved by adding new fields on an opportunity line and affects the pricing functionality. For the existing lines to incorporate the updated pricing functionality, the newly added fields must be populated and the hierarchical structure must be in place.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. On the scheduled job menu, search for the **Revise existing Opportunities on upgrade** job.
3. Open the job and select **Execute Now**.
4. Navigate to **All** > **System Logs** > **System Log** > **All**.
5. Confirm that the job has been completed by checking for the `Opportunity Upgrade Job completed` message.
   The log lists the total number of records processed, along with their success and failure count.

> **Note:** If the job is abruptly stopped, the log displays `Opportunity Upgrade Job encountered errors` in addition to the error message.

Result

The scheduled job updates the open opportunities (not in any of the closed stages). The job works differently for opportunities that are synced to Quote than the ones that aren't.

Example:

For open, non-synced opportunities:

1. The scheduled job updates the newly added **Top Opportunity Line Item** and **Product Specification** fields for all the opportunity lines.
2. If a complex product offering has a child offering, the job creates child opportunity lines under the parent line. Newly created child lines contain correct values populated for the newly added fields.
3. A subsequent pricing call is made to populate pricing fields for all the lines in the hierarchy.

For open, synced opportunities:

1. A scheduled job updates the newly added **Top Opportunity Line Item** field for all the opportunity lines.
2. The **Product Specification** field, new hierarchy, and pricing fields for this line are updated only if any change is done on the corresponding synced quote line.

> **Note:** After upgrading to the Yokohama Q2 release, run the scheduled job before working with Opportunity. Failure to do so results in inconsistent behavior in Opportunity and the related tables.

Configure Sales Forecasting

Use the Sales Forecasting application to project your future sales volumes and revenue based data from opportunities and pipeline analysis.

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Activate Sales Forecasting

As an admin, you can activate the following plugins to enable users to access Sales Forecasting. For more information, see Activate a plugin.

Sales Forecasting plugins

Plugin	Description	Dependency
com.snc_sales_forecasting	Project your future sales volumes and revenue based on data from opportunities and pipeline analysis.	• com.snc_app-l2c-core • com.snc_app-prd-pm • com.snc_app_l2c_oppty_mgmt • com.snc_app-tmt-core
com.sn_sales_quota_application	Assign the quota targets to the sales reps in the sales team hierarchy.	com.snc_app_l2c_oppty_mgmt

You need the Sales Quota Application plugin to assign the quota targets to each team and sales agent. You can view and track the targets achieved for each agent and team on the sales forecasting dashboard and the gap remaining to achieve the target.

Roles in Sales Forecasting

Role	ID	Functions
Forecast Administrator	sn_sales_forecast.forecast_admin	• Setup group hierarchy and sales teams with the managers and sales agents' information for the organization. • Set up Sales forecasting settings and be able to initiate calculate forecasts. • Create/edit/view forecast category choices and forecast model details.
Forecast Analyst	sn_sales_forecast.forecast_analyst	View all forecasts item entries, forecast category, forecast model, and associated opportunities.
Sales Quota Admin	sn_quota_core.quota_admin	Create/import/edit/delete quota for different sales teams and individuals.
Sales Quota Manager	sn_quota_core.quota_manager	Edit the sales quota for the groups.
Sales Quota Owner	sn_quota_core.quota_owner	View the Sales quota assigned to the owner.

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Roles in Sales Forecasting (continued)

Role	ID	Functions
Adjustment Viewer	sn_sales_forecast.adjustment_viewer	View forecast-adjusted records assigned to them and the people below them in the hierarchy.
Adjustment Writer	sn_sales_forecast.adjustment_writer	Edit the forecast-adjusted records that they own.
Forecast Viewer	sn_sales_forecast.forecast_viewer	View all the forecast data that they own and the data of people below them in the hierarchy.
Submission Viewer	sn_sales_forecast.submission_viewer	View forecast-submitted records that they own and the records owned by people below them in the hierarchy.
Submission Writer	sn_sales_forecast.submission_writer	Edit the forecast-submitted records that they own.

Set up a sales team for forecast hierarchy

The system administrator can create groups, sales teams, associating them with specific managers. The sales hierarchy determines how the forecast rolls up within your company and how it can be viewed.

Before you begin

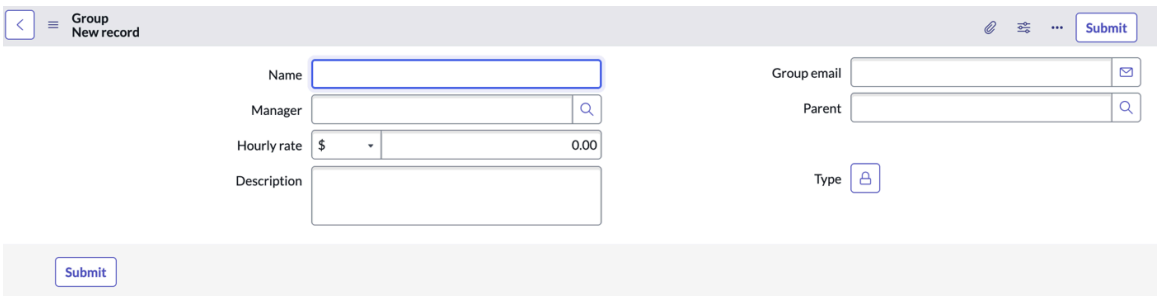
Role required: admin

About this task

Once the users, teams, and opportunity data are added, along with selection of category, you can view the sales forecast for any group or specific sales team on the Sales Forecast dashboard on the CSM workspace.

Procedure

1. Navigate to **All** > **System Security** > **Groups**.
2. Select **New**.



3. On the form, fill in the fields.

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Field	Description
Name	Name of the team that will be visible on the Sales Forecast dashboard.
Group email	Email ID of the team.
Manager	Name of the manager of the group.
Parent	Parent group of the team for which you want to forecast.
Description	Short description about the team and its sales activities.
Type	Select Sales Team only.

4. Select **Submit**.
   The new team is created and added on the Groups page.

Configure Forecast Model

The forecast model is a framework used to predict future sales based on historical data, current sales activities, and other relevant factors.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Sales Forecast** > **Forecast Model**.
2. Select#**New**.
3. On the form, fill in the fields.

Fields	Description
Name	Name of the forecast model that you want to create.
Description	Short description of the forecast model.
Forecast Source	Entity from which forecast data is generated. For example, Opportunity and Opportunity Allocation.
Filter By	Conditions that limit that records from the forecast source are included in the forecast.
Rollup Type	Select how forecast values roll up the hierarchy. For example, cumulative and single.
Measure Type	Data type of the forecast value.
Active	Option to activate the forecast model.
Measure	Parameter to calculate the forecast value.
Order	Display order of the forecast model.

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Fields	Description
Primary Hierarchy Type	Select **Sales Team** or **Territory** to select the hierarchy used to roll up the forecast values.
Sales Team Hierarchy	Conditions that restrict which sales teams are included in the rollup.
Territory Hierarchy	Territories that are included in the rollup. **Note:** This field is displayed when you select **Territory** from the Primary Hierarchy Type list.
Secondary Hierarchy Type	Select the secondary hierarchy that will be displayed within a territory or sales team, for example, Product Offering Family.
Base	Option to submit and adjust forecasts at base forecast source. **Note:** If you select this option, **Single** is the default option for Rollup Type field.

4. Enter the configurations for forecast generation.
   a. Select **Forecast Configuration Overrides** related list.
   b. From the **Forecast Date Field** list, select the date from the forecast source to generate the forecast.
   c. From the **Forecast Category Field** list, select the category to generate the forecast.
   d. From the **Forecast Territory Field** list, select the field from the Forecast Source that contains the territory information.
   e. From the **Product Offering Family Field** list, select the field from the Forecast Source table that contains product offering family information.
5. Select the conditions to configure the forecast periods and submissions.
   a. Select **Period and Submissions** related list.
   b. From the **Primary Forecast Period** list, select the period for which you want to generate the forecast.
   c. From the **Additional Forecast Period** list, you can select more granular periods from the Primary Forecast Period to generate forecasts.
   d. Select the **Submission Required** check box to activate the submission period.
   e. From the **Submission Frequency** list, select the frequency to submit forecasts.
6. Configure the owner of the forecast.

   Note: This field is displayed only when you select **Territory** from **Forecast Hierarchy Type** list.

   a. Select **Forecast Owner Configuration** related list.
   b. From the **Forecast Owner Field** list, select the field that determines the owner of that forecast.

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7. Define the rolled#up forecast at each level of the selected forecast hierarchy.

   Note: This field is displayed only when you select **Territory** from **Forecast Hierarchy Type** list.

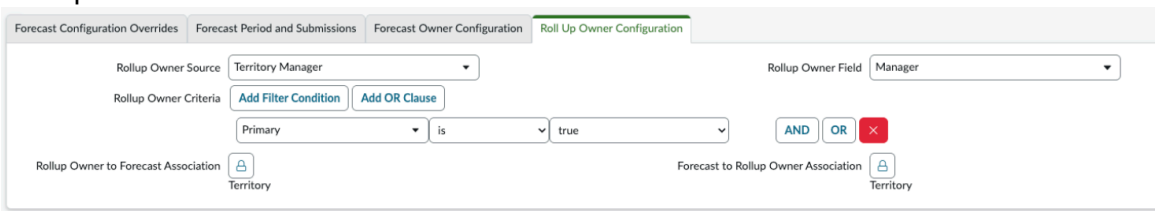
   a. Select **Rollup Owner Configuration** related list.

   b. From **Rollup Owner Source** list, select the table that determines the rollup owner.

   c. From the **Rollup Owner Field** list, select the table field that identifies the rollup owner on the selected rollup owner source.

   d. In the **Rollup Owner Criteria** field, use **Add Filter Condition** or **Add OR Clause** to refine the rollup owner selection.

   e. From the **Rollup Owner to Forecast Association** field, define how the rollup owner record is associated to the forecast record.



   f. From the **Forecast to Rollup Owner Association** field, define how the forecast record is associated back to the rollup owner.

   Note: The values in the **Rollup Owner to Forecast Association** and **Forecast to Rollup Owner Association** fields should be identical.

8. Select **Submit**.

Result

The new forecast model is created. You can view it on the Forecast Models page.

Configure Forecast Categories

Configure the forecast categories in CSM configurable workspace.

Before you begin

For current opportunities in the system, the default value of the field Forecast Category is Pipeline. Every sales agent working on that opportunity, updates this field once the sales process starts. When the agents update the category, the dashboard reflects more accurate analysis and sales forecast prediction. These categories classify the sales based on the level of certainty regarding their closure. By default, six forecast categories are available. For more info, refer Forecast terminologies topic.

Role required: admin

Procedure

1. Navigate to **All** > **Sales Forecast** > **Forecast Categories**.
2. Select#**New**.
3. On the form, fill in the fields:

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Fields	Description
Name	Name of the forecast category that you want to create.
Description	Short description of the category.
Active	Select the **Active** check box to activate the forecast category.
Order	Select the order number in the current category cycle.
Type	From the list, select the type of category this new forecast category belongs to.

4. Select **Submit**.
   The new category is created.

Result
If required, users can either delete or make a forecast category inactive. When a category becomes inactive, the forecast items in that category will be deleted automatically.

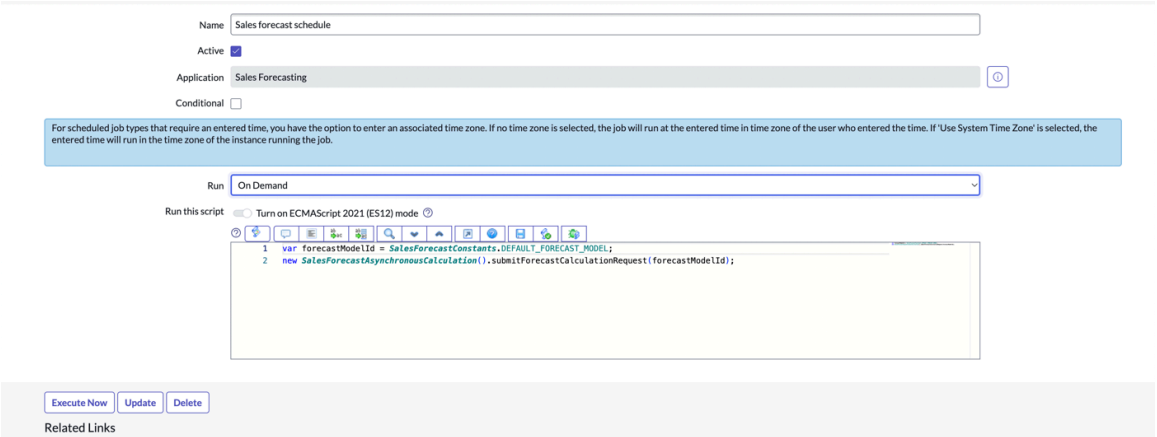
Set up forecast schedule

Forecast schedule automatically fetches all the opportunities in the system and generates forecast data.

Before you begin
Create a scheduled job to update or create the forecast data at a specific time or recurring schedule. A default sales forecast scheduler is available with the Sales Forecasting application. You can edit that scheduler according to your requirements.

Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. Enter **Sales forecast schedule** in the Search field.
3. Select **Sales forecast schedule** from the schedule list.
4. From the Run list, select the option to customize the timing of the scheduler according to your requirements.



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5. Select **Update** to save the settings of your scheduler.
6. Select **Execute Now** to run the scheduler.

Note:

You can copy the script provided in the Run this script field to create your own scheduler.

Set up sales quota

Assign quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

Before you begin

Sales agents and managers can set the quotas/targets for a specific period and distribute. The quota can be assigned to a sales group as well. Quotas can be imported from external sources or entered manually in the system. Bulk import can be done by system administrator only.

Role required: sn_quota_core.quota_admin

Procedure

1. Navigate to **All** > **#Sales Quota Management** > **#Sales Quota**.
2. Select **New**.
3. On the form, fill in the fields.

Fields	Description
Owner	Name of the owner of the team the quota has been assigned to.
External ID	ID of the owner of external source from which the quota is imported from.
Sales team	Reference field to User Group in which the quota is assigned for.
Territory	Reference field to the Territory in which the quota is assigned for.
External Source	Name of the external source in which the quota is imported from.
Period	Select a specific time period to assign this quota.
Amount	Select the currency and the amount of money to assign as quota to a team or an individual.
Type	Indicates if the quota is owned by an individual or at the roll up level.
Forecast Model	Select the forecast model. **Note:** By default, Opportunity Amount Forecast is available to the users.
Active	Select the **Active** check box to activate this quota.

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4. Select **Submit**.
   The sales quota has been assigned to sales team.

Configuring Sales Territory Management

Learn how to configure the features and components that help distribute accounts, consumers, leads, and opportunities to manage sales territories.

Activate Sales Territory Management

As an admin, activate the plugin (com.sn_sales_territory) to enable users to access Sales Territory Management. For more information, see Activate a plugin.

Sales Territory Management plugin

Plugin	Description	Dependency
com.sn_sales_territory	• Provides the core territory tables and APIs that extend base Territory Planning. • Provides the roles for granting access to CRM entities via Responsibility Framework. • Provides Sales CRM Tracker to help to run assignment rules algorithm asynchronously.	• CRM Territory Extensions - com.sn_tp_crm_extn • Sales Common - com.sn_l2c_sales_common • Lead to Cash Core - com.snc.l2c_core

Related information

Using Sales Territory Management

Components installed with Sales Territory Management

Configuring Territory Level

Create territory levels to categorize territories such as regional, district, area, and global for better organization of territories.

Before you begin

Role required: sales territory admin

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory Level**.
2. Select#**New**.
3. On the form, fill in the fields:

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Territory Level form

Fields	Description
Name	Name of the territory level that you want to create, for example: Global, Industry, Area, Region, District, and Territory.
Description	Short description of the level.
Order	Integer to define order of records for sorting purpose.

4. Select **Submit**.
   The new territory level is created.

Configuring the Territory Model

Territory model contains the territory hierarchies mapped to it and maintains the organizational structure for a territory hierarchy. Create a Territory Model to add territories that can be assigned to accounts, consumers, leads, and opportunities.

Before you begin

Role required: admin

Set the **Application scope** to **Sales Territory Management**.

Note:

The Sales Territory Model is shipped by default with the necessary configurations that can be used.

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory Model**.
2. Select#**New**.
3. On the form, fill in the fields:

Territory Model form

Fields	Description
Name	Name of the territory model that you want to create.
Description	Short description of the model.
Territory Role	Roles that can access the sales territory model and its related territories must include Sales Territory Basic.
Application	Read-only field, the set value is Sales Territory Management
Active	Select the Active check box to use the territory model.

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4. Select **Submit**.
   The new territory model is created. You can update the new territory model with the associated **Territory Model Sources** and **Territory Model Level Mappings**.

Configuring the Territory

Create territories to optimize the assignment of a territory to CRM data. Map these territories to the territory model and levels to maintain the hierarchy. Provide conditions for automated assignments, and onboard members with role-based access in a territory for restricted permissions.

Before you begin

Role required: sales territory admin, sales territory manager

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory**.
2. Select#**New**.
3. On the form, fill in the fields:

Territory form

Fields	Description
Name	Name of the territory.
Description	Short description of the territory.
Model	Name of the territory model to which to map this territory.
Level	The associated Territory Level.
Parent	Name of the parent territory to create the territory hierarchy. If no parent territory is specified, this territory will serve as the highest-level (parent) territory.
Rank	Rank of the territories. Helps in the automated assignment algorithm where the territory with the lowest rank becomes the primary territory.
Territory Code	A unique identifier assigned to each territory.
Active	Select the Active check box to indicate the territory is available for assignments.
Cascade condition	Used during assignment rules, this flag indicates whether the parent territory conditions must be evaluated for all the child territories (under its hierarchy).

4. Select **Submit**.
   The new territory is created.

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Configuring resources for territories

Territory managers and members to the territory are added with their appropriate responsibility. Managers of the territory get access to manage the members in their hierarchy. Members get access via the roles and the linked responsibility to the CRM entities that belong to the hierarchy.

Add managers to a territory

Managers get access to a territory to manage members of the assigned territory and its child territories.

Before you begin

Role required: sales territory admin

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory**.
2. From the territories list, open the territory where you want to add managers.
3. In the related list for the Territory Managers, select **New**.
4. On the form, fill in the fields.

Territory Manager form

Fields	Description
Territory	Name of the territory.
Manager	Name of the manager. **Note:** The added user must have Sales Territory Manager role to access the territory hierarchy.
From	Manage territory from the selected date.
Manager Type	Select the type either Territory manager or Resource manager.
Primary	Option to indicate whether the manager is primarily dedicated for all activities in the territory.
To	Manage territory until the selected date.

5. Select **Submit**.

   The territory manager is added to the territory and can manage the territory members of the territory and child territories.

Result

The manager appears in the Territory Managers related list when you open the territory.

Add members to a territory

Add territory members with their appropriate responsibility to get access to the CRM entities belonging to the territory.

Before you begin

Role required: sales territory admin, sales territory manager

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About this task

- A territory comprises a team, where different members play different roles.
- A member can belong to one or more territories, where they can play different/same roles.
- A member can have different roles in the same territory. Their membership and role grant them access and permission to the CRM entities. The access is driven by the responsibility framework, for additional information see Create a responsibility definition.
- Only active members during their membership period get access to the CRM entities.

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory**.
2. From the territories list, open the territory where you want to add members and member roles.
3. On the Territory Members tab, select **New**.
4. On the form, fill in the fields.

Territory Membership Override form

Fields	Description
Territory	Name of the territory. This field is automatically set to the territory for which the member is added.
User	Name of the member.
From	Date from which the member is available to work in the territory.
Membership type	Type of membership for the member, either primary or secondary.
Active	Option to indicate whether the member is available to work in the territory.
To	Date until which the member is available to work in the territory.

The member appears in the Territory Members related list.

5. On the Territory Members tab, select ⓘ and **Open Record** of the territory member to add Territory Member Roles.
6. On Territory Membership Responsibilities, select **New**.
7. On the form, fill in the fields.

Territory Membership Responsibility form

Fields	Description
Territory Membership	Name of the member.
Member Role	Role of the team member. Following member roles (related party types) and responsibility are shipped by default:

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Fields	Description
	○ Account Executive ○ Solution Sales Executive ○ Price Band Approver However, more roles can be configured. For more information, see Create related party configurations.

The member with the defined role appears in the Territory Member roles related list.

Configure Properties

To put a sales territory model into use at the CRM entities, enter the sys_id of an active sales territory model. By default, this model and its territories will be utilized for sales territory assignments.

Before you begin

Role required: sales territory admin

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Properties**.
2. On the Sales Territory Management Properties form, enter the sys_id of an active sales territory model.

   Note: By default, this model and its territories are used for sales territory assignments.

3. Select **Save**.

Run Assignments

Run sales territory assignments to assign CRM entities to the most eligible territory. Each territory is checked against its own or cascaded territory conditions related to the CRM entity.

Before you begin

Role required: sales territory admin

- Complete all prerequisite configuration steps, such as activating the sales territory model, configuring territory levels, and defining territory conditions.

Procedure

1. Navigate to **All** > **Sales Territory Management** > **Run Assignments**.
2. Select an active sales territory model or territory to run assignment rules:
   - If active sales territory model is selected, all selected sources and their data are evaluated against the complete territory hierarchy. Existing assigned territory will be replaced with the newly evaluated one.
   - If active territory is selected, only those entities with no assigned territory will be evaluated against the territory condition.
3. Select one or more source tables to run assignment rules on:
   - Opportunity (sn_opty_mgmt_core_opportunity)
   - Lead (sn_lead_mgmt_core_lead)

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- Consumer (csm_consumer)
- Account (customer_account)

4. Select **Run Assignment Rules**.

Result
Sales Territory Management is assigned in the CRM entities. All the Sales Territory admins will receive an email notification when the job is completed. The selected sources entities are assigned to a territory if they fulfill the territory conditions.

Configuring Activity Management

Install and configure the necessary plugins for enabling Activity Management features.

Important:

To use personal email mailbox in Activity Management, you must install the User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) on your ServiceNow instance. For setup instructions, see Personal corporate mailbox.

You must also install the Omnichannel Callback for Customer Service Management (com.sn_omnichannel_callback) application to enable the click-to-call feature, so agents can call customers from the touchpoint record.

Configuring CRM Touchpoints

Install and configure the CRM Touchpoints application. It provides a unified system for capturing and tracking customer engagements for your sales and service teams while providing leadership with visibility into representative activity and engagement effectiveness.

1. Install CRM Touchpoints

   You can install the CRM Touchpoints application (com.sn_crm_touchpoint) if you have the admin role.

2. Create custom touchpoint types

   Create touchpoint types tailored to your sales organization's workflow to capture activities beyond the standard Discovery, Demo, and CBR types.

Configuring CRM Outlook Add-in

Install and configure the CRM Outlook Add-in application to make the ServiceNow CRM for Outlook add-in available to your users.

1. Install CRM Outlook Add-in

   You can install the CRM Outlook Add-in application (com.sn_crm_outlook) if you have the admin role.

2. Configure CRM access from Microsoft Outlook

   Download and install the ServiceNow CRM for Outlook add-in to access and manage CRM records directly from your Outlook inbox, eliminating the need to switch between applications.

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3. Make emails associated through the CRM Outlook Add-in visible to agents

   Configure email promotion so that emails associated with CRM records through the ServiceNow CRM for Outlook add-in are promoted from the Staged Email [sys_email_staging] table to the Email [sys_email] table, making them visible to agents in the workspace.

Install CRM Touchpoints

You can install the CRM Touchpoints application (com.sn_crm_touchpoint) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the CRM Touchpoint application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with CRM Touchpoints:

- Roles
- Tables

For more information, see Components installed with CRM Touchpoints.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM Touchpoints application (sn_crm_touchpoint) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

Create custom touchpoint types

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Create custom touchpoint types

Create touchpoint types in Activity Management tailored to your sales organization's workflow to capture activities beyond the standard Discovery, Demo, and CBR types.

Before you begin

Role required: sn_crm_touchpoint.admin

About this task

Several touchpoint types are available by default. To view the available options, see Create new CRM touchpoint form.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Label** search field, enter `CRM Touchpoint` and select the **CRM Touchpoint** [sn_crm_touchpoint_touchpoint] table.
3. In the **Column label** search field, enter `Subcategory` and select the record.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Navigate to the **Choices** tab under Related Links.
6. Select **New**.
7. On the form, fill in the fields.

Choice New record form

Field	Description
Label	User#visible name for the type shown in the Type drop-down menu on the CRM Touchpoints form. For example, Business Value Assessment (BVA).
Value	Internal value stored in the database when a choice is selected.

8. Select **Submit**.

Install CRM Outlook Add-in

You can install the CRM Outlook Add-in application (com.sn_crm_outlook) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the CRM Outlook Add-in application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

User roles are installed with CRM Outlook Add-in. For more information, see Components installed with the CRM Outlook Add-in.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM Outlook Add-in application (sn_crm_outlook) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

- Configure CRM access from Microsoft Outlook
-

Configure CRM access from Microsoft Outlook

Download and install the ServiceNow CRM for Outlook add-in to access and manage CRM records directly from your Microsoft Outlook inbox, eliminating the need to switch between applications.

Before you begin

The CRM Outlook Add-in must be installed on your ServiceNow instance. For more information, see Install CRM Outlook Add-in.

Role required: sn_crm_outlook.crm_outlook_admin

About this task

This procedure describes how to install the ServiceNow CRM for Outlook add-in on your Microsoft Outlook client. For information about how to deploy and centrally manage the add-in across your organization, refer to the Microsoft Outlook product documentation on deploying and publishing Office add-ins.

Procedure

1. Log in to your ServiceNow instance.
2. Download the manifest file.

   a. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-in Manifests**.

   b. Select **ServiceNow CRM for Outlook** from the list.

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c. Download the file on your computer by selecting **Download Manifest**.
You can also provide the `manifest.xml` file to your agents so they can install the add-in to their Microsoft Outlook clients.

3. Install the ServiceNow CRM for Outlook add-in on your Microsoft Outlook client.

a. Open your Microsoft Outlook client.

b. On the Microsoft Outlook client, select the See more items icon ••• and select **Get Add-ins**.

c. Navigate to **My add-ins** > **Custom Addins**.

d. From the **Add a custom add-in** drop-down menu, select **Add from File**.

e. Browse to and select the manifest file.

f. Review the warning and select **Install**.
The ServiceNow CRM for Outlook add-in is installed and available in your Microsoft Outlook client.

What to do next
Log in to the ServiceNow CRM for Outlook add-in to start using it.

Make emails associated through the CRM Outlook Add-in visible to agents

Configure email promotion so that emails associated with CRM records through the ServiceNow CRM for Outlook add-in are promoted from the Staged Email [sys_email_staging] table to the Email [sys_email] table, making them visible to agents in the workspace.

Before you begin
Note: Configuring email promotion is required if you're on CRM Outlook Add-in application version 1.0.1.

Role required: admin

Procedure
1. Log in to your ServiceNow instance.
2. Add a promotion rule.

a. Set the application scope to **Global**.

b. Navigate to **All** > **User Mailboxes** > **Promotion Rules**.

c. Select **New**.

d. On the form, fill in the fields.

Email Promotion Rule form

Field	Value
Name	<promotion rule name>

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Field	Value
Condition	(current.target_table == "<table_name>") && !gs.nil(current.instance) For example, (current.target_table == "sn_lead_mgmt_core_lead") && !gs.nil(current.instance)
Promotion strategy	Promote and run Triggers

e. Select **Submit**.

3. Create a business rule on the Staged Email [sys_email_staging] table.

a. Set the application scope to **Global**.

b. Navigate to **All** > **System Definition** > **Business Rules**.

c. Select **New**.

d. On the form, fill in the fields.

Business Rule form

Field	Value
Name	<business rule name>
Table	Staged Email [sys_email_staging]
Active	Selected
Advanced	Selected

e. In the **When to run** tab, enter the following values.

Field	Value
When	after
Insert	Selected
Filter Conditions	[Target] [is anything] AND [Target table] [is anything]

f. In the **Advanced** tab, add the following line in the **Script** field to trigger email promotion processing for staged emails.

```
gs.eventQueue("email_staged.read", current);
```

This event initiates asynchronous processing for the staged email record. It triggers the promotion logic that moves emails from the staging table to the Emails [sys_email] table, ensuring all staged emails are processed successfully after the UID duplication issue is resolved.

The following image shows the complete **Script** field value.

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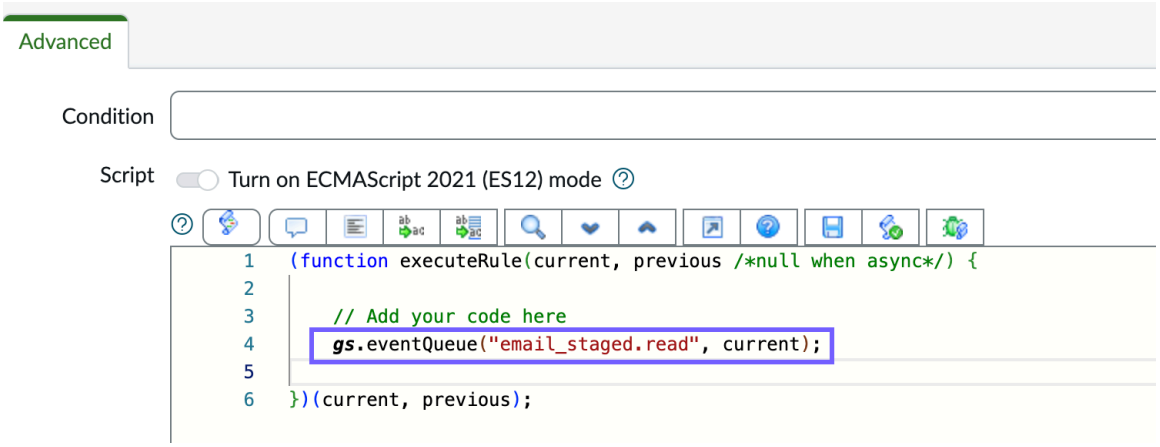

g. Select **Submit**.

Result

When an agent associates an email with a CRM record through the Microsoft Outlook add-in, the business rule fires and promotes the email from the Staged Email [sys_email_staging] table to the Email [sys_email] table. The email then appears in the Emails tab on the associated Lead, Opportunity, or Account record.

Related topics

Classic Business rules

Track emails linked from Microsoft Outlook

Configuring Order Management

Learn how to configure the features and components that you need for customer and service order processing, depending on whether you are a provider or an enterprise customer.

Related topics

Order management

Install Order Management

You can install the Order Management application (sn_ind_tmt_orm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Order Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Order Management:

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- Roles
- Tables

For more information, see Components installed with Order Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Management application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   - Order Management (sn_ind_tmt_orm): Select this app to install the Order Management application.
   - Order Management for Telecommunications, Media, and Technology (sn_om_tmt): Select this app if you have a Telecommunications Service Management subscription. This installs the Order Management application, and the Telecommunication Open APIs (sn_tmf_api) for the TM Forum API REST specifications: Product Catalog, Service Catalog, Product Order, Service Order, Product Inventory, and Technical Service Qualification.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure order enrichment flows using Decision Tables

Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.

Before you begin
Role required: process admin

About this task
Add rows to the Order Enrichment Flow Policy decision table to specify which products should go through enrichment. Add the product enrichment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of product specification and offering information.

Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Order Enrichment Flow Policy** decision table.

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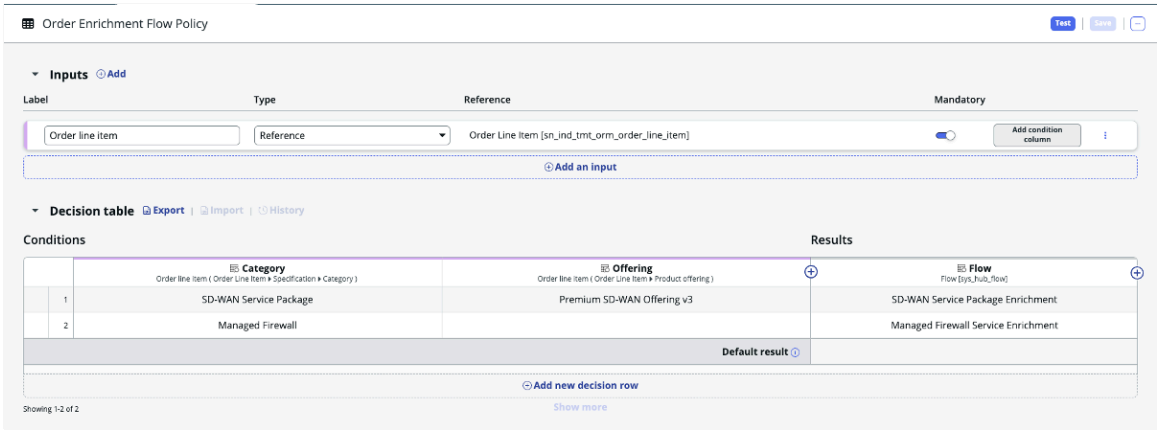
3. In the **Specification** column of the conditions section, select the order line item to set a condition.
4. Select the product offering in the **Offering** column.

Decision table for order enrichment process



5. Select **Save**.

Result

A list of subflows appear in the results section. These sub flows create the enrichment tasks for an order line item during the enrichment process. For more information, see Decision Builder user interface.

Configure product order fulfillment policy using Decision Tables

Associate fulfillment subflows with the product specifications by using the Product Order Fulfillment Policy in Decision Tables for move order.

Before you begin

Role required: admin

About this task

Add rows to the Product Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the product fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Product Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:
   a. Select **true** in the Move Operation column.
   b. Select **Change** in the action column.

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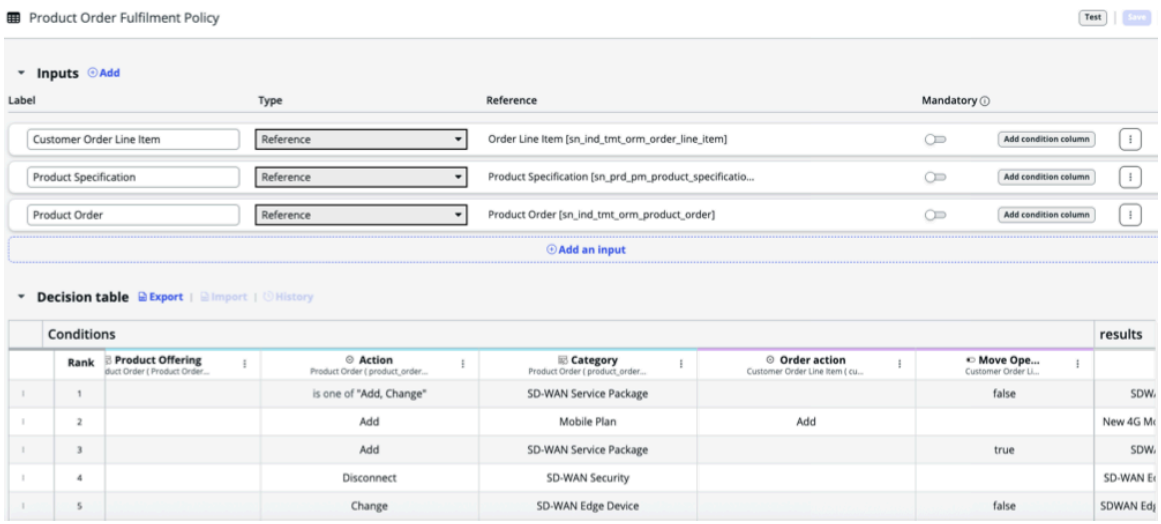

4. To trigger separate subflow for change and not move, do the following:
   a. Select **Change** in action column.
   b. Select **false** in the move operation column.
5. Select **Save**.

Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

Configure service order fulfillment policy using Decision Tables

Associate fulfillment subflows with the service specifications by using the Service Order Fulfillment Policy in Decision Tables for move order.

Before you begin

Role required: admin

About this task

Add rows to the Service Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the service fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Service Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:
   a. Select **true** in the Move Operation column.
   b. Select **Change** in the action column.

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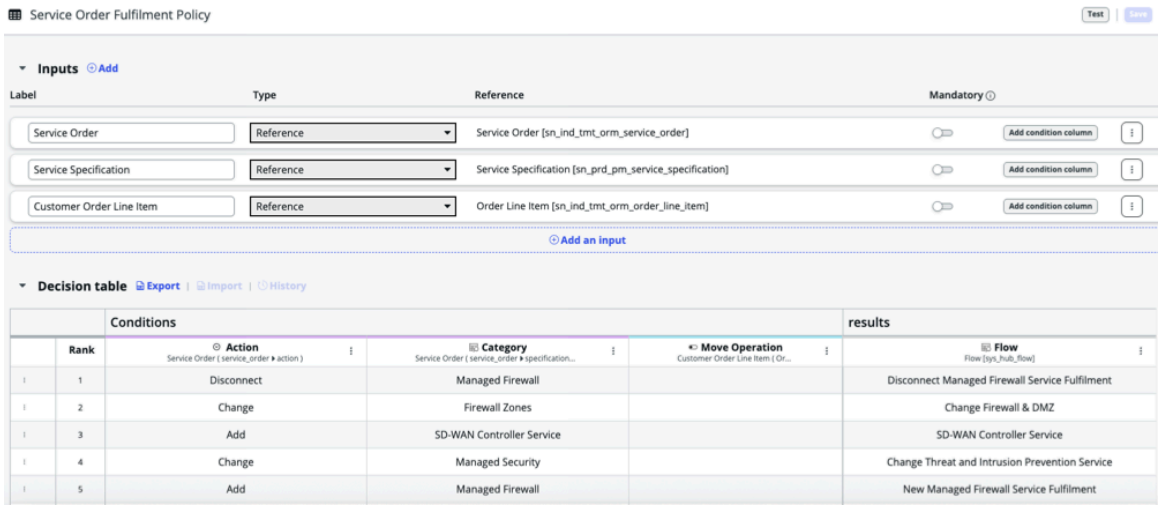

4. To trigger the separate subflow for change, do the following:
   a. Select **Change** in action column.
   b. Select **false** in the move operation column.
5. Select **Save**.

Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

Configure resource order fulfillment policy using Decision Tables

Associate fulfillment subflows with the resource specifications by using the Resource Order Fulfillment Policy in Decision Tables for move order.

Before you begin

Role required: admin

About this task

Add rows to the Resource Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the resource fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Resource Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:
   a. Select **true** in the Move Operation column.
   b. Select **Change** in the action column.

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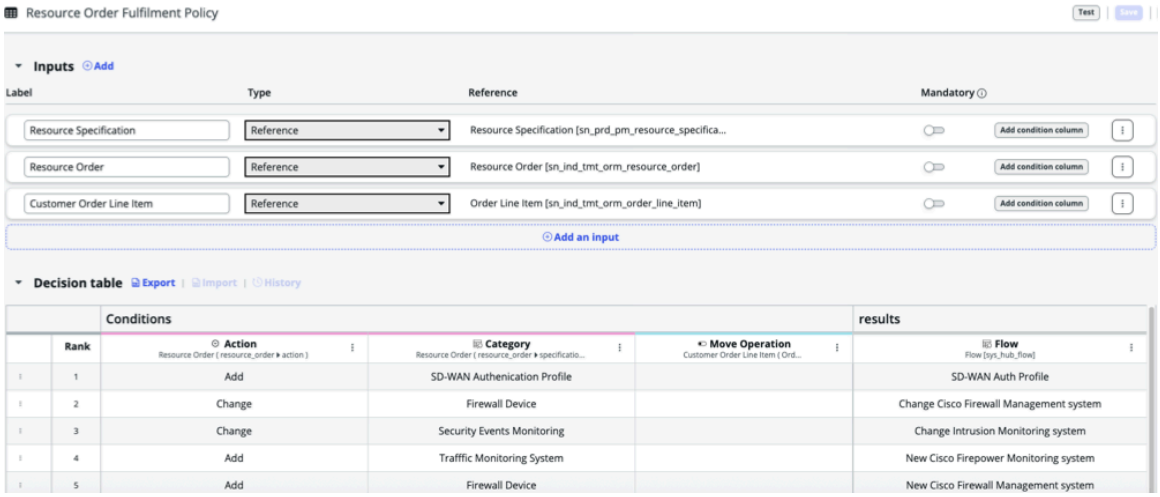

4. To trigger the separate subflow for change, do the following:
   a. Select **Change** in action column.
   b. Select **false** in the move operation column.
5. Select **Save**.

Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

Configure order fulfillment

Order fulfillment is the process for fulfilling customer orders by using Workflow Studio.

Order fulfillment, also referred as order orchestration, defines how to coordinate the fulfillment of orders.

You can define the order fulfillment processes that you require and then configure them by performing the tasks in the following table.

Task	Description
Configure subflows for order fulfillment	Subflows define the task flow for fulfillment agents to fulfill customer orders. You can copy a subflow from the base system and change your business needs. For more information on configuring subflows, see Building Subflows.
Configure decision tables for order fulfillment	Decision tables define the conditions for triggering the order fulfillment subflow. The Order Management for Telecommunications, Media, and Technology application uses the Order fulfillment Policy decision table. For more information on configuring decision tables, see Decision tables.
Configure order assignment rules to route tasks to agents, based on their skill sets	For more information on assignment rules, see Create an assignment rule.

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Flow actions for fulfillment subflow definition

If you define your own fulfillment subflows in Workflow Studio, you can use the standard flow actions that are available in the ServiceNow AI Platform. Each action deals with different aspects of the fulfillment or inventory maintenance that provides some consistency in retrieving and updating data.

The fulfillment flows in the demo data that was shipped with the ServiceNow AI Platform use the flow actions in the following table.

Action name	Description
Create Install Base Item and Installed Product	Flow action to create and manage the installed case items in the order fulfillment subflow. The flow action takes the customer order line, configuration item (CI), and sold product as input, and creates the install base item and installed product.
Update Configuration Item	Flow action that includes a prescriptive way to update the configuration items order fulfillment subflow. The flow action takes the sold product, product model ID, and comments as input, and updates the corresponding configuration item based on the install base Item.
Get Child Sold Product	Flow action that includes a prescriptive way to retrieve the sold products that are relevant to a specification in a customer order. The flow action takes the specification and the parent sold product as input and retrieves the child sold product from the respective hierarchy. Using this flow action helps the product inventory updates that occur at the end of the fulfillment process.
Get Customer Order Characteristic Value	Flow action that takes the customer order line Item and characteristic as input and returns a characteristic value from the customer order line item. If the characteristic is not present in the customer order line item, it returns the default value for the characteristic from the respective order line item offering.

Related topics

- Flow Designer
- Flows
- Create a flow

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Integrate with Field Service Management

Customer Service Management provides an integration with the Field Service Management application. This integration enables you to view work order and work order task information from a case.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Enter Customer Service with Field Service Management plugin **com.snc.csm_fsm_integration** in the Search field.
3. Click **Install**.
   For more info, see Activate a plugin.

Result

After the plugin is installed, Field Service Management application is integrated with Customer Service Management.

Integrating with Field Service Management

The Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration) provides an integration between the Customer Service Management and Field Service Management applications.

Users can view account and contact information on work orders and work order tasks in the Field Service Management application. Customers and consumers can view case-related work orders from the Customer Service and Consumer Service Portals.

When an agent creates a work order from a customer service case, the work order and task forms include case-related information. This information includes the account and contact details.

When a user views a case from either the Customer or Consumer Service Portals, they can view the details of any work orders and tasks related to the case.

Product use rights included with this application

If you have purchased a subscription for the Field Service Management (FSM) application, Customer Service Management you can create and view all FSM work orders and appointments. External CSM users can create and view FSM work orders and appointments of their own or related#accounts.

Changes to the Field Service Management application

In the Field Service Management application, this integration adds the following fields to the Work Order form. These fields are visible in the Case view. To display these fields, right-click the Work Order form header and select **View** > **Case**.

- Account
- Consumer
- Contact
- Asset
- Partner
- Partner Contact

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Updating the **Account** field on the Work order form also updates the **Company** field. Updating the **Contact** field on the Work Order form updates the **Caller** field.

Changes to the Customer Service Management application

In the Customer Service Management application, this integration adds the **Work Orders** link to the Customer Service Portal and Consumer Service Portal headers. Select this link to view a list of work orders, including the work order number, priority, state, and short description. The work orders displayed in this list on the Customer Service Portal depend on the customer role: customer, customer admin, partner, or partner admin.

Select a work order in this list to display the work order details.

Known Limitations

There is no synchronization between the Work Order form and the associated Case form. If information changes on the Case form, it does not get updated on the Work Order form.

Configure customer product data management

Learn how to use the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property to either create sold products or product inventory records after an order is completed and fulfilled.

Before you begin

Role required: admin

About this task

The following table lists the values that you can set for the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property depending on whether you want to create an entry in the Sold Products [sn_install_base_sold_product] table or Product Inventory [sn_prd_invt_product_inventory] table after an order is fulfilled.

Value	Description
True	Create a record in the Product Inventory [sn_prd_invt_product_inventory] table. This is the default setting.
False	Create a record in the Sold Products [sn_install_base_sold_product] table.

Note: You can choose to create either sold products or product inventory records, but not both.

Procedure

1. Log in to the ServiceNow instance.
2. Select **All**.
3. Switch the application scope to Order Management.
4. Enter `sys_metadata.list` in the Filter text box.
5. On the Application Files list view, search and select the `sn_ind_tmt_orm.enable_prod_invt_for_order_management` property from the Display name column.
6. On the System Property form, specify a value in the **Value** depending on how you want to create inventory records.
7. Select **Update**.

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Related topics

- Creation of sold product and product inventory records
- Managing post-fulfillment order changes
- Product data

Configuring Jeopardy Management

You can configure Jeopardy Management to monitor tasks in a fulfillment plan and alert managers about the jeopardy levels.

There are several steps to set up Jeopardy Management in Order Management as listed in the following table.

Jeopardy Management setup

Configuration actions	Description
Define Jeopardy-enabled fulfillment workflows	Define subflows for product and service specifications using the following Jeoapardy-specific Workflow Studio actions: • Create Order Planned Task • All Place Holder Tasks Created for Domain Order • Set Task Relationships • All Relationships Created for Order Tasks on Domain Order • Set Order Task State All tasks are created in a Draft state.
Configure the Order Jeopardy Enablement Policy	Enable Jeopardy Management for product and service using the Order Jeopardy Enablement Policy in Decision Builder. **Note:** Enable Jeopardy Management for all fulfillment flows in an order or specification.
#unique_573	Define service level agreements (SLA) based on request type and specify the proper start and end conditions to monitor order task progression.
Configuring Jeopardy Management	Set up decision policy tables to retrieve jeopardy information. Policy tables include: • Configure Order Task Assignment Policy • Configure Order Line Jeopardy Level Calculation Policy • Configure Order Task Jeopardy Level Calculation Policy
Set business hours for tasks in Jeopardy Management	Use the *sn_ind_tmt_orm.order_task_schedule* system property to set business hours for tasks.

Additional attributes in Jeopardy Management

The following section contains additional information about Jeopardy Management:

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- Is Jeopardy Management domain separated? Yes.
- How does Jeopardy Management interact with domain separation? Tables are domain separated.
- Does Jeopardy Management introduce new roles or access control list (ACL)? Yes, read access for the Task SLA table (task_sla) is granted to the following roles:
  - sn_ind_tmt_orm.service_order_agent
  - sn_ind_tmt_orm.order_fulfilment_agent

Demo data

If you have a Telecommunications subscription, the following fulfillment subflows are included with the demo data for Order Management for Telecommunications and Media:

- Ethernet Edge Device Fulfillment
- Ethernet Modem Fulfillment
- Change Ethernet Edge Device
- Disconnect Ethernet Edge Device
- Disconnect Ethernet Modem
- Network Interface Profile Fulfillment
- Change Network Interface Profile
- Disconnect Network Interfact Profile
- EVC Configuration Fulfillment
- Disconnect EVC Configuration Service

Setting up jeopardy management

Learn about how to set up and configure Jeopardy Management for Order Management.

During design time, fulfillment managers must complete the following Jeopardy Management configuration and setup steps:

- Define Fulfillment Subflows: Creates an Orchestration plan for each specification. Fulfillment managers can use demo data flow actions to ensure that order task relationships are created.
- Define Service Level Agreements (SLA) Definitions: SLA definitions track how much time each order task takes to complete.
- Build Decision Tables: Build decision tables that contain information including order task duration, jeopardy level assignment, and jeopardy enablement.

Define Fulfillment Subflows

To use Jeopardy Management, fulfillment managers must either reconfigure existing fulfillment subflows or create subflows for each specification.

- Order tasks are created up front: Subflows that are configured for jeopardy management create order tasks up front and in a Draft state.
- Use Create Order Planned Task flow action: In Decision Builder, use the Create New Order tasks.

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- Create task relationships: After all the order tasks are created, fulfillment managers create order task relationships.
- Define fulfillment progress: After all order tasks and task relationships are created, define the fulfillment progress.

Create SLA Definitions

SLA definitions and SLA Processing flows are linked to tasks in a fulfillment plan and track and report on the time jeopardy-enabled tasks take to complete. See #unique_573 for more information.

- SLA Definitions: Set start condition, pause condition, cancel condition, and reset conditions according to use case.
- SLA Durations: Durations are specified so that tracking can be achieved when task SLA is created.
- SLA Processing flow should be defined: Customer can use demo data flows, which trigger jeopardy level calculation for order tasks at 50%, 75%, 100% task SLA progression.

Link Jeopardy Management to Product and Service Specifications using Decision Builder

Decision tables are used to link and configure Jeopardy Management to product and service specifications in Order Management.

- Order Line Item Jeopardy Level Calculation: Returns Jeopardy Level for order line item based on delayed percentage of tasks.
- Order Task Jeopardy Level Calculation: Sets a task's jeopardy level based on percentage task completion.
- Order Task Duration Assignment Policy: Defines the order duration and task SLA definition.
- Order Jeopardy Enablement Policy: Defines if a specification has jeopardy enabled.

Jeopardy Management use cases

Jeopardy Management use cases help you explore and understand how Jeopardy Management works in different scenarios in Order Management.

Design-time use cases

Design-time use cases explain some of the scenarios around configuring and setting up Jeopardy Management for Order Management.

Use case: Configure business logic and workflows

System admins want to configure and define fulfillment subflows with Jeopardy Management actions and logic.

Define jeopardy logic using Workflow Studio to links product specifications and a fulfillment workflow.

- Create planned order tasks in Draft state.
- Set task relationships.
- Create placeholder for domain orders.
- Create relationships for order tasks in a domain order.

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- Set order task state.
- Configure jeopardy decision tables.

Run-time use cases

Run-time use cases explain some of the scenarios around running and monitoring Jeopardy Management for Order Management.

Use Case: Support predictive jeopardy that monitors customer orders

Fulfillment agents and managers use jeopardy management workflows to monitor the potential risk of an order missing a customer due date.

- Calculate planned task completion dates and estimated dates.
- Monitor order tasks against service level agreements (SLA)s.
- Trigger SLA thresholds for order task and order line items.
- Update jeopardy levels as needed in the order entry forms.
- Roll up planned dates for order tasks that complete.

Use Case: Support staggered order decomposition and *Jeopardy Management*

Fulfillment managers and agents expect that when a staggered order decomposition occurs, each occurrence of a staggered order line item causes the Jeopardy Management workflow logic to restart.

- Completed decomposed order line items, the Jeopardy Management workflow restarts when additional planned tasks are added.
- New planned tasks get a task SLA assigned, which is benchmarked for all tasks repeated, and includes the date roll ups.

Use Case: Support inflight orders and *Jeopardy Management*

Fulfillment managers and agent want Jeopardy Management to pause orders. When the order revision is approved, the jeopardy monitoring restarts.

- Revision in progress and all tasks are on hold: jeopardy monitoring halts.
- Order revisions approved: task states go from on hold to their previous state and upcoming tasks move to a scheduled state.
- Jeopardy logic recalculates dates: planned dates and estimated or expected dates.
- Dates are benchmarked.
- Date roll up logic run and reflects the new start and end dates for planned and estimated dates.

Define Jeopardy-enabled fulfillment workflows

Create jeopardy-enabled fulfillment workflows using Workflow Studio. The workflows enable Jeopardy Management to track task completion times and manage risk.

Before you begin

Role required: admin

About this task

Creating fulfillment flows starts with defining subflows in Workflow Studio using unique actions developed for Jeopardy Management.

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The following Workflow Studio actions are used to create Jeopardy Management flows:

- Create Order Planned Task
- All Place Holder Tasks Created for Domain Order
- Set Task Relationships
- All Relationships Created for Order Tasks on Domain Order
- Set Order Task State

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
   Workflow Studio opens in a separate window.
2. Select **Subflows** and do one of the following:
   - Search for existing subflows that you want to edit.
   - Start a new flow by selecting **New** > **Subflow**.
3. Give the subflow a name and provide any additional information.
4. Select the **Build subflow** action.
5. Build the Jeopardy Management subflow using the following actions:

Jeopardy Management flow actions

Order flow action	Definition
Create Order Planned Task	Creates an order task and provides the option to establish task relationship with an existing order task. The Create Order Planned Task action extends planned tasks to Jeopardy Management.
All Placeholder Tasks Created for Domain Order	Sets the domain order stage to all order tasks created, so order tasks created by other subflows can have relationships created with current flow order tasks.
Set Task Relationship	Sets the relationship between two order tasks by creating a record in the planned_task_rel_planned_task table. The table calculates the order line item runtime and the order task jeopardy calculations.
All Relationships Created for Order Tasks on Domain Orders	Introduces the domain order all_relationship_set and sets the field to true in the subflow when all task relationships are established.
Set Task Order State	The flow action checks if an order task has a previous state value and uses the previous state to update the order task state during inflight state change. The Set the Order Task State action checks to see if an order task has a previous state value and uses the previous state to update the order task state during inflight state changes.

Note: For more information about building subflows, see Building subflows.

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6. Test the flow by selecting **Test**.
7. Publish the flow by selecting **Publish**.

What to do next

Configure the Order Task Duration Assignment Policy.

Configure the Order Task Duration Assignment Policy

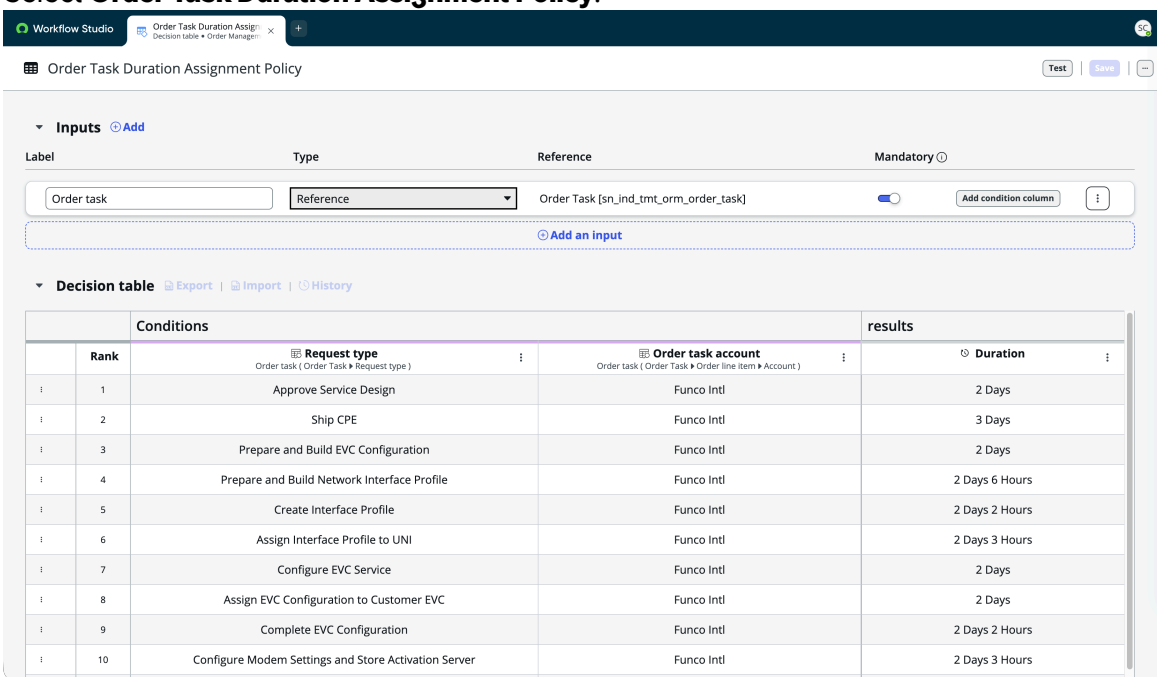
Configure the Order Task Duration Assignment Policy using Workflow Studio. This policy determines how long each task should take to complete, when it should start, and when it's expected to finish, enabling accurate scheduling, resource planning, and timeline visibility across the order life cycle.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Task Duration Assignment Policy**.



3. On the Order Task Duration Assignment Policy decision table, fill in the fields.

Order Task Duration Assignment Policy fields

Field	Description
Request type	Order task for which you want to add a duration time.
Order task account	Order task account associated with the task.
Duration	Allotted time for this task. For example, 2 Days 6 Hours.

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Field	Description
	Note: The allotted time for order tasks must be the same as the allotted time in the SLA definition assigned to the order task.

4. Select **Save**.

What to do next
The next step is to configure SLA definitions for Jeopardy Management. For more information, see #unique_573.

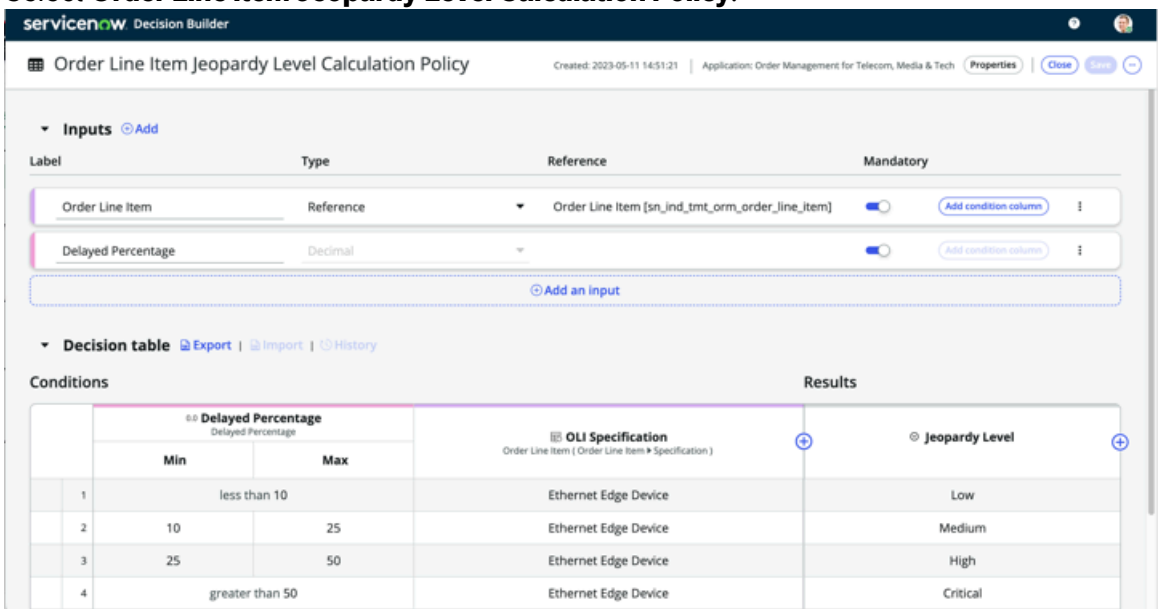
Configure the Order Line Jeopardy Level Calculation Policy

Configure the Order Line Jeopardy Level Calculation Policy using Workflow Studio to set the jeopardy risk level for order line items.

Before you begin
Role required: admin

About this task
You must provide a time range for each jeopardy level. When the time range is reached, the linked jeopardy alert level is displayed.

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Line Item Jeopardy Level Calculation Policy**.



3. On the Order Line Item Jeopardy Level Calculation Policy decision table, fill in the fields.

Order Line Item Jeopardy Level Calculation Policy

Field	Description
Delayed Percentage	Set the minimum and maximum delayed percentage for the order line item (OLI).

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Field	Description
Order Line Items (OLI) Specification	Select the order line item to attach to the **Delayed Percentage**.
Jeopardy Level	Set the jeopardy level for the values indicated in the **Delayed Percentage** field. In the example: ○ Less than 10% delayed percentage = the lowest jeopardy level. ○ 10–25% completion, Jeopardy level moves to a medium alert. For example, if the minimum and maximum values in the **Delayed Percentage** field are 5% and 10% respectively, you can assign that value range a Low Jeopardy Level.

4. Select **Save**.

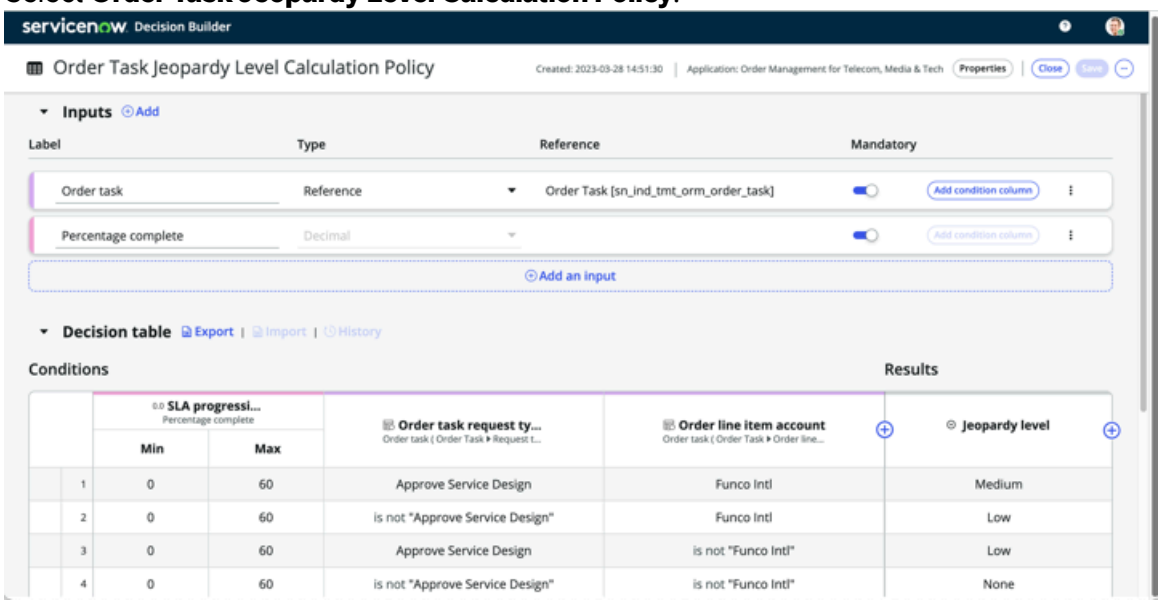
What to do next
Configure the Order Task Jeopardy Level Calculation Policy

Configure the Order Task Jeopardy Level Calculation Policy

Configure the Order Task Jeopardy Level Calculation Policy using Workflow Studio to set the risk levels for the minimum and maximum Service Level Agreement (SLA) percentage completion for order tasks.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Task Jeopardy Level Calculation Policy**.



3. On the Order Task Jeopardy Level Calculation Policy decision table, fill in the fields.

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Order Task Jeopardy Level Calculation Policy

Field	Description
SLA progression	Set the minimum and maximum percentage for the order task.
Order task request type	Select the order task request type. A request task is part of a jeopardy-enabled workflow.
Order line item account	Select the order line item account. The account is linked with the order and order line item.
Jeopardy level	Assign the jeopardy level to associate with the SLA progression percentage minimum and maximum values.

4. Select **Save**.

What to do next
Configure the Order Jeopardy Enablement Policy

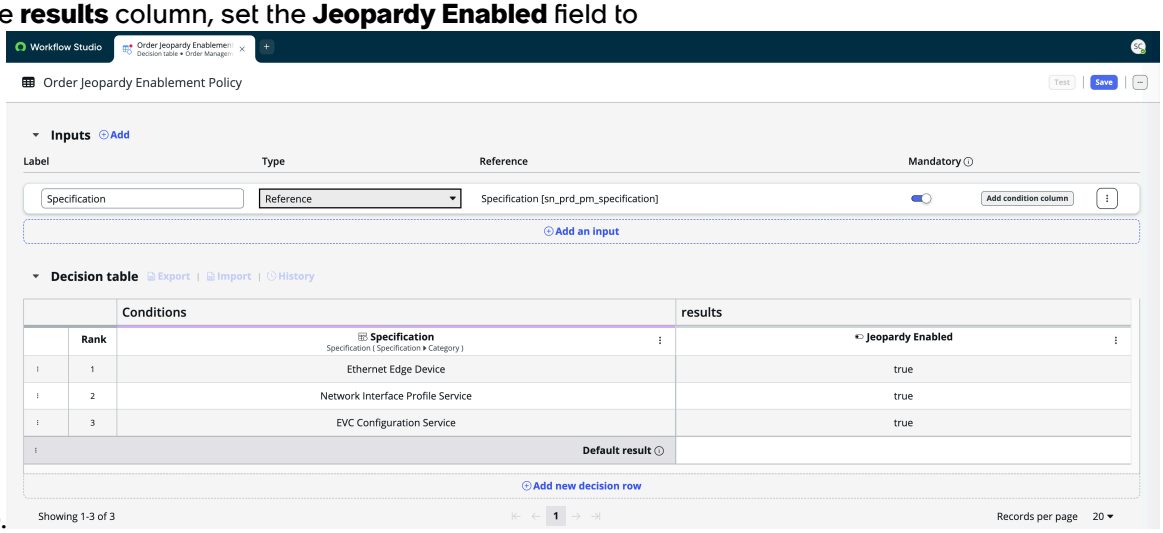
Configure the Order Jeopardy Enablement Policy

Add Jeopardy Management workflows to product and service specifications using the Order Jeopardy Enablement Policy in Workflow Studio.

Before you begin
Role required: admin

About this task
Use Workflow Studio to define which product, service, or resource specification is jeopardy-enabled.

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Jeopardy Enablement Policy**.
3. In the **Specification** column under the **Conditions** section, select a product or service specification to link to Jeopardy Management.
4. In the **results** column, set the **Jeopardy Enabled** field to **True**.



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Note: Entries in this decision table are for top-level product or service specifications. In a single order, customers can purchase multiple top-level products or services. However, if any one of the products or services isn't jeopardy-enabled, the entire order is treated as a non-jeopardy-enabled order.

5. Select **Save**.
   The product specification workflow is jeopardy-enabled. Jeopardy logic begins when the specification workflow starts.

What to do next
After configuring Jeopardy Management, see Monitoring order jeopardy to review different ways to monitor Jeopardy Management.

Configuring Fallout Management

As a provider, you can use Fallout Management to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, according to the requirements of your enterprise. To learn more about managing order task fallout, see Managing order fallout.

Create additional fallout types

Define your own enterprise-specific fallout types to identify, resolve, and investigate order processing issues so that they can continue processing through to completion.

Before you begin
Role required: admin

About this task
The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, as per the requirements of your enterprise. To learn more about managing order task fallout, see Managing order fallout.

Procedure

1. Log in to the ServiceNow instance.
2. In the application navigator, enter `sn_fallout_mgmt_fallout_type.list`.
3. Select **New**.
4. In the **Name** field, enter the name of the fallout type.
5. **Optional:** Add a brief description in the **Description** field.
6. Select **Submit**.

Configuring inflight changes

You can use inflight change order management to manage the receipt of changes for customer or service orders that are still in the process of being orchestrated and fulfilled.

Inflight change order management handles modifications to orders that are already in progress after submission but before fulfillment is complete. This capability is essential for real-world scenarios where customers need to adjust quantities, swap products, change configurations, or cancel portions of an order while fulfillment activities are already underway.

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Inflight change order management enables you to decide when you permit such changes to ongoing orders, assesses the impact of the requested changes for an order, and automatically generates a compensation plan for them.

Note: Characteristic, Contact, Quantity, or Price inflight revision types are standard in the ServiceNow AI Platform but you can define additional ones as per the requirements of your enterprise. To learn more, see the "Types of Inflight order changes" section in the Managing inflight order changes and cancellation requests.

Create additional inflight order change types

Define your own enterprise-specific inflight order change types that are used to categorize revisions or requests for cancellations, product orders, service orders, and their related line items.

Before you begin

You must be in the Order Management application scope.

Role required: admin

Procedure

1. In the application navigator, enter `sn_ind_tmt_orm_inflight_change_type.list` to view the Inflight Changes Type (sn_ind_tmt_orm_inflight_change_type) table.
2. Select **New**.
3. In the **Name** field, enter the name of the inflight order change type.
4. Select **Submit**.

Configuring order tasks to respond to inflight revision and cancellation requests

Configure your order task records to respond to inflight order changes and cancellation requests using Workflow Studio.

The Create Order Task action contains flow actions that you use to define the order tasks for the inflight order revision and cancellation process.

To learn more about creating a flow and inflight order change processing, see:

- Create a flow
- Managing inflight order changes and cancellation requests

To see a sample Create Flow action, see the sample Change Cisco Firepower Monitoring system flow, in your demo data, which is installed with the ServiceNow AI Platform.

When you define a Create Order Task action, you can use the standard flow actions that are available in the ServiceNow AI Platform. See the following table for a list of these standard flow actions.

Create Order Task flow action fields

Create Order Task flow action field	Description
Inflight Change Type	Flow action to configure the order task to respond to the corresponding change type. You can select one of the following: **Contact**

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Create Order Task flow action fields (continued)

Create Order Task flow action field	Description
	The order task responds to changes made to contact information on an existing order line item. **Price** The order task responds to changes made to pricing information on an existing order line item. **Quantity** The order task responds to changes made to quantity information on an existing order line item. **Characteristics** The order task responds to changes made to characteristics information on an existing order line item. **Related items** The order task responds to changes made to related items information on an existing order line item. If the task is not related to any inflight change type, you can leave it empty.
Inflight Change Option	Flow action to define if the order task is related in any characteristic changes, or only to a few characteristic changes from the corresponding request definition. You can select one of the following: **Not Applicable** The order task should not respond to any characteristic changes made to the order. **Characteristics From Request Definition** The order task should respond to the specific set of characteristics that you define in the Request Definition Characteristic [sn_ind_tmt_orm_req_def_char] table. These records contain the mappings of the order tasks to specific sets of characteristics. **Any Characteristics**

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Create Order Task flow action fields (continued)

Create Order Task flow action field	Description
	The order task should respond to any revisions made to the order line item characteristics that are available in the customer or service order.
Inflight Task Fields (Order Task)	Flow action to attach scripting that designates what redo actions, or field updates, if any, should take place in the order task. It is applied for revisions or cancellation requests for inflight orders that contain the inflight change types and options that are defined in the Inflight Change Type and Inflight Change Option.
Cancel Task Fields (Order Task)	Flow action to attach scripting that designates what undo actions, or cancellations, if any, should take place in the order task. It is applied for revisions or cancellation requests for inflight orders that contain the inflight change types and options that are defined in the Inflight Change Type and Inflight Change Option flow actions.

Related topics

Flow Designer

Flows

Configuring compatibility rules for horizontal relationships

As a provider, you can use compatibility rules to establish horizontal relationships between the specifications of multiple products, services, or resources.

You use a compatibility rule to define a source specification and a target specification and to establish a relationship between them.

The ServiceNow AI Platform provides two types of relationships that you can use to define a compatibility rule:

1. Requires: The source specification requires the defined target specification.
2. Excludes: The source specification excludes the defined target specification.

While you're creating a compatibility rule, you can establish the horizontal relationship either by defining the specifications or by defining the details for the specification characteristics. You can also define the maximum and minimum quantity of the specifications to support and fulfill your customer orders as per the defined decomposition rules.

Before you can capture a new customer order that has a horizontal relationship, you must configure the compatibility rules by defining the source and target specifications.

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Asynchronous order processing for large customer and consumer orders

Asynchronous order processing handles high-volume enterprise and consumer orders without waiting for immediate processing, improving system performance for communications service providers (CSP) using Order Management.

Overview of asynchronous order processing

CSPs support both enterprise customers and consumers. Enterprise customers typically place large multi-site orders, while consumers place high-volume orders. Asynchronous order processing enables you to create bulk or high-volume orders without waiting for each order to be processed immediately, improving efficiency and system performance.

When you submit an asynchronous order request, the system responds with a `202 Accepted` status and an order ID. This indicates the order is received for processing but not yet created. This differs from synchronous processing, which returns `201 Created` when the order is immediately created.

If you have a Telecommunications Service Management subscription, you can use the Product Order Open API to receive an order in the Order Management application. Order processing goes through three stages:

- Order validation
- Order ingestion
- Order creation

How synchronous order processing works

With synchronous order processing, an order is received in the Order Management application through the API. Then, the order records are simultaneously created in a customer order table after the order validation.

As an administrator, you can activate or deactivate the order validation for synchronous order processing by setting the *`create_product_order_validation_sync`* and *`create_service_order_validation_sync`* system properties to True (Default) or False in the ServiceNow AI Platform. Synchronous order processing takes longer than asynchronous order processing when it comes to creating a large number of customer order records.

How asynchronous order processing works

In asynchronous order processing, high-volume orders or large numbers of order payloads are received through the Product Order Open API in the Order Management application from external Configure, Price, and Quote (CPQ) systems.

The order details are first validated and then inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. If validation errors occur, an error message is returned in the response. The actual order creation happens later when a scheduled job processes entries from this queue, allowing for bulk or delayed processing.

This validation is managed by the *`create_product_order_validation_async`* system property for product orders and the *`create_service_order_validation_async`* system property for service orders. These properties control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default value is set to True.

When the order details are successfully validated, a scheduled job runs to pick up the records from the Inbound Queue [sn_tmt_core_inbound_queue] table and then creates entries in the customer order table as shown in the following diagram.

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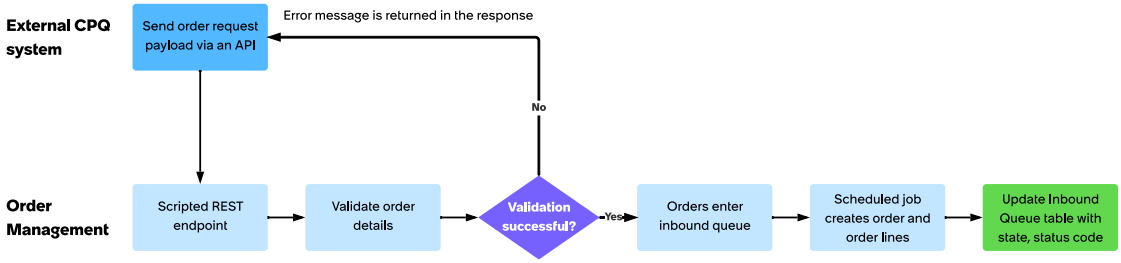
Asynchronous order processing workflow



The asynchronous order processing follows these steps:

1. You must activate the Product Order Open API. The new parameter mode enables the API to process orders synchronously or asynchronously. For more information about the API, see Product Order Open API.
2. After you receive high-volume orders or large numbers of order payloads through the Product Order Open API in asynchronous mode, the system responds with a `202 Accepted` status and an order ID. The order details are validated first and include the product offering, order line items, order specifications, order line item characteristics, and the specification relationship of order line items. For more information on how the validation works, see Validating your orders through asynchronous order processing.
3. After the validation of the order details is complete, an entry for each order with a unique record ID is created in the Inbound Queue [sn_tmt_core_inbound_queue] table. To learn more about how the order entries are created, see Create order entries manually during the asynchronous order processing.
4. When all the orders are captured in the Inbound Queue [sn_tmt_core_inbound_queue] table, a scheduled job runs to create the customer orders for the records in the New state. You can also manually trigger order creation from the Inbound Queue module by selecting the **Create Order** button, bypassing the wait for the automated job. After processing, you can verify the created orders in the customer orders section. To learn how a scheduled job creates orders, see Configure a scheduled job for asynchronous order creation.

Related topics

Inbound request states

Validating your orders through asynchronous order processing

You can validate your orders before the order records are created in the customer order table during asynchronous order processing in the ServiceNow® Order Management application.

You configure two system properties to validate your orders in asynchronous order processing. The *`create_product_order_validations_async`* system property for product orders and the *`create_service_order_validations_async`* system property for service orders control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default values of these properties are set to True.

By default, when a scheduled job picks up the record from the Inbound Queue [sn_tmt_core_inbound_queue] table, no validation occurs and the order and the order line items are created.

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To enable validation through a scheduled job, you can override the *enableValidationViaScheduleJob* property to return true. By default, this method returns false.

The following table lists all the system properties that are required for validation.

System properties for validation

Name	Description
sn_ind_tmt_orm.create_product_order_validations_async	Enable or disable the validations before inserting the product order records into the Inbound Queue [sn_tmt_core_inbound_queue] table.
sn_ind_tmt_orm.create_product_order_validations_sync	Enable or disable the validations before inserting the product order records into the Customer Order [sn_ind_tmt_orm_order]table.
sn_ind_tmt_orm.create_service_order_validations_async	Enable or disable the validations before inserting the service order records into the Inbound Queue [sn_tmt_core_inbound_queue] table.
sn_ind_tmt_orm.create_service_order_validations_sync	Enable or disable the validations before inserting the service order records into the Customer Order [sn_ind_tmt_orm_order] table.
sn_ind_tmt_orm.glide.mutex.script.maxspins	Maximum number of times for a thread to try to acquire a lock. The default value is 100.
sn_ind_tmt_orm.glide.mutex.script.spinwait	Time to wait between lock attempts, in ms. The default value is 100 ms.
sn_ind_tmt_orm.limit	Number of records (batch size) to return from the inbound queue [sn_tmt_core_inbound_queue] table for processing. The default value is 100.
sn_ind_tmt_orm.schedule.max.runtime	Maximum time up to which the scheduled job runs, in ms. The default value is 900000 ms.

Create order entries manually during the asynchronous order processing

Skip the scheduled job and create order entries manually in the Order Management application for asynchronous order requests.

Before you begin

Role required: Order Integrator [sn_ind_tmt_orm.order_integrator]

About this task

Before you can create order entries in the customer order table, records are staged in the Inbound Queue [sn_tmt_core_inbound_queue] table. This table helps you to store and manage your order requests during the asynchronous processing of orders.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Inbound Queue Requests** > **All**.

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The Inbound Queue Requests list view provides the following information.

Field	Description
Resource	Caller that created the record in the Inbound Queue [sn_tmt_core_inbound_queue] table.
Record id	Unique system-generated ID returned as orderID in the HTTP response.
State	State of the record in the Inbound Queue [sn_tmt_core_inbound_queue] table. **New** Order records created. **In Progress** Scheduler picks orders and generates a system ID. **Completed** Scheduler successfully created the customer order record from the Inbound Queue table. **Error** Scheduler did not successfully create the customer order record.
External ID	External ID of the order from the Configure, Price, and Quote (CPQ) system.
Status code	HTTP status codes. ○ 201: Target record successfully created. ○ 202: Record in the Inbound Queue [sn_tmt_core_inbound_queue] table successfully created. ○ 400: Target record not created due to an error.
Error message	(Optional) Error message returned for an exception.
Payload	Payload received via an API.
System ID	Cluster node ID.
Reference table	Name of the target table, such as Customer Order.

4. From the list, select a record to create an order.
5. On the Inbound Queue page, select **Create Order**.
   An order is created in the New state and can be viewed by navigating to **Customer Orders** > **All**.

What to do next

Approve orders in Order Management

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Configure a scheduled job for asynchronous order creation

Run a scheduled job in the Order Management application to create a customer order from the Inbound Queue [sn_tmt_core_inbound_queue] table.

Before you begin
Role required: admin

About this task
The scheduled job runs on all the active nodes of a ServiceNow instance. This schedule job picks up the order records in batches (the batch size that you have set) from the Inbound Queue table. These order records are in the New state.

Note: If you can't create an order due to an error, the state of the record in the Inbound Queue table is changed to an error, and an error message is displayed.

An email notification is triggered when the state of a record in the Inbound Queue table changes to an error. The notification is sent to all Order Fulfiller Demo Group users.

You can also use the Create Order UI action on the Inbound Queue table to create orders on demand.

Procedure
1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs** > **Today's Scheduled Jobs**.
2. From the Name column, select the **Create records from Inbound Queue table async** scheduled job.
3. On the form, fill in the fields.
   For a description of the field values, see Create records from inbound queue table async form.
4. Select **Update**.

Result
Customer order records are created.

Related topics
Advanced options for scheduled jobs

Configuring the order operations applications

Learn how to configure the order operations applications to help sales and support teams to monitor the sales processes, and manage post-sale support and returns respectively.

Installing and configuring the following applications involve installing the applications from the ServiceNow Store store, assigning roles, and enabling app-specific features that support post-sales processes and operational efficiency. It covers configuring Order Operations Case Management for handling order-related issues, enabling Return Merchandise Authorization (RMA) workflows, and setting up Lead-to-Cash process management to monitor the order life cycle.

1. Order Operations Case Management

   Install and configure the Order Operations Case Management application customer service agents to create cases for multiple customer orders or for specific products in an order.

2. Configuring Lead-to-Cash Process Management

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Install the Lead-to-Cash Process Management application, and set up business object groups and relationships so that sales process managers can create and monitor sales process records.

3. Activate the Return Merchandise Authorization plugin

   Activate the RMA Case Management plugin that enables your sales organization to manage and triage return cases for customer products and services, addressing returns, replacements, and repair use cases.

Configuring Lead-to-Cash Process Management

Plan and configure your implementation of Lead-to-Cash Process Management.

Configuration overview

1. Review the dependencies for installing and using Lead-to-Cash Process Management.

   - For sales process managers to be able to create and monitor sales process records through the CSM Configurable WorkspaceCustomer Service Management (CSM) must be installed.
   - To be able to monitor opportunities, quotes, or orders in the sales process, you must have Opportunity Management, Quote Management, Order Management installed.
   - Business Object Core (sn_bo_core) is automatically installed as a dependency when you install the Lead-to-Cash Process Management application (app-l2c-cockpit).

2. Install Lead-to-Cash Process Management

   You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they aren't already installed. Install Lead-to-Cash Process Management on each of your environments.

3. Assign roles to Lead-to-Cash Process Management users

   Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

4. Set up business objects for sales process records

   Create business object group and business object types. Define relationships between the business object types, and add them as members under the business object group. This enables the sales process managers to create sales process records using these entities.

5. Customizing the sales process dashboard

   Define the number of levels and tile content on the node map, and determine how tasks are consolidated on the Tasks tab, to enhance clarity and control so sales process managers can focus on relevant data and navigate through complex sales processes effectively.

6. Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

   Access and modify the default data retention and table cleanup policy to modify it to suit your needs.

7. Setting conditions for enabling email access in Lead-to-Cash Process Management

   Sales process managers can compose emails directly from the dashboard for sales entity records that are monitored in a sales process record.

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Install Lead-to-Cash Process Management

You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Lead-to-Cash Process Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Lead-to-Cash Process Management:

- Roles
- Tables
- Properties

For more information, see Components installed with Lead-to-Cash Process Management and Properties installed with Lead-to-Cash Process Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead-to-Cash Process Management application (app-l2c-cockpit) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you is displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

The Lead-to-Cash Process Management application is installed on your instance. The Business Object Core application is auto-installed as a dependency. For more information, see Components installed with Business Object Core.

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The O2C Objects business object group also becomes available. It contains entities involved in the opportunity-to-cash process, such as opportunity, quote, and order. You can use this group provided you have Opportunity Management, Quote Management, and Order Management apps installed on your ServiceNow instance.

What to do next

Assign roles to Lead-to-Cash Process Management users so that they can access features and perform tasks using this app. For more information, see Assign roles to Lead-to-Cash Process Management users.

Assign roles to Lead-to-Cash Process Management users

Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

Before you begin

Before you can assign roles to your users and groups, make sure you have created and configured required users and groups.

Role required: admin

About this task

The following table lists the roles business object writers and sales process managers need to access the tables necessary to perform their respective tasks.

Required roles for specific job functions

User persona	Job function	Role required	Tables accessed
Business object writer	Creates business object groups and defines relationships between the business object types.	Business object writer [sn_bo_core.business_object_writer]	• Business Object Type [sn_bo_core_obj_type] • Business Object Relationship [sn_bo_core_obj_rel] • Business Object Group [sn_bo_core_obj_group] • Business Object Group Members [sn_bo_core_obj_group_members]
Sales process manager	Creates sales process records, monitors tasks and activities on the hierarchical	Sales process manager [sn_l2c_cockpit.sales_process_manager]	• Sales Process Record [sn_l2c_cockpit_sales_process_record] • Business Process Record [sn_bo_core_process_record]

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Required roles for specific job functions (continued)

User persona	Job function	Role required	Tables accessed
	node map, links and delinks nodes.		• Business Process Resource [sn_bo_core_process_resource] • Business Process Task [sn_bo_core_process_task]

You can assign roles to users and groups using either guided setup or through the following user administration features:

- Assign a role to a user
- Assign a role to a group

Related topics

Creating users

Creating groups

Components installed with Lead-to-Cash Process Management

Components installed with Business Object Core

Set up business objects for sales process records

Create the business objects necessary for sales process managers to create sales process records using these entities.

Before you begin

Role required: Business object writer [sn_bo_core.business_object_writer]

About this task

https://player.vimeo.com/video/1102610152?h=669291cfe1&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Create business object groups.

   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.

   b. Select **New**.

   c. On the form, fill in the fields.

Business Object Group form

Field	Description
Name	Name for the business object group.

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Field	Description
Applies to	Workflow or process for which you're creating the business object group. This value should be Sales Process Record [sn_l2c_cockpit_sales_process_record].
Description	A brief description of the business object group.

2. Create business object types to add as members in the business object group.

   a. Navigate to **All** > **Business Object Core** > **Business Object Types**.

   b. Select **New**.

   c. On the form, fill in the fields.

Business Object Type form

Field	Description
Name	Name for the business object type. For example, Opportunity.
Table name	Table associated with the business object. For example, if the business object type is Opportunity, you would enter the Opportunity [sn_opty_mgmt_core_opportunity] table.

   d. Select **Submit**.

3. Define relationships between the object types.

   Relationships define how two object types are related by the source and destination columns on the respective tables and govern the hierarchy of the records displayed on the node map. For example, if you add Opportunity Line and Quote as child entities for the business object type Opportunity, on the node map you would see the related Opportunity Line and Quote records under an Opportunity node.

   You can add more than one child entity under a parent business object type. Ensure that you avoid circular relationships.

   a. Select the business object type you created.

   b. On the Business Object Type page under the Business Object Relationships related list, select **New**.

   c. On the form, fill in the fields.

Business Object Relationship form

Field	Description
Source	The parent business object type for which you are creating the relationships.
Destination	The child business object type that is related to the parent.
Source table name	Table name of the parent business object type.

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Field	Description
Destination table name	Table name of the child business object type.
Source field	(Optional) The column on the source table used for establishing the relationship.
Destination field	(Optional) The column on the destination table used for establishing the relationship.

d. Select **Submit**.

4. Add business object types as members of business object group.
   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.
   b. Under the Business Object Group Members related list, select **New**.
   c. Select the business object type you want to add using the Lookup list icon  .
   d. Select **Submit**.

Result
Business object group and business object types are available in Business process and Business entity lists respectively in the Create new sales process record form in the CSM Configurable Workspace.

Customizing the sales process dashboard

Customizing the number of levels and tile content on the node map enhances clarity and control so sales process managers can focus on relevant data and navigate more easily through complex sales processes.

Customize hierarchical node map levels for Lead-to-Cash Process Management

Customize the number of node levels to display in the Lead-to-Cash Process Management hierarchical node map visualization.

Before you begin
Role required: admin

About this task
By default, the Lead-to-Cash Process Management hierarchical node map shows three node levels. Although there is no upper limit on the number of node levels you can display, the node map can display a maximum of 250 nodes at a time.

Procedure
1. Select **All** and in the navigation filter, enter `sys_properties.list`.
2. In the **Name** column, search for sn_l2c_cockpit.node_default_levels and select it.
3. If a message appears about the application scope, select **here** to be able to edit the record."
4. In the **Value** field, specify an integer for the number of node levels you want to display on the hierarchical node map.
5. Select **Update**.

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Customize details displayed on node map tiles using a decision table

Customize the details displayed on the node map tiles in the Lead-to-Cash Process Management using Decision Tables.

Before you begin
Role required: admin

About this task
You can add more columns to display additional lines. However, this would require you to make code changes in the UI Builder.

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. In the **Name** field of the system properties table, search for and select the Business object type configuration decision table.
   You are redirected to the decision table in Workflow Studio.
3. Change the values in the **Field 1** and **Field 2** columns depending on the information you want to display in the node map tile.
4. **Optional:** Change the icon for the tile.
   a. Access the Icon Gallery to obtain the icon name corresponding to the icon you want to use.
   b. Enter the icon name in the **Node Icon** field.
5. **Optional:** Add decision rows for any additional business entities you created.
6. **Optional:** Verify the changes by selecting **Test**.
7. Select **Save**.

Customize Tasks tab views using EVAM

Customize the sales entities from which the tasks are displayed, icon and fields that are displayed on each task tile, and create custom options to filter and view consolidated tasks on the sales process dashboard in Lead-to-Cash Process Management using Entity View Action Mapping (EVAM).

Before you begin
Role required: admin or evam_admin

About this task
Note: Use SPR task EVAM definition for customizing Tasks tab views. Custom EVAM definitions are not supported.

Procedure

1. Log in to your ServiceNow instance.
2. Select the Globe icon and set the application scope to Lead-to-Cash Process Management.
3. Navigate to **All** > **Entity View Action Mapper (EVAM)** > **EVAM Definitions**.
4. In the **Name** column, search for and select SPR task.
5. **Optional:** In the **EVAM Datasource M2Ms** tab, add or remove a data source.

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- Create and Link: Define a new data source and then link this data source to your EVAM definition. For more information, see Define a data source.

  Note: When specifying a condition to define how the data is filtered from the selected table, select the operator as **is not empty** for the business entity you're adding. For example, **[Quote][is not empty]**.

- Link Existing: Add a predefined data source to your EVAM definition.
- Unlink Selected: Unlink a data source you don't want to see on the Tasks tab in the sales process dashboard.

6. Select **Submit**.
7. In the **EVAM View Config Bundle M2Ms** tab, add or remove a configuration bundle.
   - Create and Link: Define a new configuration bundle and then link this bundle to your EVAM definition. For more information, see Defining an EVAM configuration bundle and Defining an EVAM view template.
   - Link Existing: Add a predefined configuration bundle to your EVAM definition.
   - Unlink Selected: Remove the view config bundle for entities you don't want to display.
8. **Optional:** Add more data filter options on the Tasks tab of the sales process dashboard.

   a. In the EVAM Data Filters related list, select **New**.

   b. On the form, fill in the fields.

EVAM Data Filters form

Field	Description
Label	Label name of the EVAM data filter.
Active	Option to activate the EVAM data filter.
Order	Priority for the EVAM view configuration. Lower numbers indicate a higher priority.
Application	Application scope of the EVAM view configuration.
EVAM Definition	Associate an EVAM definition with the data filter.

9. Select **Submit**.

Related topics

Create an EVAM definition

Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

Modify the default data retention and table cleanup policy for Lead-to-Cash Process Management to match your organizations requirements.

By default, records are deleted from the Business Process Record [sn_bo_core_process_record] and Sales Process Record [sn_l2c_cockpit_sales_process_record] tables and child records in the Business Process Task [sn_bo_core_process_task] and Business Process Resource [sn_bo_core_process_resource] tables if they meet either of the following conditions:

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- In an inactive state and not updated in the past six months
- In an active state but not updated in the past year

You can modify the data retention and table cleanup policy depending on your expected load and volume.

To find out how to modify the data retention and table cleanup frequency for Lead-to-Cash Process Management, see Modify data retention policy for ATF test results.

Related topics

Table cleanup

Autoflush form

Setting conditions for enabling email access in Lead-to-Cash Process Management

Sales process managers must be granted access to compose emails for the sales entity records that are monitored in a sales process record.

Sales process managers can compose and send emails related to a sales process record by default. Enable sales process managers to compose emails for the related sales entities by setting the value of the *email_client* dictionary attribute to *true* and using either of the following methods:

- Grant the sales process manager write access to the child entity. For more information, see Enable the email client for a table.
- Set the value of the *glide.email_client.check_write_access* system property to *false* to override checking whether the user has write access to the child entity.

> **Note:** The *glide.email_client.check_write_access* system property isn't supported on Xanadu and Yokohama Glide versions. If you're using these Glide versions, then you must grant your users write access to the child entity.

Related topics

Email client

View and send emails in Lead-to-Cash Process Management

Activate the Return Merchandise Authorization plugin

If you have the admin role, you can activate the RMA Case Management plugin (com.sn_csm_rma_case). The plugin enables you to manage and triage return cases for customer products and services, addressing returns, replacements, and repair use cases.

Before you begin

Install the following plugins or confirm that they exist before activating the RMA Case Management plugin:

List of plugins to be installed before the RMA Case Management plugin

Plugin	Description
Lead to Cash Core [com.snc.l2c_core]	Enables you to compose Lead to Cash flow.
Customer Service Install Base Management [com.snc.install_base]	Enables you to capture the current state of the install base and establish the relationship to any downstream entities that may impact their functioning.

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List of plugins to be installed before the RMA Case Management plugin (continued)

Plugin	Description
Case lines and workflows [com.sn_case_line]	Enables a case to hold many line items. The line items are product instances and can be extended for various order to case operations entities.
Entitlements Verification [com.sn_ent_verify]	Provides API to verify entitlement and characteristics.

Role required: admin

About this task

The following items are installed with RMA Case Management:

- Plugin
- Tables
- Roles

For more information, see Return Merchandise Authorization Case Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the RMA Case Management plugin (sn_csm_rma_case) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Post-sales engagement

Learn how to configure the Customer Life Cycle Management Workflows application to manage post-sale workflows on sold products.

Installing and configuring the Customer Life Cycle Management Workflows application helps manage ongoing customer relationships and product life cycle activities after an order is completed or fulfilled.

Configure Partner Relationship Management

Install the PRM (com.snc.partner_relationship_management) application from ServiceNow® Store to enable enterprises to hire partners and improve their sales cycles.

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Admins and users with various roles, such as Enterprise partner admin (sn_prm.enterprise_partner_admin), Enterprise partner agent (sn_prm.enterprise_partner_agent), and more must complete the following configuration tasks to set up the Partner Relationship Management application.

Set up PRM

This table describes the configuration tasks required for Partner Relationship Management and their descriptions.

Task	Description	Role
Install Partner Relationship Management	Install the Partner Relationship Management application from ServiceNow Store.	admin
Roles and components of Partner Relationship Management	Assign functional roles to different PRM entities.	admin
Data model for Partner Relationship Management	Configure and add data to the different tables that are installed with PRM.	• admin • Enterprise Partner admin (sn_prm.enterprise_partner_admin)

Install Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management), along with the demo data and installations that are related to ServiceNow Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Partner Relationship Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Partner Relationship Management application (com.snc.partner_relationship_management) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Partner Relationship Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Partner Re lationship Management. **a.** Install Partner Relationship Management (com.snc.partner_relationship_manage ment). **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Partner Relationship Management plugin. **d.** In the System **Plugin Partner Relationship Management data model** window, under Related Links, select **Install Demo Data On ly**.

Result

You have successfully installed the Partner Relationship Management application.

Related topics

Roles and components of Partner Relationship Management

Data model for Partner Relationship Management

Roles and components of Partner Relationship Management

The Partner Relationship Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between enterprises and channel partners.

The PRM plugin (com.snc.partner_relationship_management) comes with a set of functional and granular roles, each with varying levels of access to raise and address queries.

The PRM application provides access and permissions to users part of both the enterprise and the channel partner ecosystem.

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Functional and granular roles

Functional roles help provide authorized related parties access to enterprise and channel partner members. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information.

You can set granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve the customer experience.

Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The following table lists the functional roles for Partner Relationship Management.

Functional roles

List of functional roles and their descriptions.

Role	Description	Contains roles
Enterprise Partner admin (sn_prm.enterprise_partner_admin)	A user who is an admin for the partner enterprise.	• sn_service_org.writer • sn_prm.channel_partner_writer • sn_prm.partner_program_writer • sn_prm.partner_program_rel_writer • sn_customerservice.csm_workspace_user • sn_seg.segment_mgmt_admin
Enterprise Partner Relationship Manager (sn_prm.enterprise_partner_rel_manager)	Contributor who belongs to an enterprise and is responsible for managing cases associated with the partner hierarchy.	• sn_bus_loc.location_relationship_manager • sn_prm.partner_data_viewer • sn_customerservice.csm_workspace_user
Enterprise Partner Agent (sn_prm.enterprise_partner_agent)	Fulfiller who belongs to an enterprise and is responsible for fulfilling partner cases.	• sn_customerservice_agent • sn_prm.partner_data_viewer
Partner Manager (sn_prm.external_partner_manager)	Contributor who belongs to a partner entity and is responsible for reporting cases associated with their partner hierarchy on the portal.	• sn_customerservice.svc_location_manager_c • sn_prm.partner_data_viewer • sn_prm_dr.partner_deal_reg_manager
Partner Associate (sn_prm.external_partner_associate)	Contributor who belongs to a partner entity and is responsible for reporting cases associated with their partners on the portal.	• sn_customerservice.service_organization_co • sn_prm.partner_data_viewer

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The following table lists the granular roles installed with Partner Relationship Management.

Granular roles

List of granular roles and their descriptions.

Role	Description	Inherited roles
Channel partner writer (sn_prm.channel_partner_writer)	This role provides granular edit access to the channel partner table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Program Writer (sn_prm.partner_program_writer)	This role provides granular edit access to the partner program table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Program Relationship Writer (sn_prm.partner_program_rel_writer)	This role provides granular edit access to the partner program relationship table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Data Viewer (sn_prm.partner_data_viewer)	This role provides granular read access to the channel partner, partner program, and partner program relationship tables.	NA
Experience (sn_prm.partner_ui)	This role provides granular access to organization staff to ensure a consistent experience across all user interfaces. **Note:** The Experience role needs to be manually inherited into other roles to view the Partner Relationship Management modules on ServiceNow platform, CSM Configurable Workspace, and the Partner portal.	NA
Program Segment Writer (sn_prm.program_segment writer)	This role provides users with the create, read, and update access to the Program segment mapping (sn_prm_program_segment_mapping) table.	• Partner Data Viewer (sn_prm.partner_data_viewer) • Segment Data Viewer (sn_Seg.segment_mgmt_data_viewer)

System properties

Navigate to **All** > **Partner Relationship Management** > **Properties**. The Enterprise Partner admin (sn_prm.enterprise_partner_admin) has the read and write access to the following properties.

- glide.ui.sn_prm_partner_program_activity.fields
- glide.service_portal.resize_text.partner.enable_rem_conversion

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- glide.ui.sn_prm_partner_program_relationship_activity.fields
- glide.ui.sn_prm_channel_partner_activity.fields

Related topics

Install Partner Relationship Management

Data model for Partner Relationship Management

Add responsibilities to PRM roles

A responsibility describes a role or function that supports a user. Use responsibility definitions to create relationships between any two partner entities.

Before you begin

Role required: sn_prm.enterprise_rel_manager, sn_prm.external_partner_associate, or sn_prm.external_partner_manager

About this task

Related party configurations define the title of a relationship between an entity and an organization or a user. These configurations also enable linking related party types with responsibility definitions to grant access as needed.

Related parties and their default responsibilities

List of role types and their associated default responsibility.

Type	Default Responsibility
Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager]	Location Relationship Manager [sn_bus_loc.location_relationship_manager]
External Partner Associate [sn_prm.external_partner_associate]	Location Contributor [sn_customerservice.service_organization_contributor]
External Partner Manager [sn_prm.external_partner_manager]	Location Manager Contributor [sn_customerservice.svc_location_manager_contributor]

Note: The default responsibilities are automatically installed with the Business Location plugin (com.snc.business_location).

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Open a channel partner record and add an external staff member or an enterprise partner relationship manager based on your requirement.

Task	Description
Register External staff member	**a.** Select **Register External Partner Staff** from the channel partner record. **b.** Select the **Role Type** you want to associate with your user, whether external partner manager or external partner associate. **c.** Select **Submit**.

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Task	Description
	To learn more about the role type and the member registration fields, see Member registration form.
Register Enterprise Partner Relationship Manager	**a.** Select **Edit** from the Members related list on the channel partner record to add an enterprise member as a channel partner. **b.** Open the record associated with the user and select **New** from the Service Organization Member Responsibilities related list. **c.** Enter the role name in the **Type** field to assign a responsibility to the role. **d.** Select **Submit**.

Result
An external staff member or an enterprise partner relationship manager is registered.

Data model for Partner Relationship Management

The Partner Relationship Management data model provides a framework to map the relationship between channel partners and programs.

Add data in the Channel Partner [sn_prm_channel_partner] and Partner Program [sn_prm_partner_program] tables and create a relationship between the two tables in the Partner Program relationship [sn_prm_partner_program sn_prm_partner_program_relationship] table.

Configuration tasks for PRM data model
List of tasks and descriptions for the Partner Relationship Management tables.

Task	Role	Description
Configure Channel Partner table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Channel partner writer (sn_prm.channel_partner_writer)	Manage information related to channel partners.
Configure Partner Program table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Partner program writer (sn_prm.partner_program_writer)	Enable channel partners to participate in structured programs to build customer relationships.

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Configuration tasks for PRM data model

List of tasks and descriptions for the Partner Relationship Management tables.

(continued)

Task	Role	Description
Configure Partner Program Relationship table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Partner program relationship writer (sn_prm.partner_program_rel_writer)	Establish a relationship between channel partners and partner programs.

Related topics

Install Partner Relationship Management

Roles and components of Partner Relationship Management

Configure Channel Partner table

With the Partner Relationship Management application, you can use the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

Before you begin

Role required: sn_prm.enterprise_partner_admin or sn_prm.channel_partner_writer

About this task

The channel partner [sn_prm_channel_partner] table is an extension of External Business Location.

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Select **New** to open the Channel Partner Registration details form.
3. On the form, fill in the fields.
   To learn more about the fields on the channel partner table and their descriptions, see Channel partner table fields.
4. Select **Submit**.

Configure Partner Program table

With the Partner Relationship Management application, enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

Before you begin

Role required: sn_prm.partner_program_writer or sn_prm.enterprise_partner_admin

About this task

Partner programs define the roles, responsibilities, and benefits for different participants. Some examples of partner programs can be Reseller Program, Managed service provider (MSP) Program, Authorized Training Partner (ATP) Program and so on.

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Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partner Programs**.
2. Select **New** to open the partner program record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner program table and their descriptions, see Partner program table fields.
4. Select **Submit**.

Configure Partner Program Relationship table

With the Partner Relationship Management application, you can establish a relationship between channel partners and partner programs.

Before you begin
Role required: sn_prm.enterprise_partner_admin or sn_prm.partner_program_rel_writer

About this task
Associate channel partners to different structured initiatives or programs using the Partner Program Relationship [sn_prm_partner_program_relationship] table.

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partnerships**.
2. Select **New** to open the partnership record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner Program Relationship table and their descriptions, see Partner program relationship table fields.
4. Select **Submit**.

Configure Program Segment Mapping

Establish a mapping between a program and a segment on the program segment mapping (sn_prm_program_segment_mapping) table to determine which segment belongs to which partner program.

Before you begin
Role required: sn_prm.partner_ui

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Program Segments**.
2. Select **New**.
3. On the form, fill in the fields.

   To learn about the fields on the program segment mapping (sn_prm_program_segment_mapping) table, see Program segment mapping table fields.
4. Select **Submit**.

Related topics

Configure Program Segment Criteria

Configure Program Criteria

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Configure Program Segment Criteria

Create records in the program segment criteria (sn_prm_program_segment_criteria) table based on different records on the entity criteria (sn_req_criteria_customer_condition) table and segments.

Before you begin

Role required: sn_prm.partner_ui

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Program Segments**.
2. Open a program from the list.
3. From the **Program Segment Criteria** related list, select **New**.
4. On the form, fill in the fields.

   To learn more about the fields and descriptions, see Program segment criteria table fields.
5. Select **Submit**.

Related topics

Configure Program Segment Mapping

Configure Program Criteria

Configure Program Criteria

Establish a mapping between the partner program (sn_prm_partner_program_relationship) table and the entity criteria (sn_req_criteria_customer_condition) table.

Before you begin

Role required: sn_prm.partner_program_writer or sn_prm.enterprise_partner_admin

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partner Program**.
2. Open a partner program from the list.
3. Navigate to the **Program Criteria** related list on the partner program form.
4. Select **New**.
5. On the form, fill in the fields.

   To learn about the fields on the program criteria table, see Program criteria table fields.
6. Select **Submit**.

Related topics

Configure Program Segment Mapping

Configure Program Segment Criteria

Partner Workspace

Partner admins, agents, and managers can manage partner programs and partnerships on the partner workspace to triage cases and requests from customers.

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Overview of the workspace

Use the CSM Configurable Workspace to enable Enterprise Partner admin (sn_prm.enterprise_partner_admin) and Enterprise Partner Manager (sn_prm.enterprise_partner_rel_manager) to access tools required to address customer questions and resolve customer queries.

You can perform the following actions using the workspace.

Tasks on the partner workspace

Task	Description
Create Channel Partner record	Create and track channel partner records on workspace to manage and store all information related to the channel partners.
View Channel Partner information on partner workspace	View all the details, cases, and other entities associated with a channel partner.
Create Partner Programs on the CSM Configurable Workspace	Enable channel partners to create Partner Programs on the workspace.
Create Partnerships on the CSM Configurable Workspace	Establish a relationship between channel partners and partner programs on the workspace.

Create Channel Partner record

Create and track channel partner records on the partner workspace to manage and store all information related to the channel partners.

Before you begin

Role required: sn_prm.enterprise_partner_admin

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields in the channel partner details section, see Channel partner table fields.

Business Profile section

Field	Description
Revenue per year	Revenue per year for the channel partner entity.
Number of employees	Number of employees in the channel partner entity.
Supported Industries	Industries that the channel partner supports.

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5. In the **Channel Partner Company Info** section of the form, fill in the contact details including the **Website**, **Email**, and **Phone** of the channel partner.
6. In the **Company Address** section of the form, fill in the address of the physical location of the channel partner, such as **Street**, **State**, and more.
7. Select **Save**.

View Channel Partner information on partner workspace

View consolidated channel partner information through the multiple tabs on workspace.

Before you begin
Role required: sn_prm.enterprise_partner_rel_manager or sn_prm.enterprise_partner_agent

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management module.
3. Open a channel partner record from the list.
   You can view all the information related to cases, child channel partners, sold products, or install base items associated with the channel partner.

   To learn more about the components on the channel partner record, see Channel Partner components on workspace.

Register Partner Staff on workspace

Register a new partner member or transfer existing staff within a partner organization.

Before you begin
Role required: sn_prm.enterprise_partner_admin

About this task
The Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager] of the channel partner can also register partner staff on the workspace.

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management module.
3. Open a channel partner record from the list and select **Register Partner Staff**.
4. On the form, fill in the fields.

   To learn more about the fields on the Register member form, see Member registration form.

5. Upload a file or document in the **Add attachments** section.

   This is an optional field.

6. Select **Submit**.

Create Partner Programs on the CSM Configurable Workspace

Enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by creating partner programs on the workspace.

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Before you begin
Role required: sn_prm.enterprise_partner_admin

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Partner Program** from the Partner Relationship Management module.
3. Open a partner program from the list and select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the Partner Program form, see Partner program table fields.
5. Select **Save**.

Create Partnerships on the CSM Configurable Workspace

With the Partner Relationship Management application, you can establish a relationship between channel partners and partner programs on the workspace.

Before you begin
Role required: sn_prm.enterprise_partner_admin

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Partnerships** from Partner Relationship Management.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the Partnership form, see Partner program relationship table fields.
5. Select **Save**.

Create cases for channel partners

Create customer service cases for channel partners to manage customer queries and offer resolution.

Before you begin
Role required: sn_prm.enterprise_partner_rel_manager or sn_prm.enterprise_partner_agent

About this task

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Cases** from the Partner Relationship Management module.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the case form.
5. Select **Save**.

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Update deal registration record

Create a deal registration record or perform actions on an existing record on the CSM Configurable Workspace.

Before you begin

Role required: sn_prm_dr.deal_reg_ui

About this task

After a deal is created on the Partner portal and is in the **Submitted** state, an agent on the **CSM/FSM Configurable Workspace** can see the same deal. The information in the fields is automatically populated from the Partner portal.

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list  view.
2. Select **Deal Registration** > **Submitted** to see a list of submitted deals.
   To learn how to create a deal and submit it, see Register a deal on Partner portal. The details in the deal registration form are auto-filled based on the selections made in the Partner portal by the B2B deal registration initiator (sn_prm_dr.partner _b2b_deal_reg_initiator), B2C deal registration initiator (sn_prm_dr.partner _b2c_deal_reg_initiator), deal registration initiator (sn_prm_dr-partner_deal_reg_initiator), and deal registration manager (sn_prm_dr.partner_deal_reg_manager).
3. Perform one of the following actions based to update the status of the deal.
   - Select **Assign to me** to assign the deal to yourself. This option is available only to agent personas.

     This changes the state of the deal to **Under Review**. In this state, you can perform one of the following actions on the deal.

     - **Reject** the deal and fill in the **Closure notes**.
     - **Mark as Duplicate** and fill in the **Closure notes**.
     - **Cancel Deal Registration** to cancel the deal.
   - Select **Submit for approval** to submit the deal.

     The deal registration is moved to the **Approvals** related list. The state of the deal registration changes to **Pending Approval** and an approval request is sent to the deal registration relationship contributor (dn_prm_dr.enterprise_deal_reg_rel_contributor) and the deal registration relationship manager (sn_prm_dr.enterprise_deal_reg_rel_manager) for the

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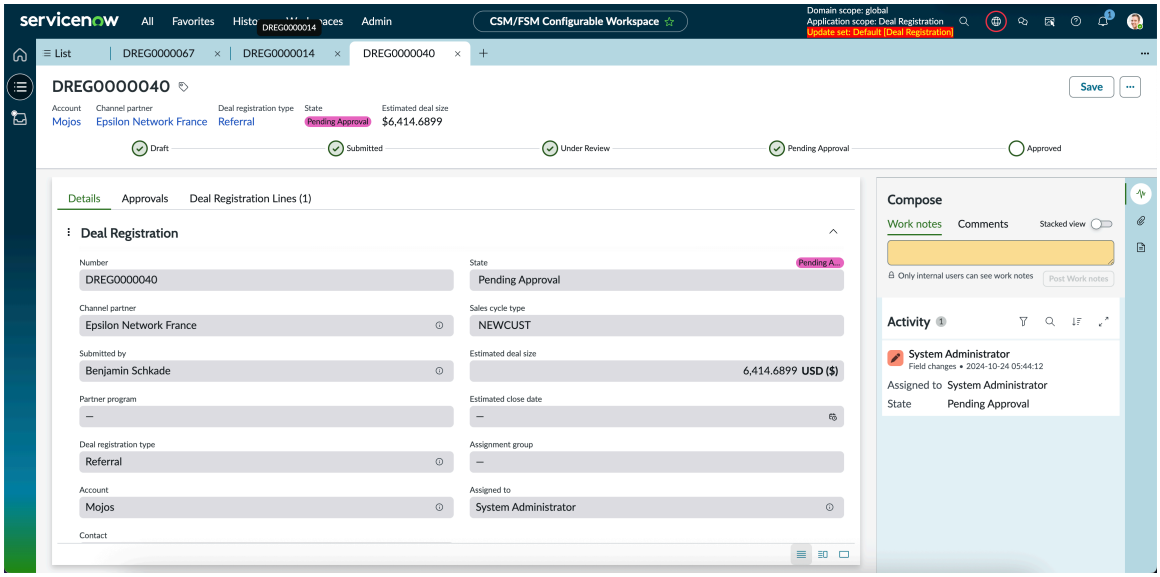
channel partner associated with the deal registration. After the deal registration is approved, the state changes to **Approved**.



4. After a deal is approved, you can perform one of the following actions on the approved deal.
   - Select **Cancel Deal Registration**

     Enter the closure notes on the deal registration. This changes the closure code to **Rejected**.
   - Select **Close** if there's inactivity.
   - Select **Convert to Opportunity** to associate the deal to an opportunity.

     The state of the deal changes to **Closed** and the closure code is updated to **Converted**.

   The deal registration is successfully converted to an opportunity.

   All line items from the deal registration form are transferred to opportunity line items with the help of Primitives. To learn more about Primitives, see LeadtoCashCore - Scoped.

Related topics

Register a deal on Partner portal

Configure Segment Management

Install the Segment Management application (com.snc.segment_mgmt) from the ServiceNow® Store to manage and group entities into various segments to promote progression.

The Segment Management plugin (com.snc.segment_mgmt) provides a general framework to create and manage segments and segmentation across various domains. Admins and users with various roles must perform the following configuration tasks to set up the segment management application.

Set up tasks for Segment Management

Configuration tasks to use Segment Management

Task	Description	Role
Install Segment Management	Install the Segment Management application	admin

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Set up tasks for Segment Management
Configuration tasks to use Segment Management

(continued)

Task	Description	Role
	(com.snc.segment_mgmt) from ServiceNow® Store.	
Data model for Segment Management	Add records in the segment (sn_seg_segment) table to create segments for specific customers.	sn_seg.segment_mgmt_admin
Roles and components of Segment Management	Set of functional roles to maintain and configure segment data.	admin

Related topics

Segment Management

Install Segment Management

Install Segment Management

Install the Segment Management plugin (com.snc.segment_mgmt), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with the Segment Management application (com.snc.segment_mgmt):

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Segment Management application (com.snc.segment_mgmt) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

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Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Segment Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Segment Management. **a.** Install Segment Management (com.snc.segment_mgmt). **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Segment Management plugin. **d.** In the System **Plugin Segment Management data model** window, under Related Links, select **Install Demo Data Only**.

Result

You have successfully installed the Segment Management (com.snc.segment_mgmt) application. You can now set up the data model and configure different roles.

Related topics

Configure Segment Management

Segment Management

Data model for Segment Management

Data model for Segment Management

The Segment Management data model provides a framework to map customers to specific segments to track partner progression toward the next tier.

With the segment admin (sn_seg.segment_mgmt_admin) role, you can add data in the segment (sn_seg_segment) table to create and manage multiple segments.

Segment table

Fields, types, and their description of the segment table

Field	Type	Description
Number	String	Auto-generated number associated with the segment.
Name	Translated text	Name of the segment.

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Segment table

Fields, types, and their description of the segment table

(continued)

Field	Type	Description
Description	Translated text	Description of the segment.
Active	True/False	Current state of the segment, whether active or not.
Order	Number	Order of the segment.
Status	Choice • Draft • Approved • Rejected • Retired	Status to manage the life cycle of the segment.
Work notes	Journal input	Important information associated with the segment.
Domain	Domain ID	Domain to which the segment belongs.

Configuration tasks for Segment Management

Perform the following configuration tasks to set up the data model tables to establish an association between segment management and Partner Relationship Management.

- Configure Program Segment Mapping
- Configure Program Segment Criteria
- Configure Program Criteria

Related topics

Install Segment Management

Roles and components of Segment Management

Roles and components of Segment Management

The Segment Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between segments and partners.

The Segment Management plugin (com.snc.segment_mgmt) comes with a set of functional roles, each with varying levels of access to segments and records.

Functional and granular roles

Functional roles help provide authorized partners to maintain data and records in the segment table. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges that determine users' access to certain information.

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You can assign granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve customer experience.

Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The segment management application uses the segment admin (sn_seg.segment_mgmt_admin) role to configure and maintain segment data in the segment (sn_seg_segment) table. The segment admin (sn_seg.segment_mgmt_admin) contains the following roles.

- Segment writer (sn_Seg.segment_mgmt_writer)
- Segment data viewer (sn_seg.segment_mgmt_data_viewer)

The following table lists the granular roles installed with Segment management.

Granular roles and descriptions

Roles, descriptions, and inherited roles for segment granular roles

Role	Description	Inherited roles
Segment data viewer (sn_seg.segment_mgmt_data_viewer)	This role provides granular read access to segment data.	None
Segment writer (sn_seg.segment_mgmt_writer)	This role provides granular read, edit, and write access to segment data.	Segment data viewer (sn_seg.segment_mgmt_data_viewer)

System properties

Navigate to **All** > **Partner Relationship Management** > **Properties**.

The Segment admin (sn_seg.segment_mgmt_admin) hasread and write access for the [glide.ui.sn_seg_segment_activity.fields] property.

Related topics

Configure Segment Management

Data model for Segment Management

Deal Registration

Install the Deal Registration Management plugin (com.snc.deal_registration_management) to enable channel partners to create a structured and organized process to identify and manage a customer's interest in the enterprise's products.

Key benefits of Deal Registration

The Deal Registration Management application (com.snc.deal_registration_management) offers the following benefits to channel partners.

- Configurable deal registration form to support multiple models, products, or partner programs.
- Reduces manual follow-up in tracking deal registrations, and all its related information, to promote trust and transparency in the partner ecosystem.

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- Provides channel partners with flexibility to create deal registrations.
- Ensures that the life cycle of a deal registration is tracked accurately through the enterprise CRM system, to convert a deal registration to an opportunity.

Set up Deal Registration

Deal registration provides channel partners exclusive rights to work on that particular deal registration or customer for a period of time. To install the Deal Registration Management plugin (com.snc.deal_registration_management), see Install Deal Registration.

Deal registrations and deal registration line items help to manage and track the products that are associated with submitted deal registrations. The Deal Registration Management plugin can promote trust and transparency between enterprises and partners.

Set up Deal Registration Management

Perform the following configuration tasks to set up and use deal registration management.

Task	Description	Role
Install Deal Registration	Install the Deal Registration Management application from ServiceNow® Store.	admin
Data model for Deal Registration Management	Add data in the deal registration tables to maintain and track partner submitted deals and the line items linked to a deal registration.	Experience (sn_prm_dr.deal_reg_ui)
Roles and components of Deal Registration Management	The Deal Registration Management (com.snc.deal_registration_management) application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between segments and partners.	admin

Install Deal Registration

Install the plugin (com.snc.deal_registration_management), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

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About this task

The following items are installed with Deal Registration:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Deal Registration Management application (com.snc.deal_registration_management) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Partner Relationship Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Deal Regis tration Management. **a.** Install Deal Registration Management (com.snc.deal_registration_management). **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Partner Relationship Management plugin. **d.** In the System **Plugin Deal Registration Management Data Model** window, under Related Links, select **Install Demo Data On ly**.

Result

You have successfully installed the Deal Registration Management (com.snc.deal_registration_management) application.

Data model for Deal Registration Management

The deal registration management data model provides a framework for channel partners to establish a consistent and organized engagement model with channel partners.

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Add data in the deal registration tables to maintain and track partner submitted deals and the line items linked to a deal registration.

Configuration tasks for Deal Registration Management

Perform the following tasks to use the deal registration data model.

Task	Role	Description
Configure Deal Registration table	Experience (sn_prm_dr.deal_reg_ui)	Configure the deal registration (sn_prm_dr_deal_registration) table to track a deal's life cycle through states and workflow stages.
Configure Deal Registration Line table	Experience (sn_prm_dr.deal_reg_ui)	Configure the Deal registration line (sn_prm_dr_deal_registration_line) table to manage product level details for a single deal.
Configure Deal Registration Type table	Deal registration admin (sn_prm_dr.deal_reg_admin)	Configure the deal registration (sn_prm_dr_deal_registration_type) type table to specify the role or involvement of a channel partner in a deal.
Configure Partner Program Deal Type Relationship table	Deal registration admin (sn_prm_dr.deal_reg_admin)	Configure the Partner program deal type relationship (sn_prm_dr_pp_deal_type) table to ensure that deal types are associated to appropriate partner programs.

Related topics

Roles and components of Deal Registration Management

Configure Deal Registration table

Configure the deal registration (sn_prm_dr_deal_registration) table to track a deal registration's life cycle through states and workflow stages.

Before you begin

Role required: sn_prm_dr.deal_reg_ui

About this task

The deal registration table stores the details of a deal submitted by a partner, including account details, deal size, and related opportunity.

Procedure

1. Navigate to **All** > **Deal Registration** > **All**.
2. Select **New**.
3. On the form, fill in the fields.

   To learn more about the fields on the form, see Deal registration table fields.
4. Select **Submit**.

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Configure Deal Registration Line table

Configure the Deal registration line (sn_prm_dr_deal_registration_line) table to manage product level details for a single deal registration.

Before you begin
Role required: sn_prm_dr.deal_reg_ui

About this task
The deal registration line table contains line items linked to a deal registration, each referencing a specific product offering.

Procedure

1. Navigate to **All** > **Deal Registration** > **All**.
2. Select **New** to create a deal registration.
   To learn how to create a deal registration, see Configure Deal Registration table.
3. Select **Deal Registration Lines** from the related list to create a deal registration line item.
4. Select **New**.

   Note: You can create a deal registration line item only if the deal is in the **Draft**, **Submitted**, or **Under Review** states.

5. On the form, fill in the fields.
   To learn about the fields on the form, see Deal registration line table fields.
6. Select **Submit**.

Configure Deal Registration Type table

Configure the deal registration type (sn_prm_dr_deal_registration_type) table to specify the role or involvement of a channel partner in a deal registration.

Before you begin
Role required: sn_prm_dr.deal_reg_admin

About this task
Configure the deal registration type table to define how a channel partner can be associated with a deal registration or can contribute to the deal registration.

Procedure

1. Navigate to **All** > **Deal registration** > **Administration** > **Deal Registration Types**.
2. Select **New** to create a deal registration type.
3. On the form, fill in the fields.
   To learn more about the fields, see Deal registration type table fields.
4. Select **Submit**.

Configure Partner Program Deal Type Relationship table

Configure the Partner program deal type relationship (sn_prm_dr_pp_deal_type) table to ensure that the appropriate deal registration types are associated to the accurate partner programs.

Before you begin
Role required: sn_prm_dr.deal_reg_admin

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Procedure

1. Navigate to **All** > **Deal registration** > **Administration** > **Deal Registration Types**.
2. Create a deal registration type.
   To learn how to create a deal registration type, see Configure Deal Registration Type table.
3. Select **Program Deal Type Relationships** from the related list.
4. On the form, fill in the fields.
   To learn more about the fields, see Partner program deal type relationship table fields.
5. Select **Submit**.

Roles and components of Deal Registration Management

The Deal Registration Management application (com.snc.deal_registration_management) uses roles to provide access to information, identify internal and external users, and maintain data security.

The Deal Registration Management application (com.snc.deal_registration_management) comes with a set of functional roles, each with varying levels of access to deals and their line items.

Functional and granular roles

Functional roles help provide authorized partners to maintain data and records in the deal registration table. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges that determine users' access to certain information.

You can assign granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve customer experience.

Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The following table lists the functional roles for Deal Registration Management.

Functional roles

List of functional roles, their descriptions, and contained roles for deal registration management.

Role	Description	Contains roles
Deal registration admin (sn_prm_dr.deal_reg_admin)	This user can configure the deal registration data model and can create and edit all deal registrations across multiple partner types.	• Deal registration type writer (sn_prm_dr.deal_reg_type_writer) • Deal registration writer (sn_prm_dr.deal_reg_writer)
B2B deal registration initiator (sn_prm_dr.partner_b2b_deal_reg_initiator)	This user can create, view, and initiate deal registrations for all B2B customers with their associated channel partners.	Partner data viewer (sn_prm.partner_data_viewer)
B2C deal registration initiator (sn_prm_dr.partner_b2c_deal_reg_initiator)	This user can create, view, and initiate deal registrations for	Partner Data Viewer (sn_prm.partner_data_viewer)

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Functional roles

List of functional roles, their descriptions, and contained roles for deal registration management.

(continued)

Role	Description	Contains roles
	all B2C customers with their associated channel partners.	
Deal registration initiator (sn_prm_dr.partner_deal_reg_initiator)	This user can create and view deal registrations for both B2B and B2C customers for their associated channel partners.	• B2B deal registration initiator (sn_prm_dr.partner_b2b_deal_reg_initiator) • B2C deal registration initiator (sn_prm_dr.partner_b2c_deal_reg_initiator)
Deal registration manager (sn_prm_dr.partner_deal_reg_manager)	This user can create and view deal registrations for all the partners across their associated partner hierarchy.	Deal registration initiator (sn_prm_dr.partner_deal_reg_initiator)
Enterprise deal registration relationship contributor (sn_prm_dr.enterprise_deal_reg_rel_contributor)	This user can create, edit, and approve deal registrations for associated channel partners.	Partner data viewer (sn_prm.partner_data_viewer)
Enterprise deal registration relationship manager (sn_prm_dr.enterprise_deal_reg_rel_manager)	This user can create, edit, and approve deal registrations for channel partners in their assigned hierarchy.	Enterprise deal registration relationship contributor (sn_prm_dr.enterprise_deal_reg_rel_contributo
B2B deal registration agent (sn_prm_dr.enterprise_b2b_deal_reg_agent)	This user can create, qualify, progress, and convert B2B deals into opportunities. A B2B deal registration agent can manage the full life cycle for B2B deal registrations. To learn more about converting deals to opportunities, see Update deal registration record	Partner data viewer (sn_prm.partner_data_viewer)
B2C deal registration agent (sn_prm_dr.enterprise_b2c_deal_reg_agent)	This user can create, qualify, progress, and convert B2C deals into opportunities. A B2C deal registration agent can manage the full life cycle for B2C deal registrations. To learn more about converting deals to opportunities, see Update deal registration record	Partner Data Viewer (sn_prm.partner_data_viewer)

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Functional roles

List of functional roles, their descriptions, and contained roles for deal registration management.

(continued)

Role	Description	Contains roles
Deal registration agent (sn_prm_dr.enterprise_deal_reg_agent)	This user can create, qualify, approve, and convert any deal registration into an opportunity. A deal registration agent can manage the full life cycle of submitted deal registrations, both B2B and B2C. To learn more about converting deals to opportunities, see Update deal registration record	• B2B deal registration agent (sn_prm_dr.enterprise_b2b_deal_reg_agent) • B2C deal registration agent (sn_prm_dr.enterprise_b2c_deal_reg_agent)

The following table lists the set of granular roles associated with deal registration.

Granular roles

List of granular roles, their descriptions, and contained roles for deal registration management.

Role	Description	Contains roles
Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer)	This granular role provides users read access to all deal registrations.	Partner data viewer (sn_prm.partner_data_viewer)
Deal registration type writer (sn_prm_dr.deal_reg_type_writer)	This granular role provides users to create, write, and edit all deal registration types. With this granular role, users can also create mapping records in the partner program and deal registration type tables.	Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer)
Deal registration writer (sn_prm_dr.deal_reg_writer)	This granular role provides users create, write, and edit access to all deal registrations.	Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer)
Experience (sn_prm_dr.deal_reg_ui)	This role provides granular access to organization staff to provide a consistent experience across all user interfaces.	NA

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Granular roles

List of granular roles, their descriptions, and contained roles for deal registration management.

(continued)

Role	Description	Contains roles
Approver (sn_prm_dr.deal_reg_approver)	This granular role provides read access to users for the deal registration to which they are added as an approver.	Partner data viewer (sn_prm.partner_data_viewer)

Install Sales Common for Partner Relationship Management

Install the Sales Common for Channel Partners plugin (com.snc.partner_relationship_management_sales_common), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The Sales Common for Channel Partners plugin acts a parent plugin for all the Lead to Cash Core workflows.

The following items are installed with the Sales Common for Channel Partners (com.snc.partner_relationship_management_sales_common) plugin:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sales Common for Channel Partners application (com.snc.partner_relationship_management_sales_common) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Sales Common for Channel Partners application.

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4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing the Sales Common plugin. **a.** Install Sales Common for Channel Partners (com.snc.partner_relationship_manage ment_sales_common) application. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for the Sales Common plugin. **d.** In the System **Plugin Sales Common for Channel Partners data model** window, un der Related Links, select **Install Demo Data Only**.

Result

You have successfully installed the Sales Common for Channel Partners (com.snc.partner_relationship_management_sales_common) application.

Roles and components of Sales Common

The Sales Common for Channel Partners plugin (com.snc.partner_relationship_management_sales_common) application uses roles to provide access to information, identify internal and external users, and maintain data security.

The PRM plugin (com.snc.partner_relationship_management) comes with a set of functional and granular roles, each with varying levels of access.

Functional roles

List of functional roles and their descriptions installed with the Sales Common application.

Role	Description	Contains roles
sn_prm_sales_partner_b2b_sales_rep	This role is assigned to external channel partner organizational staff to manage the entire sales lead to cash life cycle for B2B customers.	
sn_prm_sales_partner_b2c_sales_rep	This role is assigned to external channel partner organizational staff to manage	

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Functional roles

List of functional roles and their descriptions installed with the Sales Common application.

(continued)

Role	Description	Contains roles
	the entire sales lead to cash life cycle for B2C customers.	
sn_prm_sales_partner_sales_manager	This role is assigned to external channel partner organizational staff to manage the entire sales lead to cash life cycle for B2B and B2C customers.	
sn_prm_sales_partner_sales_relationship_manager	This role is assigned to enterprise personnel to manage the entire sales lead to cash life cycle for the hierarchy of their channel partners.	

Install Order Management for Channel Partners

Install the Order Management for Channel Partners plugin (com.snc.partner_relationship_management_orm), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The Order Management for Channel Partners (com.snc.partner_relationship_management_orm) plugin facilitates management of the entire order life cycle, specifically for indirect sales.

The following items are installed with the Order Management for Channel Partners plugin (com.snc.partner_relationship_management_orm) plugin:

- Plugins
- Store applications
- Role like the sn_prm_orm.order_partner_ui
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) application.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing the Sales Common plugin. **a.** Install Order Management for Channel Part ners (com.snc.partner_relationship_man agement_orm) application. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for the Or der Management for Channel Partners plug in. **d.** In the System **Plugin Order Management for Channel Partners data model** window, under Related Links, select **Install Demo Data Only**.

Result

You have successfully installed the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) application.

Install Opportunity Management for Channel Partners

Install the Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

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Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) plugin facilitates management of the opportunities for channel partner sales.

The following items are installed with the Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) plugin:

- Plugins
- Store applications
- Role like the sn_prm_opptym.oppty.parnter_ui

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) application.

4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing the Sales Common plugin. **a.** Install Opportunity Management for Chan nel Partners (com.snc.partner_relation ship_management_oppty) application. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for the Op portunity Management for Channel Part ners plugin.

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Demo data install task	Description
	d. In the System **Plugin Opportunity Management for Channel Partners data model** window, under Related Links, select **Install Demo Data Only**.

Result
You have successfully installed the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) application.

Install Quote Management for Channel Partners

Install the Quote Management for Channel Partners plugin (com.snc.partner_relationship_management_qm), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task
The Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) plugin facilitates management of the entire order life cycle, specifically for indirect sales.

The following items are installed with the Quote Management for Channel Partners plugin (com.snc.partner_relationship_management_qm) plugin:

- Plugins
- Store applications
- Role like the sn_prm_qm.quote_partner_ui
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) application.
4. If you want to install demo data, do one of the following depending on your entitlements.

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Demo data install task	Description
If demo data is available and you want to in stall it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing the Sales Common plugin. **a.** Install Quote Management for Channel Part ners (com.snc.partner_relationship_man agement_qm) application. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for the Quote Management for Channel Partners plugin. **d.** In the System **Plugin Order Management for Channel Partners data model** window, under Related Links, select **Install Demo Data Only**.

Result
You have successfully installed the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) application.

Configuring the Business Portal

Enable B2B customers to self-serve key processes such as order creation, order case management, invoice management, request for quote (RFQ) creation by configuring the Business Portal (sn_b2b_portal).

Configuration overview

1. Install the following applications and features in the specified order using the Application Manager to set up the Business Portal:
   a. Order Management Portal: sn_ord_mgmt_portal
   b. Product Catalog Management Portal: sn_prd_pm_portal
   c. Customer Service Portal: sn_csm_portal

      Note: The Business Portal application (sn_b2b_portal) is automatically installed when you install the Customer Service Portal.

   d. UI Components for Customer Portals: sn_ciwf_ui_cmpnt
   e. Sales Cart plugin: sn_sales_cart
   f. Customer Request for Quote plugin: sn_cust_rfq
2. Enable the Business Portal

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Enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

3. Configuring product catalog visibility on the Business Portal

   By default, only users with the sn_customerservice.customer role can view the product catalog on the Business Portal. After setting up your product catalog and pricing, use the CustomerPortalCatalogAccessUtil script include to extend catalog visibility to additional users.

4. Install Sales Cart

   Provide easy order creation and checkout processes to your customers through the Sales Cart application.

5. (Optional) Install Customer Request for Quote

   Enable B2B customers to request for quotes (RFQ) from the Business Portal. Installing this application also installs the Request for Quote module in the CSM Configurable Workspace, which enables sales agents to generate quotes from the RFQs.

6. (Optional) Install apps for self-service order case management

   Install the applications or features that provide the self-service options that you want to offer customers for managing order and invoice cases on the Business Portal.

Additional configurations and customizations

The following tasks help you further customize and configure the Business Portal to support self-service Sales Customer Relationship Management workflows for B2B customers:

- Add a logo to the sales cart PDF

  Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

- Modifying the data retention and table cleanup policy for the Sales Cart application

  A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions that match your organization's policies.

- Modify terms and conditions for the sales cart

  Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

Related topics

Customer self-service using the Business Portal

Business Portal reference for Sales Customer Relationship Management

Enable the manage order operations agent on the Business Portal

Enable the Business Portal

Admins can enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

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Before you begin

The application scope must be set to Business Portal. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

About this task

To set up the Business Portal and Sales Customer Relationship Management self-service enhancements, first install the Business Portal plugins, which are available in the app store.

See Configuring the Business Portal for more information.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select **Business Portal**.
3. Clear the **Inactive** box.
4. Select **Save**.
   The Business Portal is enabled.

What to do next

Customize the Business Portal to match your organization's branding and user experience requirements. For more information, see Setup Business and Consumer Portal.

Configuring product catalog visibility on the Business Portal

Only authorized customers can view the product catalog on the Business Portal by default. After setting up your product catalog and pricing, use the CustomerPortalCatalogAccessUtil script include to extend catalog visibility to additional users.

When customers access the Business Portal, the product catalog is visible by default to users who have the sn_customerservice.customer role and are registered in the ServiceNow CRM software. This default visibility is controlled by the CustomerPortalCatalogAccessUtil script.

To grant product catalog visibility to other users, use the CustomerPortalCatalogAccessUtil script to extend access to those users. Navigate to **All** > **Activity Subscriptions** > **Administration** > **Script Includes**. In the **Name** column, search for CustomerPortalCatalogAccessUtil.

You must also set up your product catalog and configure pricing to help ensure that the correct products and prices are available to customers on the portal. For more information, see Configuring product offerings and catalogs and Configuring product pricing.

Post-upgrade order migration for the Business Portal

Migrate draft proxy order carts to the new sales cart to avoid having your customers lose products they added to their carts on the Business Portal

Before you begin

Ensure that the Sales Cart application has been installed. For more information, see Install Sales Cart.

Role required: admin

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About this task

Note: If you have used the Business Portal and are upgrading to the Zurich release, you must run the *Migrate proxy orders to sales cart* scheduled job after installing the Sales Cart application. This job migrates the draft proxy order carts to the new sales cart and prevents your customers from losing products added to their carts on the Business Portal.

The *Migrate proxy orders to sales cart* scheduled job performs the following actions:

- Migrates items from customers' existing cart to the new sales cart
- Creates cart-related records in the Sales Cart tables
- Updates the value of the *sn_sales_cart.show_cart_migration_msg* property to false

Until you run the this job, the following message is displayed to your customers on the Business Portal:

```
A system update cleared your cart. Please contact your
 administrator for help.
```

Procedure

1. Select **All** > **System Definition** > **Scheduled Jobs**.
2. On the Scheduled Jobs page, enter `Migrate proxy orders to sales cart` in the search field.
3. Select the job.
4. On the Scheduled Script Execution page, select **Execute Now**.

Install Sales Cart

You can install the Sales Cart plugin (sn_sales_cart) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Sales Cart listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the Sales Cart plugin (sn_sales_cart):

- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Sales Cart.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sales Cart plugin (sn_sales_cart) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

A sample logo is applied to the sales cart PDF by default. To customize and add your logo, see Add a logo to the sales cart PDF.

Add a logo to the sales cart PDF

Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Name** search field, enter `db_image` table and select the Images table.
3. On the Tables details page, select **Show List** from the Related Links section.
4. In the **Name** search field, enter `sn_sales_cart.sales_cart_download_logo.png` and select the record.
5. If a message appears about the application scope, select **here** to be able to edit the record.
6. Update the logo by selecting **Update** next to the Image field.
   a. Select **Update** next to the **Image** field.
   b. Select the **Choose File** button and select the image file on your computer that you want to use.
   c. Select **OK**.
7. On the Images page, verify that your logo file uploaded successfully.

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Note: You might have to change the application scope again.

8. Select **Update**.

Modifying the data retention and table cleanup policy for the Sales Cart application

A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions. You can modify these conditions to match your organization's policies.

By default, records in the complete state are deleted from the Sales Cart [sn_sales_cart] table if they meet either of the following conditions:

- Records older than six months
- Records that haven't been updated for more than six months

Modify the data retention and table cleanup frequency depending on your expected load and volume. For more information, see Modify data retention policy for ATF test results.

Related topics

Table cleanup

Autoflush form

Modify terms and conditions for the sales cart

Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

Before you begin

Role required: admin

About this task

The CartTermsAndCo document template block in the Sales Cart Demo Template and Sales Cart Terms and Conditions Default document templates is used for displaying terms and conditions in the cart summary PDF and while checking out respectively.

Procedure

1. Navigate to **All** > **Document Templates** > **Document Template Blocks**.
2. Select **CartTermsAndCo**.
3. Select the record from the Document Template Block Contents related list.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Add your terms and conditions in the Body section.
6. Select **Update**.

Related topics

Document Templates

Create block content in Document Templates

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Install Customer Request for Quote

You can install the Customer Request for Quote application [sn_cust_rfq] if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Customer Request for Quote application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Customer Request for Quote:

- Plugins
- Roles
- Tables

For more information, see Components installed with Customer Request for Quote.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Request for Quote application (sn_cust_rfq) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Making self-service order and invoice case management available on the Business Portal

Install the necessary applications based on the self-service order and invoice case management options that you want to offer customers on the Business Portal.

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Note: For information about activating the Business Portal itself, see Enable the Business Portal

Case management applications

The following apps must be installed from the ServiceNow Store to enable your customers to create and view order cases from the Business Portal:

- Order Case Self Service [sn_ord_case_ss]
- Order Case Playbook [sn_ord_case_pb]

These plugins have the following dependencies:

- Customer Service Portal [com.snc.customer_service_portal]
- Order Operations Case Management [sn_order_case]
- Playbooks for Customer Service Management [sn_csm_playbook]

If your customers need to only view order cases in the Business Portal, you don't need to install the Order Case Playbook [sn_ord_case_pb] and Playbooks for Customer Service Management [sn_csm_playbook] plugins.

Invoice and invoice case management applications

The following apps must be installed from the ServiceNow Store to enable your customers to manage invoices and invoice cases from the Business Portal:

- Invoice Self-Service [sn_invoice_ss]
- Invoice Case Self-Service [sn_invoice_case_ss]
- Invoice Case Playbook [sn_inv_case_pb]

These plugins have the following dependencies:

- Customer Service Portal [com.snc.customer_service_portal]
- Invoice Operations Case Management [sn_csm_invoice]
- Playbooks for Customer Service Management [sn_csm_playbook]

If your customers only need to view invoice cases in the Business Portal, you don’t need to install the Invoice Case Playbook [com.sn_inv_case_pb] and the Playbooks for Customer Service Management [sn_csm_playbook] plugins.

Install the order case management apps for Business Portal

You can install the order case management applications if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Note: Demo data is unavailable with these applications.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   The applications for order case management are:

   - Order Case Self Service (sn_ord_case_ss)
   - Order Case Playbook (sn_ord_case_pb)

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Install the invoice management apps for Business Portal

You can install the invoice case management applications if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Note: Demo data is unavailable with these applications.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the applications using the filter criteria and search bar.

   The applications for invoice and invoice case management are:

   - Invoice Self-Service (sn_invoice_ss)
   - Invoice Case Self-Service (sn_invoice_case_ss)
   - Invoice Case Playbook (sn_invoice_case_pb)

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Configuring agent tools in Sales Customer Relationship Management

The applications in Sales Customer Relationship Management share common features and tools for agents.

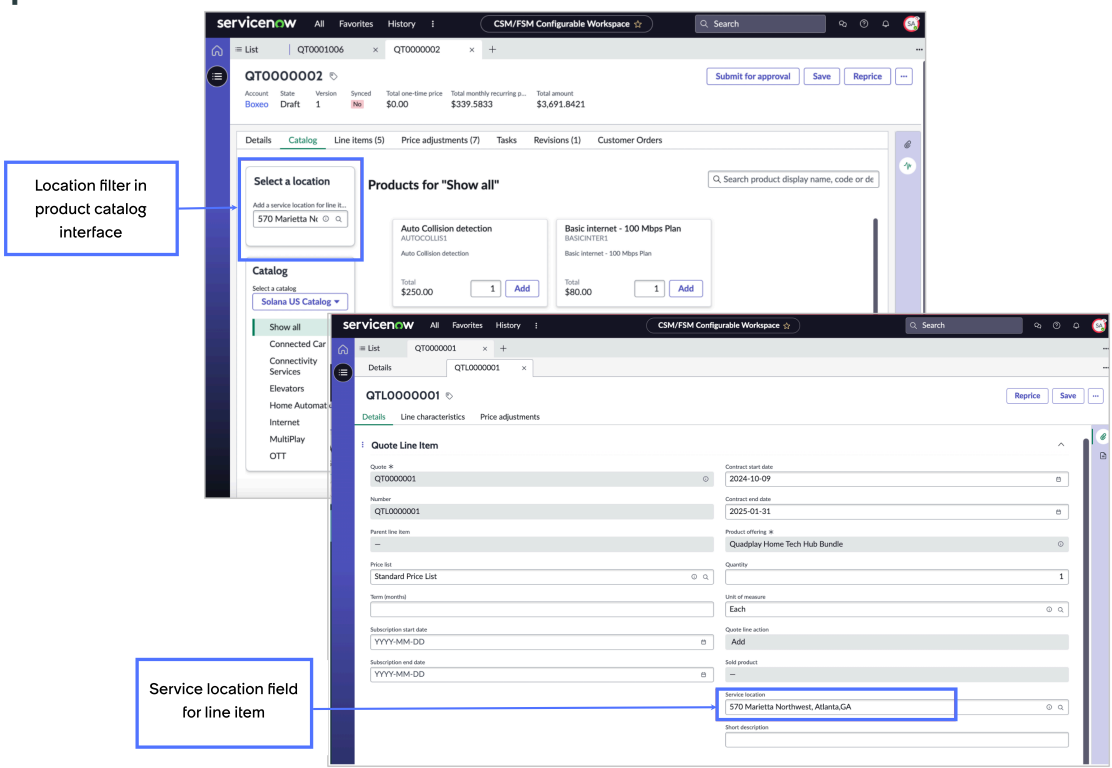
This section describes common features that you can configure for your agents, such as location-based transactions.

Configuring location-based product transactions

In Sales Customer Relationship Management, agents can create opportunities, quotes, and orders tailored to customer location. These transactions are called location-based product transactions.

When the product offerings and services available to customers vary based on location, your agents can use a location filter in the product catalog UI to select a service location and view only the products and services appropriate for that location. Agents can then add the appropriate products to an opportunity, quote, or order. Agents can also copy products and services from one location to another within the same transaction, which eliminates the need to create another opportunity, quote, or order for each location.

Location filter in the product catalog UI and service location in the line item view for quotes



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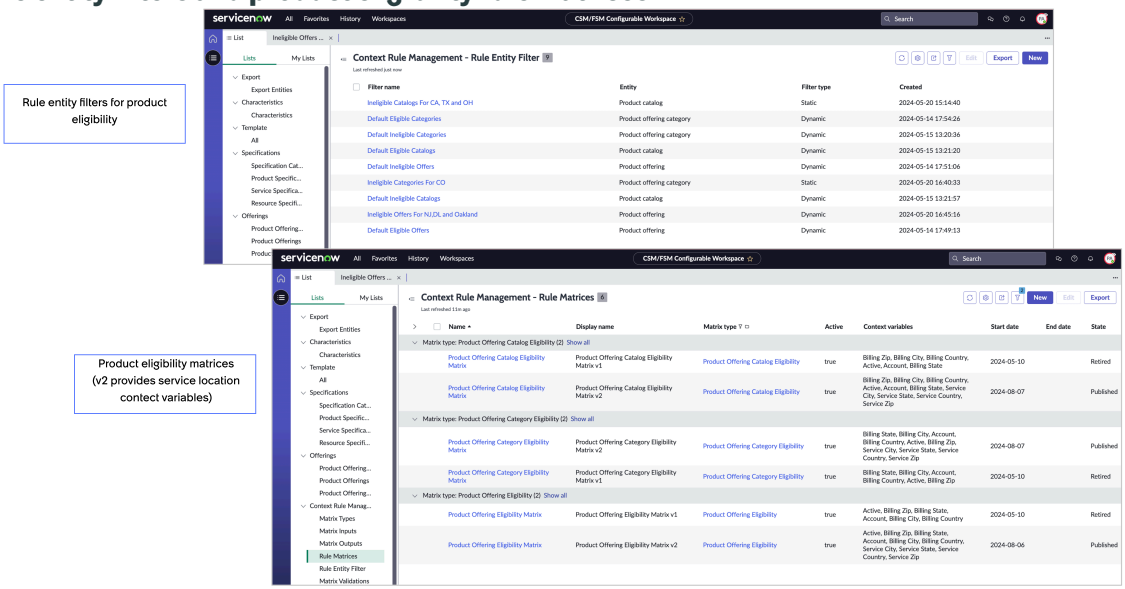
How location-based transactions work

Admin and product catalog admin configuration

Admins activate location-based transactions by enabling the *sn_sales_common.enable_location_based_transactions* system property.

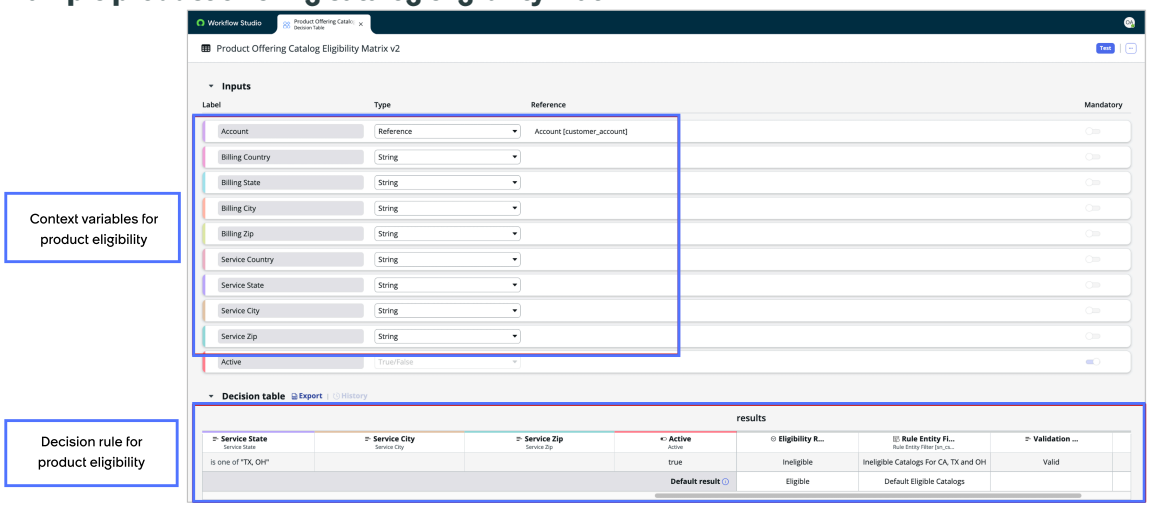
Product catalog admins use the product eligibility rule entity filters to identify eligible and ineligible product entities (catalogs, categories, and product offerings). They also set up decision rules in product eligibility matrices, to specify the context variables, such as billing state or the service location variables (introduced in the November 2024 release), for controlling the display of eligible catalogs, categories, or product offerings.

Rule entity filters and product eligibility rule matrices



In the following example of the Product Offering Catalog Eligibility matrix, a rule entity filter for ineligible catalogs and the context variable, service state, are used to filter the product catalog displayed.

Example product offering catalog eligibility matrix



Agent experience for location-based transactions

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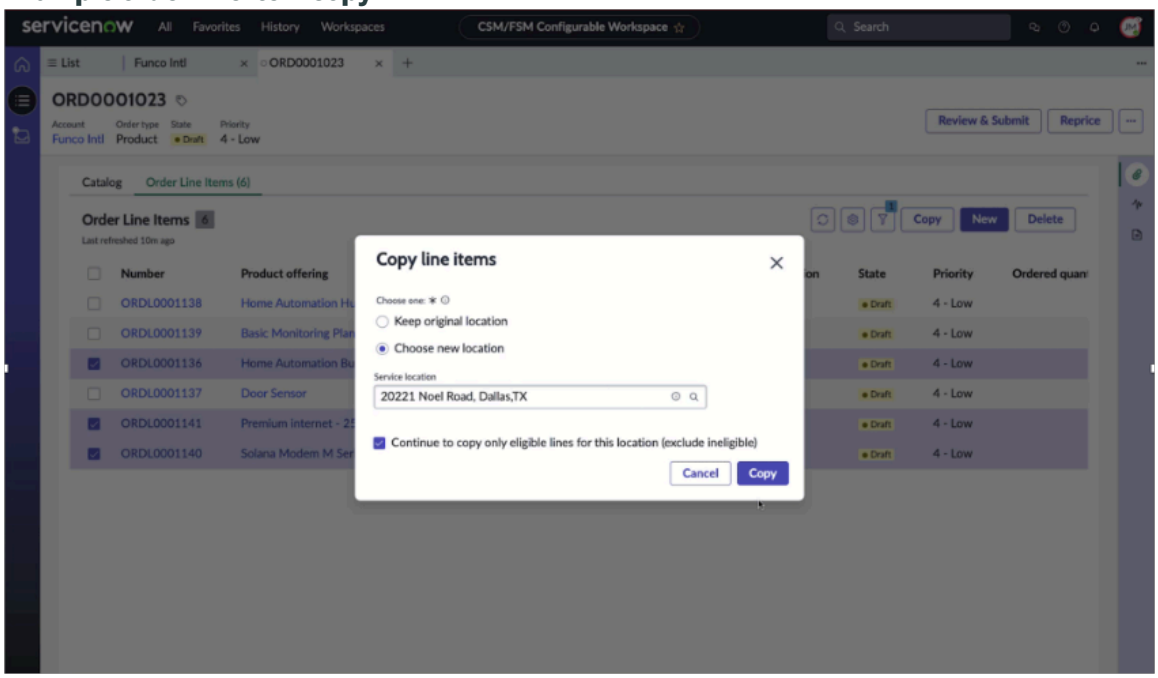
When agents specify a service location, the product catalog UI displays the eligible catalog, categories, or offerings for that location, depending on the product eligibility entities configured. When they select a simple or fixed product, the line item is created automatically for the specified location. If they select a configurable product, they use the product configurator to customize the product options. A line item is created automatically when they save the product configuration.

Your agents can then copy line items to another location in the same transaction (opportunity, quote, or order). They can indicate that only eligible line items be copied to the specified location.

Example order line item copy



For details on how agents add products to an opportunity, quote, or order by location, see the following:

- Use location filter to add opportunity line items.
- Copy opportunity line items to a location.
- Filter catalogs by location in a quote.
- Copy locations for quote line items.
- Filter product catalog by location.

Setting up location-based transactions

Admins and product catalog admins complete the following configuration tasks to set up location-based transactions.

Location-based transaction configuration tasks

Step	Description	Role
Activate location-based transactions	Enable the *sn_sales_common.enable_location_based_transactions* system property.	Admin

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Location-based transaction configuration tasks (continued)

Step	Description	Role
Create rule entity filters	Define the rule entity filters that make catalogs, categories, and product offerings either eligible or ineligible for display.	Product catalog admin
Define product eligibility rules	Set the product eligibility rules by selecting the context variables, such as the service location context variables, that control the display of product catalog, category, or offerings.	Product catalog admin

Activate location-based transactions

Turn on location-based transactions for opportunities, quotes, and orders by using the *sn_sales_common.enable_location_based_transactions* system property.

Before you begin

Role required: admin

About this task

The *sn_sales_common.enable_location_based_transactions* system property enables your agents to select a customer location and view only the eligible products for that customer location when adding product lines to an opportunity, quote, or order. This feature also enables agents to copy line items to another location within the same transaction (opportunity, quote, or order).

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_sales_common.enable_location_based_transactions* system property.
3. In the **Value** field, enter `true`.
4. Select **Update**.
   The location filter is displayed in the product catalog interface. Agents can use the filter to select a location when adding product lines to an opportunity, quote, or order. The catalog displays the eligible product offerings for the location. After adding products from the catalog, agents can then copy selected products (line items) to another location within the same transaction, without having to create another opportunity, quote, or order for a different customer location.

What to do next

Define the product eligibility rule filters and matrices that control the product offerings displayed by location.

Assign user roles in Sales Customer Relationship Management applications

The Sales Customer Relationship Management (Sales CRM) applications use roles to control access to features and capabilities. Roles also determine access to information for data security, identify users, and define the work that users perform in your organization.

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Overview of roles

Roles define the functions available to users of the Sales CRM applications, including:

- Product Catalog Management
- Pricing Management
- Lead Management
- Opportunity Management
- Quote Management
- Sales Agreement Management
- Order Management

Assign roles to users and groups by using the ServiceNow AI Platform user administration feature.

- To assign a role to a user, see Assign a role to a user.
- To assign a role to a group, see Assign a role to a group.

Lead Management roles

The roles in the following table apply to Lead Management.

Role	Description
Lead Agent [sn_customerservice.csm_workspace_user]	Identifies, nurtures, and converts leads into opportunities. Creates, reads, updates, and deletes leads. Has access to CSM Workspace. I
Sales Agent [sn_sales_common.sales_manager]	Role that has access to CSM and lead entities.
Sales Operations Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Read access to lead entities. Configures sales processes in an organization.
Lead Viewer [sn_prd_pm.product_catalog_viewer] [sn_csm_ctxrul_mgt.context_variable_viewer] [sn_csm_ctxrul_mgt.rule_matrix_viewer]	Granular role that has access to view product catalog entities such as product offerings.
Lead Writer	Read access to all lead tables such as header and line items.

Opportunity Management roles

The roles in the following table apply to Opportunity Management. To learn more about these roles, see Opportunity Management.

Role	Description
Sales Agent [sn_sales_common.sales_agent]	Identifies, nurtures, and converts opportunities into successful sales. Creates, reads, and updates opportunities.

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Role	Description
Sales Manager [sn_sales_common.sales_manager]	Reviews open opportunities and assigns them to sales agents. Creates, reads, and updates opportunities.
Sales Operations Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Configures sales processes in an organization.
sn_opty_mgmt_core.opportunity_setup_viewer	Granular role that has access to sale cycle and stages.
sn_opty_mgmt_core.opportunity_setup_writer	Granular role that has access to sales cycle and stages.
sn_opty_mgmt_core.opportunity_viewer	Read access to all opportunity tables such as header and line items.
sn_opty_mgmt_core.opportunity_writer	Read access to all opportunity tables such as header and line items.

Quote Management roles

The roles in the following table apply to Quote Management.

Role	Description
Sales Agent [sn_sales_common.sales_agent]	Identifies, nurtures, and converts quotes into successful sales.
Sales Manager [sn_sales_common.sales_manager]	Assigns quotes to sales agents or sales teams.
Sales Operation Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Configures sales processes in sales operations.

Sales Agreement Management roles

Role	Description
Sales Agent, Sales Manager, Data Viewer sn_sales_agmt_core.sales_agreement_viewer	Read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables.
Sales Agent, Sales Manager sn_sales_agmt_core.sales_agreement_writer	Create, read, and update operations on sales agreements and sales agreement lines.

Product Catalog Management roles

The roles in the following table apply to Product Catalog Management.

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Role	Description
Product Catalog Manager [sn_prd_pm.product_catalog_manager]	Create, read, update, and delete product, service, and resource specifications.
Product Catalog Admin [sn_prd_pm.product_catalog_admin]	Create, read, update, and delete product, service, resource specifications, characteristics, and characteristic options. Can also export and import catalog entities and set up any catalog-related system properties.
Product Catalog Viewer [sn_prd_pm.product_catalog_viewer]	Read access to product, service, resource specifications, characteristics, and characteristic options.

Pricing Management roles

The roles in the following table apply to Pricing Management.

Role	Description
Price List Admin [sn_csm_pricing.pricelist_administrator]	Create, update, and read pricing entities. Can also export and import pricing entities, set up or edit pricing-related system properties, and view transaction logs.
Price List Manager [sn_csm_pricing.pricelist_manager]	Create, update, and read pricing entities.
Price List Writer [sn_csm_pricing.pricelist_writer]	Granular role that has read, write, and delete access to pricing entities. To delete a pricing entity such as a price list or cost book, the pricing entity must be in Draft state.
Sales Agreement Price List Writer [sn_csm_pricing.sales_agreement_pricelist_writer]	Granular role that has read and create access to pricing entities. Create access is granted only through back-end workflows. Write access only for Sales Agreement price lists. Inherited within the Sales Agreement Writer role.
Price List Viewer [sn_csm_pricing.pricelist_viewer]	Granular role that has read access to pricing entities such as price lists, price list lines, cost books, cost book lines, attribute adjustments, and rule matrices.
Pricing integrator [sn_csm_pricing.pricing_integrator]	Role required to access pricing features through the REST API.

Order Management roles

Order Management uses the roles in the following tables to control and manage access to the application features for Order Management, Service Order Management, and Fallout Management.

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Order Management roles

Role	Description
Order Fulfillment Manager [sn_ind_tmt_orm.order_fulfillment_manager]	View and edit access to product orders, product order tasks, service orders, and resource orders. Fulfillment managers with this role can view, but not edit, order fallout records. The Order Fulfillment Manager receives orders, reviews order line items, checks that orders are ready for fulfillment, and then approves them.
Order Fulfillment Agent [sn_ind_tmt_orm.order-fulfillment_agent]	View access to product orders, product order tasks, service orders, and resource orders. Agents with this role can also view, but not edit, order fallout records, but they can edit some fields on the product order tasks. After the Order Fulfillment Manager approves an order, the agent performs these fulfillment tasks. This role also includes the Order Viewer [order_view] role.
Order Approver [order_approver]	View access to customer orders and product catalog data. Users with this role can approve customer orders but can't create, update, or delete an order like an Order Fulfillment Manager or Order Fulfillment Agent would do. This role also includes the Order Viewer [order_view] role.
Order Viewer [order_viewer]	View access to customer orders, product orders, product order tasks, service orders, and resource orders. You should also grant an order viewer with the sn_prd_pm.product_catalog_viewer role to access the product catalog data. **Note:** The order approver and order viewer roles are included in the Order Management Business Stakeholder role, which has a fee associated with it. Don't assign these roles to users without confirming that your organization has the appropriate entitlement. To learn more, see Activate Business Stakeholder.
Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer]	Granular role that has read access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders.
Fulfillment Writer [sn_ind_tmt_orm.fulfillment_writer]	Granular role that has read and write access to fulfillment tables: order tasks, domain orders,

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Order Management roles (continued)

Role	Description
	product orders, resource orders, and service orders. This role includes the Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer] role.
Order Agent [sn_ind_tmt_orm.order_agent]	A persona role with permissions to create, edit, view, and delete orders, order lines, and order line characteristics, as well as permissions to view tasks.
Order Admin [sn_ind_tmt_orm.order_admin]	A persona role with the same permissions as the Order Agent role (create, edit, view, delete orders, order lines, and order line characteristics, and permissions to view tasks). In addition, this role can configure and approve orders.

Service Order Management roles

Role	Description
Service Order Manager [sn_ind_tmt_orm.service_order_manager]	View and edit service order requests, service orders, resource orders, and related fulfillment tasks. A manager with this role can also view, but not edit, order fallout records. The Service Order Manager can review external service order requests, review service order line items, checks that service orders are ready for fulfillment, and then approve them.
Service Order Agent [sn_ind_tmt_orm.service_order_agent]	View access to service order requests, service orders, resource orders, and related fulfillment tasks. Service Order Agents can edit some fields on the service order tasks. After the Service Order Fulfillment Manager approves a service order, the agent performs these tasks. This role also includes the Order Viewer [order_view] role.

Fallout Management roles

Role	Description
Fallout Manager [sn_fallout_mgmt.fallout_manager]	Create, view, assign, and edit fallout records. Managers with this role can also view order tasks and domain orders.
Fallout Agent [sn_fallout_mgmt.fallout_agent]	View fallout records. Agents with this role can also update the state of fallout records and create work notes on them.

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Using Sales Customer Relationship Management applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales Customer Relationship Management applications.

From the workspace you can access product catalogs to see the product offerings available in your organization and select them for Sales Customer Relationship Management transactions. You use a configurator interface, either the CPQ Configurator or the legacy product configurator, to customize configurable products that you add to opportunities, quotes, and orders or to make changes in sold products and product inventory.

Note: The CPQ Configurator is available if your organization has implemented the CPQ Integration application. For details on using the CPQ Configurator in Sales Customer Relationship Management workflows, see Configure a customizable product using CPQ Configurator.

Lead and opportunity management



Win more deals by capturing leads, tracking opportunities, forecasting sales, managing territories and buying groups.

Configure, price, quote



Quote faster and more accurately by configuring products, setting pricing, and creating sales agreements.

Order management



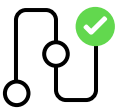
Keep orders on track by managing fulfillment, staying ahead of jeopardy, and resolving issues quickly.

Order operations



Run seamless lead-to-cash processes by managing end-to-end order workflows and handling returns with ease.

Post-sales engagement



Deliver on your promises by managing contracts, tracking entitlements, and driving product life cycle workflows.

Partner Relationship Management



Grow your partner ecosystem by onboarding partners, strengthening relationships, and enabling collaboration.

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Lead-to-cash foundation	Business Portal	
		
Browse, customize, and add products using the product catalog interface with AI Search.	Empower your customers by letting them place orders, submit RFQs, view quotes, and raise cases on their own.	

Using lead and opportunity management applications

Learn how to use lead and opportunity management applications.

Using Lead Management

Use the Lead Management to create your lead.

Lead Management interface

The Lead Management interface contains the following tabs:

Lead Management tabs

Tab	Description
Details tab	Add basic information for your lead.
Catalog tab	Search for and add product offerings to your lead.
Needs tab	Lists the need templates that provide product recommendations for a lead.
Tasks tab	Create lead tasks.
Appointments tab	Create appointments for your lead.
Line items tab	Add different line items to a lead.
Emails tab	Create emails to communicate with the required stakeholders.

Create a lead

Create a lead in the Lead Management application by entering the details, such as customer name, sales stage, lead type, score, and source.

Before you begin
Role required: sales_agent

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select **New**.
3. On the form, fill in the fields.

Create new lead

Field	Description
First Name	First name of the lead.
Last Name	Last name of the lead.
Email	Email address of the lead.
Mobile Phone	Mobile number of the lead.
Business Phone	Business phone number of the lead.
Title	Title of the lead.
Company	Company name of the lead.
Stage	Current stage of the lead in the sales lifecycle. Options include: ○ New ○ Contacted ○ Nurturing ○ Qualified ○ Disqualified
Lead Source	Channel or origin through which the lead was acquired. Options include: ○ Inbound Phone ○ Inbound Web ○ Partner Referral ○ 3rd Party Referral ○ Employee Referral ○ List ○ Trade Show ○ Pr ○ Display Ad ○ Billboard ○ AI-Suggested ○ Other

4. Select **Create Lead**.

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A message confirms that the lead was created. To continue working on the lead, select the link in the message.

5. Select **Refresh** to see the new lead in the list.

What to do next
Start adding more information to your lead. To learn more, see Add and view the details of a lead.

Update a lead

Edit or update a lead in Lead Management.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that is in New or Contacted or Nurturing stage.
   - On the **Leads- All** page, select **Edit** to make changes to lead information and select **Update**.
   - Open the lead record, make the changes and select **Save**.

What to do next
To learn more, see Using Lead Management.

Assign a lead

Assign a lead to a sales agent in Lead Management.

Before you begin
Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.
   - On the **Leads- All** page, select **Assign to**.
   - Open the lead record, select three-dot menu at the top-right corner on the lead header and select **Assign to**.

   To Create a lead, select **New**.

   Note:

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. On the **Assign leads to** dialogue box, select **Owner** and choose a sales agent.
   You can select the box if you want to reassign all the tasks from the selected leads to this sales agent.
4. Select **Assign**.

What to do next
To learn more, see Using Lead Management.

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Add and view the details of a lead

Use the Details tab to add more information about your lead.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead that you're working with.
3. Fill in the information on the Details tab.
   For more information on the description of the field values, see Lead details form.
4. Select **Save**.

What to do next
Use the Product Catalog tab to add products to your lead. To learn more, see Add products to a lead.

Add products to a lead

Use the Catalog tab in the Lead Management to add products to your lead.

Before you begin
Role required: sales_agent

About this task
You can use the Catalog tab to search for and select product offerings from catalogs and add them to your lead.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and , select the lead that you're working with.
3. Select **Catalog**.
4. Use the following table to learn about the functionality of the **Catalog** tab.

Catalog tab

Element	Description
Product catalog hierarchy	This option selects the product catalog.
Add button	The **Add** button adds the product to the quote. The **Add** button appears for simple products that don't have any selectable options.
Search field	Use the search field to search for a product in the product catalog hierarchy selected.

5. Select **Add**.
   The product offering is added to the lead as a **Line Item**.

What to do next
Add line items to a lead.

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Get product recommendations for leads using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales leads.

Before you begin
Role required: sales_agent

About this task
A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead that you want to work on.

   The product catalog displays in the Catalog tab of the lead.
3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.
   The needs template cards for the guide are displayed.
4. In the needs template card that best matches what your customer wants, select **Capture Needs**.
   The questionnaire for the selected template opens.
5. Answer the series of questions.
6. After replying to the last question, review or select the recommendations:
   - To review your responses, select the **Edit** icon. You can change your responses if needed.
   - To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.
7. Choose a recommendation by selecting **Add** in the tile for the product that best matches your customer needs.
   The selected product is added to the lead. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.

Add line items to a lead

Create a new product line item for your lead by entering the details, such as product offering and quantity.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **LeadsAll**.
3. Select the lead you want to work with and select the **Line Items** tab.
4. Select **New** to start a new lead line item or select an existing lead line item to make changes.
5. Fill in the fields in the Lead Line Item form.

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Lead Line Item form

Field	Description
Number	System-generated number of the lead line item.
Quantity	Quantity of the lead line item.
Product Offering	Product offering bundle for the lead line item.
Unit of Measure	Measuring unit of the lead line item.
Work Notes	Additional information related to the lead line item.

6. Select **Save**.
   The Lead Line Item is added to the main lead.

What to do next
Add lead tasks.

Add lead tasks

Create lead tasks to follow-up calls, emails, or meetings with your to progress on the lead.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to **List** view and select **Leads - All**.
2. From the **Leads List** window, select the lead you want to work with.
   - On the **Leads- All** page, select **Create task**.
   - Open the lead record, select the **Tasks** tab and select **New** to start a new lead task or select an existing lead task to make changes.

   To Create a lead, select **New**.

   Note:

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. On the Create New Lead Task form, fill in the fields.
   For a description of the field values, see Create new lead task form.
4. Select **Create Task**.
   This task is added to the lead.

What to do next
You can create appointments in your lead tasks. To learn more, see Create an appointment from Opportunity Management.

Create appointments for lead tasks

Create appointments with your stakeholders to conduct business discussions for your lead.

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Before you begin
Role required: sales_agent

About this task
You can create appointments only after creating a lead task. To create a lead task, see Add lead tasks.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Lead** > **All**.
3. Select the lead task you want to work with and select the **Appointments** tab.
4. Select **New** to start a new appointment or select an existing appointment to make changes.
5. Fill in the fields in the Create New Appointment form.
   For description of the field values, see Create new appointment form.
6. Select **Save** to save the appointment and send it later or select **Send activity** to send it now.

Compose emails

Create an email to communicate the product information to your customer as per the business requirements.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select a lead that you want to work with.
3. Select the **Emails** tab.
4. Select **Compose Email** to start a new email or select an existing email to view details.
5. Fill in the details in the Email draft form.

Lead Email Draft form

Fields	Descriptions
From	Email id of the sender.
To	Email id of the receiver.
Subject	Subject of your email.
Email message	Body details of your email.

Note: You can create your own email templates and use the pre-filled email templates while creating a new email. To discard your email, select **Discard draft**. To attach any files with your email, select **Attach File**.

6. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

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Manage leads using Kanban view

Personalize and manage the leads information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
3. Select the **View Kanban** button.

   By default, the leads are grouped by different stages and displayed on the page.

   - To change a lead stage, drag the lead card from one state and drop it into another state.
   - To view the leads by different categories, such as industry, source, and reason, select **Group by:** drop-down menu on the page.
   - You can take various actions for your leads, such as creating a lead task, assigning a lead, and composing an email by selecting the three vertical dots either on a lead card or vertical leads stage header.
   - To create a new lead directly from this page, select **New** button. To learn more, see Create a lead.

Convert a lead into an opportunity

Convert a lead into an opportunity in Lead Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. In the **Leads - All** list, select the lead that you're working with.
   - For a business customer, select **Convert lead** > **to an account** and fill in the fields in the form.

Convert lead form

Field	Description
Account	Name of your customer account. ▪ Create new: Select if you want to create a new account. ▪ Choose existing: Select if the customer is your existing account.
Contact	Name and email of your customer contact. ▪ Create new: Select if you want to create a new contact. ▪ Choose existing: Select if the contact already exists.

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Field	Description
Opportunity	Details to create an opportunity. To learn more, see Create an opportunity. ▪ Create new: Select if you want to create a new opportunity. ▪ Choose existing: Select if you already have an existing opportunity. **Note:** Select the check box if you don't want to create an opportunity for the lead.

- For a consumer account, select **Convert lead** > **to a consumer** and fill in the fields in the form.

Convert lead form

Field	Description
Consumer	Name and email of your consumer. ▪ Create new: Select if you want to create a new contact. ▪ Choose existing: Select if the contact already exists.
Opportunity	Details to create an opportunity. To learn more, see Create an opportunity. ▪ Create new: Select if you want to create a new opportunity. ▪ Choose existing: Select if you already have an existing opportunity. **Note:** Select the check box if you don't want to create an opportunity for the lead.

3. Select **Convert Lead**.
   A dialog box appears for the successful conversion of your lead into an opportunity. You can select the new opportunity record that was created.

Disqualify a lead

Disqualify a lead in Lead Management.

Before you begin

Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.

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3. Open the lead record, select three-dot menu at the top-right corner on the lead header and select **Disqualify lead**.

   Note: You can only disqualify a lead that is in New or Contacted or Nurturing stage.

4. On the **Disqualify lead** dialogue box, select a **Reason**.
5. Select **Disqualify**.

What to do next
To learn more, see Using Lead Management.

Export leads

You can export a quote as a JSON file in Lead Management and provide it to a customer.

Before you begin
Role required: sales_agent

About this task
The export lead feature in Lead Management exports a list of all leads. Use the following steps to export leads.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
3. Select the **File Type**:
   - Excel
   - CVS
   - JSON
   - PDF
4. Select the **Delivery Type**:
   - Email - Enter a valid email address.
   - Download - Downloads the export to a local drive.

   The list of leads is exported according to the parameters set.

Using Customer Engagement Sequences

Empower sales teams to automate and optimize customer engagement at every stage from initial outreach to renewal and expansion. By orchestrating both automated and manual steps, provide timely, relevant, and consistent engagement experience to every prospect and customer.

Using sequences across the sales life cycle

Pre-Sales: Attract and nurture

In the pre-sales phase, sequences help sales development representatives (SDRs) and account executives (AEs) to manage cold prospecting and lead nurturing efficiently. For example, a lead nurturing sequence can guide an SDR through a series of outreach steps such as sending introductory emails, making follow-up calls, and offering recommendations, helping ensure that no lead falls through the cracks. Feature adoption campaigns and user feedback invitations can also be automated to engage prospects early and gather valuable insights.

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Sales: Propose and transact

During the active sales cycle, sequences automate workflows for opportunity management, proposal delivery, and order confirmation. Agents are prompted by a guided process to conduct discovery calls, send proposals, and confirm orders. With decision-based steps, if a prospect doesn't respond, the workflow adapts, perhaps by scheduling another follow-up or offering a different product. This stage can also include onboarding new customers for a smooth transition from prospect to client.

Post-Sales: Fulfill, service, renew and expand

After the sale, sequences support onboarding, proactive customer service, and product adoption. For instance, a sequence might prompt an account manager to schedule a welcome call, share service usage tips, or send outage notifications and updates. Maintenance reminders, upgrade offers, and renewal sequences help keep customers engaged and informed. Sequences can also be configured to recommend upsell or cross-sell opportunities such as suggesting additional products during a renewal conversation or after successful onboarding.

Sales operations: Analyze and optimize

Sales operations teams analyze sales metrics such as conversion rates or upsell success across different workflows. They optimize and share the high-performing sequences with other territories, promoting best practices across the organization. For example, if a particular onboarding sequence consistently leads to higher product adoption, it can be rolled out to all sales teams for maximum impact.

Sample use cases

The following sample use cases provide examples on how you can use Customer Engagement Sequences to support your sales teams:

Cold prospecting

Guide sales reps through structured outreach to new, unqualified prospects.

For example, an agent might be prompted to send an introductory email, follow up with a call, and log responses, so every cold lead receives consistent attention.

Lead nurturing

Automate ongoing engagement with leads to build relationships and move them toward qualification.

For example, after initial contact, the agent might be guided to share relevant content, schedule a demo, and send reminder emails, adapting steps based on lead responses.

Offer recommendations

Help agents to present tailored product or service recommendations at the right time in the sales process.

For example, during a discovery call, the workflow prompts the agent to suggest complementary products based on the customer's needs and previous purchases.

Order confirmation

Provide prompts so every new order is acknowledged and processed efficiently.

For example, once a customer places an order, the agent is prompted to send a confirmation email, verify order details, and initiate fulfillment steps.

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Onboarding

Guide agents and customers through the onboarding process for new products or services.

For example, after a sale, the agent follows a checklist to schedule a welcome call, share onboarding materials, and confirm the customer's first successful use.

Product adoption

Drive ongoing engagement to help customers realize value from their purchase.

For example, the agent is prompted to check in after 30 days, offer training resources, and gather feedback to help the customer use the product most effectively.

Proactive customer service

Encourage agents to reach out before issues arise, improving satisfaction and retention.

For example, the workflow schedules periodic check-ins, sends usage tips, and prompts the agent to address potential concerns before the customer contacts support.

Renewal

Automate the renewal process, for timely outreach and to maximize retention.

For example, as a contract nears expiration, the agent is prompted to send renewal reminders, discuss new terms, and handle objections, all tracked in the workflow.

Upsell

Identify and act on opportunities to expand customer value through additional products or services.

For example, during a renewal or check-in, the workflow suggests relevant upgrades or add-ons, and prompts the agent to present these offers to the customer.

Related topics

Configuring Customer Engagement Sequences

Create a customer engagement sequence

Drive personalized outreach by creating customer engagement sequences that automate timely, relevant interactions that are ideal for nurturing leads, onboarding clients, or re-engaging inactive customers.

Before you begin

Check whether features you need to access are supported by reviewing the table in Compatibility information for Customer Engagement Sequences.

Your instance must be integrated with platforms such as Amazon Connect.

Delegated developer roles should be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

You should be familiar with using Workflow Studio and Playbook Experience.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

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Note: If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

About this task

Important:

- Create sequences from the Sequences module in the CSM/FSM Configurable Workspace, not from Workflow Studio. If you create a playbook of the type Sequence directly in Workflow Studio, the required Setup, Configure sequence activities, and Tear Down stages are not added automatically.
- Setup and Tear Down are predefined stages in the Customer Engagement Sequences playbook. Do not remove these stages or add more activities in these stages. Avoid making any other changes to the Start Sequence and End Sequence activities.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Sequences** > **All Sequences**.
4. Select **Create New Sequence**.
5. On the Create new Sequence window, specify a name and optionally a description for your sequence.
6. Select **Create**.
   You're redirected to Workflow Studio and a playbook of the type sequence is created with the following predefined stages:
   - Setup
   - Configure sequence activities
   - Tear Down
7. Select a source table whose records will trigger the sequence.
   a. Select the Edit icon above the Start pill.
   b. Select a table from the **Parent table** drop-down list.
   For example, you might want the sequence to trigger when a record is created or updated in the Lead [sn_lead_mgmt_core_lead] table.
   c. Select **Save and close**.
   The Triggers icon is activated on the left sidebar.
8. Define trigger conditions that initiate a sequence.
   For more information, see Define trigger conditions.
9. **Optional:** Change the priority with which a sequence task is created by navigating to the **Automation** tab of the Start sequence activity properties under the Setup stage.
   When the trigger condition is met, this activity creates a sequence task with a state of Work in progress and a priority of Moderate by default.

   Note: Do not remove this stage or add more activities to this stage. Avoid making any other changes to the Start Sequence activity.

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10. In the sequence diagram, configure sequence steps in the Configure sequence activities stage.

    Use this stage to configure activities you want to make available to the sales representative as guided sequence steps during runtime. For more information, see Add and configure an activity in a playbook.

    You can add any number of activities to this stage in your sequence. For example, for telesales workflows, you might want to add a schedule call activity. For more information, see Add a schedule call activity to a telesales workflow sequence.

11. **Optional:** Add decision nodes to activate the next stage in the playbook based on the outcome of the previous stage.
    For more information, see Add decision nodes to a sequence.

12. Add a stage for the new branch you created and repeat the steps to add more activities as needed, including the schedule call activity as needed.
    For information about adding new stages, see Add and configure a stage in a playbook.

13. **Optional:** Update the sequence task record by selecting the **Customer Engagement Sequences** > **Update sequence task** activity from the activity picker.
    You can also use the Update sequence task activity to exit early from the sequence. For more information, see Add the Update sequence task activity to a sequence.

14. Review the configuration in the Tear Down stage.
    This predefined stage uses the Update sequence task activity to update the sequence task record when the sales representative completes all the sequence steps in their sequence task. By default, the system updates the state of the sequence task record as complete (indicated by State = 3) in the Customer Engagement Sequence Task [sn_crm_sequence_task] table.

    Note: Do not remove this stage or add more activities to this stage. Avoid making any other changes to the End Sequence activity.

15. Verify the sequence by selecting **Test**.

16. Publish the sequence by selecting **Activate**.

17. **Optional:** View the sequence in the CSM/FSM Workspace by selecting the List icon and navigating to **Sequences** > **All Sequences**.

What to do next

Assign runtime permissions while creating sequences.

Related topics

- Stages and activities
- Triggers
- Table extension and classes
- Enabling playbook restart

Define trigger conditions

Define trigger conditions that start a sequence by configuring simple triggers, or combining multiple triggers for initiating workflows from multiple record-based events.

Before you begin

Note: Multi-trigger capability is available only with Playbooks versions 28.1 and higher on the Zurich release. For more information, see Playbook release notes.

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Assign delegated developer roles to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

Note: If you're using Customer Engagement Sequences 1.0.0, then you need the playbook.admin or pd_author role to create sequences.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. On the left sidebar, select the Triggers icon .
6. Select an option that indicates when the playbook should run from the to**Add trigger** drop-down list.

   The available options are:

   - When record is created
   - When record is update
   - When record is created or updated
7. In the **Conditions** field, add conditions that must be met to trigger your playbook.

   Example
   To trigger the sequence when a new record is created in the Lead [sn_lead_mgmt_core_lead] table, you would set the condition **[State][is][New]**.
   For more information, see Condition builder .
8. Select **Save and close**.
9. **Optional:** To create a multi-trigger sequence, select **Add triggers** from the Triggers pane and repeat the steps of defining the trigger conditions.

   (Optional) When adding additional triggers, if you select a child table or any other table from the **Trigger table** field, then you must use the data pill picker to select the parent record.

   Tip: You can add up to 10 triggers.

Result

The triggers that you've created appear under the Record based triggers section on the Triggers pane.

Related topics

Triggers

Add and configure a trigger in a playbook

Add a schedule call activity to a telesales workflow sequence

Add a schedule call activity in your sequences to support telesales workflows.

Before you begin

Review feature support information in Compatibility information for Customer Engagement Sequences.

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To support the ability for your agents to initiate outbound calls from the sequence task, your instance must be integrated with platforms such as Amazon Connect. The Omnichannel Callback application (sn_omni_callback) must also be installed. For more information, see Install Omnichannel Callback.

Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

About this task

You can add the Schedule call activity with other activities in a stage or in its own stage.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. **Optional:** In the sequence diagram, create a stage to add the activity.
   For more information, see Add and configure a stage in a playbook.
6. Within a stage, select the Add icon.
7. Open the activity picker by selecting the Add an activity icon.
8. On the Add activity screen, search for and select **Customer Engagement Sequences** > **Schedule call**.

   Note: The options available in the activity picker vary by release. For compatibility information, see Compatibility information for Customer Engagement Sequences.

9. On the Details tab of the Schedule call properties pane, enter a name to appear on the Sequence Steps tab during runtime in the **Label** field.
   For example, you might enter `Call attempt 1`.
10. On the Automation tab, fill in the fields.
    For a description of the field values, see Automation form fields.
11. Select **Save and close**.

Related topics

Start with delay input properties

Add decision nodes to a sequence

Omnichannel Callback

Add decision nodes to a sequence

Activate the next stage in the playbook based on the outcome of the previous stage by adding decision nodes while creating or updating a sequence.

Before you begin

Note: Decision-based stages and the demo data are available only starting with Playbook version 28.3 on the Zurich release. The sample Lead nurturing tele-sales sequence available with the demo data shows how to configure a decision-based, telesales sequence with the schedule call activity.

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Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

Note: If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. In the sequence diagram, hover over the object that you want to insert a decision activity next to, and select the icon to add an activity.
6. Select the Add a decision icon.
   A decision is added with two branches and the Decision properties side panel opens for configuration.
7. Under the Details tab, enable the **Start with delay** option to add delay between the two call attempts.

   Example
   For example, if you want the agent accessing the workflow to wait two days before calling the prospective lead or customer again, you would set Duration type to **Explicit duration** and set **Days** to 2.
   For more information, see Start with delay input properties.
8. Under the Branches tab, expand New branch and enter a unique name for the branch in the **Branch label** field.
9. Select **Add Condition**.

   Example
   For example, to execute the branch when the outcome of the previous call attempt was unsuccessful, you would set the condition **[Schedule call > Output > State][is][Cancelled]**.
   For more information, see Decision activities.
10. Select **Save and close**.

What to do next

Add a stage for the new branch you created earlier, and repeat the steps to add more activities as needed. For more information, see Add and configure a stage in a playbook.

Related topics

Decision stages

Add the Update sequence task activity to a sequence

Dynamically update the sequence task records based on predefined configuration using the Update sequence task activity while designing customer engagement sequences.

Before you begin

The delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

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Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

Note: If you're using Customer Engagement Sequences 1.0.0, then you need the playbook.admin or pd_author role to create sequences.

About this task

Add the Update sequence task activity with other activities in a stage or in its own stage to update the sequence task record after the previous activity or stage has run. For example, the agent accessing the workflow could skip unnecessary call attempts when a lead is successfully contacted and move directly to the tear down stage after updating the record on the parent table. This example is demonstrated in the sample Lead nurturing tele-sales sequence available with the demo data.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. In the sequence diagram, create a stage to add the activity.
   For more information, see Add and configure a stage in a playbook.
6. Within the stage, select the Add icon.
7. Open the activity picker by selecting the Add an activity icon.
8. On the Add activity screen, search for and select **Customer Engagement Sequences** > **Update sequence task**.
9. On the **Details** tab, enter a name for the activity in the **Label** field.
10. On the **Automation** tab, use the data pill picker to establish a connection between the parent table and columns to the fields listed in the following table.

Automation tab form

Field	Description
Record	The record you want to update on the parent table. For example, to update the record on the Lead [sn_lead_mgmt_core_lead] table, you would select **Lead**.
Table	This field is automatically set to the name of the parent table.
Fields	Field in the parent table you want to update. For example, to mark a lead as contacted, you would select **Stage** from the Fields drop-down list and set its value to 200_contacted.

11. Select **Save and close**.

Assign runtime permissions while creating sequences

Use permission sets to control access to sequence records such as sequence tasks and steps.

Before you begin

Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

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Note: Runtime permissions are available only with at least Playbooks version 28.1 on the Zurich release. For more information, see Playbook release notes.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

Note: If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. On the Workflow Studio page, select **Properties** from the More actions menu icon.
6. On the Playbook properties window, select **Runtime permissions**.
7. Grant fine-grained access to sequence records by selecting a permission set from the **Add permission set** menu.
   The available permission sets are:
   - Users
   - User groups
   - User criteria
8. Use the data pill picker to establish a connection between a user, user group, or criteria with a column on the parent table.

   Example
   To allow agents to view only their own assigned sequence tasks for a sequence based on the Lead table, you would select Parent Record as Lead and then its **Owner** column. For instance, if user Max Blaze is overlooking a lead, only Max Blaze will be able to view the sequence steps and complete activities.
9. Confirm your selection and set the permission by selecting the Add permission set icon.
10. Grant the level of access by selecting View or Manage or both.
11. **Optional:** Add additional permission sets as needed.
12. Select **Save and close**.

Review sequences in Workflow Studio

Review sequences in Workflow Studio so you can suggest optimizations and share high-performing sequences across territories to promote best practices across the organization.

Before you begin

Role required: Sequence reader [sn_crm_sequence.reader]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.

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4. Select a sequence that you want to view.
5. On the Details page, select **Open steps**.
   You're redirected to Workflow Studio where you can view the sequence diagram.

View sequence tasks

View sequence tasks assigned to you from the CSM Configurable Workspace.

Before you begin
Role required: sequence viewer [sn_crm_sequence.viewer]

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. View your in-progress sequence tasks by selecting **My Active Sequence Tasks**.
   For more information, see My sequence task list view.
5. View the sequence steps for a record by selecting it.

What to do next
Engage with your prospective customers by following the activities in the sequence steps. For more information, see Complete predefined customer engagement tasks.

Complete predefined customer engagement tasks

Execute predefined sequence steps in your sequence tasks in the CSM Configurable Workspace to engage with your prospective customers.

Before you begin
Role required: Sequence executor [sn_crm_sequence.executor]

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. Select a sequence task record.
5. When the record opens, select the **Sequence Steps** tab.
   The navigation pane lists the activities or steps you need to complete. The activity details and actions are displayed in the work area.
6. **Optional:** View sequence steps in Workflow Studio.
   a. Go to the **Details** tab.
   b. Select the Open record icon ⓘ next to the **Sequence** field and select **Open record**.
      The associated sequence record opens in a new tab.
   c. View the sequence by selecting **Open steps**.
      You're redirected to Workflow Studio where you can view the sequence diagram, including stages and activities.

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7. After completing an activity, select an appropriate option to move to the next activity.
   The sequence is marked as Completed when you finish all activities in the sequence task.

Related topics

Fulfill a telesales sequence

Fulfill a telesales sequence

Connect with leads or customers using the click-to-call outbound calling capability in telesales flows.

Before you begin

Role required: Sequence executor [sn_crm_sequence.executor]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. Select a sequence task record.
5. In the record, select the **Sequence Steps** tab.
6. Review detailed call task information by selecting **Call task details**.
7. Select the Call icon next to the **Callback number** field to start an outbound call.

   Note: The Call icon does not appear on the **Callback number** field in Xanadu or in Yokohama if you created the schedule call activity using the Schedule call - Deprecated activity. For compatibility information, see Compatibility information for Customer Engagement Sequences.

8. Complete the activity by setting the following fields.

Field	Description
Reason	Call outcome. The available options are: ○ Resolved: The call task was successfully completed and the goal met. ○ Timeout: The task expired because it was not accepted or acted upon in the allowed time. ○ Max attempts exceeded: Multiple attempts to connect or complete the task failed, reaching the configured limit. ○ No show: The customer did not join the scheduled call. ○ Cancelled by agent: The assigned agent manually cancelled the task before completion. ○ Technical issue: Call task could not proceed due to a system or connectivity problem. ○ Other: The task ended for a reason not covered by the predefined categories.
State	Status of the call task. The available options are:

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Field	Description
	○ Open: The task has been created but work has not yet started. ○ Work in Progress: The task is actively being worked on. ○ Closed Complete: The task has finished successfully and all required actions are done. ○ Closed Abandoned: The task was closed without completion, usually due to irrelevance or inability to proceed. ○ Cancelled: The task terminated before completion.
Work notes	Optional field for capturing internal work notes.

9. Select **Save**.
10. On the Sequence Steps tab, select **Mark Complete** to indicate you have finished all activities in the sequence task.

Related topics

View sequence tasks

Using Buying Group

Sales teams can track decision-makers, influencers, and evaluators collectively, manage buying decisions that span multiple opportunities or product family, and retain stakeholder context beyond a single sales opportunity.

Related topics

Configuring Buying Group

Using Opportunity Management

Using Lead Management

Using Customer Engagement Sequences

View buying group engagement metrics

View a buying group engagement metrics to track how individual members and the group as a whole interact across marketing and sales activities, providing a consolidated view of participation, engagement levels, and buying readiness throughout the buying group lifecycle.

Before you begin

Role required: bg_admin; bg_writer

Note:

Engagement metrics are created automatically when Buying Group members are added. They update as members interact through marketing and sales activities and reflect current participation over time.

Procedure

1. Select the Buying Group record where you want to view buying group engagement metrics.
2. Navigate to **All** > **Buying Group** > **All Buying Groups**.
3. Go to **Buying Group Engagement Metrics** tab and view the listed metrics for each Buying Group member.

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4. On the form, view the fields:

Buying Group Engagement Metrics form

Fields	Description
Engagement Score	A system#generated score that reflects the level of engagement of the Buying Group member based on signals, events, and activities across marketing and sales interactions.
Contact Member	Identifies the Buying Group member (contact) to whom the engagement metrics apply. Metrics are tracked at the individual member level within the context of the Buying Group.
Last Engaged Date	The most recent date and time when the Buying Group member interacted through a tracked marketing or sales activity. This indicates how recently the individual participated.
Rating	A qualitative classification derived from engagement data that summarizes the member's overall engagement level within the Buying Group: ○ Cold: Indicates little to No recent engagement from the member or group. This suggests limited participation in marketing or sales interactions and may signal low awareness, low interest, or disengagement. ○ Warm: Indicates some engagement activity, but participation is inconsistent or limited. This suggests early or moderate involvement, with potential need for follow-up or role alignment. ○ Hot: Indicates strong and recent engagement. This suggests active participation in the buying process and alignment with the ongoing sales or evaluation motion. ○ Super hot: Indicates very high and sustained engagement. This suggests strong involvement, high responsiveness, and a likely influence on decision progress.

Using Opportunity Management

Use the Opportunity Management application to create your opportunity.

The Opportunity Management interface has tabs that help you create and manage your opportunities.

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Opportunity Management tabs

Opportunity Management tab	Description
Details	Add details of the opportunity such as account, sales cycle, and stage information.
Catalog	Use the product catalog to add line items to the opportunity.
Needs	Add more accurate information about your customer's business requirements to the opportunity.
Line Items	Add opportunity line items.
Competitors	Add competitors information to your opportunity.
Tasks	Create opportunity tasks.
Team	Create opportunity team members.
Contacts	Create opportunity associated contacts.
Emails	Create emails to send to the required stakeholders.
Quotes	Create quotes directly from the Opportunity.
Related Channel Partners	Add authorized service organizations or partner entities (for example, referral or influencer partners) linked to a customer opportunity. Related channel partners can be: • Authorized organization: Full permissions to access, view, edit, or modify opportunity details • Listed organization: Only for tracking purpose. No permissions to view, access, edit, or delete opportunity details

Related topics

- Using Lead Management
- Using Customer Engagement Sequences
- Using Buying Group
- Using Sales Forecasting
- Using Sales Territory Management
- Using Activity Management

Create an opportunity

Create a new product opportunity in the Opportunity Management application by entering the details, such as account, sales stage, sales cycle type, and deal size.

Before you begin

Role required: sales_agent

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. In the **Opportunity - All** list, select **New**.
   The **Create new opportunity** dialog box opens.
3. Use the following table to fill in the information.

Fields	Description
Short Description	Fill in a short description for the opportunity.
Estimated Deal Size	Amount of potential opportunity.
Account	Provide account information.
Consumer	Select a consumer.
Deal type	Indicates the type of deal associated with the opportunity: ○ Direct: The seller engages directly with the customer, with no intermediary partner in volved. ○ Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor.
Stage	Enter a stage of the opportunity. For example: Qualify, Develop, Propose, Negotiate, Closed-Won, or Closed- Lost.
Route to market	Identifies the exact sales channel used to exe cute the deal: ○ Direct ○ Reseller ○ Service Provider ○ Distributor
Sales Cycle Type	Enter the type of sales cycle during the cre ation of the opportunity. For example: NEW CUST, RENEW, or UPSELL.
Contact	Fill in the primary contact information associ ated with the opportunity.
Channel partner	An external organization involved in selling, influencing, or supporting an opportunity as part of an indirect sales.

4. Select **Save** to save the opportunity and **Close** to return to the main Opportunities window.
5. Select Refresh to see the new opportunity in the list.

What to do next

Start adding more information to your opportunity. To learn more, see Add and view the details of an opportunity.

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Add and view the details of an opportunity

Use the Details tab to add and view information about your opportunity, including the source and competitor.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select your opportunity.
3. Fill in the information on the Details tab.
   For more information, see Opportunity details form.
4. Select **Save**.

What to do next
Use the Product Catalog tab to add products to your opportunity.

Get product recommendations for opportunities using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales opportunities.

Before you begin
Role required: sales_agent

About this task
A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

Procedure

1. In the CSM Configurable Workspace, select the List view.
2. Navigate to **Opportunity** > **All** and select the opportunity that you want to work on.

   The product catalog displays in the Catalog tab of the opportunity.
3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.
   The needs template cards for the guide are displayed.
4. In the needs template card that best matches what your customer wants, select **Capture Needs**.
   The questionnaire for the selected template opens.
5. Answer the series of questions.
6. After replying to the last question, review or select the recommendations:
   - To review your responses, select the **Edit** icon. You can change your responses if needed.
   - To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.

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7. Choose a recommendation by selecting **Add** in the card for the product that best matches your customer needs.
   The selected product is added to the opportunity. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.

Add line items to an opportunity

Create a new product line item for your opportunity by entering the details, such as product offering and quantity.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select **New** to start a new opportunity line item or select an existing opportunity line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

Opportunity Line Item form

Fields	Descriptions
Number	The system-generated number of the opportunity line item.
Opportunity	The system-generated id of your opportunity.
Product Offering	The product offering that is selected for the opportunity line item.
Short Description	Brief description of the opportunity.
Unit of Measure	The measuring unit of the opportunity line item.
Quantity	The quantity of the opportunity line item.
Existing contract	Contract that is already active or in effect.
Parent Line Item	The primary line in a hierarchical structure of line items within an opportunity.
Channel partner	The name of the organization selling a product or service. You can change the channel partner. Each line items can have different channel partners.
Product Specification	Specifies how the product is presented, configured, and fulfilled within a product catalogue.

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Fields	Descriptions
Service location	Service location to which the opportunity line item applies.
Unit of Measure	A standard quantity used to express a value.
Periodicity	Periodicity is based on the pricing method selected for the product offering. ○ If the pricing method is selected 'One time', the periodicity is set to 'None'. ○ If the pricing method is selected 'Recurring', the periodicity can be set to 'Monthly' or 'Annually'.
Contract start date	Estimated date when the contract becomes effective.
Contract end date	Estimated date when the contract expires.

5. Fill in the fields in the Pricing form.

Pricing form

Fields	Descriptions
Price List	Default price list based on the opportunity created.
Unit Net Price	Price per unit after adjustments, if any. **Note:** The **Unit Net price** and **Unit List Price** fields have the same values if the opportunity isn't in sync with the quote.
One-Time Price	One-Time Price of the product offering included in the opportunity line item.
MRR	Monthly recurring revenue (MRR) amount.
Cumulative MRR	Cumulative monthly recurring revenue of the opportunity and any child lines. ○ If periodicity is monthly, Cumulative MRR = Unit Net Price * Quantity. ○ If periodicity is annual, Cumulative MRR = Unit Net Price/12 months * Quantity. Customer can change this formula in case of they customize their own values for periodicity. This field is populated only if the periodicity of the opportunity is recurring in nature.
Cumulative ACV	Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract.

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Fields	Descriptions
	Cumulative ACV = Cumulative One-Time Price + Cumulative ARR.
Renewal amount	Contract Renewal Amount for the Opportunity Line.
Unit List Price	Unit list price of the product offering included in the opportunity line item. **Note:** The **Unit Net price** and **Unit List Price** fields have the same values if the opportunity isn't in sync with the quote.
Term (months)	Subscription period of the opportunity line item. The default term is 12 months only for recurring products.
Cumulative One-Time Price	One-time price of the opportunity and opportunity child line items. Cumulative One-Time Price = Quantity * Unit Net Price.
ARR	Annual recurring revenue (ARR) amount.
Cumulative ARR	This field is populated only if the periodicity of the opportunity is recurring in nature. Cumulative ARR = Cumulative MRR * 12
Cumulative TCV	Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract. Cumulative TCV = Cumulative One-Time Price + Term * Cumulative MRR.
Upsell/downsell amount	Value representing upsell or downsell in comparison to the renewal amount for the opportunity line.

6. Enter any related notes in **Work Notes**.
7. Select **Save**.
   The Opportunity Line Item is added to the main opportunity.

What to do next

Add a task to your opportunity. To learn more, see Add opportunity tasks.

Managing allocations

Allocate and track sales credit across opportunity team members to recognize individual contributions, improve transparency, and support accurate revenue attribution.

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For clear visibility into who contributed to each sale, supporting collaboration, reporting, and forecasting:

- View allocations: View existing sales credit allocations for an opportunity.
- Add allocations: Add sales credit allocations to recognize individual or team contributions.
- Split allocations: Split sales credit across multiple team members for accurate revenue attribution.

View allocations for an opportunity

View allocation details and distributed amounts for an opportunity.

Before you begin

Role required: sn_opty_mgmt_core.opportunity_allocation_viewer

At least one allocation type must be active. If none are configured, contact your system administrator.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select the opportunity you want to view.
3. Select the **Allocations** tab to view all the allocations for this opportunity.

   The number in brackets displays the total count of active allocations. Each allocation group appears separately with its own set of rows for easy identification:

   - Revenue: Distributes the total opportunity amount across eligible participants for ownership, forecasting, and credit.
   - Overlay: Distributes product or line-level opportunity value for shared credit and forecasting.

   Note: You can customize active allocation types as needed.

   When no allocations are associated with this opportunity, the list appears empty.

Result

All allocations for the opportunity are displayed in a read-only list, grouped by allocation type.

Add or edit opportunity allocations

Use the allocations configurator to add new allocation rows, edit existing ones, or split an allocation across multiple contributors.

Before you begin

Role required: sn_opty_mgmt_core.opportunity_allocation_writer

About this task

The configurator displays active allocation types in the left pane. Each type shows its current row count, for example, Revenue (2). You can switch between types and make changes to any of them. All changes across all types are saved or discarded together when you select Save or Discard changes.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All**, open the opportunity record, and select the Allocations tab.

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3. Select **Manage Allocations**.
4. In the left pane, select an allocation type - for example, Revenue.
5. Select **Add allocation**.
   A new blank row is added at the bottom of the list. The Effective Date is pre-filled with the opportunity's estimated close date.
6. Fill in the row fields:
   - Team Member: Select the opportunity team member.
   - Territory: Select one among the active sales territory from the active territory model.

     Note: When a team member is selected, the territory list includes only territories in which the member is an active territory member.

   - Product Offering Family: High-level product grouped under which the product offering belongs to. Shows the product offering family for products added to opportunity lines.
   - Allocation Percentage: Allocation percentage assigned to the team member for their allocation.
   - Allocation Amount: Monetary value of the allocation.
   - Effective Date: Date on which the allocation becomes effective for crediting. Used for sales forecasting.
   - Reason: Additional notes.

   Note:
   - The percentage and amount fields are interdependent; a change to either value triggers automatic recalculation of the other.
   - If the Require full allocation property is enabled, the combined percentages for the allocation type must total 100% before saving.
   - When a type is associated with multiple dimensions, all dimensions are mandatory fields in the configurator.

7. Select any cell in a row to edit and update its value.
8. Select **Save** to commit all changes across all allocation types.

   Note: **Save** and **Discard changes** are only enabled when there are unsaved changes. If you navigate away with unsaved changes, you are prompted to save, discard, or continue editing.

   The allocation rows are saved. The Allocations tab count updates to reflect the new total.
9. Select **Delete allocation** to delete the allocation.

Split opportunity allocation

Split an allocation row to divide its credit between two contributors while keeping, for example, the same product family and effective date.

Before you begin

Role required: sn_opty_mgmt_core.opportunity_allocation_writer

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All**, open the opportunity record, and select the **Allocations** tab.
3. Select **Manage Allocations**.
4. Select the allocation type that contains the row you want to split.
5. Select **Split allocation** icon on that row.
   A new row is inserted immediately below the original. The grouping/dimensions related fields are copied from the original row. All other fields are blank.
6. Update the Percentage (or Amount) on both the original row and the new row so that together they reflect the intended split — for example, 70% and 30%.

   Note: If the Require full allocation property is enabled, the combined percentages for the allocation type must total 100% before saving.

7. Fill in the row fields:
   - Team Member: Select the opportunity team member.
   - Territory: Select one among the active sales territory from the active territory model.

     Note: When a team member is selected, the territory list includes only territories in which the member is an active territory member.

   - Allocation Percentage: Allocation percentage assigned to the team member for their allocation.
   - Allocation Amount: Monetary value of the allocation.
   - Reason: Additional notes.
8. Select **Save**.

   Note: Users with the Account Executive role in Sales Territory Membership or Opportunity Team Member have create, split, and update access to Revenue-based allocations. Overlay allocations are read-only for these users.

   The allocation is split into two rows. Both rows are saved and displayed in the Allocations tab under the relevant allocation type.

Add competitors to an opportunity

Capture competitor details for your opportunity so that you can have winning sales conversations with your customer.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Competitors** tab.
3. Select **New** to start a new opportunity competitor or select an existing opportunity competitor to make changes.

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4. Fill in the fields in the Opportunity Competitor form.

Opportunity Competitor form

Fields	Descriptions
Opportunity Competitor	
Opportunity	The opportunity number starting with the prefix OPTY.
Competitor Source	Indicates where the competitor presence originates from in the context of an opportunity and associated product offering. Allowed values: ○ Existing: When the competitor represents a currently deployed or incumbent solution at the customer. ○ Other: When the competitor is not currently deployed at the customer.
Product Offering	The commercial product selected or evaluated on the opportunity.
Company	Competitor or incumbent company name.
Product Offering Family	Higher-level grouping or BU/family used for forecasting and analysis.
Incumbent	Selected if the vendor or solution is currently deployed at the customer and is being replaced, competed with, or evaluated against for this product offering.
Notes	
Strengths	Strengths of the competitor.
Weaknesses	Weaknesses of the competitor.
Work Notes	Internal-only notes for product, sales, or design follow-up.

5. Select **Save**.
   The competitor information is added to the main opportunity.

Add opportunity tasks

Create opportunity tasks to capture additional details of your customer's requirements.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. Select the opportunity you want to work with and select the **Tasks** tab.
3. Select **New** to start a new opportunity task or select an existing opportunity task to make changes.

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4. On the Opportunity Task form, fill in the fields.
   For more information, see Create new opportunity task form.
5. Select **Save**.
   The Opportunity task is added to the main opportunity.

What to do next
You can create appointments in your opportunity tasks. To learn more, see Create an appointment from Opportunity Management.

Related topics
Create a related task from a touchpoint

Create an appointment from Opportunity Management
Create appointments with the required stakeholders to move the business discussion forward for your opportunity.

Before you begin
Role required: sales_manager

About this task
You can create appointments only after creating an opportunity task. To create an opportunity task, see Add opportunity tasks.

Procedure
1. Navigate to **List** view and select **Opportunity Tasks**.
2. Select the opportunity task you want to work with and select the **Appointments** tab.
3. Select **New** to start a new appointment or select an existing appointment to make changes.
4. On the Create New Appointment form, fill in the fields.
   For more information, see Create new appointment form.
5. Select **Save**.
   The appointment is added to your opportunity task.

Related topics
Schedule an appointment from a touchpoint

Add a new opportunity team member
Create an opportunity team member for a structured collaboration among multiple users.

Before you begin
Role required: opportunity_writer

Note: Users who aren't assigned the sales_agents or sales_managers roles, might require access to specific opportunities when they're added to an opportunity team. Such users must be assigned the sales_restricted_agent role. The opportunity role assigned to the user then determines the scope and level of access granted for the associated opportunity.

Procedure
1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Team** tab.

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3. Select **New** to add a new opportunity team member or select an existing opportunity team member to make changes.
4. Fill in the fields in the Opportunity Team Member form.

Opportunity Team Member form

Fields	Descriptions
Opportunity	The opportunity number.
Member	Name of the member.
Opportunity Role	Role of the team member. Following member roles (Related party types) and responsibility are shipped by default: ○ Account Executive ○ Solution Sales Executive ○ Price Band Approver However, more roles can be configured. Depending on the responsibility, access to the opportunity is provided to the opportunity team members. For more information, see Create related party configurations.
Primary	Identify one primary member for a given role.
Notes	Enter work notes for reference.

5. Select **Save**.
   The Opportunity Team Member information is added to the main opportunity.

Add an opportunity associated contact

Create opportunity for associated contacts to identify each contact's role when multiple stakeholders are involved.

Before you begin

Role required: opportunity_writer

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Contacts** tab.
3. Select **New** to associate a contact from Account hierarchy or select an existing contact to make changes.

Note:

Applicable only for Account-based opportunities and not consumer-based opportunities.

4. Fill in the fields in the Opportunity Associated Contact form.

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Opportunity Associated Contact form

Fields	Descriptions
Opportunity	The opportunity number.
Contact	Name of the customer contact.
Opportunity Role	Role assigned to an opportunity associated contact. Following contact roles (Related party types) are shipped by default: ○ Business user ○ Decision maker ○ Economic buyer ○ Evaluator ○ Executive sponsor ○ Influence However, more roles can be configured.
Account	Account of the contact.
Primary	Primary opportunity role.
Notes	Enter work notes for reference.

5. Select **Save**.
   The Opportunity Associated Contact information is added to the main opportunity.

Compose emails

Create an email to communicate to your customer the product information that meets their business requirements or the product demo as required by your customer.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Emails** tab.
3. Select **Compose Email** button from the top right corner to start a new email or select an existing email to make changes.
4. Fill in the fields in the Email Draft form.

Opportunity Email Draft form

Fields	Descriptions
From	Email id of the sender.
To	Email id of the receiver.
Subject	Subject of your email.

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Fields	Descriptions
Email message	Body details of your email.

Note: You can create your own email templates and use the pre-filled email templates while creating a new email. To attach any files with your email, select **Attach File**.

5. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

View an existing opportunity

View an existing opportunity to make changes, such as updating its status or additional details.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
   - All- shows all the opportunities in the instance.
   - Opportunity Tasks- shows your opportunity tasks.
2. Select the opportunity that you're working with.
3. Make updates to the opportunity as needed.
4. Select **Save**.

Track opportunities using Kanban view

Personalize and manage the opportunities information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin
Role required: sales_agent

About this task
A Kanban view is a visual representation of the data that enables you to drag and drop the data records according to the business flow. The Kanban view feature in Opportunity Management provides the following benefits:

- Viewing the opportunities of all stages and filtering them on the basis of sales cycle types.
- Updating the state of an opportunity by navigating them in between different stages.
- Viewing the auto-calculated rollup amount (in the base currency) on the sub-header for all opportunities in Kanban lane.

The Kanban view as part of Opportunity Management in Sales Customer Relationship Management.

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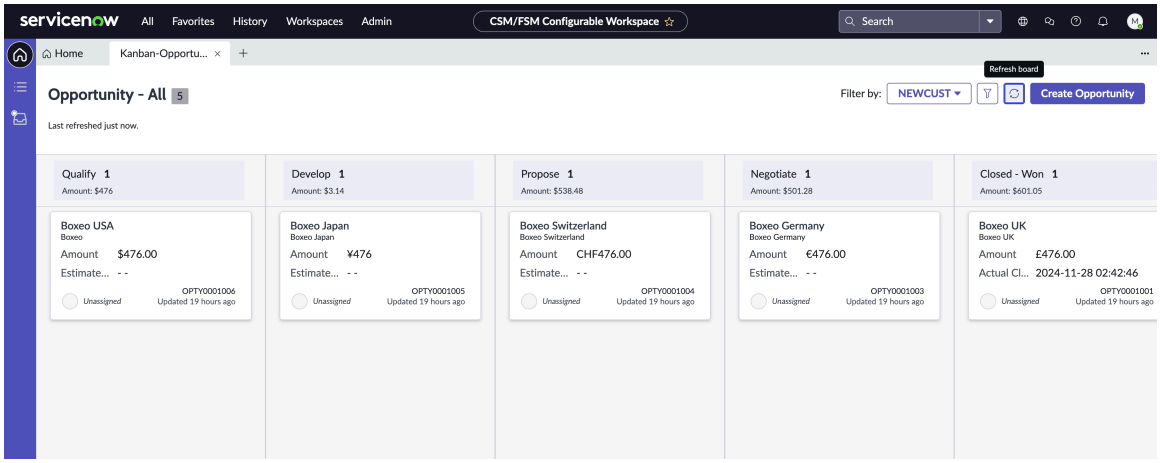

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **View Kanban** button.
   - To change an opportunity state, drag the opportunity card from one state and drop it into another state.
   - To view the opportunities of different sales type, use the Filter by option on the page.
   - To create a new opportunity directly from this page, select the **Create Opportunity** button. To learn more, see Create an opportunity.

Export opportunities

You can export an opportunity as a JSON file in Opportunity Management and provide it to a customer. The export opportunity feature in Opportunity Management exports a list of all opportunities.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **Export** button.
3. Select the **File Type**:
   - Excel
   - CVS
   - JSON
   - PDF
4. Select the **Delivery Type**:
   - Email - Enter a valid email address.
   - Download - Downloads the export to a local drive.

   The list of opportunities is exported according to the parameters set.

Create a quote from an opportunity

Create a quote directly from an opportunity as a sales agent or with integrated roles.

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Before you begin
Ensure that you have captured and provided all the information for your opportunity, such as opportunity details, line items, competitors information and other details.

Role required: sales_agent

Procedure
1. Navigate to the **Workspaces** > **CSM/FSM Configurable Workspace**.
2. From the **List** view, select **Opportunity - All**.
3. Select the desired opportunity.
4. Select **Create Quote** to create a new quote from the selected opportunity.
   If users with integrated roles create quotes then the channel partners and the related channel partners are copied to the newly created quotes. All the created quotes can be viewed on the **Quotes** tab. For details about integrated roles, see Integration with Sales Customer Relationship Management.

Create a quote from an opportunity line item

Create a quote from the selected line items in an opportunity record.

Before you begin
Role required: sales_agent

Procedure
1. Navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more line items and select **Create new quote** to create a quote from the selected line items.
   A dialogue box appears that indicates the creation of new quote. Select the new quote record to view it. Or you can also navigate to the Quotes tab to view the new quote record.

What to do next
To learn more about using the Quote Management workspace, see Using Quote Management.

Sync quote and opportunity

Sync quote information from the quote record to an opportunity record. This keeps the quote data consistent and accurate across both the records and enables sales agents to track revenue from opportunities accurately.

Establish a sync between quote and opportunity

As a sales agent, you can establish the sync between quote and opportunity records and ensure that a defined set of fields between opportunity-quote and opportunity line items-quote line items remain synchronized.

When a quote is created through an opportunity, the **Source Opportunity** field on the quote record is automatically populated with the details of the opportunity through which the quote is created. To create a quote through an opportunity, see Create a quote.

When a quote is created with child line items, the revenue metrics and prices for the quote are automatically calculated. To learn more about the revenue metrics and how they're calculated, see Subscription revenue metrics.

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When the quote record is synchronized with the opportunity record, the prices and revenue metrics are also synced and are consistent across both forms.

The **Synced** banner on the **Details** tab on the opportunity record displays whether the quote is in sync with its opportunity. To automatically sync the first quote with its source opportunity, set the autoEnableSyncFirstQuote system property to **true**.

To learn more about establishing a sync between quote and opportunity and automatically enable sync, see Sync a quote with an opportunity.

You can create a new version of a quote from a quote record to establish a sync between the new revised quote with the initial opportunity.

Note: The new version of the quote is in sync with the opportunity only if the previous version was also in sync.

View the new quote revisions from the **Revisions** tab on the quote record.

On the quote record, mark the **State** as **Accepted** or **Completed** to move the synced opportunity to **Closed-won**.

Map quote and opportunity header fields and line items

As a sales agent, you can only edit and make changes on the fields on an opportunity record that aren't in sync with a quote.

The following is a list of default field mappings between opportunity line items with quote line items and opportunity header with quote header fields. To learn more about the fields and their descriptions, see Subscription revenue metrics.

Default synced fields between opportunity header and quote header

Opportunity header	Quote header
Term (months)	Term (months)
Total one-time price	Total one-time price
Total MRR	Total Monthly Recurring price
Total ARR	Total Annual Recurring price
Amount	Total Amount
Primary Quote	Quote id ref
Currency	Currency
Price list	Price list

Default synced fields between opportunity line-item and quote line-item fields

Opportunity Line items	Quote Line items
Term (months)	Term (months)
Cumulative one-time price	Cumulative one-time price
Cumulative MRR	Cumulative Monthly Recurring price
Cumulative ARR	Cumulative Annual Recurring price

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Default synced fields between opportunity line-item and quote line-item fields (continued)

Opportunity Line items	Quote Line items
Cumulative TCV	Cumulative Net price
Product offering	Product Offering
Price list	Price list
Unit of measure	Unit of measure
Unit list price	Unit list price
Quantity	Quantity
Periodicity	Periodicity
Unit net price	Unit net price

Note: When an opportunity and quote header, and an opportunity line item and quote line item are in sync with each other, the addition and deletion of line items on the opportunity record is disabled. All the synced fields on the opportunity and opportunity line item record becomes read only.

Collaborate with stakeholders by using the sidebar

Initiate a discussion with internal and external stakeholders, such as sales agents, solution consultants, and subject matter experts using sidebar integration with Microsoft Teams.

Before you begin

Role required: sales_agent or sales_manager

Before using the sidebar integration, you must first complete configuring the sidebar integration with your opportunity. To learn more, see Configuring Sidebar.

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with.
3. Select **Discuss** on the opportunity header.
4. On the form, fill in the fields.

Field	Description
Record number	Number of the opportunity record.
Subject	Description about the opportunity.
Add participants	Name of the other users that you want to add to the opportunity discussion.
Include a brief message for participants	Additional information that you want to add for your users.

5. Select **Start discussion**.
   A Microsoft Teams chat is created for your collaboration.

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What to do next
Make your collaboration more effective by sharing emojis, messages, and attachments.

Location-based transactions for Opportunity Management

Agents can create opportunities and support product configurations and services for different locations.

Agents can use the location filter in the product catalog to select a particular customer location. The catalog only displays the products associated with that location. This enables the agents to add appropriate product lines to an opportunity. Agents can also copy products and services from one location to the other within a single transaction. This eliminates the need to create multiple opportunity line items for each location. To learn more about copying locations, see Copy opportunity line items to a location.

Using location-based transactions

To use the location filter in Opportunity Management, complete the following steps.

Note: As an agent, you can use the location feature if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin.

Using location-based transactions

Step	Description	Role
Use location filter to add opportunity line items	Use the **Service location** filter in the **Catalog** tab to add opportunity line items to a location.	Agent
Copy opportunity line items to a location	Copy existing line items to another location in the opportunity based on the eligibility rules set up by your product catalog admin The copy line items modal is displayed when selecting **Copy** on the line items related list. If the system property is false, all the line items are copied.	Agent

Use location filter to add opportunity line items

Use the **Service location** filter in the product catalog to add products (line items) to a location.

Before you begin
Role required: sales_agent

About this task
You can add opportunity lines by location if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin for location-based transactions.

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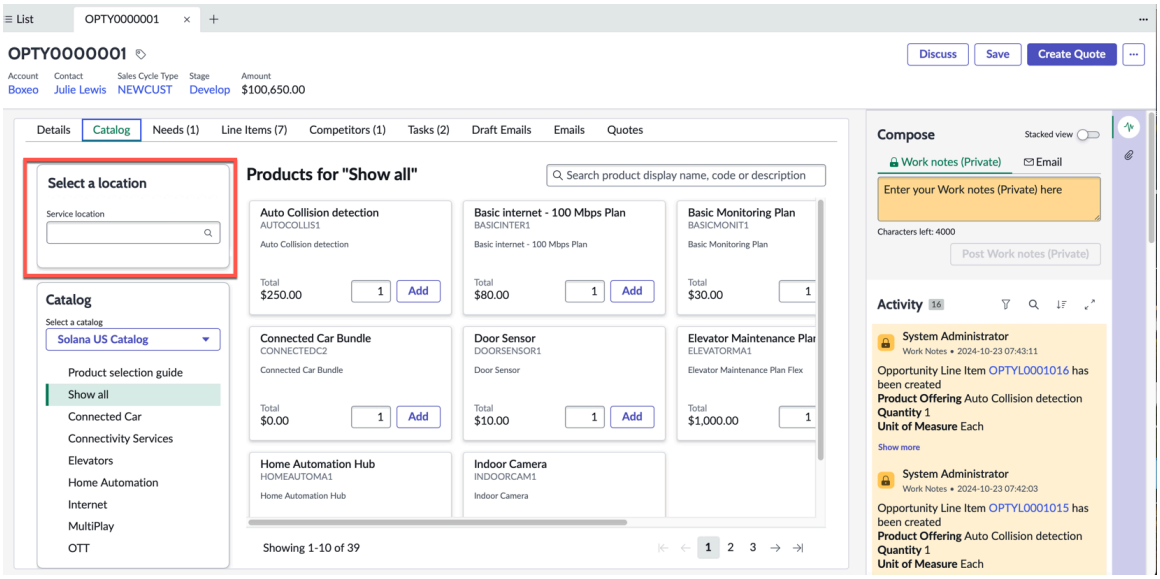
Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and navigate to the **Catalog** tab.
3. In the **Select a location** filter, pick a location to which you want to add the line items.
   After you select a location, only the opportunity line items that are eligible for the selected location are displayed.



4. Select **Add** to create an opportunity line item.
5. Navigate to the **Line Items** tab to view the details of the newly added opportunity line item.

Copy opportunity line items to a location

Duplicate existing line items to another location using **Copy** on the Line items tab.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more opportunity line items that you want to copy to another location.
4. Select **Copy**.
5. In the **Copy line items** dialog box, choose one of the options.

Option	Description
Keep original location	New line items for the selected opportuni ty are created and the source location is re tained.
Choose new location	This copies the line items to a new location.

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Option	Description
	In the **Service location** filter, select the new location that you want the line items to be copied to.

Note: Select the **Continue to copy only eligible lines for this location (exclude ineligible)** option in the **Copy line items** dialog box.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If this option isn't selected, no opportunity line items are copied.

6. Select **Copy**.

Using Sales Forecasting

Sales Forecasting uses the current opportunities in the system to predict future opportunity amounts. The Opportunity Management application contains the list of opportunities created for the customers and each of these opportunities are in different stages of the sales cycles.

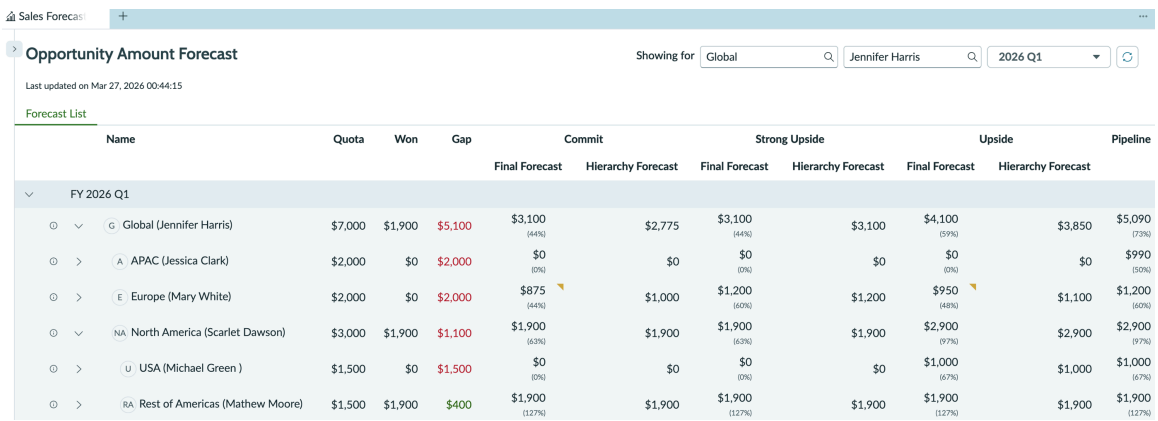
Once an opportunity is created, the Forecast Category field displays Pipeline by default. The sales agent working on that opportunity updates this field once the sales process starts. When the agents update the forecast category, the dashboard keeps displaying the latest data. The forecast scheduler keeps updating the data on the Sales Forecast dashboard. After the users, groups and opportunity data are added, along with selection of category, select Update Forecast on the Sales Forecast dashboard to view the latest forecast information.

Viewing the Sales Forecast dashboard

You can view the Sales Forecast dashboard to see the current sales status and targets achieved for your teams. Only Forecast Admin, Forecast Analyst, and the owner of the highest group can see the data and sales forecast for all the groups and the team. Other personas such as agents and managers can only view the sales forecast and related information for their own hierarchy or territory below them.

Using the Sales Forecast dashboard

To access the Sales Forecast dashboard, navigate to **CSM/FSM Configurable Workspace** and select the **Sales Forecast** view. Select the refresh icon to see the latest sales forecast data. Select **Update Forecast** on the dashboard to fetch the data to generate the latest forecast information. The Active Forecasts list on the side panel displays the forecast models configured for your Sales Forecasting dashboard. Select the forecast model that you want to view. You can view forecasts with one hierarchy or two hierarchies.



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Select the options from these three filters to view the data for your group or manager for a selected time-period.

- Group: Select the group for which you want to view the forecast, the manager of the group is automatically updated in the third filter.
- Manager: Select the manager to see the field.
- Period: Select the period (quarter) for which you want to view the forecast.

For the above screenshot, the forecast data is being shown for the Global region. The owner of the forecast is Jennifer Harris. The forecast period selected is FY 2026 Q1. Global has a total quota of $7,000 assigned to it. Gap is the difference between the Quota and Won sales. For Global, the gap is $5,100, meaning they must achieve an additional $5,100 to meet the quota. As the owner of this group, Jennifer Harris can track the quota achieved for each team and specific agent if required.

Commit, Strong Upside, Upside, and Pipeline represent different stages of certainty in the sales pipeline, helping to estimate the likelihood of achieving the overall target. As a manager, you can expand and see the total amount of opportunity in each stage for your team and agents. You can see the roll-up amount for all the agents under that manager. Each category displays two values under Final Forecast and Hierarchy Forecast. Hierarchy Forecast displays the amount generated by the total opportunities in the system. Final Forecast displays the adjusted value of the forecast that is manually done by the manager or sales agent. Agents can adjust the value of the forecast in any category based on their judgment and predictions for a more accurate forecast.

The Rest of American group with the owner as Mathew Moore in FY 2026 Q1 displays that the team's quota has been set at $1,500. The agent working under the owner is Charlotte Turner who has already closed (Won column) $1,900 in sales. You can select the "i" icon for an agent and view all the opportunities for that agent and the total value in each forecast category.

Under Active Forecasts, you can view other forecast models that have a primary and a secondary hierarchy, such as territory and product family or sales team and product family. This dashboard enables forecast owners to view and manage forecasts drill down by two dimensions, for example, territory hierarchy and product family for a given period. Users can filter the forecast by territory, product family, the forecast owner, and the period. The **Update Forecast** button triggers a manual recalculation of rollup values. Each row represents a territory–product family pairing, such as Global – Workflows. The expand/collapse icons can be drilled into to reveal further sub-territories. Sales managers can review their committed forecast hierarchy numbers at each level and override values where their judgment differs at their hierarchy level. For more info, see Submitting a forecast. The product family dimension lets them see which product lines are driving or lagging behind their overall target numbers. If you select the **Base** option on the Forecast model, a forecast record is created for each forecast source. For more info, see Configure Forecast Model. These forecast records are visible on the dashboard below the sales agents to whom they are assigned. Sales agents can review and adjusts the value of the forecast records assigned to them.

As a sales agent, you can view the status of each opportunity that you own. As the sale progresses, you can update the Forecast Category field of the opportunity and the new data is updated on the dashboard. You can adjust a forecast value and the adjustment propagates up both the primary (territory) hierarchy and the secondary (product family) hierarchy, so all related rollup records reflect the change automatically. You can view the total amount in each sales stage and track the status of the quota target assigned to you. Select **Submit Forecast** to view the Submission Entry tab.

Note: Submit Forecast is available only if you select **Submission Required** in the Forecast model. For more info, Sales Forecasting terminology.

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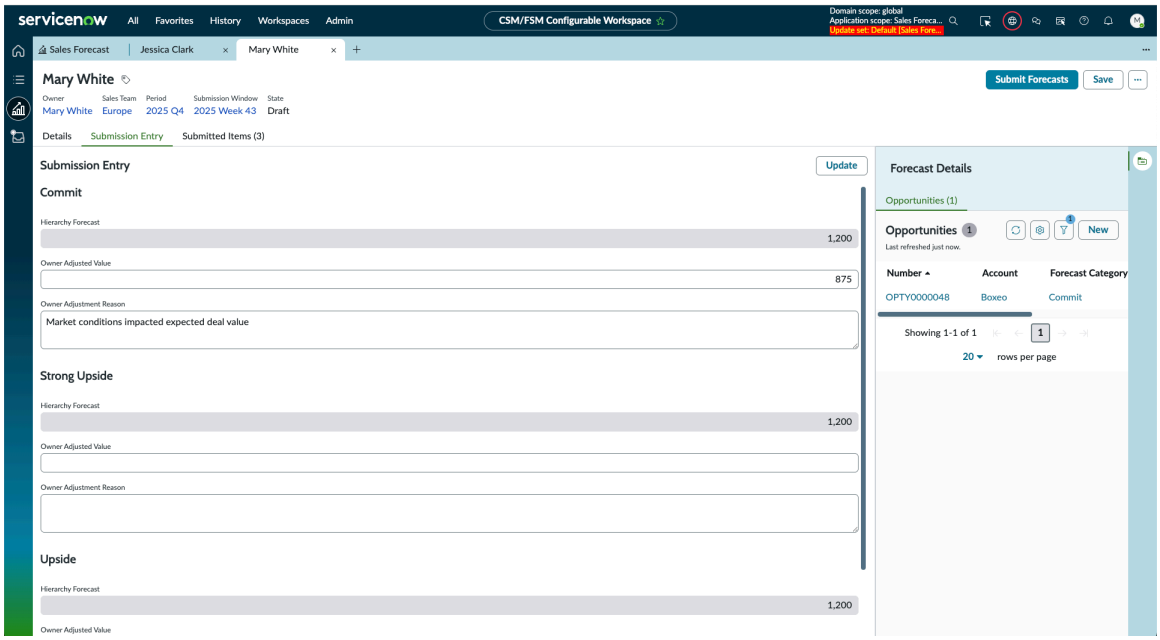

The Submission Entry tab displays the cumulative value of all the opportunities for each category for that agent. The agent can adjust the value of the forecast for any category depending on the latest insights. For any of the categories, enter the adjusted value of the forecast in **Owner Adjusted Value** field. Enter a reason for the adjusted forecast value in the **Owner Adjustment Reason** field. Select **Update** to save the adjusted forecast values. Select **Submit Forecast** to finalize the forecast values. After submitting these forecast values, they cannot be changed.

Create forecast adjustment

Modify system-generated forecast values based on your judgment and prediction. Sales agents can adjust their individual forecasts and managers can modify team forecasts to align with overall targets. Sales managers can override team-level adjustments and the system automatically recalculates the roll-ups to reflect the updated forecast values.

Before you begin

Role required: sn_sales_forecast.adjustment_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **My lists > Sales Forecast > Forecast**.
4. Select the forecast header record to view your forecast items.
5. Select **Forecast Items** on the Details tab to view all the forecast items.
6. Select the forecast item that you want to adjust.
   The Details tab for that forecast item is displayed.
7. Select the **Forecast Adjustment** tab.
8. In the **Adjusted Value** field, enter the new forecast value that is different from Hierarchy Forecast value.
9. Enter a description for the adjusted value in the **Reason** field.
10. Select **Save**.
    On your forecast item, the Owner Adjustment field displays the adjusted forecast value and the Hierarchy Forecast value displays the original forecast value.

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Submitting a forecast

Sales agents and managers can finalize and submit forecasts in defined periods to ensure accurate projections. Agents can adjust forecast values, lock them, and submit in the specified time frame.

Before you begin

Role required: sn_sales_forecast.submission_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **My lists > Sales Forecast > My Forecast Submissions**.
4. Select **New**.
   The Create New Submitted Forecast page is displayed.
5. From the **Forecast** list, select the forecast record that you want to submit.
6. Check the values in the following fields that are automatically populated:
   - Owner
   - Sales Team
   - Period
   - Currency
   - State
7. From the **Submission Window** list, select the time period for which you want to submit the forecast.
8. Select **Save**.
   The Submission Entry page for that forecast is displayed.
9. Select **Submit Forecast** to submit your forecast.
   The forecast has been submitted. The forecast values have been locked and cannot be changed.

Using Sales Territory Management

Sales Territory Management is a strategic framework for organizing and managing CRM entities such as Accounts, Consumers, Leads, and Opportunities. To assign territories, you can run **Run Assignment** to automatically distribute CRM entities, or manually update the primary territory.

Related topics

Configuring Sales Territory Management

Components installed with Sales Territory Management

Assigning a territory on account

You can update the primary territory on an account in which Sales Territory Management has been implemented.

Before you begin

Role required: sales territory admin (or a user with sales territory override role)

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Customer** > **Accounts** and select the account you want to update the territory.
3. On the Details tab, update the **Sales Ownership** > **Primary Sales Territory** field with the other available territories.
4. Select **Save**.

Assigning a territory on opportunity

You can update the primary territory on opportunity in which Sales Territory Management has been implemented.

Before you begin

Role required: sales territory admin (or a user with sales territory override role)

Note: If an account is set with a territory, any Opportunity created from that account will inherit the territory as well. User with sales territory override role can override it.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select the opportunity you want to update the territory.
3. On the Details tab, update the **Territory** field with the other available territories.
4. Select **Save**.

Assigning a territory on lead

You can update the primary territory on a lead in which Sales Territory Management has been implemented.

Before you begin

Role required: sales territory admin (or a user with sales territory override role)

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead you want to update the territory.
3. On the Details tab, update the **Territory** field with the other available territories.
4. Select **Save**.

Assign a territory on consumer

You can update the primary territory on a consumer in which Sales Territory Management has been implemented.

Before you begin

Role required: sales territory admin (or a user with sales territory override role)

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Customer** > **Consumers** and select the consumer you want to update the territory.

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3. On the Details tab, update the **Sales Ownership** > **Primary Sales Territory** field with the other available territories.
4. Select **Save**.

Using Activity Management

Activity Management enables you to log and track every customer interaction across the sales cycle. Touchpoints provide a method to record meetings, calls, appointments, and emails. You can use the Microsoft Outlook add-in to associate emails and create CRM records without leaving your inbox.

Build a complete interaction history

Every team member can inherit full context as a deal progresses. Log calls and emails as touchpoints from the first prospect interaction, and capture structured details such as agenda, stakeholders, discussion notes, and outcomes as the deal advances. Account executives, solution consultants, and customer success managers can view the complete engagement timeline before picking up where the previous team member left off.

Coordinate stakeholders and keep deals on track

Teams can align on next steps and maintain a clear engagement timeline without relying on disconnected calendars or email threads. Schedule meetings and appointments directly from touchpoint records to bring the right stakeholders together. Create tasks linked to a CRM entity at any point in the deal to assign and track action items such as sending a proposal, following up on a demo, or completing a legal review.

Document outcomes for post-sale handoffs

Post-sale teams can start onboarding with full engagement context rather than piecing together what was agreed. When a deal closes, capture the outcome directly in the touchpoint record to document what was discussed and decided, providing a complete engagement history for customer success and service handoffs.

Capture email interactions without leaving Outlook

CRM data stays current without requiring agents to switch between applications. If your team works in Microsoft Outlook, use the ServiceNow CRM for Outlook add-in to associate inbound emails and create new leads and contacts directly from your inbox.

Create a CRM touchpoint

Create a CRM touchpoint to log and track customer interactions across the sales cycle. Link touchpoints to accounts, contacts, and associated records to maintain a complete interaction history and support timely follow-ups.

Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Select **New**.

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5. On the Create New CRM Touchpoint form, fill in the fields.
   For a description of the field values, see Create new CRM touchpoint form.
6. Select **Save**.

What to do next

After creating a CRM touchpoint, you can plan and track the following pre-engagement activities from the touchpoint record:

- Schedule a meeting with the customer or internal stakeholders to align on discovery goals or next steps. For more information, see Schedule a meeting from a touchpoint.
- Schedule a call to follow up on commitments made during a previous interaction or to prepare for upcoming customer engagement. For more information, see Schedule a call from a touchpoint.
- Compose and send an email to share information, confirm meeting details, or follow up after a call. For more information, see Send an email from a touchpoint.
- Create a related task to capture preparation work such as researching customer background, identifying stakeholders, or tracking commitments before closing the touchpoint. For more information, see Create a related task from a touchpoint.

Schedule a meeting from a touchpoint

Schedule meetings with leads, opportunities, and accounts directly from the touchpoint record. Align internal and external stakeholders, avoid scheduling conflicts, and build a timeline view of customer interactions for risk analysis and planning future actions.

Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer, sn_meeting_mgmt.meeting_creator

About this task

Schedule meetings directly from a touchpoint record to coordinate customer-facing and internal engagements without switching tools. Meetings are linked to the originating touchpoint, preserving the full context of the customer interaction and making the scheduled engagement visible to everyone on the account team. After the meeting, share a summary with the customer as an email and capture post-meeting observations and follow-up actions using internal notes. Use this when you need to align stakeholders, conduct discovery sessions, or plan recurring check-ins as part of a structured customer engagement.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
   To view your touchpoints, select **My Touchpoints**.
4. Open a touchpoint record that you want to work with.
5. Navigate to the **Meetings** tab.
6. Select **New**.
7. On the Create New Meeting form, fill in the fields.
   For a description of the field values, see Create new meeting form.
8. **Optional:** Add attachments to your meeting.
   - Drag a file on to the Attachments pane.
   - Select **Select file** to browse and attach a file.

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The maximum file size that you can upload is 1024 MB.

9. Select **Save**.

Result

The meeting is scheduled and an invite with the agenda is sent to all invitees. You can view saved meetings from the touchpoint's Meetings tab.

Schedule a call from a touchpoint

Plan and track customer calls to organize and manage follow-ups and outreach and maintain a complete interaction history.

Before you begin

The Omnichannel Callback for Customer Service Management (com.sn_omnichannel_callback) application must be installed to enable the click-to-call feature so agents can call customers from the touchpoint record. For more information, see Install Omnichannel Callback for Customer Service Management.

Role required: sn_crm_touchpoint.touchpoint_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record.
5. Navigate to the **Scheduled calls** tab.
6. Select **New**.
7. On the Create New Callback form, fill in the fields.
   For a description of the field values, see Create new callback form.
8. Select **Save**.

Result

The call is scheduled and can be tracked from the touchpoint's **Scheduled calls** tab.

Send an email from a touchpoint

Send emails to customers and stakeholders directly from a touchpoint record without having to leave the workspace. Emails are stored in the CRM system so other agents, managers, and customer success managers have full context about interactions with the customer or account.

Before you begin

The User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) must be installed on your ServiceNow instance to enable agents to send emails from the touchpoint record. For setup instructions, see Personal corporate mailbox.

Role required: sn_crm_touchpoint.touchpoint_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Touchpoints** > **All Touchpoints**.

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4. Open the touchpoint record you want to work with.
5. Select **Compose Email**.
6. Draft the email message in the New Email Draft form.
   a. In the **To** field, enter the recipient's email address.
   b. In the **CC** or **BCC** fields, enter the name of recipients.
   c. Review the text in the **Subject** field and change it if necessary.
   d. Either compose an original email in the body field or use a template if templates are available.
      - If templates are available and you want to use a template, select a template from the Email templates pane.
      - Compose an original email in the text field.

        Toolbar options are available to format the text.
   e. **Optional:** Add attachments to your email by selecting the Attach file icon and selecting the file.
7. Either save the email as a draft or send it right away.
   - To save the email as a draft to send later, close the form.

     The draft is automatically saved and accessible from the **Draft Emails** tab.
   - To send the email right away, select **Send email**.

     The email is sent to the recipients and can be viewed from the touchpoint's **Emails** tab.

Create a related task from a touchpoint

Create tasks directly from a touchpoint record to assign follow-up actions such as researching customer backgrounds, track post-interaction commitments, and coordinate stakeholders without having to leave the touchpoint workspace. Tasks are automatically linked to the touchpoint so all related activity stays connected.

Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record you want to work with.
5. Navigate to the tab related to the entity type.
   For example, if Opportunity is the associated entity, then the name of the tab would be Opportunity Tasks. However, if the associated entity is Account or Contact, then the tab name is Task.

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6. Select **New**.
7. On the create new task form, fill in the fields.
   For more information about the form fields for the CRM entities, refer to the corresponding topic.

CRM entity	Form field descriptions
Lead	Create new lead task form
Opportunity	Create new opportunity task form

8. Select **Save**.

Result

A task record is created against the CRM entity and touchpoint record. You can view the corresponding task from the respective module. For example, to view opportunity task, navigate to **Opportunity** > **Opportunity Tasks** list menu. You can also access it from the **Opportunity Tasks** tab from the touchpoint record.

Related topics

Add opportunity tasks

Add lead tasks

Schedule an appointment from a touchpoint

Schedule appointments with customers and stakeholders directly from a touchpoint record to coordinate in-person or virtual engagements and keep the entire account team informed.

Before you begin

You can create appointments only after creating a lead or opportunity task. For information on how to create an opportunity task from the Touchpoints module, see Create a related task from a touchpoint. Alternatively, you can create an opportunity task from the Opportunity module in the CSM/FSM Configurable Workspace. For details, see Add opportunity tasks and Add lead tasks.

Role required: sn_crm_touchpoint.touchpoint_writer

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record to update.
5. Navigate to the tab related to the entity type.
   For example, if Opportunity is the associated entity, then the name of the tab would be Opportunity Tasks.
6. Select a task record.
7. Navigate to the **Appointments** tab.
8. Select **New**.
9. On the Create New Appointment form, fill in the fields.
   For more information about the form fields for the CRM entities, refer to the corresponding topic.

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CRM entity	Form field descriptions
Lead	Create new appointment form
Opportunity	Create new appointment form

10. Select **Save**.

Result
The appointment is scheduled and can be viewed from the touchpoint record's **Appointments** tab.

Associate an email with an existing CRM record

Link an email to an existing lead, account, contact, or opportunity record directly from Microsoft Outlook. Associating emails with CRM records helps maintain a complete engagement history without having to switch between applications.

Before you begin
Role required: sn_crm_outlook.crm_outlook_user

Procedure
1. Open an email in Microsoft Outlook.
2. Load the Microsoft Outlook add-in by selecting **ServiceNow CRM for Outlook** from the Microsoft Outlook ribbon.
3. If you're logged out, select **Log in** and enter your credentials.
4. Select a tab for the record type you want to search.
   - Leads
   - Account
   - Contacts
   - More > Opportunities
5. **Optional:** In the **Filters** field, set filters to narrow results.

   Example
   For example, to find a lead by email address, you would set the condition **[Email] [is] [**<email address to search for>**]**.
6. In the **Search** field, enter the search information such as a name or email address.
7. Locate the record you want to associate and select **Associate**.
   The email is linked to the CRM record. The association appears in the record's activity history in ServiceNow CRM.
8. **Optional:** Enter additional information for your selected CRM entity, and select **Save**.
   For more information about the form fields for the CRM entities, refer to the corresponding topic.

CRM entity	Form field descriptions
Lead	Lead form in the ServiceNow CRM for Outlook add-in
Opportunity	Opportunity form in the ServiceNow CRM for Outlook add-in

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CRM entity	Form field descriptions
Account	Account form in the ServiceNow CRM for Out look add-in
Contact	Contact form in the ServiceNow CRM for Out look add-in

9. **Optional:** View the associated record in the CRM by selecting **Open**.
   You're redirected to the entity record in the CSM/FSM Configurable Workspace.

Result
The email is associated with the CRM record, and the engagement is logged for future reference.

What to do next
You can view the associated emails if you have the staging_emails_admin role. For more information, see Track emails linked from Microsoft Outlook.

Track emails linked from Microsoft Outlook

View emails that have been linked to CRM records using the Microsoft Outlook directly from the CSM/FSM Configurable Workspace.

Before you begin
Email promotion must be configured before you can view the associated emails on the Emails tab of the Lead, Opportunity, Accounts, or Contacts record. For more information, see Make emails associated through the CRM Outlook Add-in visible to agents.

The User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) must be installed on your ServiceNow instance to enable agents to send emails from the touchpoint record. For setup instructions, see Personal corporate mailbox.

Role required: sn_crm_outlook.crm_outlook_user

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to CRM entity with which you associated the email.
   To view emails associated with a Lead, you'd navigate to **Leads** > **All** and select a LEAD record.
4. Open the CRM entity record that you want to work with.
5. Navigate to the **Emails** tab.
6. View email by selecting a timestamp link from the Created column.

Create a CRM record from Microsoft Outlook

Create a new lead or contact record and associate an email to it directly from Microsoft Outlook, enabling you to capture new prospects without having to leave your email inbox.

Before you begin
Role required: sn_crm_outlook.crm_outlook_user

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Procedure

1. Open an email in Microsoft Outlook.
2. Load the Microsoft Outlook add-in by selecting **ServiceNow CRM for Outlook** from the Microsoft Outlook ribbon.
3. If you're logged out, select **Log in** and enter your credentials.
   The add-in displays tabs for Leads, Accounts, Contacts, and More (which includes Opportunities).
4. Select a record type from the **Create new** drop-down menu.

Record type	Description
Lead	New lead record for a potential customer who has shown interest but is not yet qualified. For a description of the field values, see Lead form in the ServiceNow CRM for Outlook add-in.
Contact	New contact record for an individual associated with an existing or new account. For a description of the field values, see Contact form in the ServiceNow CRM for Outlook add-in.

5. Complete the required fields and any optional fields relevant to your workflow.
6. Select **Create and associate**.

Result

The CRM record is created and the email association is logged, enabling you to continue engagement tracking from either Microsoft Outlook or CSM/FSM Configurable Workspace.

What to do next

You can view the associated emails if you have the staging_emails_admin role. For more information, see Track emails linked from Microsoft Outlook.

Using configure, price, quote applications

Learn how to use configure, price, quote applications.

Using the CPQ Configurator

Agents and customers use the CPQ Configurator to customize configurable products in Sales Customer Relationship Management transactions such as opportunities, quotes, and orders.

CPQ Configurator overview

With the CPQ Configurator, agents and customers can configure offerings dynamically based on customer needs or product attributes, without having extensive knowledge of product structures and hierarchies. Agents use the configurator in the CSM Configurable Workspace, while customers use the configurator in the Business Portal for self-service transactions.

Note: The CPQ Configurator is available if it's been implemented in your organization. Otherwise, the legacy product configurator is available for customizing configurable products.

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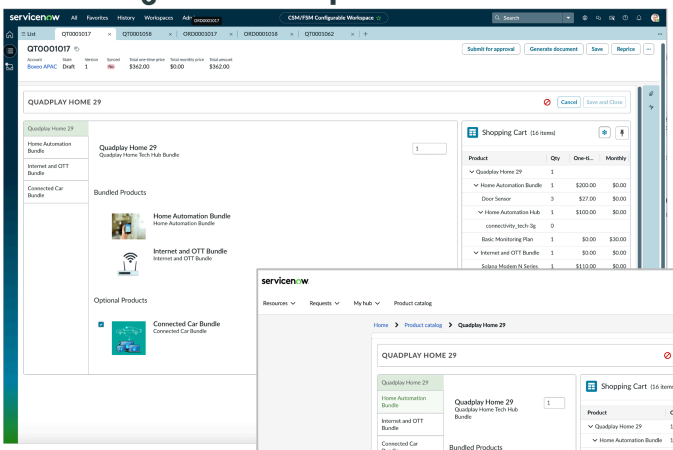
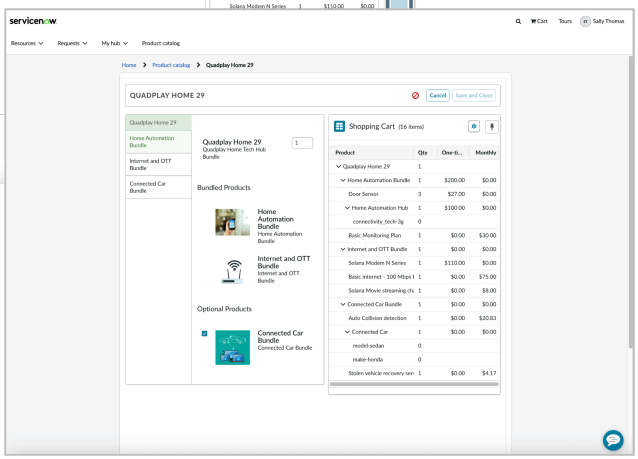
CPQ Configurator in CSM Configurable Workspace and Business Portal

CSM Configurable Workspace

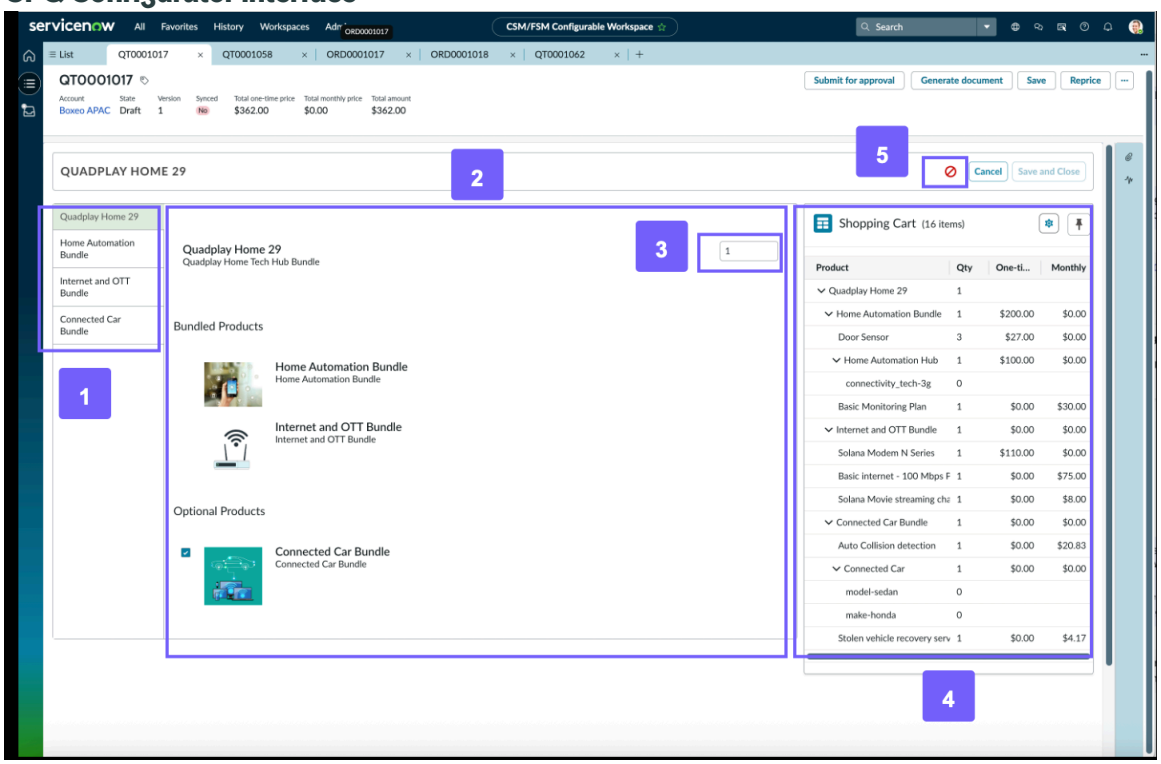


Business Portal



When adding products to Sales Customer Relationship Management transactions, agents and customers select a customizable product offering from the product catalog, which automatically launches the configurator. The configurator displays the available features and options that can be selected for the product.

CPQ Configurator interface



The CPQ Configurator interface has the following features:

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CPQ Configurator features

Feature	Description
1. Products in the bundle	Products that comprise the bundle. Select a product in the bundle to view the features and options available.
2. Option selections	Section that displays the available product attributes and features, such as characteristics and characteristic options for the product. This section can include text fields for entering relevant product information.
3. Quantity	Option for entering the number of products needed.
4. Shopping cart	List that reflects the current selections made and their associated pricing. • As you select options, the pricing is calculated and displayed automatically. • Use the Gear icon to move the shopping cart component to different locations in the layout (left, right, bottom). **Note:** The default location for the shopping cart is below the option selections section. In this example, the shopping cart was moved so that it appears in the right pane. • Use the Pin icon to dock the shopping cart in a particular location (left pane, right pane, or below the options selection section).
5. Completion icons	Icons that indicate the state of the configuration: • Checkmark icon: Indicates that the required entries and option selections are complete. • Attention icon: Indicates that a required entry must be made. Select the icon for a description of the option or entry to be completed. To locate the required entry, review the selections for all the products in the bundle. The required entry is identified by an alert icon and message.

Related topics

Add customizable products using CPQ Configurator

Add customizable products using CPQ Configurator

Use the CPQ Configurator to add configurable products to a Sales Customer Relationship Management transaction, for example an opportunity or quote.

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Before you begin

Role required: sales agent, order agent, customer

Procedure

1. Create the transaction, for example an opportunity or quote in the CSM Configurable Workspace.

   a. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and select the List icon.

   b. Navigate to the module for the transaction, for example **Quotes** > **All**, and select **New** to create the transaction.

   c. When the transaction is created, select **Add line items** to create a line item.
   The tabs (related lists) open for the transaction.

2. Select the Catalog tab to open the product catalog interface, then select the appropriate catalog.
3. In the card for the product offering to be configured, select **Customize**.
   The CPQ Configurator opens.
4. Select a product in the bundle and in the Options selection section, choose the product option.
   - As you select options and enter quantity items, review the shopping cart to see the associated pricing for your selections.
   - Review the completion icons.
     - Attention icon: Indicates that a required option or entry must be completed. Select the icon to see which item must be completed. To find the required entry, review the options for all the products in the bundle. The required entry is identified by the Alert icon and message.
     - Checkmark icon: Indicates that all required options and entries for the configurable offering have been completed.
5. When you complete your selections, select **Save and Close**.
   The configurable product is added as a line item to the transaction.

Using the legacy product configurator

The legacy product configurator in Sales Customer Relationship Management is an interface for customizing configurable product offers. The interface displays the product options available and automatically calculates product pricing as you select options.

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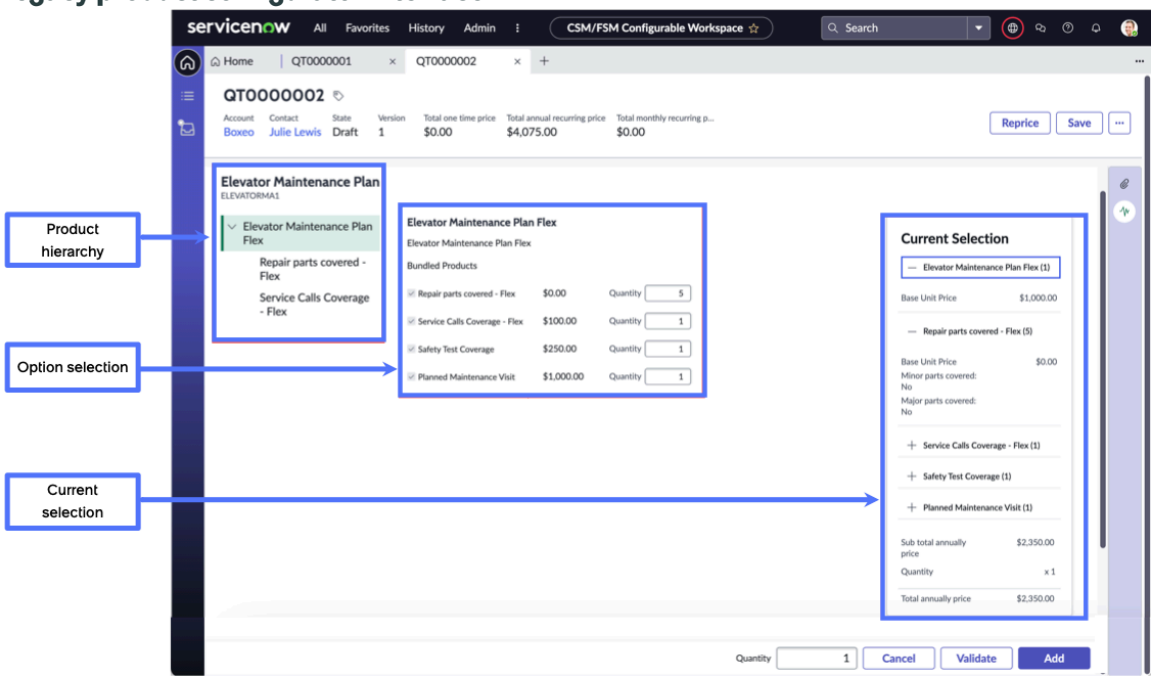
Legacy product configurator interface

Legacy product configurator interface



The interface consists of three main sections:

- **Product hierarchy**: Lists the parent and child product relationships for configurable products.
- **Option selection**: Displays the product options that can be selected, for example product characteristics such as color or model.
- **Current Selection**: Shows the pricing for the options that you select. The pricing is calculated automatically and displayed dynamically as you select product options.

When you complete the product offering configuration, select **Add** to add the product as a line item for the transaction.

Selecting complex product characteristics and options

When you select a complex product for opportunities, quotes, and orders, the product hierarchy and option selection sections in the configurator display the complex attributes and options hierarchically.

You can expand the product hierarchy to show the available characteristics and options.

The gear icon displayed next to a child product indicates that a hierarchy of complex characteristics is available at that level. Select that level to view the characteristics and options.

Note: Pricing details aren't provided in the **Current Selection** pane for complex characteristics.

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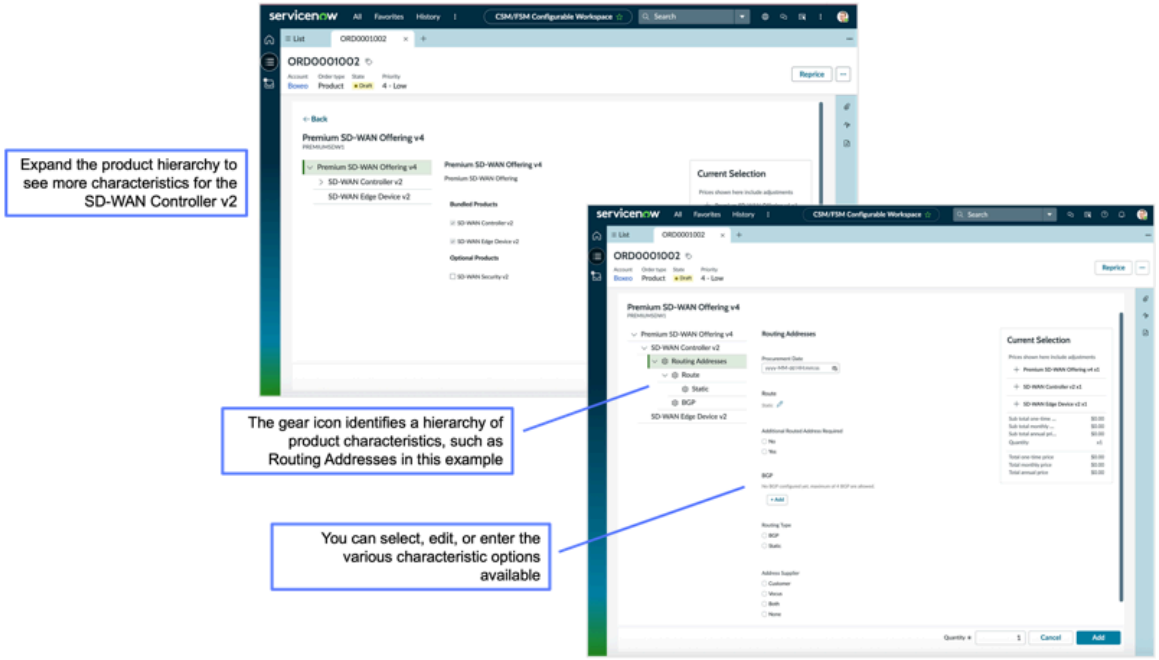
Complex characteristics and options in the product configurator



Create multiple configurations

Create multiple configurations of a child product offering when you're adding a configurable product to an opportunity, quote, or order. You can then configure the product options and characteristics separately for each offering configuration.

Before you begin

Role required:sales_agent or sn_ind_tmt_orm.order_agent

About this task

If your product catalog admin has enabled multiple configurations for child offerings in a bundled product, you can create multiple child offering configurations for selected child offerings using the legacy product configurator. When creating multiple configurations of child offering, you can do the following:

- Change the quantity of a child offering that can have multiple configurations.
- Clone a child offering or split a child offering that has a quantity greater than 1.
  - The **Clone** option copies the child offering based on the number of copies that you specify and creates identical offering configurations.
  - The **Split** option divides the current child offering quantity by the number of splits that you specify and distributes the quantity evenly across all the copies.
- Customize the options and characteristics for each child offering instance created.
- Delete a child offering instance, as long as the minimum number of child offerings defined for the product is maintained.

Note: Even when the multiple configurations feature is enabled, there are scenarios in which some configuration options might not be available. The system uses the default, minimum, and maximum quantity values from the product definition to determine valid configurations and then enables or disables the **Split** or **Delete** options for managing child offering configurations. For more information on validation, see Multiple configurations.

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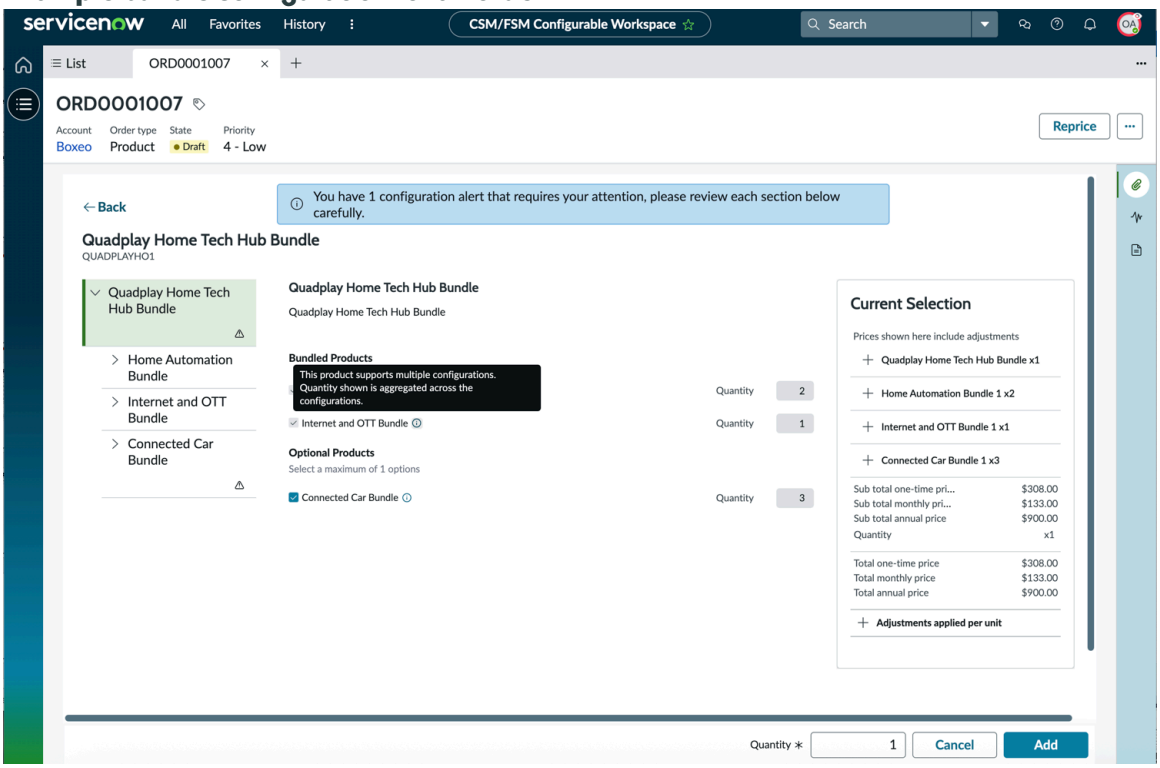
Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to the opportunity, quote, or order that you want to work with.
   For example, navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the Catalog tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products as product offering cards.
5. Select the configurable product by choosing **Customize** in the appropriate product offering card.
   The product configurator displays the product offering configuration, including the bundle product options and characteristics. Child offerings that can have multiple configurations are identified by information icons. Select the information icon to view a message indicating that the offering can have multiple configurations and that the offering quantity shown is aggregated across the configurations.

Example bundle configuration for an order



6. Navigate to the child offering in the product hierarchy, which displays the offering summary page.
   You can do the following:
   - To change the quantity of the child offering, enter the new value in the **Quantity** field.
   - To add new configurations for the offering, select the **More options** menu next to the **Quantity** field and select an option.

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More options

Option	Description
Clone	Option for creating copies of the selected child offering. Enter the number of clones to be created. The system creates identical copies of the child product offering, and each clone has a quantity of 1. For example, if the current child offering quantity is 2, and you specify 2 clones, two identical copies of the child offering are created. Each clone has a quantity of 1 and becomes a separate line item that you can configure. **Note:** The system checks the total quantity allowed for the child offering.
Split	Option for creating child offering instances by splitting the current child offering quantity and distributing the quantities across the offering instances. Enter the number of splits to be used. For example, if the child offering quantity is 5, and you specify 3 splits, the system creates two child offering instances. After the split, you have three child offering instances, which have a quantity of 2, 2, and 1, respectively. You can then configure each line item as needed.
Delete	Removes an existing child offering instance.

New configurations resulting from the clone or split are listed in the product catalog hierarchy. The associated pricing is displayed in the Current Selection pane.

- New configurations have names that reflect the child offering name, followed by an incremental number, for example, Home Automation Hub 2, Home Automation Hub 3, and so on.
- Quantity changes for a child offering are also reflected in the Current Selection pane.

7. For each new offering configuration, select the appropriate characteristics and product options.
8. When you finish configuring the child offerings, select **Add** to add each configuration as a separate line item to your opportunity, quote, or order.

Using Quote Management

Use the Quote Management application to build your quote. The interface includes the following tabs to help you create and manage product quotes.

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Quote Management tabs

Quote Management tab	Description
Details tab	Add details of the quote, such as address and contact information.
Line Items tab	Add quote line items to a quote.
Catalog tab	Use product catalogs to add products to your quote.
Revisions tab	Create multiple versions of quotes.
Customer Orders tab	Convert quotes to product order sales.
Pricing adjustment tab	Add manual pricing adjustments to products in a quote.

Building quotes

Use these basic steps to create, build, and manage your quotes.

Building and managing quotes

Step	Description
Create a quote	Start a quote, then add and view quote details.
Add products to a quote	Build your quote by adding products from the product catalogs.
Create a quote PDF document	Sales agents can create a PDF document from a quote to send to customers.
View and update products in your quote-	Use the Line items tab to see and update products in your quote.
View and update manual pricing adjustments in quotes	Add pricing adjustments to quotes.
Get additional product offering recommendations for quotes	Use product offering recommendations to find other products that you can upsell or cross-sell to your customers based on the line items in your quote.
Create quote versions	Use the Revisions tab to create and view versions of a quote.
Convert quotes into orders	Use the Customer Orders tab to convert quotes to orders.

Create a quote

Create a quote in Quote Management to start the quote building process.

Before you begin

Role required: sales_agent

About this task

When you start a quote, a dialog box prompts you for quote information. You can choose to create a quote for a customer account or consumer. The dialog box changes depending on your choice.

- Account – The quote is created for an existing customer account.
- Consumer – The quote is created for an existing consumer.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select **New**.
3. On the **Create new quote** form, fill in the fields.

To	Description
Create quote for an account	Select the **Account** and enter the following: ○ Expiration date: Date and time that the quote expires. ○ Contact: Name of the primary customer contact. ○ Route to market: Identifies the exact sales channel used to exe cute the deal: ▪ Direct ▪ Reseller ▪ Distributor ○ Deal type: Indicates the type of deal associated with the quote: ▪ Direct: The seller engages directly with the customer, with no in termediary partner involved. ▪ Indirect: The seller engages the customer through an intermedi ary, such as a reseller, service provider, or distributor. ○ Short description: Brief description of the quote for this account. ○ Channel partner: (Optional) The name of the organization selling a product or service.
Create quote for a consumer	Select the **Consumer** name and enter the following: ○ Deal type: Indicates the type of deal associated with the quote: ▪ Direct: The seller engages directly with the customer, with no in termediary partner involved. ▪ Indirect: The seller engages the customer through an intermedi ary, such as a reseller, service provider, or distributor. ○ Channel partner: (Optional) The name of the organization selling a product or service. ○ Expiration date: Date and time that the quote expires. ○ Route to market: Identifies the exact sales channel used to exe cute the deal: ▪ Direct ▪ Reseller ▪ Distributor ○ Short description: Brief description of the quote for this consumer.

4. Select **Save and close**.
   The quote is saved and you return to the **Quotes** list view.
5. Select refresh to see the new quote in the list.
6. Select **Add Line Items** to save the quote and begin adding quote line items.

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What to do next
Add and view details of a quote.

Add and view details of a quote

Use the Details tab to add and view basic information for a quote.

Before you begin
Role required: sales_agent

About this task
Use the Details tab to add more information about your quote, such as addresses and contacts. You can also indicate whether the quote is active and set the quote state.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select your quote.
3. Fill in the information on the Details tab.
   For more information, see Quote details forms.
4. Select **Save**.

What to do next
Add products to a quote.

Add products to a quote

Use the Catalog tab in Quote Management to add products to your quote.

Before you begin
Role required: sales_agent

About this task
You can use the Catalog tab to search for and select product offerings from catalogs and add them to your quote. You can choose simple and complex product offerings. Complex product offerings have options for customizing the product by using the product configurator.

Note: Check your entitlements to see if the product configurator is available.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the **Catalog** tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products in product offering cards.
5. In the product offering card, select the product.

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- For a simple product that doesn't have any selectable options, select **Add**.
- For a configurable product that has options that you can choose, select **Customize** to open the product configurator for selecting product options.

  As you configure the product, you can reprice, validate, and then save your selections. For details on using the product configurator, see Using Sales Customer Relationship Management applications.

The product offering is added to the quote as a line item.

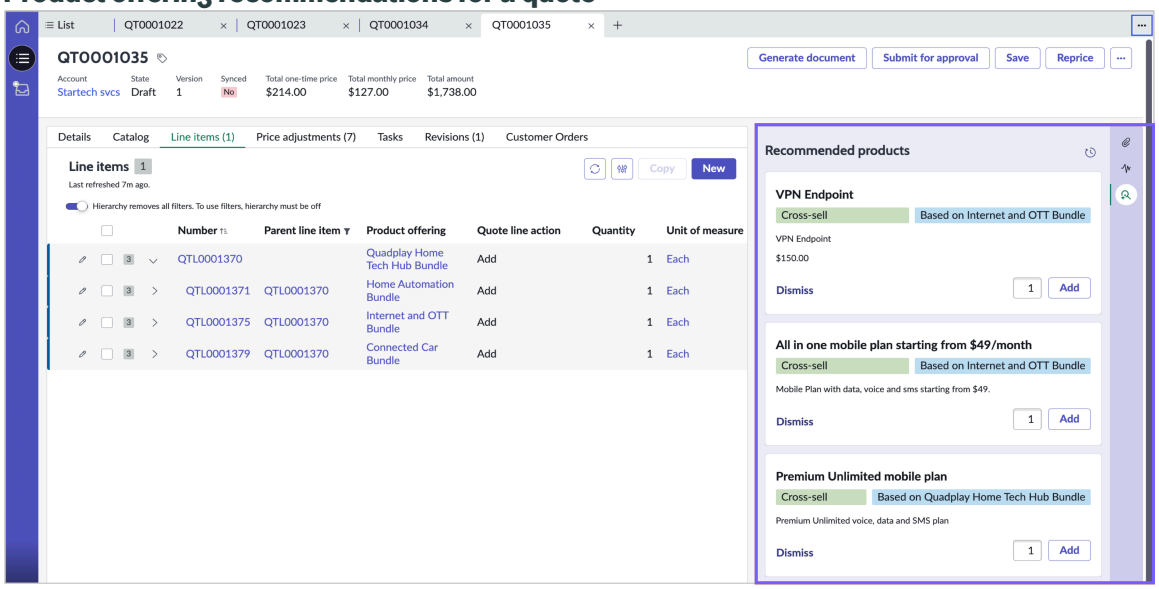
Using product offering recommendations in quotes

As a sales agent, you can use recommended product offerings to upsell or cross-sell additional products in your quotes.

Product offering recommendations

Product recommendations appear as cards in the contextual side panel in the CSM Configurable Workspace when you're adding, updating, or viewing quote line items using the Catalog or Line items tab. Each card provides a recommendation to either upsell or cross-sell a product.

Product offering recommendations for a quote



Product recommendation cards display the following information:

- Name and brief description of the recommended product offering.
- Type of recommendation:
  - Upsell: Sales strategy for upgrading customers to a better or enhanced version of a product that they're buying.
  - Cross-sell: Sales strategy for selling additional products that are related to but different from the items that customers are buying.
- Source product offering to which the recommendation applies.
- Product pricing
- Options to accept the recommendation and set the product quantity or dismiss the product offering recommendation.

When multiple cards are displayed, they're arranged in the order value that was set when the recommendation was created by your product catalog admin.

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Recommendation process

When you add a product recommendation, the recommended product offering is added as a line item to your quote. For more information, see Get additional product offering recommendations for quotes. After you add or dismiss recommendations, they're moved to the recommendation history. Use the History icon in the Recommended products panel to view the recommendation history.

Get additional product offering recommendations for quotes

Get product offering recommendations to upsell or cross-sell additional products in quotes.

Before you begin

Your quote must have at least one or more line items and be in the draft state.

Role required: sales_agent

About this task

When you're working on a draft quote and adding or updating products, product offering recommendations are displayed as recommendation cards in the contextual side panel of your workspace. These cards identify the products that you can upsell or cross-sell, to complement or supplement existing products in your quote. When you accept a product offering recommendation, the product is added as a line item to your quote.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote that you want to work on.
3. Select the Catalog or Line Items tab.
   If the quote doesn't have at least one line item, add a line item.

   The contextual side panel displays any relevant recommended products for the quote.
4. Review the recommended product offering cards and do one of the following:
   - To accept a recommendation, change the quantity if needed and select **Add** in the card.

     The product is added as a line item to the quote. When a configurable product is added from the recommendations panel, quote line items are created with default selections configured as set in the product offering definition. The product offering card is moved to the recommendation history.
   - To remove a recommendation from the side panel, select **Dismiss**.

     The product offering card is moved to the recommendation history.

   You can review the recommendation history by selecting the History icon in the Recommended products panel.
5. **Optional:** Continue reviewing the recommended offering cards and add or dismiss them as needed.

Related topics

Configuring product offering recommendations

Create a product offering recommendation

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Add tasks to a quote

Create a single or multiple tasks for a quote and assign those to different agents. Tasks are the various actions that agents perform to create a quote.

Before you begin
Role required: sales_manager

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view and select **Quotes** > **All**.
2. Select the quote that you want to work with and select the **Tasks** tab.
3. Select **New** to start a new quote task or select an existing quote task to make changes.
4. Fill in the fields in the Quote Task form.

Quote Task form

Field	Description
Number	System-generated number of the quote task.
Quote	Number of the quote.
Due date	Date by which the quote task has to be completed.
Short description	Information about the quote task.
State	State of the quote task.
Assigned to	Name of the sales agent to whom the sales manager has assigned this quote task.
Work notes	Additional information about the quote task.

5. Select **Save**.
   The quote task is added to the main quote.

Create quote versions

Use the Revisions tab to create and view the versions of your quote.

Before you begin
Role required: sales_agent

About this task
The Revisions tab shows all the versions of a quote. Version numbers are sequential. If the quote is active, the **Active** field is selected.

Procedure

1. In the CSM Configurable Workspace, select the List icon .
2. Select **QuotesAll**.
3. Select the quote that you're working with.
4. Select the **Revisions** tab.

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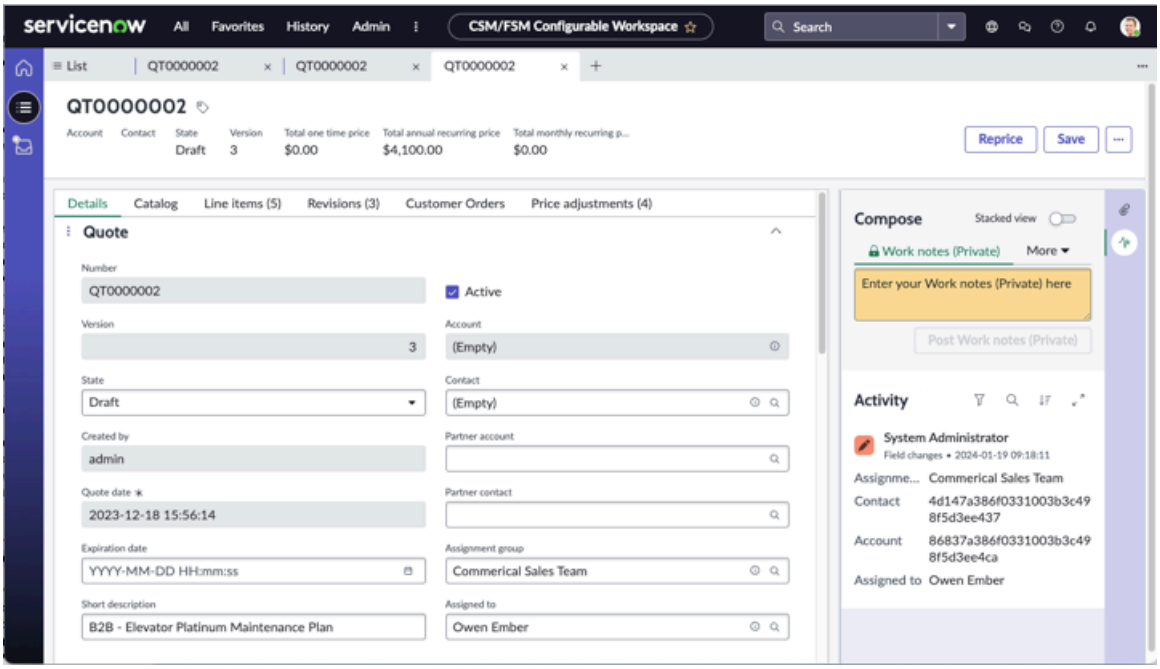

5. Select the More Actions icon ••• and select **Create new version**.
   A new version of the quote is created. Select the quote in the message to open the new version. The **Active** option, if selected indicates the **Active** version of the quote. Use the Revisions tab to view a list of all the current quote versions. Version numbers are sequential.
6. Return to the **Quote** list view and refresh the view to see the latest version created.
7. Select the **Active** option as a reminder of the active quote.

What to do next

Use the Customer Order tab to start an order from the Quote. See Convert quotes into orders for more information.

Convert quotes into orders

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

Before you begin

Role required: sales_agent

About this task

The quote must be in an Active state and the quote state must be set to Completed. Then the Customer Orders tab becomes active.

Note: Verify your entitlements to see if you have access to this feature.

Procedure

1. In the CSM Configurable Workspace, select the **List** view ☰.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you want to convert to a customer order from the **Quote List** view.
4. In the Details tab, change the quote State to **Completed** and select **Save**.
5. Select **Create Order**.
   When the order is created, a message appears with the order number.

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6. Select the Order number in the message to open the order.
   The **Order Line Item** view displays the order line items, pricing adjustments, and order tasks.

Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created.

Before you begin
Role required: sales_agent

About this task
You can make the following types of pricing adjustments for quote line items as a way to incentivize customers during the quote process.

Types of pricing adjustments

Adjustment type	Description
Markdown %	Percentage for a markdown in price.
Markdown amount	A dollar amount of a markdown in price.
Markup %	Percentage for the markup in price.
Markup amount	A dollar amount for a markup in price.
Price Override	Overrides the product price with a new price.

Procedure
1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. In the Line items tab, select the quote line item for a pricing adjustment.
4. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
5. Enter an adjustment value in the Adjustment value.
6. Add a description of the price adjustment.
7. Select **Save**.

Add price ramps on a quote line item

Add price ramps to quote line items to define incremental price changes for recurring product offerings.

Before you begin
Configurable product offerings eligible for price ramps must have the **Enable ramps** option turned on and the **Price method** set to recurring.

Role required: Sales_agent

About this task
https://player.vimeo.com/video/1175328753?h=1792813020&badge=0&autopause=0&player_id=0&app_id=58479

Use price ramps to specify how the price of a configurable product offering in a quote increases over different time segments, yearly, quarterly, or with a custom ramp structure.

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- When you create ramps for a parent offering, the same ramps are created automatically for each child product offering in the product bundle.
- If price ramps haven't been created for the parent product offering, you can create ramps for child product offerings. However, if you want to create price ramps for the parent offering later, remove the ramps for all its child offerings, and then create the ramps for the parent offering.
- After price ramps are created on a quote line item, they are visible on order line items for viewing only. Ramps can be created and modified only in quotes.
- After price ramps are created, you can make manual pricing adjustments to a ramp segment.

Note: Price ramps aren't supported for quotes with sales agreements.

Procedure

1. Navigate to **Workspaces** > **CSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select a quote.
5. In the **Line Items** tab, select the **Select row** check box for the quote line and select **Ramps**.
   The Price ramps dialog displays the default settings for the ramp.
6. On the Price ramps form, fill in the fields.
   Default values are set for the **Term, Ramp type,** and **Segments**. You can change them as needed.

Field	Description
Start date	Date that the quote starts.
End date	Date that the quote ends.
Term (months)	Number of months for the ramps. The maxi mum term is 60 months. You can enter a two-digit decimal value, for example 36.25. After entering the term, the **End date** is updated au tomatically.
Ramp type	Option that indicates whether the ramp is Yearly, Quarterly, or Custom. Custom ramp types allows agents to define ramp segments with flexible durations. When custom is select ed, agents can manually add and manage ramp segments.
Segments	Number of segments in the ramp. The default number of segments is 1. If you change the **Term** value, the number of segments is updat ed automatically based on the **Ramp Type**.
Annual % increase	The percentage increase to be applied on a yearly basis.

7. Select **Create**.
   The price ramps are created based on the ramp settings. The Price ramp details section shows each ramp segment created and associated pricing values:**Unit list price**, **Net price**, and **Cumulative net price** for the ramp segment.

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8. To change the ramp settings, change the **Term**, **Ramp**, or **Amount % Increase** values as needed, then select **Update**.
   For example, you can change the **Ramp type** from yearly to quarterly or percentage increase. The updated price ramp details section.
9. To make manual price adjustments to a ramp segment, do the following:
   - Select the check box for the segment to be adjusted.
   - Select the type of adjustment to be made.
10. If you are amending a quote, modify ramp segments in the price ramps details section as needed.
    - To split a segment into two shorter segments within the original term, select the check box for the segment and select **Split segment**. The system automatically divides the segment and assigns the correct effective dates for each resulting segment. If the segment is currently active, the first segment ends on the current date and the second segment begins the following day. If the segment is a future segment, it is divided into two equal segments.
    - To remove a split segment, select the check box for the segment and select **Remove segment**. The split segments are re-merged and the ramp returns to its previous state.

    Note: Only segments created by splitting can be removed. Original ramp segments cannot be removed.

Add a header discount to a quote

Apply a percentage-based discount to the entire quote, or to a selected type of line items within the quote. The quote line items automatically inherit the designated discount percentage as a manual adjustment on the quote line level.

Before you begin

Role required: Sales Agent [sn_sales_common.sales_agent]

Procedure

1. In the **Configurable Workspace**, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select your quote.
4. In the **Line Items** tab, select the **More Actions** menu at the header level.
5. Select **Apply bulk discount**.
6. In the **Quote bulk discount** dialog, choose either **Override current line-level manual adjustments** or **Retain current adjustments and apply for all other line items**, and enter the quote header discount percentage.
7. Select **Apply**.

Approving or rejecting quotes

Sales agents request approval for quotes, and approvers decide whether quotes can proceed under an advanced approval workflow.

Quote approvals help organizations manage financial, legal, and operational risk by ensuring that quotes meet internal approval criteria before they are shared with customers. Sales representatives submit quotes for approval, while approvers review quote details to determine whether a quote can proceed, requires changes, or must be rejected.

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Approval workflow

Quote approvals are managed through Advanced Approval Management, which evaluates quotes against configured approval rules and routes approval requests to designated approvers. Approval workflows can include sequential, parallel, or combined approval steps based on pricing thresholds, discounts, payment terms, product characteristics, or other business conditions.

When a sales agent submits a quote for advanced approval, the system creates one or more approval requests and routes them to the appropriate approvers. Each approver is responsible for reviewing only the approval steps assigned to them.

As part of the approval process, approvers review:

- Quote details and pricing
- The approval reason or condition that triggered the request
- Any comments provided by the requester

Approvers can approve or reject only the approval steps routed to them. Approval actions taken by one approver do not grant access to approval steps assigned to other approvers.

Advanced Approval Management supports multiple channels for taking approval actions, such as from within the workspace, from approval lists, or through notifications, depending on how the approval process is configured.

Approval reminders and escalations

Administrators can configure reminder schedules so that approvers receive automated notifications when their approval steps are pending. Reminders help ensure that approval requests are not overlooked and that quotes continue to move through the approval process on time.

If an approval step is not completed within the time period defined by the administrator, the step can be escalated to a designated approver. When a step is escalated, the step card updates to display the escalated approver so that all parties know who is responsible for the next action.

Ad-hoc approvers

Sales agents and administrators can add approvers to an approval request outside of the configured approval workflow when additional review is needed. Ad-hoc approvers are added at the time of submission and are incorporated into the approval process for that request.

Override approvals

Administrators with the appropriate roles can override an approval to move a quote forward when permitted by the organization's approval configuration. Override approvals allow the process to continue without waiting for all configured approval steps to be completed.

Recalling approval requests

After a quote is submitted for advanced approval, a sales agent can recall the approval request if changes are required. Recalling an approval request cancels any pending approval steps and returns the quote to a state where it can be updated.

Recalling a quote helps prevent approvers from continuing to review outdated information and allows sales agents to address issues before resubmitting the quote for approval.

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Rejection workflow

If an approver rejects an approval request generated by Advanced Approval Management, the system updates the approval workflow based on the configured process.

When rejecting an approval request, approvers are required to provide a comment explaining the reason for rejection. Rejection prevents the quote from progressing through the remaining approval steps and indicates that changes are required.

Rejected quotes are returned for further review or updates, depending on the approval configuration. The sales agent can modify the quote and resubmit it for advanced approval.

Reevaluating and resubmitting quotes

A recalled or rejected quote can be updated and resubmitted for advanced approval. When the quote is resubmitted, Advanced Approval Management reevaluates the quote and determines which approval steps must run again based on the configured rules.

Approval steps that are unaffected by the changes may be automatically approved, while approval steps impacted by the changes are routed again to the appropriate approvers. This helps reduce unnecessary re-approvals while ensuring that all required conditions are met before the quote is approved.

Once all required approval steps are approved, the quote can proceed to the next stage of the sales process.

Create an order from a quote line item

Create orders from quote line items by using the **Create new order** UI action.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select **List** view and select **Quotes** > **All**
2. Select the quote, which must be in the Completed state, and select the Line items tab.
3. Select a quote line item and select **Create new order**.
   A dialog box indicates the creation of a new order. Select the new order record to view it. Or you can also navigate to the Customer Orders tab to view the new order record.

Add subscription pricing to a quote

Add subscription pricing to a quote or quote line items including start and end dates in Quote Management.

Before you begin
Role required: sales_agent

About this task
Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In a quote, you can set the subscription pricing start date and end date, or you can enter a term and the subscription end date is automatically calculated.

Subscription pricing can be added at the quote header level or at the quote line item level.

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See Subscription revenue metrics for more information about how subscription pricing works.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**
3. Select the quote that you're working with.
4. In the **Quote Details** tab, add a **Subscription pricing start date** and a **Subscription pricing end date**.
   When the dates are entered, the following information automatically updates.

Field	Description
Total monthly recurring price	Shows the monthly recurring price based on the dates entered in subscription pricing.
Total annual recurring price	Shows the total annual recurring subscription pricing based on the dates entered.
Total amount	Shows the total amount of the subscription pricing according to the subscription pricing start and end dates.
Term	Shows the number of months the subscription is valid based in the start and end dates.

5. Select **Save**.

Submit a quote for advanced approval

Submit a quote for advanced approval to route it to required approvers before sharing it with a customer.

Before you begin

Advanced Approval Management must be installed to submit a quote for advanced approval.

Role required: sn_adv_appr_mgmt.approval_request_writer

About this task

When you submit a quote for advanced approval, the system routes it to the required approvers based on configured approval rules and sequencing. You can also add ad-hoc approvers to the approval request when additional review is needed outside of the configured workflow.

If your administrator has configured reminder schedules, approvers receive automated notifications when their approval steps are pending. If an approval step is escalated, the step card displays the escalated approver so that all parties know who is responsible for the next action. Your administrator configures reminder and escalation settings.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List Icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote that you want to submit for approval.

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5. Select **Submit for approval**.
6. In the Preview and request dialog, review the required approvals and their sequence.
7. In **Message to approvers** field, enter comments for the approvers.
8. Select **Request Approval**.

Result
The quote is submitted for approval and enters the In Review state. Approval requests are generated based on configured approval rules and sequencing.

Recall a quote approval request

Cancel a pending quote approval request to change a quote before resubmitting it for advanced approval.

Before you begin
Role required: sn_adv_appr_mgmt.approval_request_writer

About this task
Recalling an approval request cancels any pending approval steps and returns the quote to the Draft state. Recall a quote approval request when changes are required after submission. For example, recall the request when quote details must be corrected or updated before the quote can proceed through the approval process.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote with the approval request that you want to recall.
5. Select the **Approvals** tab.
6. Select **Recall approval request**.

Result
The approval request is canceled, all pending approval steps are canceled, and the quote is returned to the Draft state. You can update the quote and resubmit it for advanced approval when ready.

Approve an approval request for a quote

Review and approve or reject a quote advanced approval request that is routed to you as part of an advanced approval workflow.

Before you begin
Advanced Approval Management must be installed to approve a quote advanced approval request.

Role required: sn_adv_appr_mgmt.approval_request_approver

About this task
You can approve a quote advanced approval request from several locations:

- A quote.
- Your approval entry on the quote.
- My Approvals.

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- Approval notification email.
- My Tasks in Now Mobile.

This task describes how to approve a request directly from a quote.

If your administrator has configured reminder schedules, you receive automated notifications when your approval steps are pending. If an approval step has been escalated, the step card displays the escalated approver in the **Remaining by** section and removes all other remaining approvers, so you know who is responsible for the next action. Your administrator configures reminder and escalation settings.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote that contains the advanced approval request.
5. Select the **Approvals** tab.
6. Locate the approval step assigned to you.
7. From your approval box, select the **ellipsis** menu, then select **Approve** or **Reject**.
   a. If you select **Approve**, then enter comments (if needed) and select **Approve** to confirm.
   b. If you select **Reject**, then enter a comment explaining the reason for rejection and select **Reject** to confirm.

Result

If approved, your decision is recorded for the quote approval step, and the approval workflow continues based on the configured sequencing.

If rejected, the approval request is marked as rejected and the quote is returned for further review or updates, based on the configured approval process.

View and update products using the line items tab

Use the line items tab to review and update products in your quote and to add additional line items.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the List icon and select **Quotes** > **All**.
2. Select the quote that you're working with and select the **Quote Line Items** tab.

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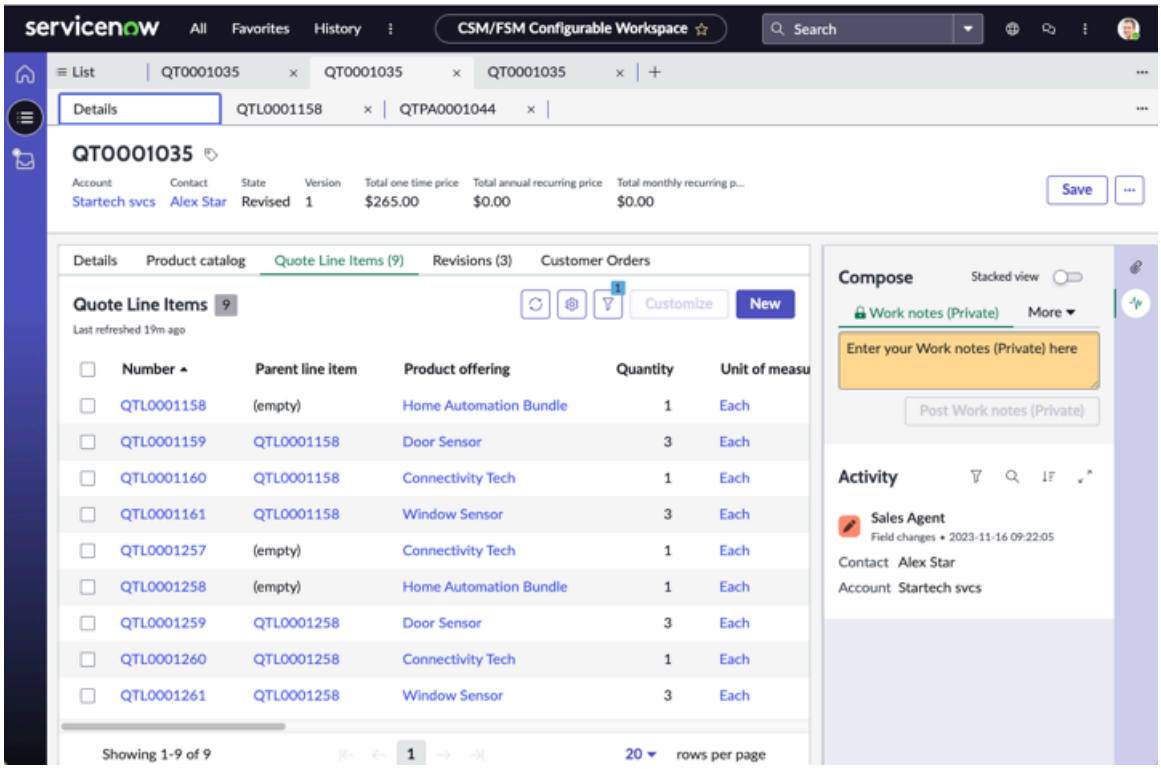

3. Select **New** to start a new quote line item or select an existing quote line item to make changes.
4. Fill in the fields in the Quote Line Items.

Quote line item fields

Field	Description
Quote	Automatically generated field.
Number	Automatically generated field.
Parent line item	Automatically generated field.
Price list	Price lists are added to the product line item. Price lists show pricing that is already configured.
Term (months)	Monthly terms for the price list selected. Monthly terms reflect the cost monthly of the product or service.
Subscription start dates	Subscription state date is the date when an entitlement or service begins.
Subscriptions end date	Subscription end date is the end date for an entitlement or a service.
Contract start date	Contract state date is the date a service contract or entitlement contracts start.
Contract end date	Contract end date is the date when a service contract or entitlement contract ends.
Product offering	Product offering let agents select the product or service for the quote.

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Field	Description
Quantity	Quantity is the number of a product that is selected for the quote.
Unit of measure	Agents can select a unit of measure for products that come in quantities.
Service location	Service location allows agents to select a location for the service that is added to the quote.
Short description	The description field for the service location, which provides information about the location such as address and phone number.

5. Select the Quote Line Characteristics tab to add or modify the quote characteristics.
6. Select the **Pricing Adjustment** tab to add or modify a manual pricing adjustment to the quote line item.
7. Select **Save**.
   The Quote Line Item is updated to the main quote.

What to do next
Add a pricing adjustment to a quote line item. See View and update manual pricing adjustments in quotes for more information.

View and update manual pricing adjustments in quotes

Use the Pricing Adjustments tab in Quote Management to view and update manual pricing adjustments made to order line items in your quote.

Before you begin
Role required: sales agent

About this task
To create a pricing adjustment, see Add pricing adjustment to a quote line item.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All** and select the quote that want to work with.
3. Select the **Pricing Adjustment** tab.
4. Select the price adjustment line item that you want to update.
5. Make the pricing adjustment.
6. Select **Save**.
   The pricing adjustment is updated and reflected on the overall quote pricing field.

Initiate a contract request

Initiate a contract request from the Quote Management application.

Before you begin
Role required: sales_agent

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About this task
You can create a legal sales contract to finalize a deal and formalist the agreements with your customer.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. Select the quote in the Completed state for which you want to create a contract.
4. Select the **More Actions** menu and select **Initiate contract**.
5. On the form, fill in the fields.

Field	Description
Type of paper	Type of paper to be used in the contract. Select Own paper.
Contract type	Type of contract to be generated. Select Sales Contract. If you want to generate a different type of document, select Other types of contract.
Signature type	Type of signature to do to complete the contract. ○ Electronic signature: You sign the document through electronic medium. ○ Wet signature: You download the document and sign it manually.
Start date	Date that the contract begins.
End date	Date that the contract ends. **Note:** The End date must be later than the Start date.

6. Select **Initiate**.
   A contract management request is generated in the Contract documents tab. Select the record to view the document.

View an existing quote

View existing quotes to update the quote status or make other changes.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.

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- All Quote- shows all the quotes in the instance.
- My Quotes- shows your quotes.
- My Teams Quote- shows the team quotes.

3. Select the quote that you're working with.
4. Make updates to the quote as needed.
5. Select **Save**.

Export quotes

Export a list of all quotes in Quote Management and provide it to a customer.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select **Export**.
4. Select the **File Type** to be exported:
   - Excel
   - CSV
   - JSON
   - PDF
5. Select the **Delivery Type**:
   - Email - Enter a valid email address.
   - Download - Downloads the export to a local drive.
6. Select **Export**.
   The list of quotes is exported according to the parameters set.

Enable a sales agreement in a quote

Agents can enable a sales agreement for a quote. Once enabled in Quote Management, sales agreements are generated that show the product and service lines and other relevant details for the quote.

Before you begin

Role required: pricelist_manager and sales_manager

About this task

A sales agreement is a document that outlines the terms and conditions of a sale between a seller and a buyer.

The agreement specifies the details of the transaction including the goods or services being sold, the price, the quantities, delivery terms, and any other relevant conditions, for a specific period.

Sales agreements filter the product catalog according to the agreement.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select **New**.
3. Add quote details to the quote and select **Enable sales agreement quote**.
   When the **Enable sales agreement quote** is selected, the quote is set on a sales agreement workflow. See Using Sales Agreement Management for more information.
4. Fill in the **Sales agreement start date** and **Sales agreement end date**.
5. Select **Save**.
6. Use the **Catalog** tab to add quote line items to the quote.
   See Add products to a quote for more information.
7. Make other updates to the quote.
8. Once the quote is ready, select **Submit for approval**.
9. When the quote is at an **Approved** state, change the quote to **Completed** by either updating the **State** field or selecting the context menu and choosing **Mark as complete**.
   The quote is saved to a **Completed** state and the **Create sales agreement** button appears in the quote details form.
10. Select **Create sales agreement**.
    A sales agreement is created. The message displays the sales agreement number.
11. Select the sales agreement message to open the sales agreement.

Sync a quote with an opportunity

Agents can sync quote information with an opportunity to ensure that information is consistent between both applications in Quote Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select a quote that you want to sync with an opportunity.
3. In the **Details** tab of the quote, go to the **Source Opportunity** option and choose the opportunity you want to sync with.
4. Select **Save**.
   The **Enable sync** button is enabled.
5. Select the **Enable Sync** option.
   Current Information and future changes to the quote are automatically synced. The following areas show the sync status.
   - The **Sync** check box shows that the quote is synced.
   - The **Sync** flag on the secondary header changes to **Yes**.
   - The **Synced** column in the Quotes related list on the Opportunity record shows **Yes** when sync is activated and **No** when the quote isn't synced.

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6. Turn off automatic sync by selecting the **Disable sync** button.

Note: When sync is enabled, the following conditions occur:

- No changes can be made to that opportunity (for example, adding line items, changing quantities).
- Additional changes should be made to the quote record.
- The opportunity record is updated asynchronously with the latest product offerings and prices that are added to the quote.
- The synced opportunity state changes to closed when the quote is marked as complete

Add covered products to a quote

Add a covered product to line items in a quote in Quote Management.

Before you begin

Role required: sales_agent or sales_manager

About this task

Covered products are products that are added to a warranty or entitlement. Once you add a warranty or entitlement to your quote line items, the covered product option becomes available.

When converting quotes to orders, the covered product relationships are transferred from the quote to order.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All** and select a quote to which a covered product is to be added.
3. From the **Quote line items** tab, select the quote line item.
4. Select **More** > **Covered product**.
5. In the **Covered Product** tab, select **New**.
6. In the **Create New Covered Product** form, select the covered product line item you want to add.
   There are three types of covered products types that you can add to a line item:

Covered product type	Description
Covered quote line item	Select a quote line item to be added as a cov ered product.
Covered sold product	Select a covered sold product to be added as a covered product.
Covered install base item	Add an install base item as a covered prod uct.

7. Select **Save**.
8. On the quote line item page, select the contract start date and the contract end date.
9. Change the state to **Complete**.
   A contract is created with the contract details for the order line.

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Filter catalogs by location in a quote

Use the location filter on the Catalog tab to filter products by location in Quote Management.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. Select the **Catalog** tab.
5. In the **Select a location** field, choose a location.
   The products in the catalog are filtered according to the selected location.

Copy locations for quote line items

Use the copy location function to change the location of multiple quote line items in Quote Management.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**
3. Select the quote to work on and select the Line Items tab.
4. Select one or more quote line items that you want to copy to another location.
5. Select **Copy**.
6. In the **Copy line items** dialog box, choose one of the options.

Option	Description
Keep original location	Line items for the selected quote are created and the source location is retained.
Choose new location	This action copies the quote line items to a new location. In the **Service location** filter, select the new location that you want the line items to be copied to.

Note: Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** dialog box.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied if any line item is ineligible.

7. Select **Copy**.

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Create a quote PDF document

In Quote Management, sales agents can create a PDF of a quote that can be sent to customers for review and signatures.

Before you begin

Create a quote PDF document

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. On the **Details** tab, go to **Quote Document Details** and fill in the fields.

Option	Description
Document template	A document template is required to create a quote document PDF. A standardized tem plate is included with the base system. Select the template that you want. See Set up PDF document templates for more information about how to create customized templates.
External signer	Option that enables you to have the quote document signed by someone outside the or ganization. See Set up PDF document sign ers for more details on how to set up external signers. When you select **Send for signature**, the ex ternal signer's email address is used to send an email through Docusign for review and electronic signature.
Internal signer	Option that lets you select an internal signer for the quote. When you select **Send for signature**, the in ternal signer's email address is used to send an email using Docusign for review and signa ture. See Set up PDF document signers for more details about how to set up an internal signer.

5. Select **Save**.
6. In the Quote form, select **Generate Document**.
   The PDF document is generated and appears in the **Attachment** side window.
7. Select the attachment icon to open the attachments window.
8. Select the actions icon and choose an action for your PDF document.

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Choice	Description
Download	Agents can download a document that en ables them to send is a different way.
Remove	This option deletes the document.
Rename	This choice enables agents to rename the document.
Send for signature	Agents use this option to send the document for signatures. The document is sent to the signers indicated on the Quote details tab un der Quote document.

A message appears indicating that the PDF document was generated.

9. To view the generated PDF, select the PDF in the attachments window.

View a quote PDF document

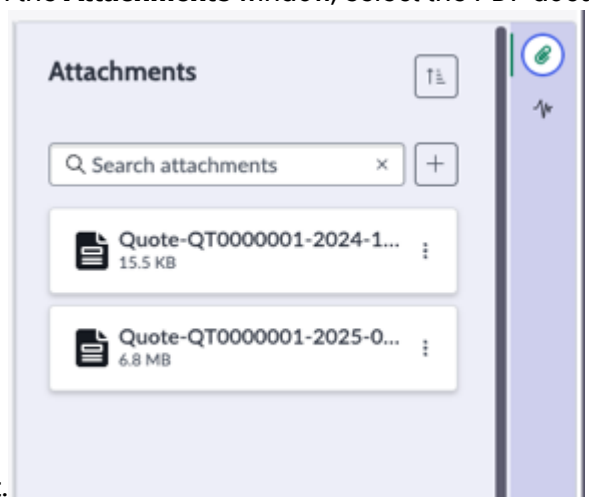
Agents can view quote documents in the PDF viewer window. The PDF viewer window has controls that enable agents to manage the PDF.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the List icon .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. In the **Attachments** window, select the PDF document to open it.



The PDF document opens in the PDF viewer.

5. Use the PDF viewer controls to manage the PDF.

Use hierarchical list view for quote line items

Sales agents can view quote line items as a hierarchical list, which helps to view the parent and child relationship between line items.

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Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the List icon .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with and open the **Line items** tab.
4. Use the control to manage the line items.

Control	Description
Caret	Opens the hierarchical list view showing the child line items.
Pencil	Make additional configuration changes to the products in the line item.
Number 5	Shows the number of child line items contained in the parent line item.
Filter	Filters line items.
Toggle	Toggles between hierarchical view and standard view.

Consolidate quotes

Consolidate renewal quotes to merge multiple quotes for the same account into a single unified quote.

Before you begin
The admin needs to configure the Quotes related list on the Account Details page.

Role required: sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the List view, navigate to **Accounts** and select the required account.
3. On the Account Details page navigate to **More** > **Quotes**.
4. On the **Quotes** related list, select the quotes that you want to consolidate.
5. Select **Consolidate**.
6. In the Quote Consolidation dialog box that appears, select the target quote from the **Select a target quote** list.
7. Select **Proceed**.
   The selected quotes are merged into the target quote. A confirmation message appears with a link to the consolidated quote. The target quote displays a **Consolidation History** related list that shows all source quotes that were merged into it.

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Using Advanced Approval Management

Sales teams can use workflows for approving Sales Customer Relationship Management entities such as customer quotes. Workflows begin with approval requests submitted by sales agents, which are then routed for approval by designated approvers.

Tracking approval status and history

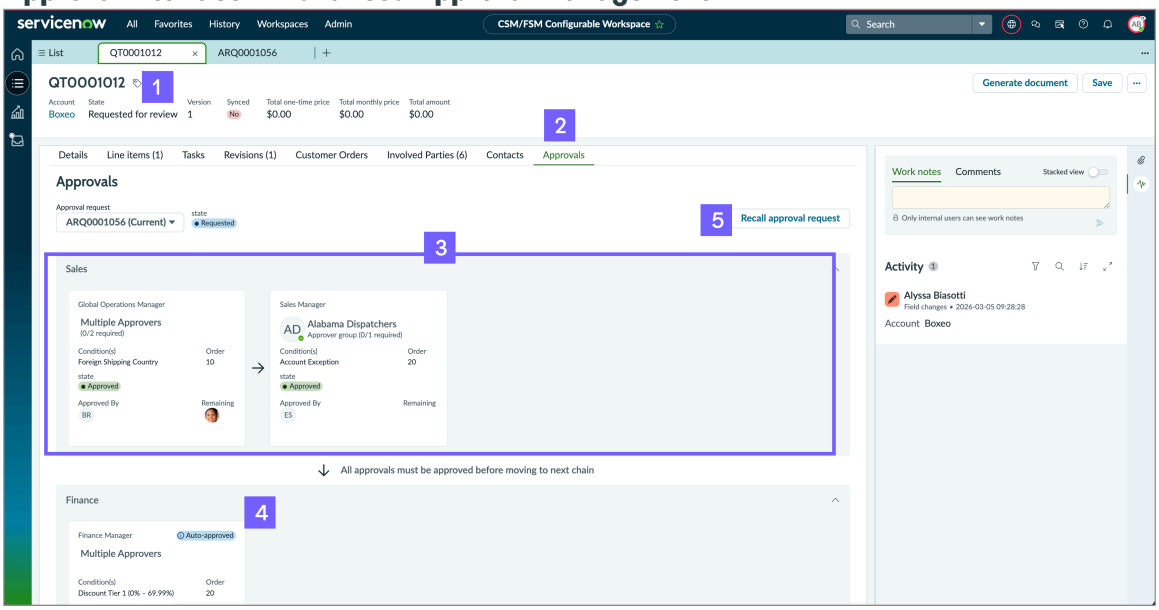
Monitor the progress of an approval request as it moves through the steps in an approval workflow.

Approval workflow interface

After a requester submits an approval request, users involved in the approval process can view and track the approval request steps for the entity in the CSM Configurable Workspace. For example, in a quote approval workflow, the requesters, approvers, and users with view access can navigate to the quote and access the approval workflow interface from the Approvals tab.

The approval workflow interface provides an audit trail of each approval step, including the rule, assigned approvers, actual approvers (for completed steps), approval comments, and assignment and completion timestamps.

Approval interface in Advanced Approval Management



Approval workflow interface elements

Feature	Description
1. Approval request state	State of the approval request.
2. Approvals tab	Related list for the entity, such as a quote, which displays the approval workflow.
3. Approval chain with approval steps	Grouping of approval steps that are run in sequential order, based on the order specified for the steps in the approval rules. Each step card represents an approval rule.

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Approval workflow interface elements (continued)

Feature	Description
4. Approval step card	Card that provides information about the approval step and the rules and conditions for that step. • If the request was previously recalled during the approval process, an Auto-approved flag indicates at least one or more previously completed approvals are automatically reapplied. • Depending on the approval request state and the user role, the card displays the More options ( ) menu for approvers to approve or reject the request in the step. • For approval admins that also have the requester role, the More options ( ) menu includes an **Override** option to bypass the step if it's no longer required. For details, see Override an approver.
5. Approval options	Options displayed for different approval actions, depending on the user role. For example: • Requesters have the option to **Recall an approval request**. • Requesters and approvers have the option to add an ad-hoc approver to the approval workflow using **Add approver**. For more information, see Add approvers to an approval request.

Submitting approval requests

As a requester with the approval request writer role, when you submit your request for approval, you preview it, then request approval. You can also recall a request if you need to make changes or update a request if it was rejected, then resubmit it for approval.

Previewing and submitting approval requests

When a business item such as a customer quote is ready for approval, you can submit an approval request from the Sales Customer Relationship Management application for the entity, for example Quote Management. When you select the **Preview and Submit for approval** option, a preview of your request and the approval workflow opens. You can see the approval conditions that will be used to evaluate your request, the approval steps in the process, and the approvers who review your request. Select **Request Approval** to generate the request.

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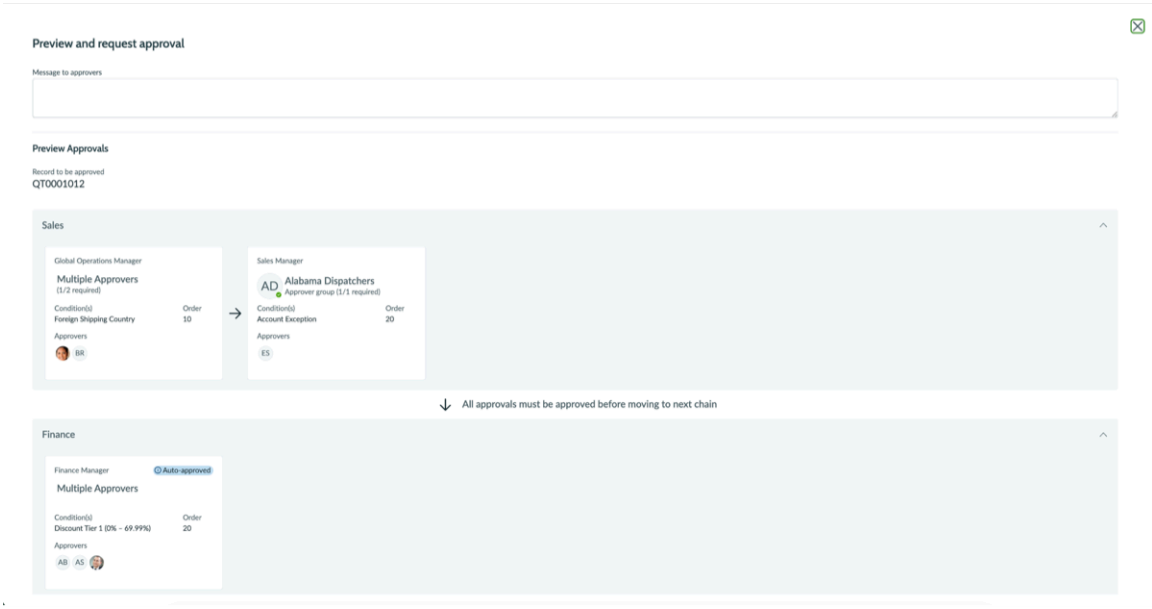
Preview approval request



Recalling approval requests

After you submit a request for approval, you can recall the approval request using the **Recall approval request** option if changes are required. Recalling an approval request cancels any pending approval steps and returns the request to a draft state where it can be updated.

Recalling a request helps prevent approvers from continuing to review outdated information and allows you to address issues before resubmitting the request for approval.

Resubmitting rejected or recalled approval requests

If you recalled an approval request or a request was rejected, you can revise it and resubmit for approval. For example, when you resubmit an approval request for a quote, the approval engine reevaluates the request and determines which approval steps must run again based on the configured rules and conditions.

Approval steps that are unaffected by the changes might be automatically approved (smart reapprovals) depending on the reapproval conditions set by your approval admin. But approval steps affected by the changes are routed again to the appropriate approvers. This helps reduce unnecessary reapprovals while ensuring that all required conditions are met before the quote is approved.

Once all required approval steps are approved, your business item, such as the quote that was approved, can proceed to the next stage of the sales process.

Adding ad-hoc approvers to an approval request

As a requester, you can add one or more approvers or approval groups to a chain named General, when an approval request requires approval by others who are familiar with the rules or business guidelines relevant to the request, but outside of the original approvers. For details on adding ad-hoc approvers, see Add approvers to an approval request.

Overriding an approval step

There may be times when an approval is no longer required. If you're a requester who also has the approval admin role, you can override or bypass a pending approval request step to unblock

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an approval request when the approval is no longer required. For more information, see Override an approver.

Add approvers to an approval request

As a requester or an approver, add one or more ad-hoc approvers to an approval request in Advanced Approval Management.

Before you begin

Role required: sn_adv_appr_mgmt.approval_request_writer or sn_adv_appr_mgmt.approval_request_approver

About this task

After an approval request has been submitted, you can add approval users or approval groups to an approval request. Add approvers when the request requires approval by others who are familiar with the rules or business guidelines relevant to the request, but outside of the original approvers.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to the approval request.
   Access the request by navigating to the transaction entity, and then select the entity, such as a quote for which an approval request was submitted. Select the Approvals tab for the transaction to open the approval workflow interface.
4. Select **Add Approver**.
5. In the Add ad-hoc approver dialog box:
   a. Select **Approver(s)** or **Approver group**.
   b. In the **Approver(s)** or **Approver group** field, enter the approver users or approver groups.
   c. In **Approval criteria**, select Anyone or All to indicate the approvers required.
   d. In **Comment to approvers**, enter the reason for adding approvers or approval groups.
   e. Select **Add**.
   The ad-hoc approvers are added as approvers to the approval workflow. A step card in the General chain is added at the top of the workflow interface, identifying approvers in the Ad-hoc Approval step.

Result

The ad-hoc approver can approve or reject the approval request in one of the following ways:

- In a simple Advanced Approval notification for the approval user or approval group.
- In the approval step card in the General chain, by selecting the **More options** menu and choosing the **Approve** or **Reject** option.
- In the My approvals feature in the ServiceNow AI Platform.

Working with approval requests as an approver

As an approver, you receive notifications informing you of approval requests for items such as customer quotes. Review the requests, evaluating them based on business policies, financial rules, legal rules, or other internal guidelines that your company follows. You can approve or reject the requests in the approval workflow or from the notification reminders that you receive for approval requests.

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Approval workflow

When a sales rep (requester) submits an approval request, the advanced approval engine creates one or more approval requests and routes them to the appropriate approvers. As an approver, you're responsible for only the approval steps assigned to you. Approval actions taken by another approver do not give you access to approval steps assigned to other approvers. But you can track and review the approval process for the request using the approval workflow interfaceapproval workflow interface.

Review the following when you receive an approval request:

- Details of the approval entity, such as quotes and their related pricing
- The approval reason or condition that triggered the request
- Any comments provided by the requester

You can approve or reject requests from different channels, depending on how the approval process is configured by your approval rules admin and how you've set your notification preferences to receive notifications on various channels:

- From the approval workflow interface in the CSM Configurable Workspace
- From system email notifications reminding you of your approval request tasks
- In push notifications from the ServiceNow Now® Mobile application
- From My Approvals in the ServiceNow AI Platform

You may also receive email reminders if your approval rule admin has set up email reminders for your approval configurtion.

Note: For more information on setting up your preferred notification channels, see Notification Preferences.

Rejection workflow

When you reject an approval request, the advanced approval engine updates the approval step record. Rejection helps prevent the request from progressing to the remaining approval steps and indicates that changes are required.

When rejecting an approval request, you provide a comment explaining the reason for rejection. Rejected requests are returned to the requester for further review or updates, depending on the approval configuration. The requester can modify the business item, such as a quote, and resubmit the request for approval.

Escalation workflow

If the escalation feature for your configuration is enabled, and your advanced approval admin has designated you as an escalation assignee for an approval rule, you will receive notification reminders for approval requests that have been escalated and routed to you since the original approver hasn't acted on the request within a certain time period. The original approver also receives a notification indicating the approval request has been escalated.

As an escalated assignee, you can approve or reject requests from different channels, as in the basic approval workflow.

Adding ad-hoc approvers

You can add one or more approvers or approval groups to a workflow, when an approval request requires approval by others who are familiar with the rules or business guidelines relevant to

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the request, but outside of the original approvers. For more information on adding an ad-hoc approver, see Add approvers to an approval request.

Delegating approvals

If you need to be away from work for a specific time period and can't review your approval requests, you can delegate your approval responsibilities to another coworker if the delegation feature in Employee Workflows has been implemented by your admin. For more information on delegation, see Granular Delegation.

Using Customer Contracts and Entitlements

Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate customer contracts and contract lines.

Customer contracts, customer contract lines, and entitlements can be created in the following ways:

- Via workflows: You can create customer contracts, customer contract lines, and entitlements by using the contracts and entitlements workflow. For more information, see Creating contracts and entitlements using workflows.

  Note: When a customer contract line or entitlement is created via the Sales Customer Relationship Management workflow, the account/consumer/household details are copied from the sold product and it inherits the state of the sold product. Further, when the state of the contract line changes, the same state is synced back to the parent sold product.

- Via API integrations:
  - Service Contract API
  - Entitlement API

You can perform the following features using Customer Contracts and Entitlements Workflows:

- Standard renewals: A standard renewal occurs when a contract is renewed on schedule. The system creates a new contract with the existing contract lines, entitlements, and child records, with the new term starting immediately after the original contract ends. There is no pricing adjustments that are needed beyond the agreed renewal terms.
- Non-standard renewals: A non-standard renewal occurs when a contract is renewed outside of the renewal cycle. This covers three scenarios: an early renewal, a late renewal, and a short-term renewal. For more info, see Renew a customer contract line.
- Consolidation of Contracts: You can merge multiple contracts for the same account into a single contract. Use contract consolidation during renewal to align contract terms and combine subscriptions into one contract. For more info, see Renew a customer contract line.
- Upsell or Downsell: You can add or reduce the quantity to an existing contract during its term.

Using Contracts and Entitlements Workflows

Learn how contracts and entitlements using workflows enable you to create and manage customer contracts, customer contract lines, and entitlements.

You can manage the life cycle of customer contracts and entitlements from offer creation to contract generation using contracts and entitlements workflows. Using workflows you can suspend, resume, cancel, and renew multiple entities at once. You can view customer contract lines as a hierarchical list that helps to view the parent and child relationship between line items. Customer Contracts and Entitlements supports variable and derived pricing models.

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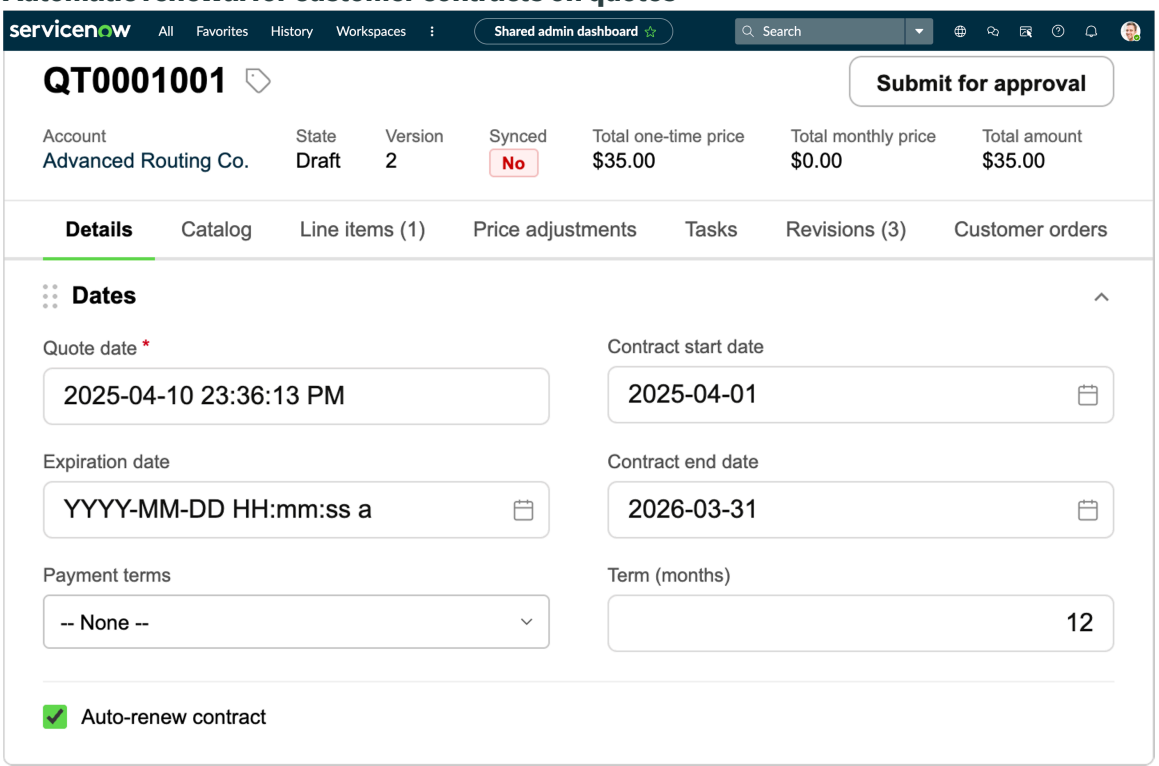
Contracts and entitlements correctly reflect dynamically calculated prices, ensuring consistency with underlying pricing logic and improving accuracy across contract-driven workflows. For more info, see Configuring derived pricing. You can also perform the following functions using workflows:

- Create, suspend, resume, cancel, and renew customer contracts.
- Create, modify, suspend, resume, cancel, and renew customer contract lines, and entitlements.

Automatic renewal of customer contracts

While creating customer contracts from quote or orders, you can select the **Auto-renew contract** option on a quote or order to automatically renew the contracts. When you add or delete a contract line from these customer contracts, the renewed quotes and opportunities are updated. You can configure the auto-renewal date of the contract in the Customer Life Cycle Workflows Policy decision table. By default, you can choose to initiate the auto-renewal 90, 60, or 30 days before the contract end date, or on the contract creation date. For more info, see Creating contracts and entitlements using workflows.

Automatic renewal for customer contracts on quotes



In the Renewal adjustment basis field, you can select **List price** or **Contracted price**. Selecting List price renews the contract at the market price of the contract at the time of the renewal date.

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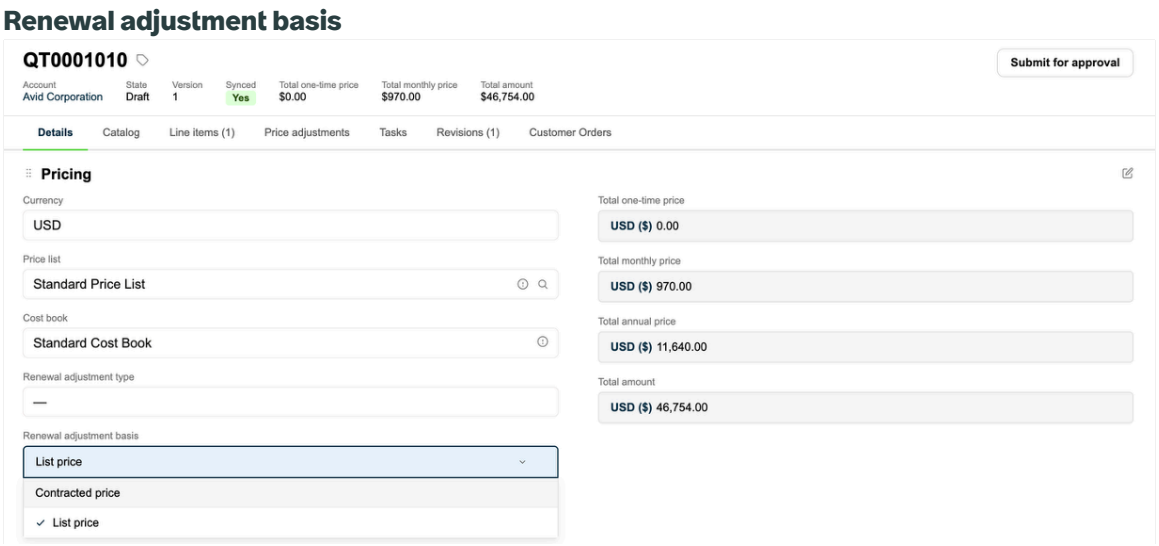
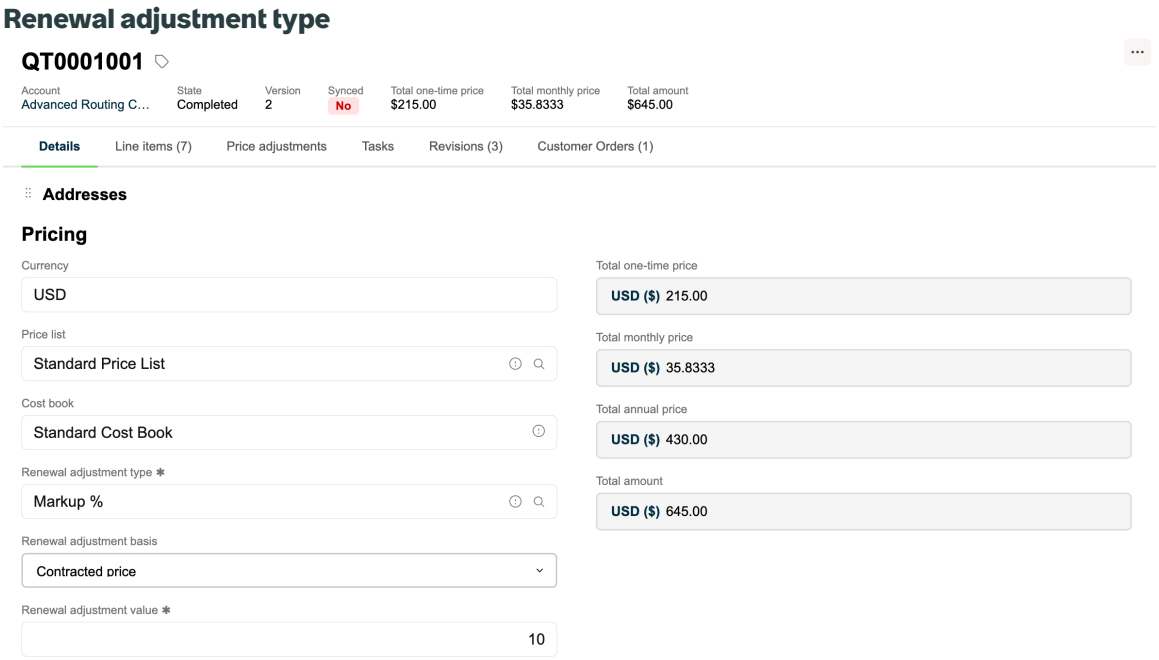


Selecting Contracted price gives you the option to renew the contract at Markdown % or Markup % of the current contract price. For example, if you select **Markup %** field and you enter 10 in **Renewal adjustment value**, the customer contract is renewed at 10% above the current contract price.



That exact renewal date and the renewal adjustments for that customer contract will be visible on the customer contract form in the **Auto renewal date** field.

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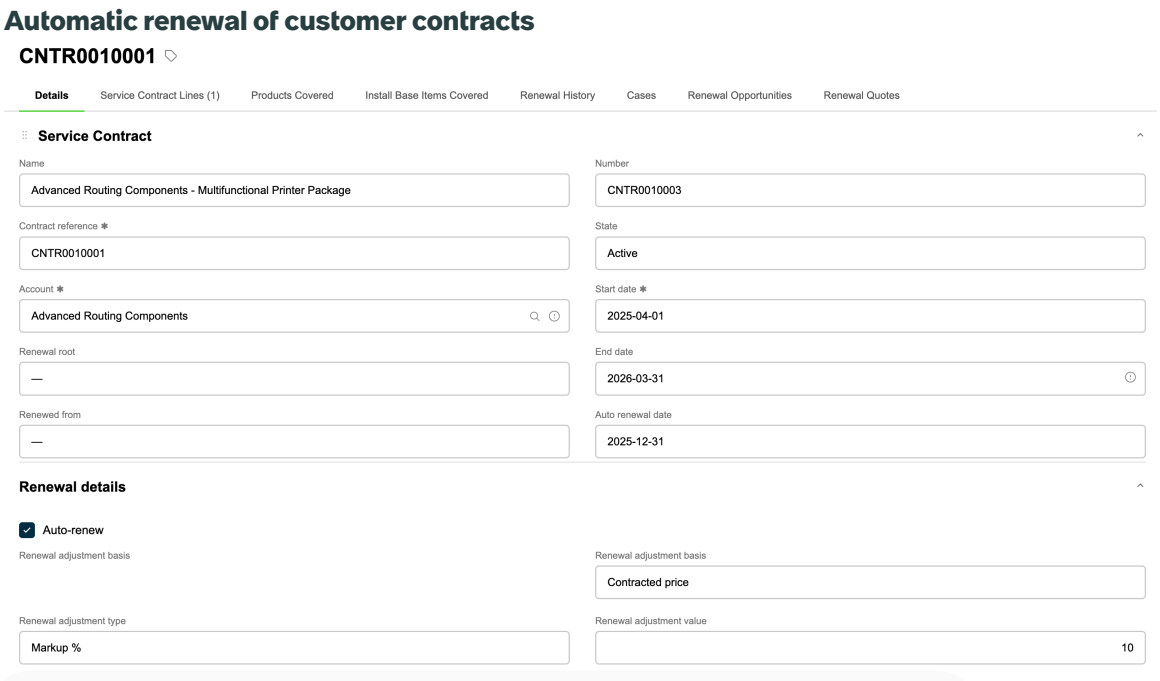

You cannot modify the renewal adjustment fields on the customer contract. You can only modify the renewal adjustment values on the quote and orders.

Updating contract end date

During quote processing, the system alerts you when the contract end date is exceeding the product offering end date. When you submit quotes for approval, a dialog box appears alerting you. You can select the option **update contract end dates to match offering end dates** to match the contract end date to the product offering end date.

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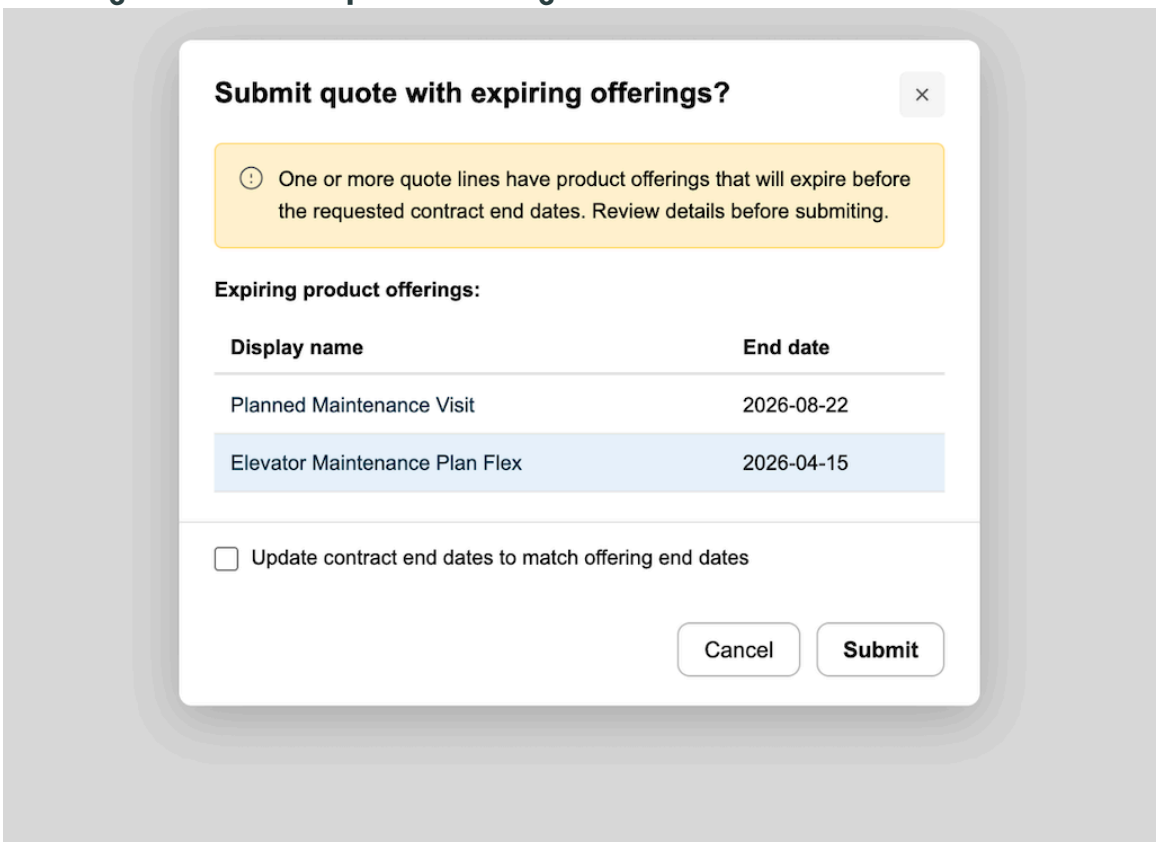
Matching the contract and product offering end dates



If you do not select this option and approve the quote, the contract end date remains the same.

Co-terminate quote lines

You can assign the same start and end dates to multiple quote lines while creating or renewing a quote. On the **Line items** tab on the quote details page, select multiple quote lines and then select **Co-terminate**. All the selected quote lines have the same start and end date.

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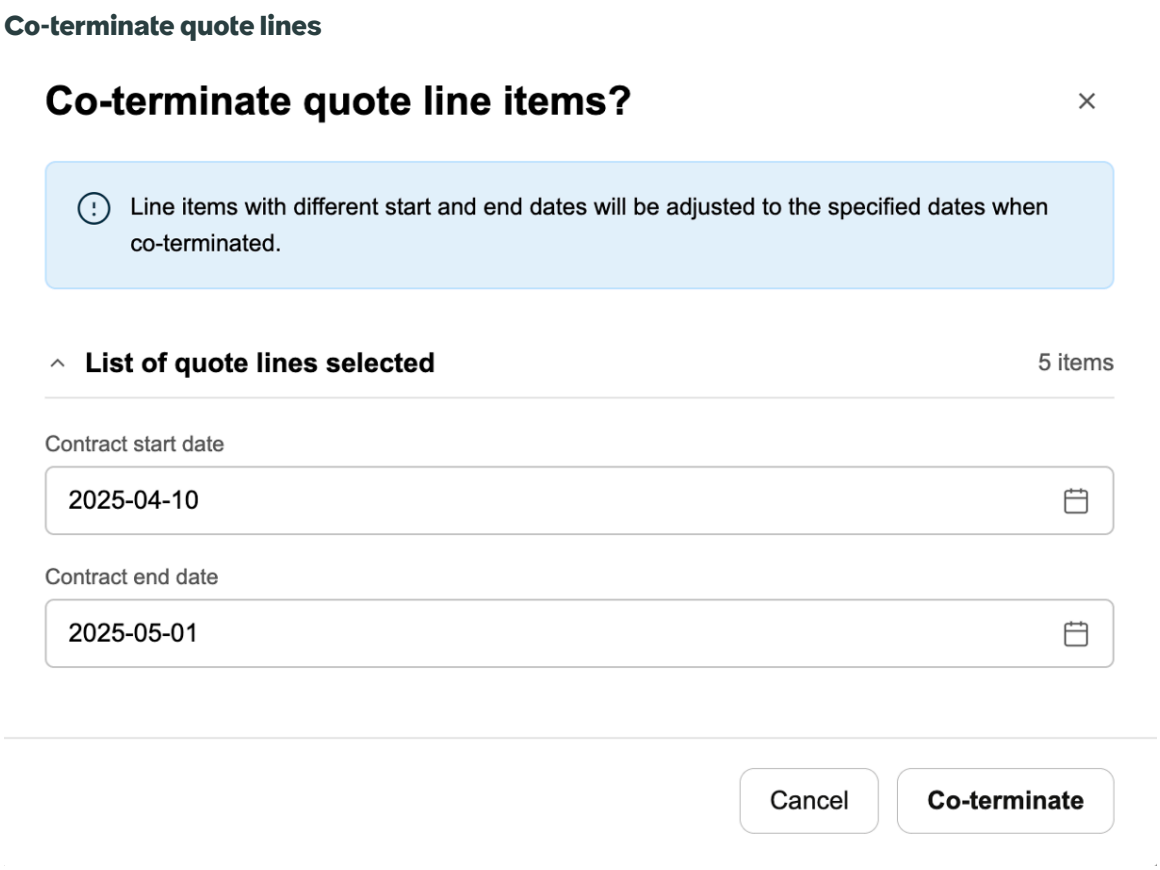

Viewing price ramps

Customers can scale their purchases by adjusting the pricing and quantity throughout the contract or subscription term by using Ramps feature. For more info, see Add price ramps on a quote line item. You can view the price ramp details on the contract line. Only the active price ramp segment is displayed on the contract line. Select a contract line and select **Ramps** to view all the details of the price ramp for that contract line. You can view start and end date, term period, ramp type (yearly or quarterly), ramp segments, and Annual percentage increase (API%).

Add contract lines to a customer contract

Add one or more contract lines to a customer contract on the CSM Configurable Workspace.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract to add more contract lines.
4. On the Customer Contract form, select **Customer Contract Lines** related list.
5. Select **New**.

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The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

- If the selected target entity is a quote, a quote to create new customer contract line is created.
- If the selected target entity is an order, an order to create new customer contract line is created.
- If the selected target entity is an opportunity, an opportunity to create a new customer contract line is created.
- If the selected target entity is an opportunity and a quote, both opportunity and quote to create the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

The Existing contract field will refer the current customer contract. All the other fields like Contract start date, Contract end date, and contract renewal fields will be auto-populated with the current contract details.

6. In the Catalog tab, add products to the new quote or order that is created.
   For more info, see Add products to a quote.
7. Select **Submit for approval**.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   On the Customer Contract Line related list, a new customer contract line is created and added.

Result

The new customer contract line is added to the contract and is visible on the selected target entity. The new customer contract line is synced with auto-renewal quote or opportunity that is generated for the contract. When the associated customer contract is auto renewed, the new customer contract line is automatically renewed and added to the renewal quote or opportunity.

Renew

Renew customer contracts, contract lines, and entitlements.

Renewing a customer contract, contract line, or entitlement initiates the configured renewal workflow and generates a new renewal record as applicable. The workflow carries forward relevant terms, pricing, and relationships to ensure continuity. Renewal maintains life cycle history while enabling ongoing service and billing processes.

Renew a customer contract line

Renew a customer contract line on the CSM Configurable Workspace. You can renew the services specified in the customer contract line and its associated child customer contract lines and entitlements.

About this task

You cannot renew a customer contract line when it is in Canceled state or it does not have an end date.
The order processing for product inventory based contract lines are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

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Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to renew.
4. In the customer contract lines related list, select the customer contract lines that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the customer contract line is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the customer contract line is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the customer contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

     Note: If you select a quote or an opportunity, the line items with same product offerings and configuration will be consolidated into a single quote or opportunity line. The consolidated line item reflects the total quantity of all the combined items. For more info, see Consolidate quotes.

   If more than 20 contract lines are renewed, the target entities are created asynchronously. You can configure the threshold value for the number of contract lines.
6. Perform an early or late renewal on the customer contract line.
   In early renewal, users can terminate the contract before the expiry date and create a new contract with the desired start date. For late renewal, users can renew expired contracts that are not renewed.
   - Select a date before the contract expiry date in the **Renew from** field to perform an early renewal. Two quote or order line items are created. One change order or quote line is created with the modified expiry date of the current service contract line. A new renewal quote or order line is created is created with the new start date.
   - For an expired contract line, enter a new date to renew the service contract line in the **Start from** field. A new renewal quote or order line is created with a new start date.
7. After the order line items are fulfilled, set the status to **Completed**.
   A new customer contract line is created.

Result

The new customer contract line is created with the renewed contract line in the Draft state. You can see more details in the Renewal History related list.

Renew an entitlement

Renew an entitlement on the CSM Configurable Workspace.

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Before you begin

You cannot renew an entitlement when it is in Canceled state or it does not have an end date. For more info, see Order fulfillment.

The order processing for product inventory based entitlements are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the entitlement is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the entitlement is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the entitlement is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the entitlement are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.
6. After the order line items are fulfilled, set the status to **Completed**.
   A new entitlement is created.

Result

The new entitlement is created in the Draft state. You can see more details in the Renewal History related list.

Modify

Modify Customer contracts, contracts lines, and entitlements.

Modifying customer contracts, contracts lines, and entitlements applies the requested changes and updates the record based on configured amendment rules. Modifications can impact terms, pricing, dates, or related records while preserving life cycle history.

Modify a customer contract

Modify a customer contract so that you can update its existing configurations.

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Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Modify all lines** to modify the customer contract.
5. On the Configurator UI, modify the existing configurations for the customer contract line. To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.

   Note: The Configurator UI is displayed only if the customer contract has a single customer contract line. For multiple customer contract lines, a quote or an order will be created with contract lines in Draft or Active state.

6. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the customer contract is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the customer contract is created. You can click the order number from the confirmation message to view the modified order line items.
7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Modify a customer contract line

Modify a customer contract line so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select one ore more customer contract line that you want to modify the characteristics and line items for.

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5. Select **Modify** to modify the selected customer contract lines.
6. On the Configurator UI, modify the existing configurations for the customer contract line.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.

   Note: The Configurator UI is displayed only if you select a single customer contract line. If you selected multiple customer contract lines, the order or quote created is displayed.

7. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the customer contract line is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the customer contract line is created. You can click the order number from the confirmation message to view the modified order line items.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Modify an entitlement

Modify an entitlement associated to an account so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to modify the characteristics for.
5. Select **Modify**.

   Note: You can only modify entitlements associated with an account. You cannot modify entitlements associated to customer contract lines.

6. On the Configurator UI, modify the existing configurations for the selected entitlement.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.

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An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

- If the selected target entity is a quote, a quote to modify the entitlement is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
- If the selected target entity is an order, an order to modify the entitlement is created. You can click the order number from the confirmation message to view the modified order line items.

8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Suspend

Suspend Customer contracts, contract lines, and entitlements.

Suspending a customer contract, contract line, or entitlement to pauses the life cycle processing and related service activities. During suspension, associated workflows, renewals, and dependent records are paused based on configuration.

Suspend a customer contract

Suspend a customer contract and its child customer contract lines by creating an order on the CSM Configurable Workspace. Suspending a customer contract suspends or disables the services specified in that customer contract.

Before you begin

You can suspend a customer contract when at least one of the associated root sold products is in Active state. For product inventory records, you can suspend a customer contract when the associated product inventory record is in Active state.

Note: If you don't create a resume order, the customer contract is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Suspend**.
5. In the Suspend customer contract window, enter the period of suspension for the customer contract in the **Start date and time** and **End date and time** fields.

   Note: If you do not enter a value in the **End date and time** field, the customer contract is suspended indefinitely. You can resume the customer contract manually. For more info, see Resume a customer contract.

6. Add a reason for a suspension in the **Reason for suspension** field.
7. Select **Suspend**.
   An order with the suspend action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

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Result

With the customer contract, all the associated customer contract lines and entitlements are also suspended. However, the customer contract stays in the current state. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract and all its associated child customer contract lines and entitlement will be in Active or Draft state again. After the end date of the customer contract, the suspended customer contract and all its associated child customer contract lines and entitlement move to Expired state.

Suspend a customer contract line

Suspend a customer contract line and its child customer contract lines by creating an order on the CSM Configurable Workspace. By suspending a customer contract line, you are suspending or disabling the services and characteristics associated with that customer contract line.

About this task

Before you begin

You can suspend a customer contract line when the associated root sold product is in Active state. For product inventory records, you can suspend a customer contract line when the associated product inventory record is in Active state.

Note: If you don't create a resume order, the customer contract line is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select the customer contract line from the customer contract lines related list, that you want to suspend.
5. Select **Suspend**.
6. In the Suspend customer contract line window, enter the period of suspension for the customer contract line in the **Start date and time** and the **End date and time** field.

   Note: If you do not enter a value in the **End date and time**, the customer contract line will be suspended. You can manually resume the customer contract by using the resume option. For more info, see Resume a customer contract line
7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that customer contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result

With the customer contract line, all the associated entities in the hierarchy are also suspended. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract line will be in Active state again. After the end date of the customer contract, the suspended customer contract line and all its associated child customer contract lines and entitlement move to Expired state.

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Suspend an entitlement

Suspend an entitlement by creating an order on the CSM Configurable Workspace. By suspending an entitlement, you are suspending or disabling the services and characteristics associated with that entitlement.

Before you begin

You can suspend an entitlement when the associated root sold product is in Active state. For product inventory records, you can suspend an entitlement when the associated product inventory record is in Active state.

Note: You can only suspend entitlements associated with an account. You cannot suspend entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to suspend.
5. Select **Suspend**.
6. In the Suspend entitlement window, enter the period of suspension for the entitlement in the **Start date and time** and the **End date and time** field.

   Note: If you do not enter a value in the **End date and time**, the entitlement will be suspended You can resume the entitlement manually by using the resume option. For more info, see Resume an entitlement.

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the entitlement will be in Active state again. After the end date of the entitlement, the suspended entitlement will move to Expired state.

Resume

Resume customer contracts, contract lines, and entitlements.

Resuming customer contracts, contract lines, and entitlements updates the record status and reactivates associated life cycle workflows. Resuming restores service delivery and allows renewals, amendments, and related transactions to continue based on configuration.

Resume a customer contract

Resume a customer contract and its child customer contract lines by creating an order on the CSM Configurable Workspace. By resuming a customer contract, you are restarting the services specified in that customer contract.

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Before you begin

You can resume a customer contract when at least one of the associated root sold product is in Inactive, Canceled, or Suspended state. For product inventory records, you can resume a customer contract when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Resume**.
5. In the Resume customer contract window, in the **Start date and time** field, enter when you want to resume the customer contract.
6. Add a reason for a resuming the customer contract in the **Reason for resumption** field.
7. Select **Resume**.
   An order for resuming the customer contract is created.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Result

The customer contract and all its associated child contract lines and entitlements are back in Active or Draft state, depending on the start date of the respective entity.

Resume a customer contract line

Create an order to resume a customer contract line and its child customer contract lines on the CSM Configurable Workspace. By resuming a customer contract line, you are restarting the services specified in that customer contract line.

Before you begin

You can resume a customer contract line when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume a customer contract line when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select the customer contract line that you want to resume.
5. Select **Resume**.
6. In the Resume customer contract line window, in the **Start date and time** field, enter when you want to resume the customer contract line.
7. Add a reason for a resuming the customer contract line in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the customer contract line is created.

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9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result
With the customer contract line, all the associated entities in the hierarchy are also back in Active or Draft state, depending on the start date of the respective entity.

Resume an entitlement

Resume an entitlement by creating an order on the CSM Configurable Workspace. By resuming an entitlement, you are restarting the services and the characteristics specified in that entitlement.

Before you begin
You can resume an entitlement when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume an entitlement when the associated product inventory record is in Suspended state.

Note: You can only resume entitlements associated with an account. You cannot resume entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to resume.
5. Select **Resume**.
6. In the Resume entitlement window, in the **Start date and time** field, enter when you want to resume the entitlement.
7. Add a reason for a resuming the entitlement in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the entitlement is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result
The entitlement is back in Active or Draft state, based on the start date of the entitlement.

Cancel

Cancel customer contracts, contract lines, and entitlements.

Cancel a customer contract

Create an order to cancel a customer contract and its child customer contract lines on the CSM Configurable Workspace. By canceling a customer contract, you are terminating the services specified in that customer contract.

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Before you begin

You can cancel a customer contract when at least one of the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Cancel**.
   All the associated customer contract lines and entitlements will also be cancelled and will be set to the Cancelled state.
5. In the Cancel customer contract window, in the **Start date and time** field, enter the date when the customer contract will be cancelled.
6. Add a reason for a cancellation in the **Reason for cancellation** field.
7. Select **Cancel**.
   An order with the cancel action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Result

With the customer contract, all the associated customer contract lines and entitlements are also cancelled and will be in **Cancelled** state.

Cancel a customer contract line

Create an order to cancel a customer contract line and its child customer contract lines on the CSM Configurable Workspace. By canceling a customer contract line, you are canceling or disabling the services and characteristics associated with that customer contract line.

Before you begin

You can cancel a customer contract line when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract line when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract, select the customer contract line from the customer contract lines related list, that you want to cancel.
5. Select **Cancel**.
6. In the Cancel customer contract line window, in the **Start date and time** field, enter the date when the customer contract line will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.

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An order with the cancel action is created for that customer contract line.

9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result
With the customer contract line, all the associated entities in the hierarchy are also cancelled and move to Cancelled state.

Cancel an entitlement

Cancel an entitlement by creating an order on the CSM Configurable Workspace. By canceling an entitlement, you are canceling or disabling the services and characteristics associated with that entitlement.

Before you begin
You can cancel an entitlement when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel an entitlement when the associated product inventory record is in Active or Suspended state.

Note: You can only cancel entitlements associated with an account. You cannot cancel entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to cancel.
5. Select **Cancel**.
6. In the Cancel entitlement window, in the **Start date and time** field, enter the date when the entitlement will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result
The entitlement is permanently cancelled and will move to Cancelled state.

Add Covered Products using Contracts and Entitlement Workflow

Covered products refers to specific products or order line items that are included in a customer contract. These items are linked to the contract to define what is covered for service or maintenance. Covered products can be directly tracked through the contract records, facilitating changes and visibility of what is covered.

Agents in Order management can select the products to be covered by a contract when the order is captured for the contract offering. To manually associate a covered product with a contract line, see the Add covered products to order line items

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You can also modify the covered products added to a contract line. You can add new covered products to that contract line or entitlement and remove the existing covered products.

Upsell or Downsell a customer contract line

Upsell or downsell a customer contract line on the CSM Configurable Workspace. You can reduce or increase the quantities of the products specified in the customer contract line.

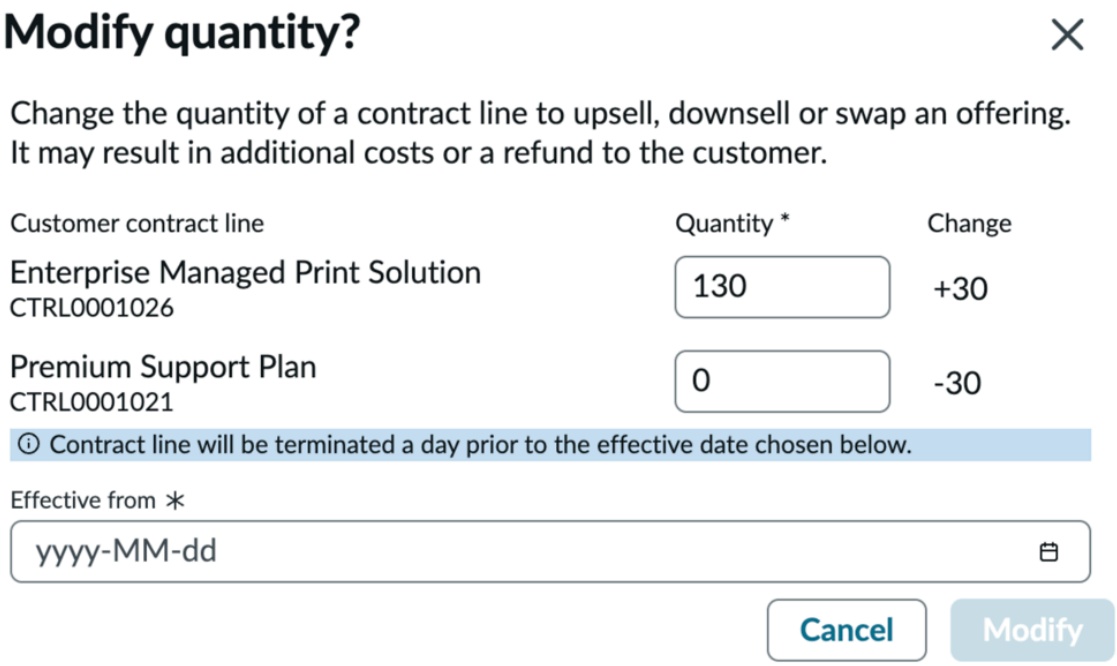
Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to update.
4. In the customer contract lines related list, select one or more customer contract lines that you want to modify.
5. From the **Modify entire line** list, select **Modify quantity**.
6. In the Modify quantity dialog box, you can swap the values fully or partially in the **Quantity** field for both the contract



lines.

For example, if one product has a quantity of 100 and another has 30, you can perform either a full swap or a partial swap. In the screenshot above, a full swap is completed by updating the Quantity field of the first contract line to **130** (adding the 30 units from the second line) and setting the second contract line's quantity to 0. The Change field reflects the change in quantity.

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You can also perform a partial swap. For instance, you can update the second contract line from 30 to 20, and add the remaining 10 units to the first contract line, increasing it from 100 to 110.

7. Select the start date of the new customer contract line from the **Effective from** field.
8. Select **Modify**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - In case of a partial swap, three quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with three order line items.
   - In case of a full swap, two quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with two order line items.
9. In the Line Items related list, select the State value of the parent order lines and set them to **Completed**.
   In case of partial swap, two new customer contract lines with the modified quantities are created with the Start date as the **Effective from** date. The end date of the existing contract line is updated. In case of full swap, one new customer contract line with the modified quantity is created with the Start date as the **Effective from** date. The end date of the existing contract line is updated.

Note: You can perform a partial or a full swap with a new product from the catalog by following the same procedure.

Add a sold product or install base item to a customer contract

Add the sold products or the install base items covered to customer contracts, contract lines, or entitlements.

Before you begin
Role required: sn_customerservice_manager

About this task
Sold products are products and components that have been sold to an account or a consumer and can have multiple contracts. An install base item is an instance of sold product that has been provisioned for an account or consumer.

Associating sold products or install base items to a Customer Contracts and Entitlements entity helps keep a track of the products or install base items that are serviced to a customer under that entity.

A sold product or an install base item can be added to a Customer Contracts and Entitlements entity in the Draft, Active, or Suspended states.

Note: If an entity is deleted, the related sold product or install base item covered is also deleted.

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Procedure

1. Navigate to the ServiceNow AI Platform interface or the CSM Configurable Workspace.

Interface	Action
ServiceNow AI Platform interface	Navigate to **All** > **Customer Service** > **Contracts and Entitlements**.
CSM Configurable Workspace	○ Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**. ○ In the list view, navigate to **Contracts and Entitlements**.

2. Add the sold product or install base item covered to customer contracts, contract lines, or entitlements.

Add to	Procedure
Customer Contracts	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that you want to add the sold product or install base item to. **c.** From the Products Covered or Install Base Items Covered related list, select **New**.
Customer Contract Lines	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that has the required contract line. **c.** From the Customer Contract Lines related list, select the contract line that you want to add the sold product or install base item covered to. **d.** From the Sold Product Covered or Install Base Items Covered related list, select **New**.

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Add to	Procedure
	Note: When a sold product or an in stall base item covered is added to a contract line, it is not added to the relat ed entitlements.
Entitlements	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that has the required contract line. **c.** From the Customer Contract Lines related list, select the contract line that has the re quired entitlement. **d.** From the Entitlements related list, select the entitlement that you want to add the sold product or install base item to. **e.** From the Sold Product Covered or Install Base Items Covered related list, select **New**. You can also directly navigate to Entitlements form as follows: **a.** In the list view, navigate to **Contracts and Entitlements** > **Entitlements**. **Note:** In the ServiceNow AI Platform interface, select **Entitlements** in the navigation menu. **b.** Select the entitlement that the sold product or install base item must be added to. **c.** From the Sold Product Covered or Install Base Items Covered related list, select **New**.

Note:

- You can either add a sold product or an install base item to the Customer Contracts and Entitlements entity.
- The state of the entity shouldn't be Expired or Canceled.

3. On the Sold Product Covered form, fill in the fields.
   For a description of the field values, see Sold product form.
4. Select **Submit**.

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Record the usage on the entitlement

Record the consumption or usages made out of the total characteristic quantities allotted for an entitlement.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

When an entitlement moves to the Active state, usage records are created. You can update the usage records on the basis of units or quantities used as and when the customer uses the services. For example, if a characteristic includes 50 visits to the customer, then the Total units field displays 50 and the Used units field is updated after each visit. Managers can create and update usage records for an entitlement but agents can only update the Used units field.

Procedure

1. Navigate to the ServiceNow AI Platform interface or the CSM Configurable Workspace.

Interface	Action
Platform interface	Navigate to **All** > **Customer Service** > **Contracts and Entitlements** > **Customer Contracts**.
CSM Configurable Workspace	○ Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**. ○ In the list view, navigate to **Contracts and Entitlements** > **Entitlements**.

2. Record the usage on an entitlement.

From	Do this
Customer Contracts	**a.** Select the contract that has the entitlement that you want to track the usage on. **b.** From the Customer Contract Lines related list, select the contract line that has the entitlement. **c.** From the Entitlements related list, select the entitlement. **d.** From the Entitlement Usages related list, open the usage record.
Entitlements	**a.** Select the entitlement that you want to track the usage on. **b.** From the Entitlement Usages related list, open the usage record.

3. On the Entitlement Usage form, fill in the **Used units** field.
4. Select **Update**.

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5. On the Entitlement page, select **Update** to save the entitlement.
   If you have used the Customer Contracts menu to record the usage, then select **Update** to save the contract line and then the customer contract.

Using Sales Agreement Management

Learn how managers, agents, and administrators use the Sales Agreement Management application to generate sales agreements from quotes.

To create a sales agreement from a quote, the following conditions must be met:

- Make sure that the selected quote is not converted to another sales agreement. You cannot create multiple sales agreements from a single quote.
- The quote is in a closed or complete state.
- A sales agreement can be created from a quote that is for an account, not a consumer.

The Sales agreement window has the following tabs that help you create and manage your sales agreement.

Sales agreement tabs

Sales agreement tabs	Description
Details	Details of the related quote, start and end date of the agreement, and so on.
Sales Agreement Line	Details about the product and the services agreed between the buyer and the seller.
Order	Displays the list of all the orders placed with the current sales agreement.
Price List	Details about the account and currency that is updated from quote header. In the Price List Line table, you can view the actual pricing details about the products and services from the related quote.

Create a sales agreement

Create a sales agreement from a quote between a buyer and a seller for future transactions.

Before you begin

Role required: sn_csm_pricing.pricelist_manager and sn_sales_common.sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select the quote to enable a new sales agreement.
3. Select **Enable sales agreement quote**.

   After the sales agreement is created, a message displays the sales agreement number. The request tracker enables agents to monitor the progress of sales agreements creation. All the information on the sales agreement is captured from the selected quote.

   For more information, see Enable a sales agreement in a quote.

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4. Select the sales agreement number.
   The new sales agreement is displayed. The price list created for this new sales agreement is referred in the Default price list field.

What to do next

An order can be placed in the Order Management application based on a sales agreement. For more info, see Add a sales agreement to an order in Order Management.

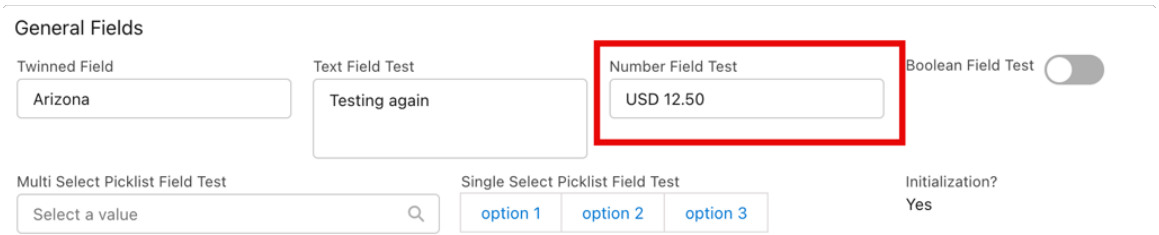
Using CPQ

Use ServiceNow CPQ to configure complex products, apply dynamic rules, and generate accurate quotes with speed and precision. You can understand how the CPQ experience works end-to-end—from guided configuration and real-time pricing to document generation and seamless integration with the rules engine.

Setting the number format of an editable field

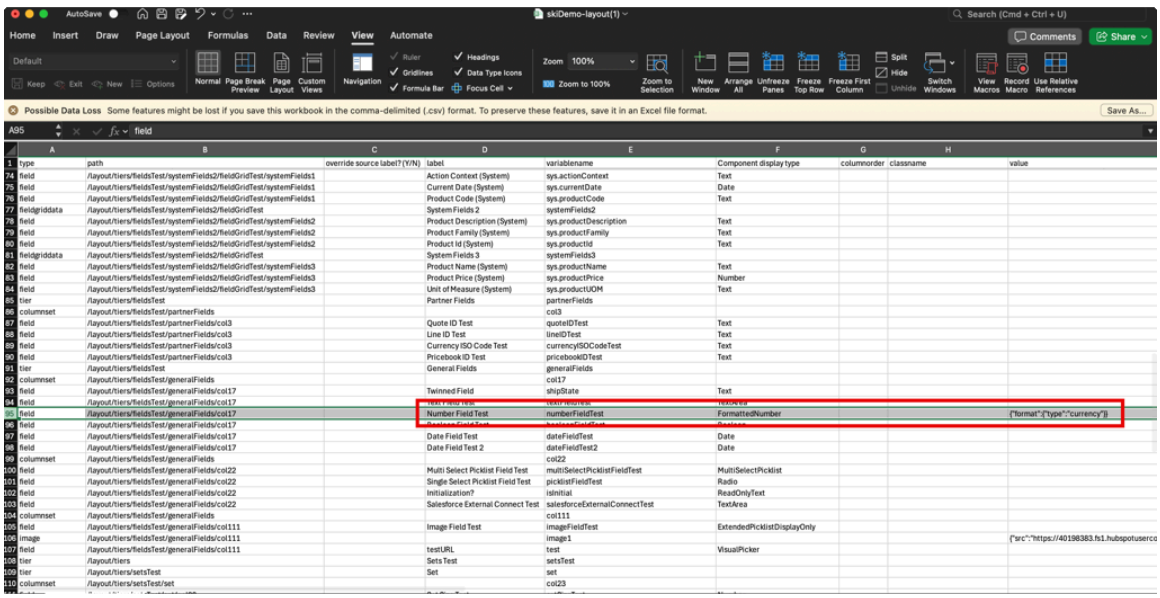
Learn how to create a user-editable field that maintains a specified format.

If an Admin wants to display a number field to an end user in a certain format, but also allow users to edit that field, a solution is to set the display type of the field to be a formatted number.



Currently, the only way to use number formatting on editable fields is to set this component display type from in the layout CSV itself. Once exported and opened with your preferred CSV editor (excel in this example) you can add the following to your field's row:

- `FormattedNumber` to column F `(Component display type)`
- `format: {...}` to column I `(value)`



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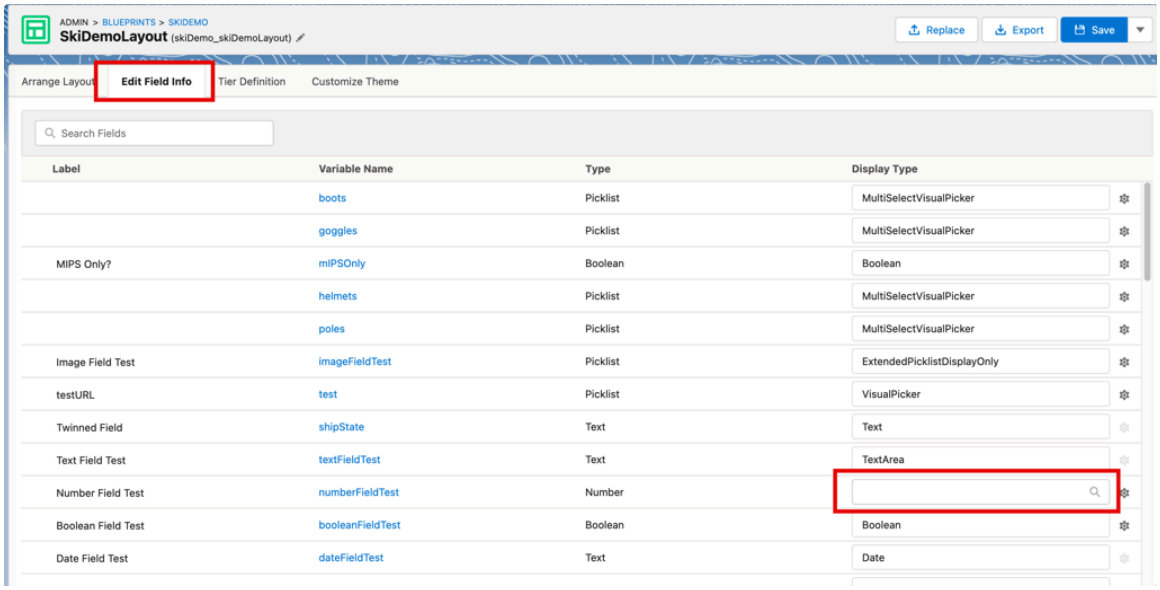
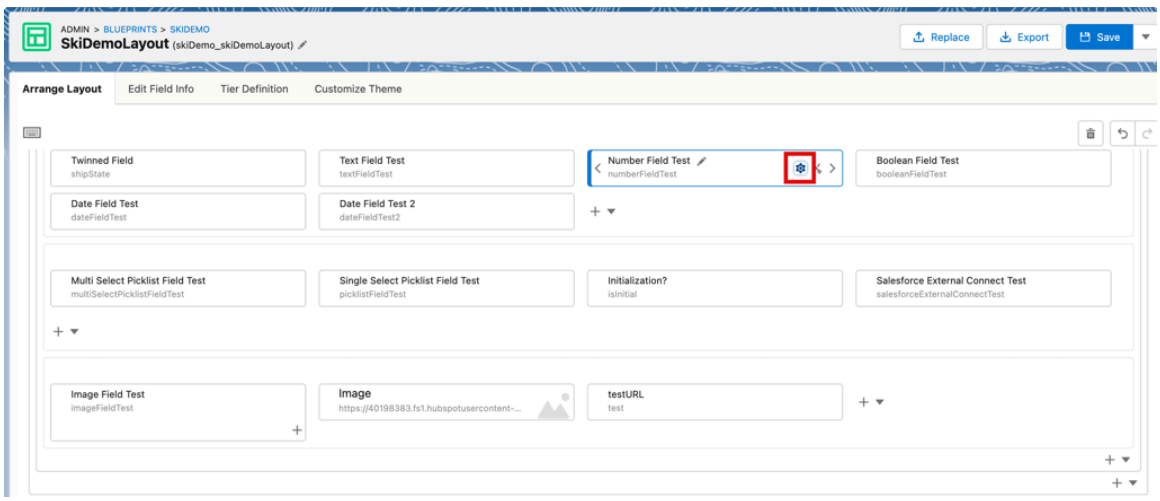
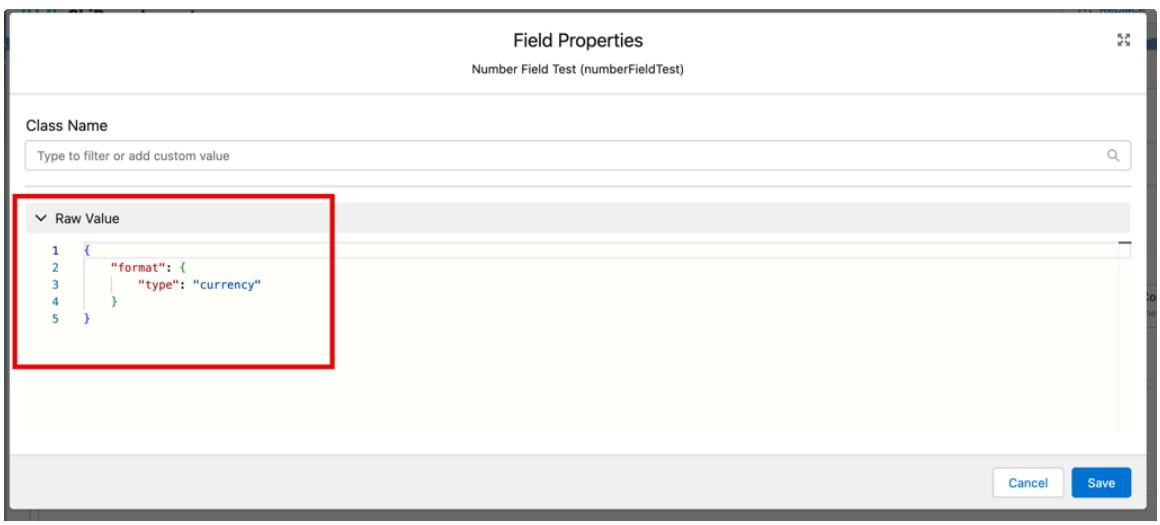
Once this is saved, you can drag this layout CSV into the layout editor window, and it will replace the current layout. You can check that this change was done from both the Edit Field Info tab of the layout editor, where the display type will be blank:



And from the Arrange Layout Tab, where the field properties of your number field will have your inputted format in the Raw Value section:





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After saving and deploying the Blueprint, you should get a similar result to the screenshot at the top of this page. Other formatting options are listed below:

```
{
 "format": {
  "type": "currency" | "percent" | "unit" | "decimal",
  "precision": 2, // Any positive integer
  "unit": Unit, // List of standard JS units, i18n supported
  "customUnit": string, // Any unit to append to the end of the
 value, untranslated
  "displayZeroPriceAs": string,
  "displayNullPriceAs": string
 }
}
```

Percent formatting automatically multiplies by 100. So a field value of 0.1 will display as 10% .

You can show only a percent sign with no math using `type: unit, unit: percent`.

To view a list of supported units, see ECMAScript® 2026 Internationalization API Specification.

You can use customUnit for units not in this list.

Document generation

You can use third-party document generation software to output configuration data by pushing information from CPQ to Salesforce.

Document generation allows you to create professionally formatted documents using a library of customizable templates. Document generation software directly interfaces with your CRM and associated tools and packages (such as CPQ and Billing tools) to output relevant data. For example, you can send a customer a quote document with billing and shipping details, product and pricing information, and so on. These documents can then be submitted to their intended recipient, sometimes with the option for electronic signatures.

Prerequisites

CPQ does not directly interface with any document generation tools; however, CPQ configuration information can be pushed to Salesforce and used in documents from there. This can be accomplished by enabling **Push Config Data to Logik Salesforce Object** in the Admin Settings if you have not done so already; this will create the Configuration Field Data and Configuration Line Items objects in Salesforce and generate records containing CPQ configuration data.

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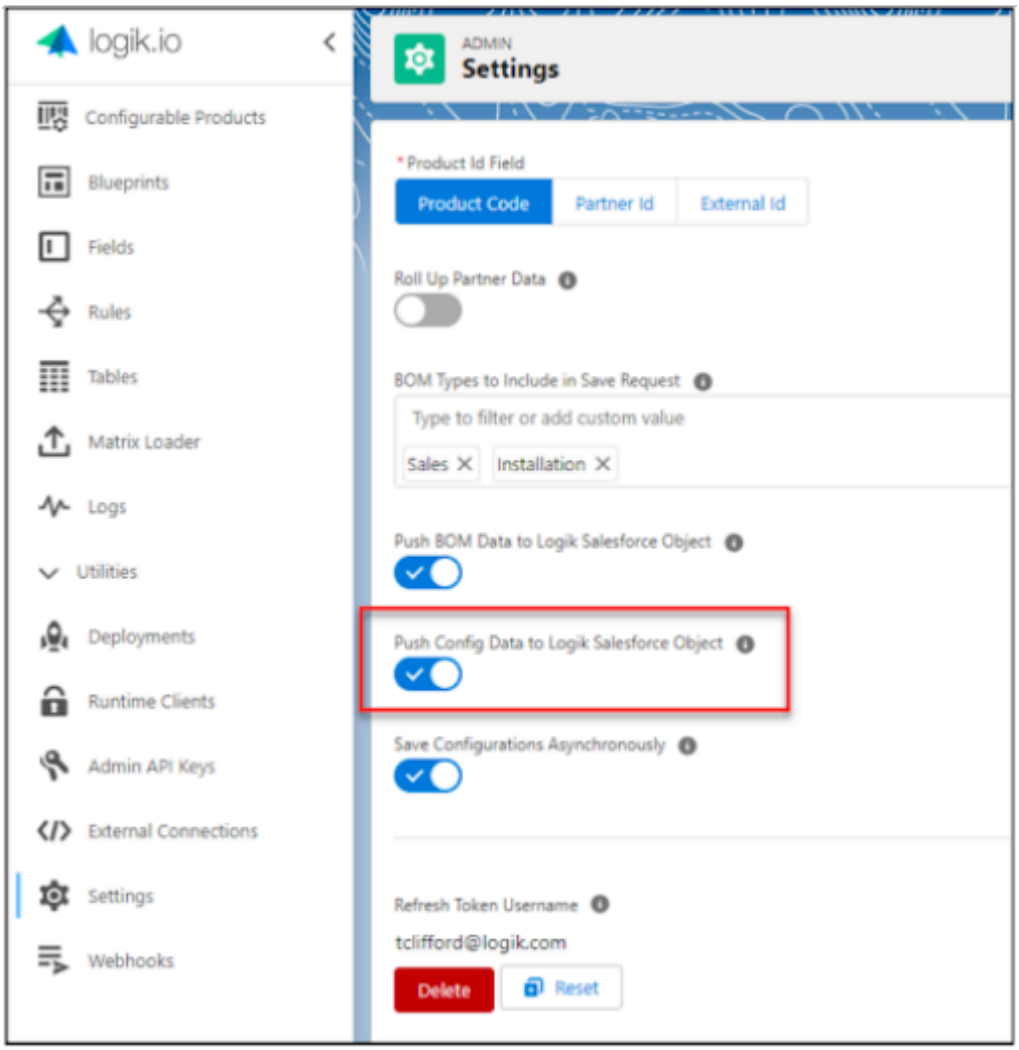

Using the Salesforce CPQ document generator

In order to display CPQ configuration data in out-of-the-box Salesforce CPQ quote documents, you must first map the data from your Configuration Line Items' extended info to custom fields on their associated quote lines. This can be accomplished by using the configuration line item to quote line" flow that is included with CPQ. For more information, see Use case: Configuration line item to quote line flow

Once these fields are populating on your quote lines, they can be used as line columns to be displayed in your CPQ line items template content. These fields can also be utilized in other CPQ quote template fields, such as the group and subgroup fields, to further customize your quote documents.

Using a third-party document generator

Third-party document generators include Conga Composer, DocuSign Gen, PDF Butler, and others. Most third-party document generation tools let you use merge fields to pull data directly from any Salesforce object, including the Configuration Field Data and Configuration Line Items objects. This means you can use your document generator's merge fields to display CPQ configuration data in your quote documents directly from those objects instead of mapping all of your data to fields on the Quote Line object. This provides additional layers of flexibility. For example, CPQ configuration data can be displayed in separate tables or used for grouping or organizing your data.

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Use cases

View a list of example use cases for CPQ.

Use case: Embed CPQ UI in an HTML page

Learn how to embed the CPQ user interface in an HTML iFrame.

This article provides an outline for how an admin can display the CPQ UI in an iframe in any HTML page. Briefly, the recipe consists of:

- the data that the host application will pass to the host HTML page, as JSON
- the host HTML page
- the Content Security Policy [CSP] settings, adjusted on the CPQ server

Configuration initialization JSON data format

To initialize the configuration, pass basic field data to the page. Here are the parameters that you can pass, represented in pretty JSON format:

```
{
  "runtimeToken": "...",
 "quote": {
  "SBQQ__PricebookId__c": "...",
  "LGK__QueriedEditAccess__c": "Active",
  "LGK__FlightPath__c": "None"
 },
 "product": {
  "configuredProductId": "...",
  "configurationAttributes": {
   "Logik__Id__c": null
  },
  "optionConfigurations": {
   "Dynamic": []
  }
 },
 "layoutVarName": "someLayoutVarName"
}
```

Replace the ellipses in the above JSON with the appropriate values from the CPQ environment, pricebook, and product ID.

Sometimes, you may want to display a default layout that is not ordered first in the list of Blueprint layouts. To designate a starting layout with which the CPQ configuration page loads, pass `"layoutVarName":"<variable name of the layout to show by default>"` in the topmost level of the JSON above.

The host HTML page

You will need to host the parent application. For security reasons, this application/host HTML page cannot be localhost. The following sample HTML is a proxy for the host page in which you intend to embed the CPQ UI. The page imports the easyXDM JavaScript library, which facilitates communication with the CPQ UI. Then, easyXDM parses the JSON input, transposes it, and passes the data to the CPQ page as a remote procedure call.

To process data passed from the CPQ UI and leverage it on this HTML page, review the values written to the browser console in the blue-colored console.log line of JavaScript below. Advanced admins can leverage this data by adding more JavaScript in this area.

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Replace the <BASE_LOGIK_URL> placeholder with the base URL of the CPQ environment.

```
<!DOCTYPE html>
<html lang="en">
 <head>
  <meta charset="utf-8" />
  <meta name="viewport" content="width=device-width,
 initial-scale=1" />
  <meta name="theme-color" content="#000000" />
  <meta name="description" content="Logik Configuration
 Wrapper" />
  <title>Logik Wrapper</title>
  <style>
   iframe {
    width:100%;
    height:92vh;
   }
  </style>
  <script type="text/javascript"
 src="assets/js/easyXDM/2.5.0/easyXDM.min.js"
  ssorigin="anonymous"></script>
  <!-- easyXDM and Lightning for VF for passing config data
 to/from Salesforce CPQ -->
  <script type="text/javascript">
  var rpc = new easyXDM.Rpc({
   remote: "<BASE_LOGIK_URL>/ui/configure",
   container: "root"
  }, {
  // method defined in CPQ
   remote: {
    postMessage: {}
   },
  local: {
   postMessage: function (message) {
    console.log("External Config JSON Received from iframe");
    configObj = JSON.parse(message);
    console.log(configObj);
    }
   }
  });
  var cfgData =
 {"runtimeToken":"<PLACEHOLDER>","quote":{"SBQQ__PricebookId__c"
:"<PLACEHOLDER"},"LGK_QueriedEditAccess__c":"<PLACEHOLDER>","LGK
__FlightPath__c":"<PLACEHOLDER>"},"product":{"configuredProductI
d":"<PLACEHOLDER>","configurationAttributes":{"LGK__LOGIK_Id__c"
:""},"optionConfigurations":{"Dynamic":[]}},"layoutVarName":"<PL
ACEHOLDER>"};
  console.log(JSON.stringify(cfgData));
  rpc.postMessage(JSON.stringify(cfgData));
  </script>
 </head>
 <body>
  <div id="root"></div>
 </body>
</html>
```

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Content security policy settings

To embed the CPQ application in an iframe, you must configure it to allow the host application's domain. Log a case with CPQ support, describe your intent to embed CPQ UI in an HTML page, and request that your CPQ server CSP settings be configured to accommodate the parent application's domain URL.

The EasyXDM library

To learn more about the easyXDM library, see easy XDM.net.

Use case: Embed CPQ UI in a Salesforce VisualForce page

Learn how to embed the CPQ user interface in a Salesforce VisualForce page.

This article outlines how to display the CPQ user interface on a Salesforce VisualForce page, such as Salesforce B2B Commerce.

Prerequisite

This example requires the easyXDM library to be loaded into Salesforce [SFDC]. Navigation: SFDC → Setup → Static Resources → New. Upload the https://drive.google.com/file/d/1T0TqffMjlZcEjFke__Re23NdZ_1gWkaJ/view file. For the purposes of thisexample, set the resource name to 'XDMFile1'.

You must also set up your runtime client in the Logik Admin to have the origins for both your Salesforce domain as well as your envrionment's custom CPQ URL

Configuration initialization data format

To initialize the configuration, basic field data needs to be passed to the page. Here are the parameters that can be passed, represented in pretty JSON format:

```
{
 "runtimeToken": "...",
 "quote": {
  "SBQQ__PricebookId__c": "...",
  "LGK__QueriedEditAccess__c": "Active",
  "LGK__FlightPath__c": "None"
 },
 "product": {
  "configuredProductId": "...",
  "configurationAttributes": {
   "LGK__Logik_Id__c": null
  },
  "optionConfigurations": {
   "Dynamic": []
  }
 },
 "layoutVarName": "someLayoutVarName"
}
```

Replace the ellipses in the above JSON with the appropriate values from your CPQ environment, pricebook, and productID.

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Note: The script is case-sensitive. Make sure that the capitalization exactly matches the script. For example, if your script contains `"LGK__Logik_Id__c": Null` (with a capital N) instead of `"LGK__Logik_Id__c": null`, it could result in a 403 `Forbidden—you don't have permission to access this resource` error.

Display the default layout

Sometimes, you may want to display a specific default layout that is not ordered first in the list of Blueprint layouts. To designate a specific starting layout with the CPQ configuration page loads, pass "layoutVarName":"<variable name of the layout to show by default>" in the topmost level of the JSON above.

The host VisualForce page

The following sample VisualForce code is a proxy for the host page in which you intend to embed the Logik UI. Key components:

- The page imports the easyXDM Javascript library, which facilitates communication with the Logik UI.
- easyXDM parses the JSON input, transposes it, and passes the data to the Logik page as a remote procedure call.

Sample VisualForce page:

```
<apex:page>
 <head>
  <apex:includeScript value="{!$Resource.XDMFile1}"/>
  <meta charset="utf-8" />
  <meta name="viewport" content="width=device-width,
 initial-scale=1" />
  <meta name="theme-color" content="#000000" />
  <meta
   name="description"
   content="Logik Configuration Wrapper"
  />
  <title>Logik Wrapper</title>
  <style>
   iframe {
    width:100%;
    height:92vh;
   }
  </style>
  <script type="text/javascript" src="{!$Resource.XDMFile1}"
 crossorigin="anonymous">
  </script>
  <!-- easyXDM and Lightning for VF for passing config data
 to/from Salesforce CPQ -->
  <script type="text/javascript">
   var rpc = new easyXDM.Rpc({
    remote: "<BASE_LOGIK_URL>/ui/configure",
    container: "root"
   }, {
   // method defined in Logik
   remote: {
    postMessage: {}
   },
```

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```
   local: {
    postMessage: function (message) {
     console.log("External Config JSON Received from iframe");
     configObj = JSON.parse(message);
     console.log(configObj);

     }
    }
  });

  var cfgData =
 {"runtimeToken":"<PLACEHOLDER>","quote":{"SBQQ__PricebookId__c
":"
<PLACEHOLDER>","LGK__QueriedEditAccess__c":"<PLACEHOLDER>","LGK_
_FlightPath__c":"
<PLACEHOLDER>"},
"product":{"configuredProductId":"<PLACEHOLDER>","configurationA
ttributes":
{"LGK__LOGIK_Id__c":""},
"optionConfigurations":{"Dynamic":[]}},"layoutVarName":"<PLACEHO
LDER>"};

   console.log(JSON.stringify(cfgData));
   rpc.postMessage(JSON.stringify(cfgData));
  </script>
 </head>
 <body>
  <div id="root"></div>
 </body>
</apex:page>
```

Replace the highlighted <BASE_LOGIK_URL> placeholder in the above VisualForce with the base URL of your CPQ environment.

Note: If you named the easyXDM library something other than XDMFile1, update the two occurrences of XDMFile1 above with the name you used for the easyXDM static resource.

Depending on what you want to do, you must also associate an action for the "Quote" button. Insert the action after the console.log(configObj) line.

Examples:

`//window.close();` // if you want to close the whole browser page

`//window.location = 'whereeveryouwanttoredirectto';` // if you want to redirect to another page

The EasyXDM library

To learn more about the easyXDM library used in this topic, see easy XDM.net.

Use case: Embed CPQ UI in a Lightning Web Component

Learn how to embed CPQ in a LWC in a Salesforce org.

You can embed CPQ in a Lightning Web Component (LWC) in a Salesforce org. This eliminates the need to directly navigate to CPQ through a particular product or the CPQ custom URL.

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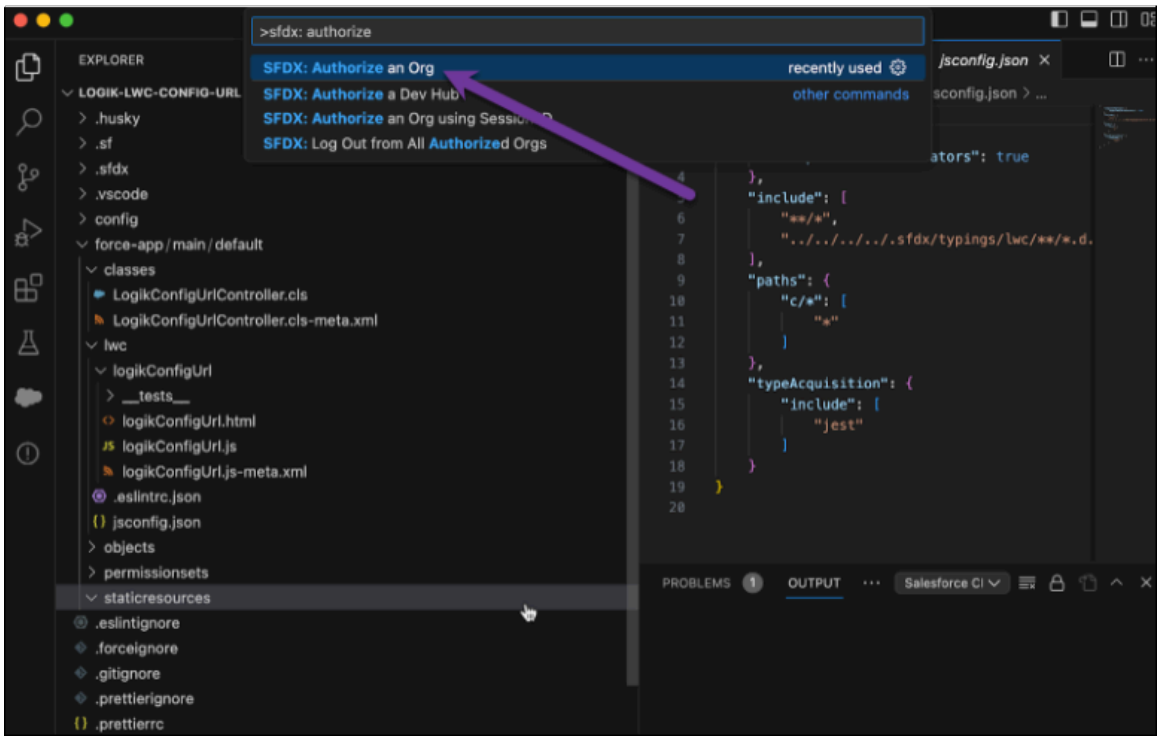
Steps for Embedding

1. Download the base LWC package here, and unzip.
2. Within an integrated development environment (IDE—in this example, VSCode), or on the command line:
   a. Connect to your Salesforce org using the Salesforce CLI or Salesforce Extensions for the IDE.



   b. Open the folder and publish to org using Salesforce CLI or the extensions in your IDE. In VSCode, this means right- clicking the folder in the VSCode explorer and clicking Deploy Source to Org.

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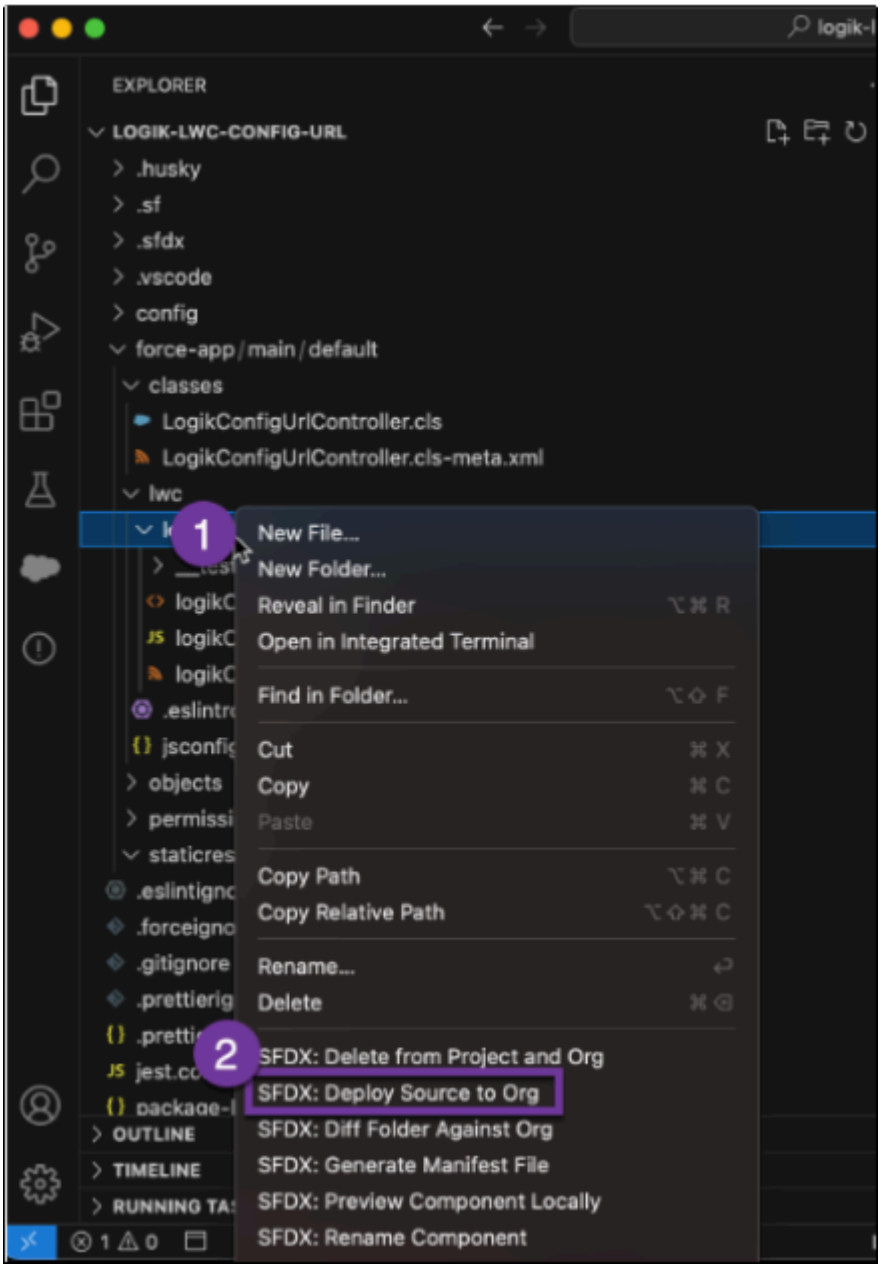
Note: To complete this step, you must be connected to the org.



3. Go into the Salesforce page where you want to embed CPQ.
4. On the Setup menu, click Edit Page.

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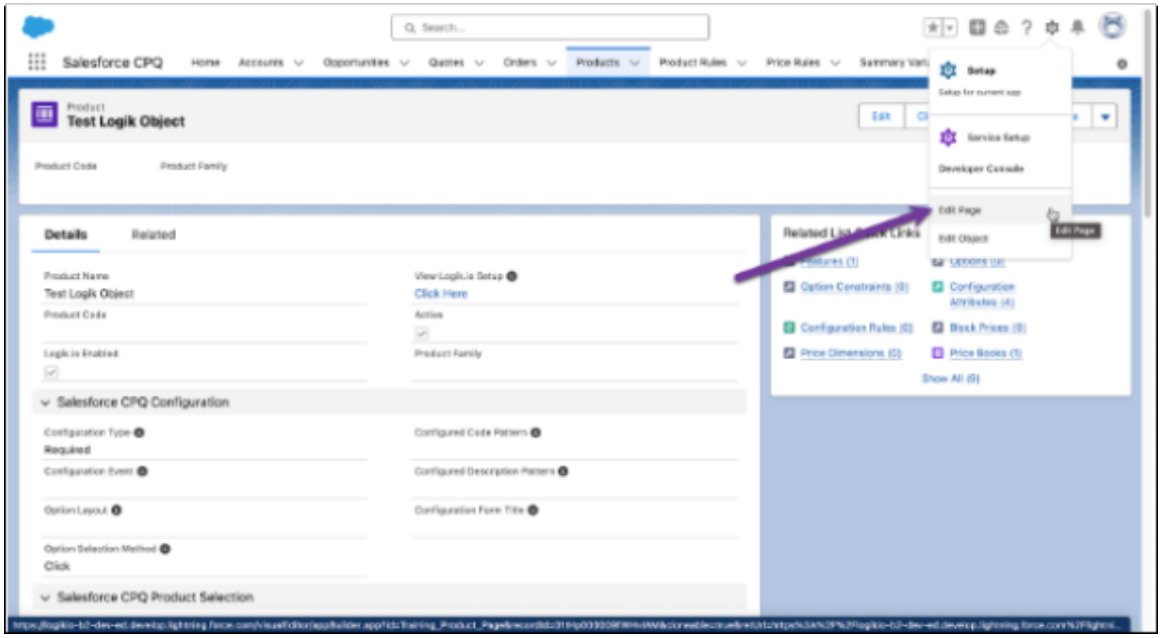
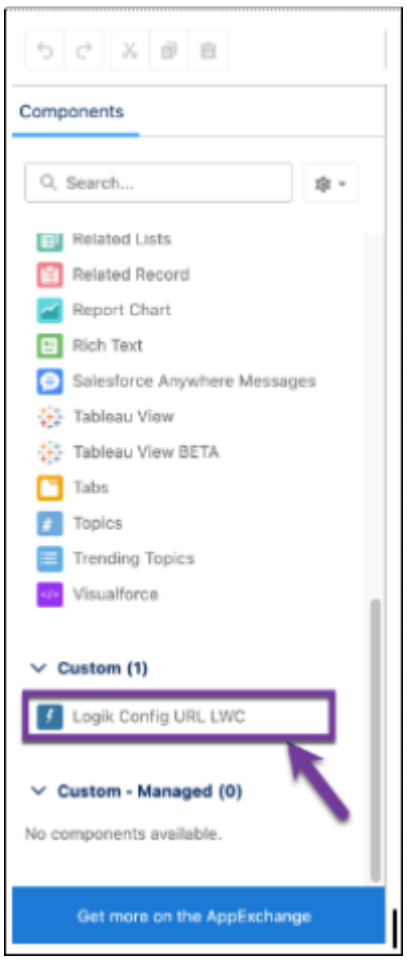


5. Drag the Logik LWC from the menu at the bottom left into the page layout where you want to embed CPQ.



6. Add the configuration URL.

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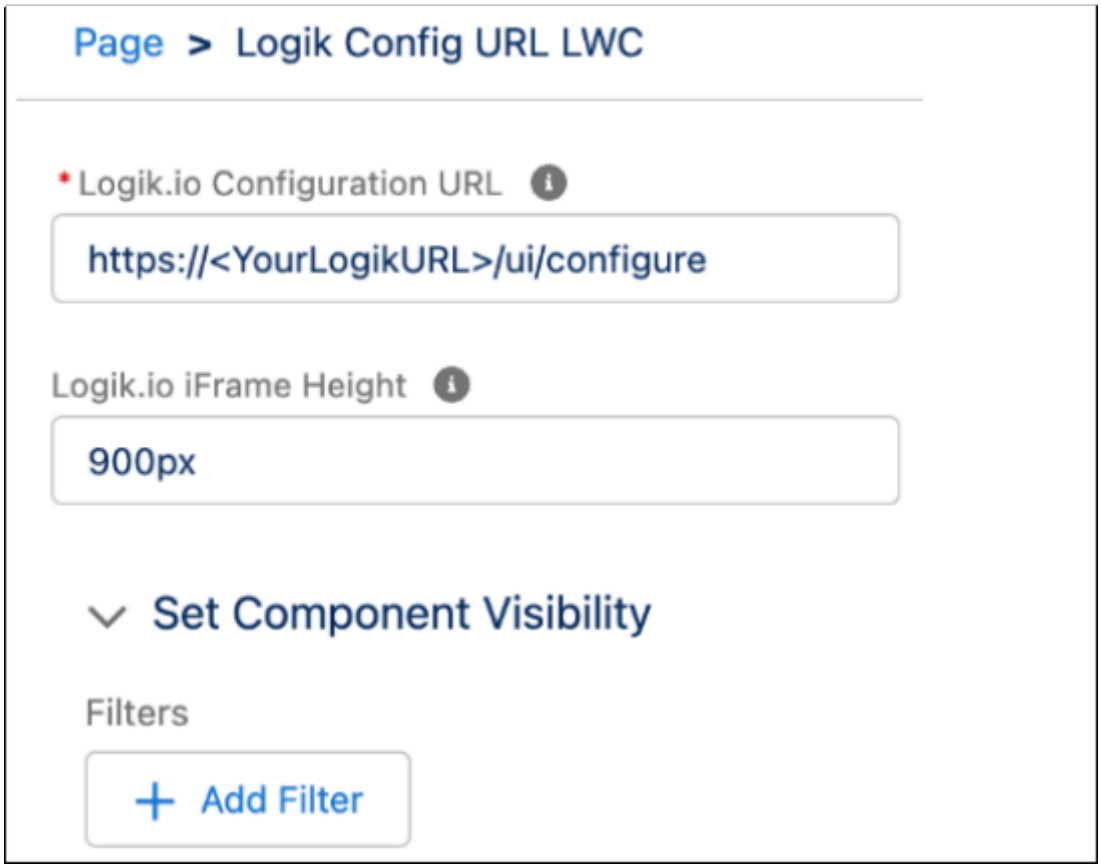
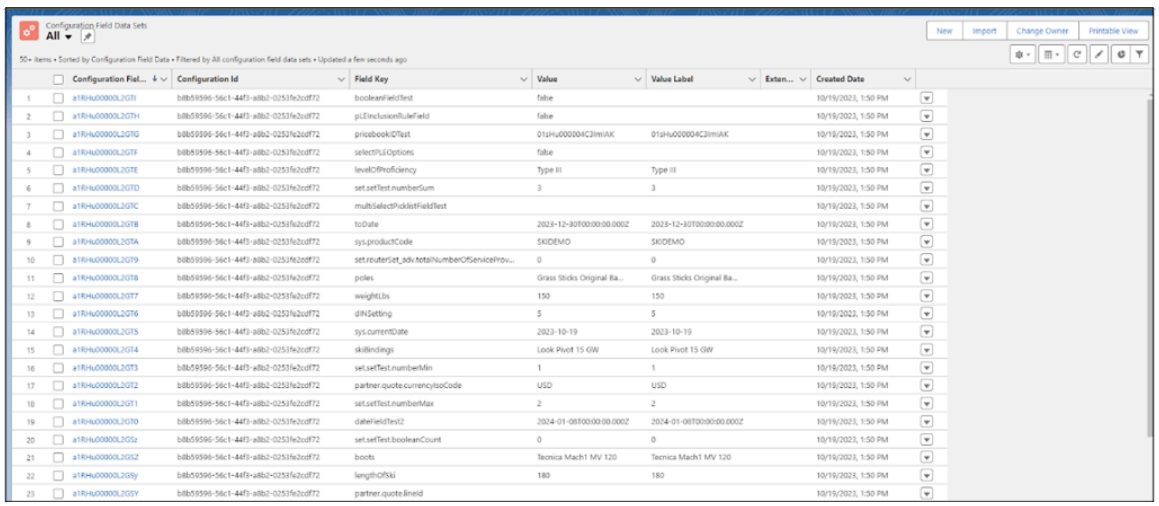


If you are passing the configuration URL as a parameter, include a Runtime Token in the URL (for example, `?rt=xxxxxxxxxxxx`)

Use case: Populate display names and quote lines in Configuration Field Data Set objects

Learn how to set up custom objects and Apex triggers in SFDC to populate the display names of CPQ fields.

As part of the CPQ Managed Package, the functionality of the Configuration Field Data Set object in SFDC is to return the Configuration ID of the configuration, every field variable name used by the blueprint, the value of that field, and the label of that value after every save from the CPQ configurator:



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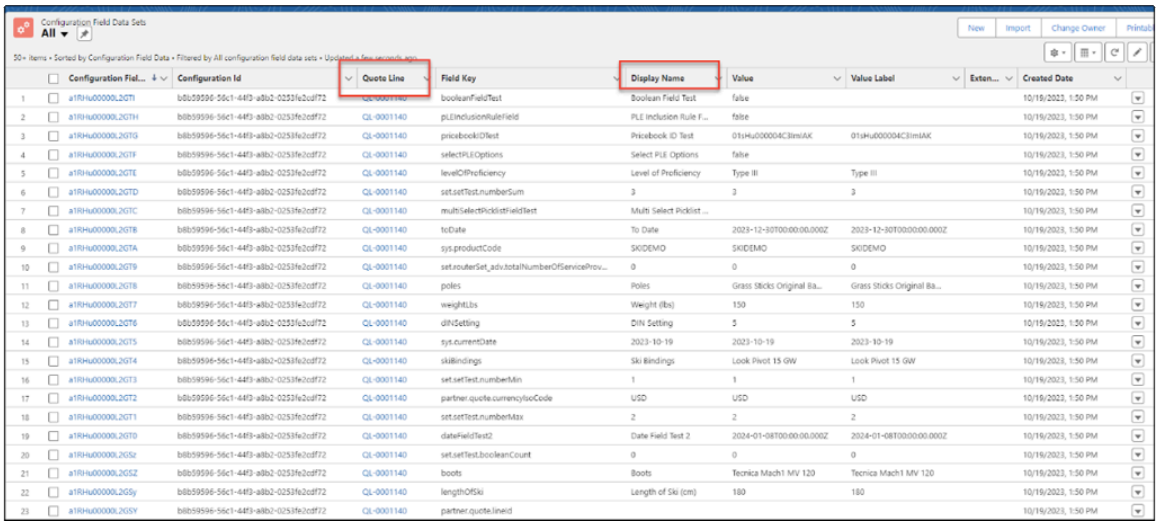
However, there might be some extra necessities about the configuration in CPQ outside of these fields created by the Managed Package that an organization needs for downstream processes. For instance, we might want to populate the display names of the CPQ fields, or easily jump to the Quote Line of the associated Configuration Field Data objects for an easy connection to the BOM.



With a little setup of custom objects and Apex Triggers in SFDC, these fields can automatically be populated after every configuration is saved.

Prerequisites

Enable “Push Config Data to Logik Salesforce Object” in the Admin Settings if you have not done so already. This will start creating the Configuration Field Data Sets objects in SFDC.

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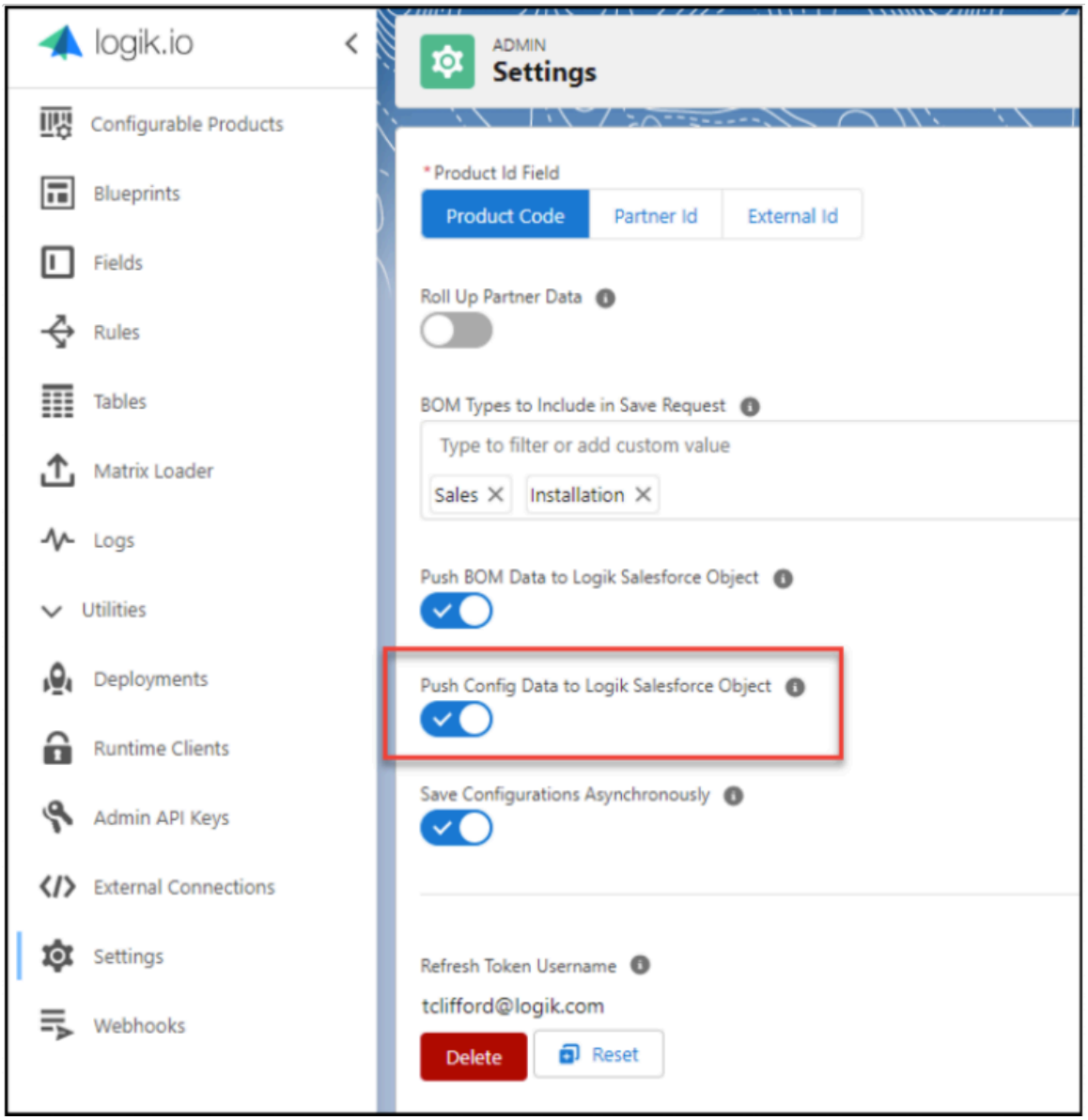

Note: The creation of these Configuration Field Data Sets will occur every time a configuration is saved from CPQ, even if the quote itself is not saved. This can lead to a lot of data being created in your Salesforce org. If you do not have a use case for pulling every field used by the Blueprint into SFDC, it is best to keep this setting disabled and rely on the Extended Information property in the BOM Data.

Populate the display name

1. In SFDC Setup, navigate to the Object Manager.
2. Create a new custom object called “LGK Label” with the following attributes:
   - Record Name: Logik Label
   - Data Type: Auto Number
   - Display Format: LGKLB-{0000}
   - Allow Search: Checked
   - Launch New Custom Tab Wizard after saving this custom object: Checked

   Leave the rest of the values as default and click **Save**.
3. On the New Custom Object Tab page, click the Tab Style field and select any style.

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4. Click **Next**, click **Next** again, and then click **Save**.
5. Click **Fields & Relationships** on LGK Label, and then click **New**. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: label
   - Field Name: label

   Click **Next**, click **Next** again, and then click **Save**.
6. Click New. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: variablename
   - Field Name: variablename

   Click **Next**, click **Next** again, and then click **Save**.

This new LGK Label object will be where we will host the Field Variable Name and Field Label Name in SFDC. The labels will not automatically be imported. They also must be manually updated/imported every so often with changes and additions to the Fields in CPQ Admin. We will go over methods of bulk import later in this guide.

1. In Object Manager, search "Configuration Field Data".
2. Click **Fields & Relationships**, and then click **New**. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: Display name
   - Field Name: Display_Name

   Click **Next**, click **Next** again, and then click **Save**.
3. Click **Triggers**, and then click **New**.
4. Paste the following code into the Apex code block:

```
trigger UpdateConfigurationLabels on
 LGK__ConfigurationFieldData__c (before insert) {
 // Step 1: Collect FieldKeys from records to be inserted
 Set<String> fieldKeys = new Set<String>();
 for(LGK__ConfigurationFieldData__c confData : Trigger.new) {
  fieldKeys.add(confData.LGK__FieldKey__c);
 }

 // Step 2: Query LGK_Label__c based on collected FieldKeys
 Map<String, LGK_Label__c> labelMap = new Map<String,
 LGK_Label__c>();
 for(LGK_Label__c label : [SELECT label__c, variablename__c
 FROM LGK_Label__c WHERE variablename__c IN :fieldKeys]) {
  labelMap.put(label.variablename__c, label);
 }

 // Step 3: Loop through records to be inserted and update
 Display_Name__c
 for(LGK__ConfigurationFieldData__c confData : Trigger.new) {
  LGK_Label__c matchedLabel =
 labelMap.get(confData.LGK__FieldKey__c);
  if(matchedLabel != null) {
```

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```
  confData.Display_Name__c = matchedLabel.label__c;
 } else if(confData.LGK__ValueLabel__c != null) {
  confData.Display_Name__c = confData.LGK__ValueLabel__c;
 }
}
```

The framework is complete. Add the new Display Name field to the Configuration Field Data Set layout. All that's left is to import the field label names into the LGK Labels objects. Depending on how you use CPQ Fields, there are three methods of accomplishing this.

Field label import methods

Ways to import field label names into the LGK Labels objects

Manual CPQ Label Creation **1.** Create a new Logik Label Object from the LGK Labels tab **2.** Enter the "variablename" to exactly match the CPQ variable name **3.** Enter the "label" to be any label you wish	Pros: • Good if you have a low number of fields for which you need the display name • Allows you to customize the field label names to be different than how they appear in the CPQ Admin and the Layout Con: Can be a tedious process for a large number of fields
Bulk Import from exporting all CPQ fields **1.** From the CPQ Admin Field's Tab, click **Export** **2.** Open the CSV file and delete all data besides columns "B" and "C" **3.** Rename the headers to "label" and "variablename," and save **4.** In SFDC, go to the LGK Label tab and click **Import** **5.** Select "LGK Labels" **6.** Select "Add new records" **7.** Select your saved CSV file **8.** Upload	Pros: • Good for a large number of fields • Global fields used across Blueprints will be labeled consistently in SFDC Cons: • Set field label names, partner fields, and system fields are not imported by this method, so the display name will default to the value of the field • These fields can be manually added as LGK Label objects using the manual label creation method
Bulk Import from exporting the Blueprint Layout **1.** From the CPQ Blueprint you'd like to use, go to your Layout, and click **Export** **2.** Open the CSV **3.** Filter column "A" by "field"	Pros: • Good for a large number of fields • Populates the display name in the layout for all fields, including set fields,system fields, and partner fields Cons:

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Field label import methods

Ways to import field label names into the LGK Labels objects

(continued)

4. Delete all data except columns “A”, “D”, and “E” **5.** Copy column “D” and “E” to a new CSV, renaming any field’s labels you’d like **6.** In SFDC, go to the LGK Label tab and click **Import** **7.** Select “LGK Labels” **8.** Select “Add new records” **9.** Select your saved CSV file **10.** Upload	• Only fields that are used in the layout will populate the display name. Fields that are only associated with the Blueprint will still create Configuration Field Data Set objects whose labels will be null • Fields that are used in multiple Blueprints will only populate the display name field with the first field label imported this way

If there are any fields that you’d like to show a different display name than what you have imported, you can easily edit the Label object to whatever label you wish and it will begin populating the Configuration Field Data Sets that way after the update.

Populate the quote line

1. In SFDC Setup, Navigate to the Object Manager.
2. Search “Configuration Field Data”.
3. Click **Fields & Relationships**, and then click **New**. Create a new field with the following attributes:
   - Data Type: Lookup Relationship
   - Related to: Quote Line
   - Field Label: Quote Line
   - Field Name: Quote_Line

   Click **Next**, click **Next** again, and then click **Save**.
4. In Object Manager, search "Quote Line".
5. Click **Triggers**, and then click **New**.
6. Paste the following code into the Apex code block:

```
trigger PopulateConfigFieldData on SBQQ__QuoteLine__c (after
 insert, after update) {
 // Step 1: Collect the Configuration Ids from the new Quote
 Lines
 Set<String> configIds = new Set<String>();
 Map<String, Id> quoteLineMap = new Map<String, Id>(); //
 Mapping Configuration UUID to Quote Line Id

 for (SBQQ__QuoteLine__c ql : Trigger.new) {
  if (String.isNotBlank(ql.LGK__ConfigurationId__c)) {
   configIds.add(ql.LGK__ConfigurationId__c);
   quoteLineMap.put(ql.LGK__ConfigurationId__c, ql.Id); //
 Storing Quote Line Id
```

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```
 }
}

if (configIds.isEmpty()) {
 return;
}

// Step 2: Query the Configuration Field Data records
List<LGK__ConfigurationFieldData__c> confFieldsToUpdate
= [SELECT Id,LGK__ConfigurationId__c FROM
LGK__ConfigurationFieldData__c WHERE LGK__ConfigurationId__c
IN:configIds];

// Step 3: Update the Field Data records
for (LGK__ConfigurationFieldData__c cf : confFieldsToUpdate) {
 Id quoteLineId =
quoteLineMap.get(cf.LGK__ConfigurationId__c);
 if (quoteLineId != null) {
  cf.Quote_Line__c = quoteLineId; // Assigning the Quote Line
Id
 }
}

update confFieldsToUpdate;
```

Now, every time a Quote is saved in SFDC, the Quote Line of the Parent Configurable Product will populate into the Configuration Field Data Set. Remember to add this custom field to the Configuration Field Data Sets layout to see it in the tab.

Note: Configuration Field Data Sets are created immediately after you click **Save** in the CPQ Configurator. When you enter the Quote Line Editor, the Quote Line field will not be populated because it hasn#t been created or updated yet. Only once you save from the Editor will the quote line appear in the field.

Use case: Pairing set repeaters and visualization components

Learn how to configure an experience where the user must answer the same questions several times so that the user is presented with a rendering of the currently configured solution.

This topic demonstrates how a ThreeKit visualization component can be paired with a set repeater.

On occasion, you may design a configuration experience in which you want the user to answer the same battery of questions several times. (These input fields would be part of a set.) If you decide to show the user one set record at a time by using a set repeater, CPQ also enables you to present the user with a rendering of the solution the user is currently configuring.

Sample layout CSV

For more information, see this video:

Visualization & Set Repeater

Use case: Configuration line item to quote line flow

By making a few adjustments to a flow template includes with the CPQ Extension package version 1.8 or later, you can parse the extended information from a configuration and map it to custom fields without using a QCP script.

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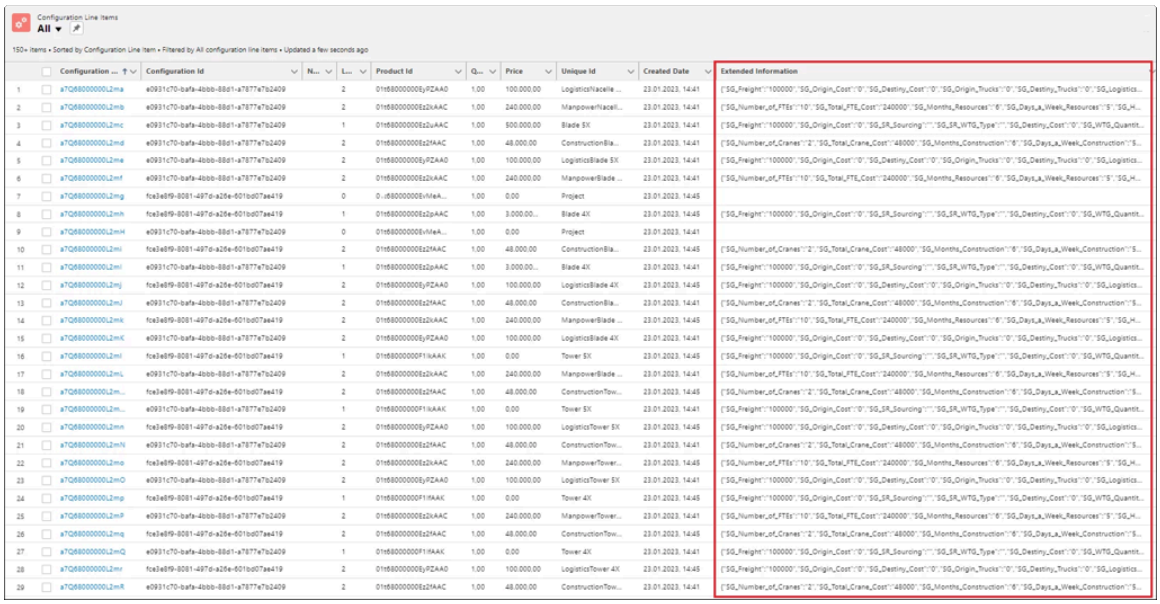
Note: This article applies to the CPQ Extension for Salesforce CPQ package version 1.8 or later. If your CPQ CPQ package is version 1.7 or earlier, see Use case: Using the Salesforce Quote Calculator plugin to integrate data from CPQ to Salesforce quotes and quote lines.

By default, if you add any extended info to a line item (using ProductList.extended), it will be added as a JSON to the corresponding configuration line item object created as the following:



Before this flow was created, the only way to parse the individual keys and map them to custom fields on the configuration line items or their corresponding Quote Lines was to write a QCP script to do so. This guide will show you how to achieve the same result by making a few adjustments to a flow template included with our CPQ Extension package starting versions 1.8 or later.

Let's take the case of the first custom field in the screenshot above. A product is added using an advanced product rule and the freight information is entered as extended info, for this example we will be using SG_Freight so adjust as necessary for your extended info name:

```
ProductList.extended = {};
ProductList.extended.SG_Freight = cfg.sRFreight;
```

You must create a SG_Freight_c field on the configuration line item and Quote Line objects (if you just enter "SG_Freight," SFDC will automatically add the _c). It is recommended to do so with the Schema Builder since it's much faster. If you do choose to add them through the Object Manager, make sure to check the Field Accessibility settings for the created fields so that the flows are able to modify them. Be sure to set the field-level security on the custom field to be visible for any profile that will be using them.

Next, in SFDC, go to Setup > Process Automation > Flows. Look for the "Configuration Line Item to Quote Line" flow and click it. It should look like this:

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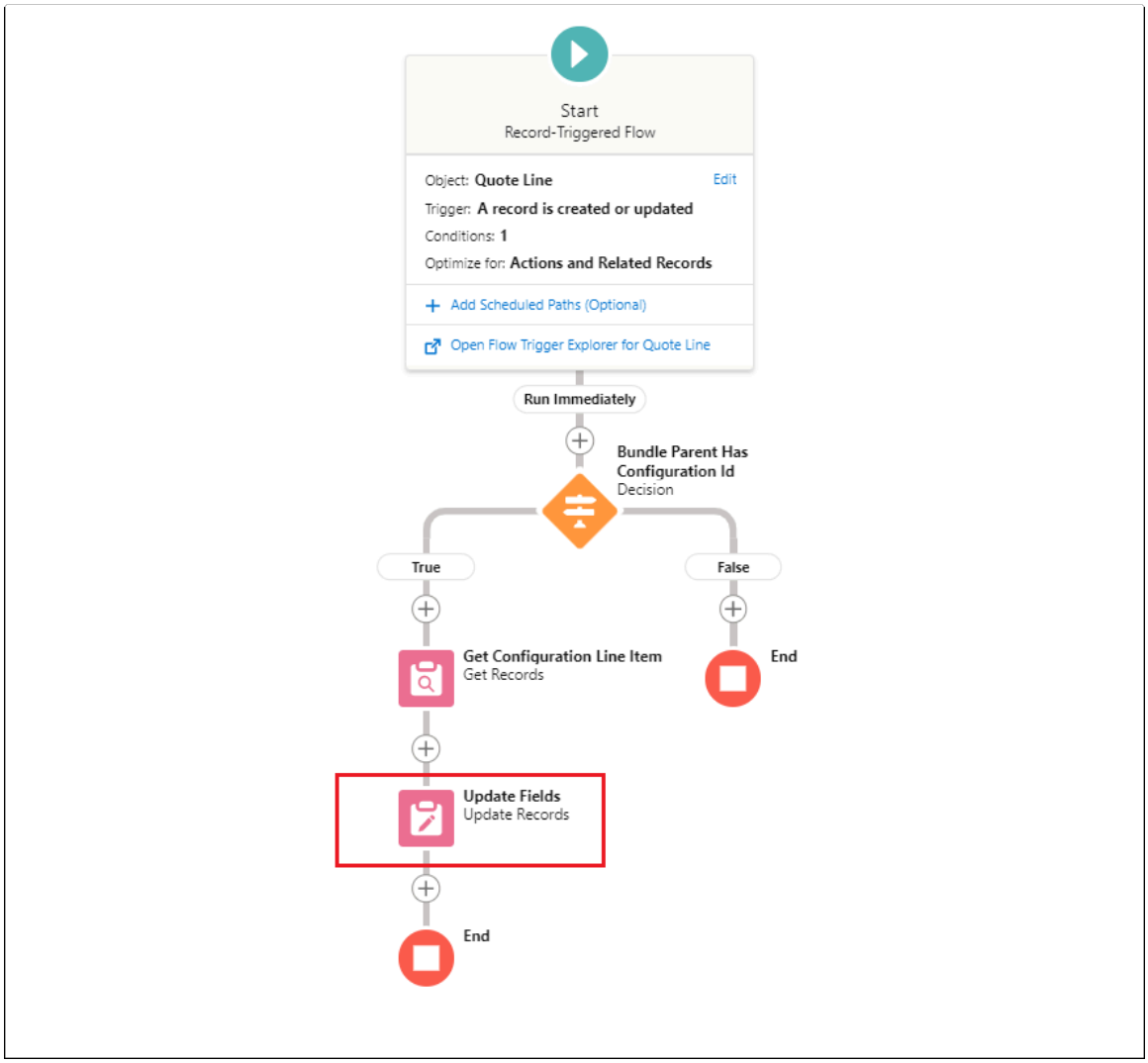

Select the Update Fields flow element and click `Edit Element`. This will open a popup window:

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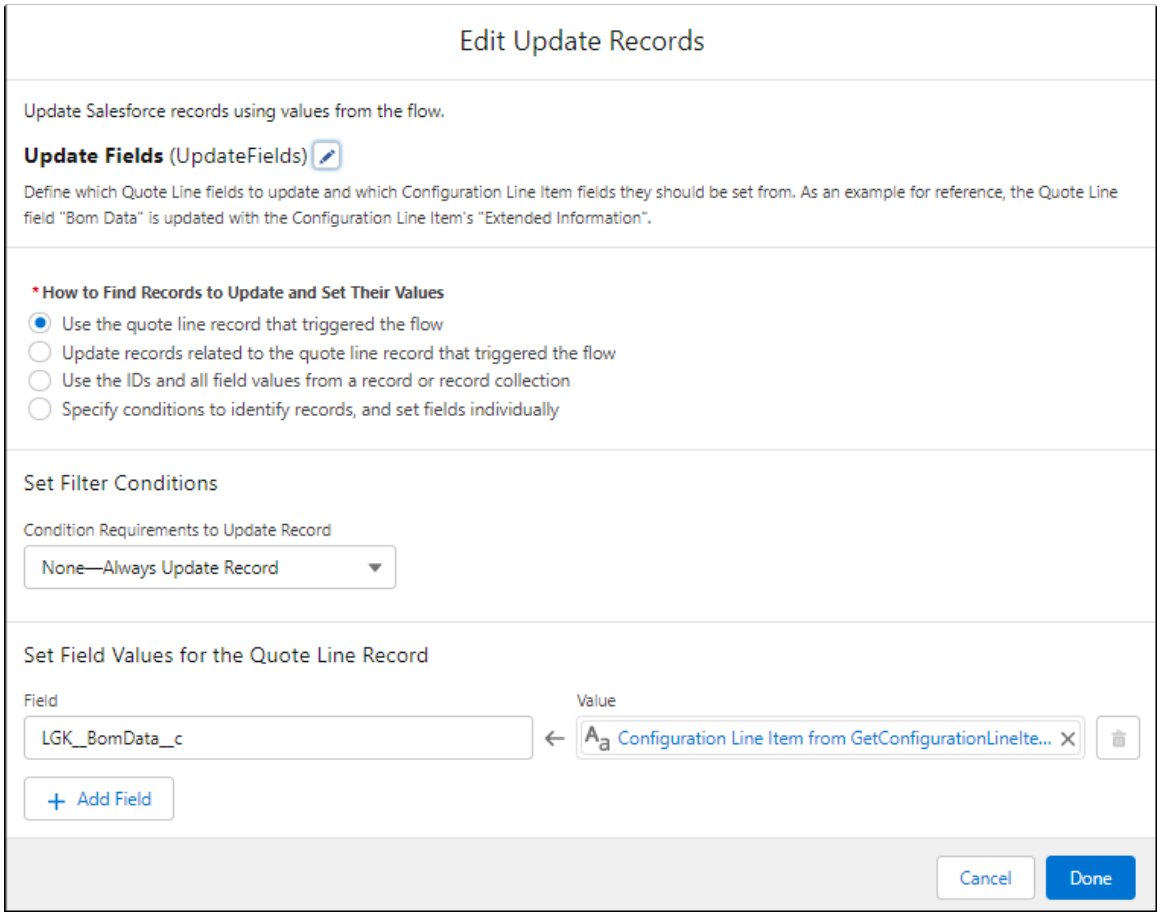
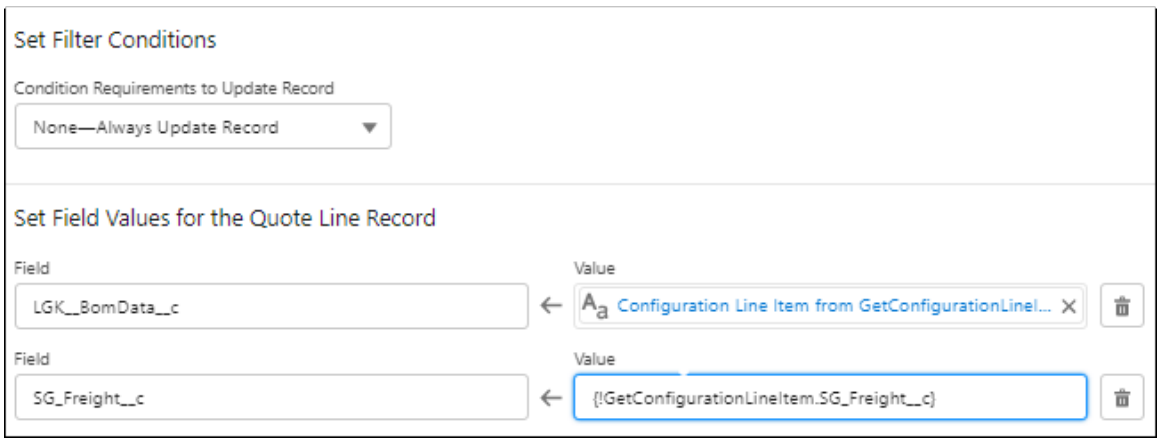


Click **+ Add Field**, and then in the Field column, enter the SFDC field name as below (autocomplete should help you type it in):



If the data is entered correctly, you should see the value for the created field change to the same format as the value above it:

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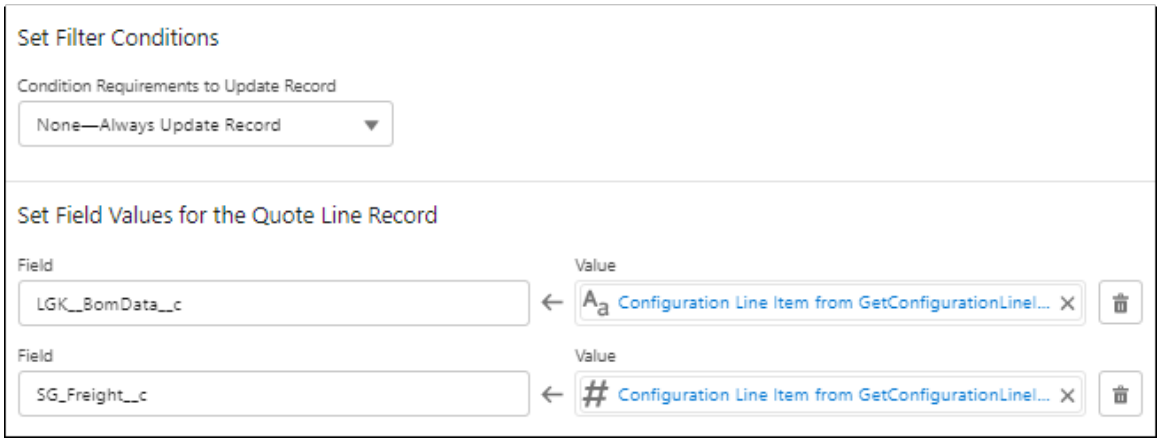

Save the flow and activate. It's recommended to save the flow as a a new flow instead of as a new version, so that you'll always have the original template to go back to if needed.

Add your fields to the configuration line item and quote line layouts in order to see these values where they belong:



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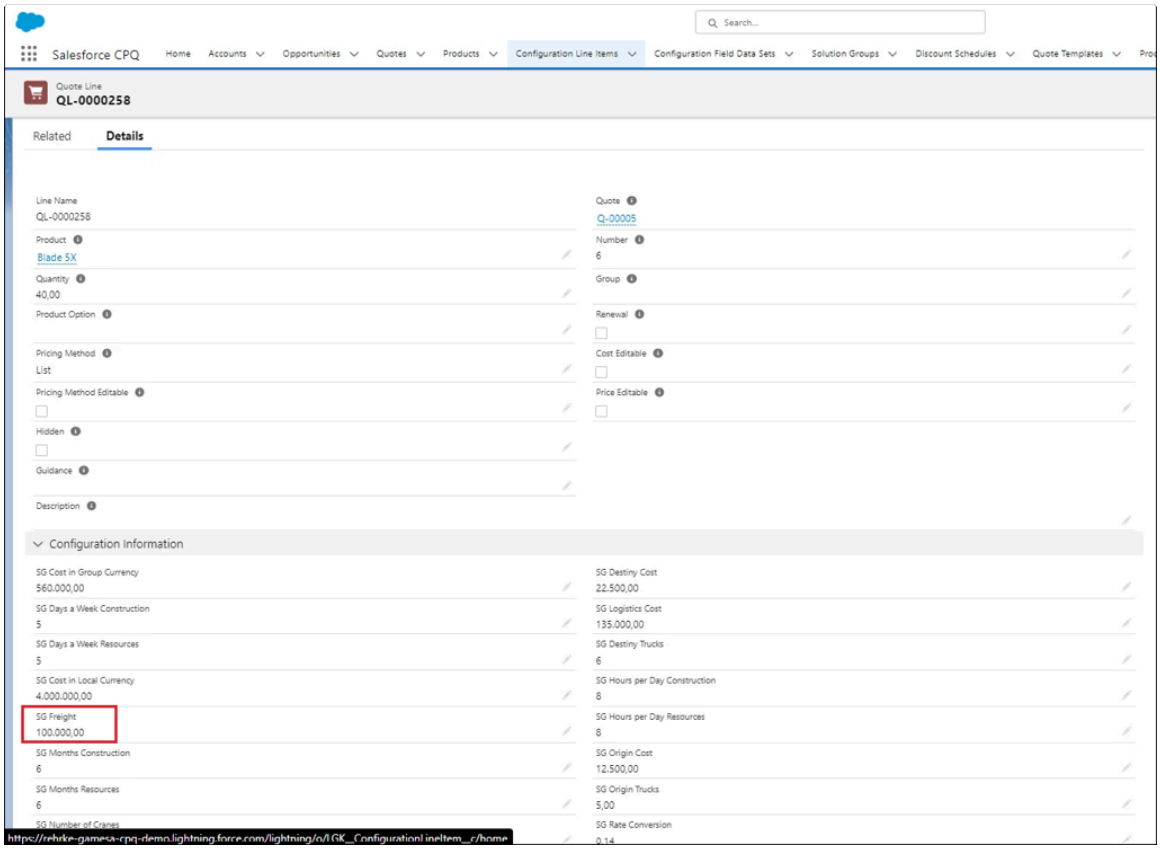


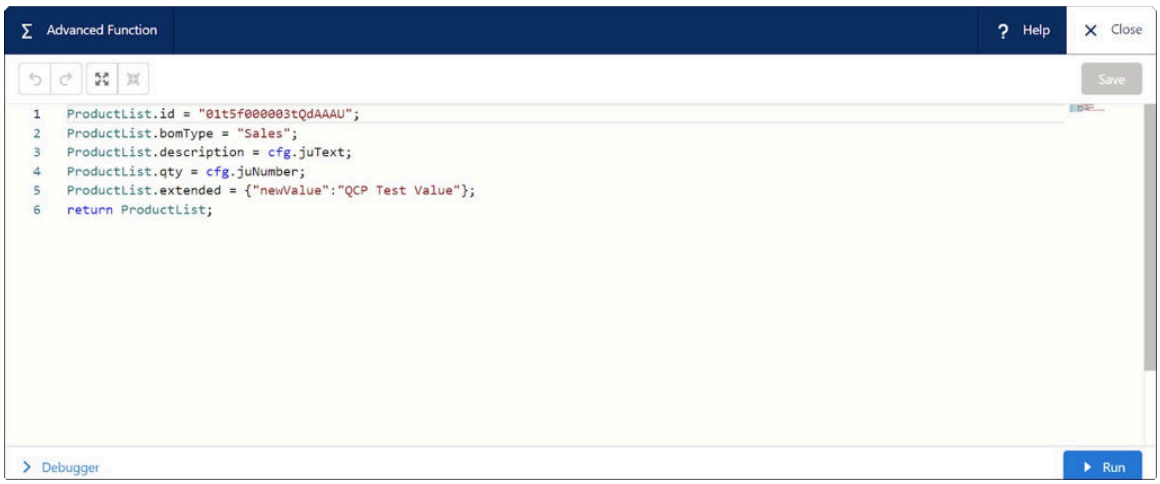
Use case: Using the Salesforce Quote Calculator plugin to integrate data from CPQ to Salesforce quotes and quote lines

In the CPQ Extension for Salesforce CPQ package version 1.7 or earlier, use the Salesforce Quote Calculator Plugin to parse extended information from a configuration and map it to custom fields.

Note: This article applies to the CPQ Extension for Salesforce CPQ package version 1.7 or earlier. If your version is 1.8 or later, see Use case: Configuration line item to quote line flow.

Using the extended information of the CPQ ProductList object with the Salesforce Quote Calculator plugin (QCP), data may be passed from CPQ into Salesforce and used to manipulate both quote and quote line information.

ProductList.extended may only be populated with an advanced product action, as shown here.



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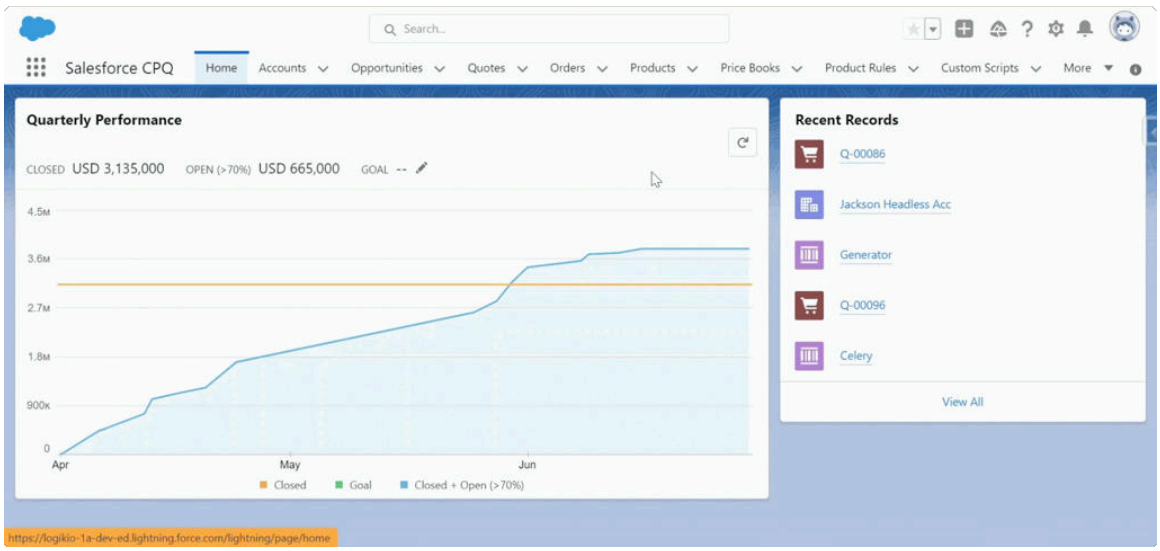
The ProductList.extended object takes the form of a JSON object and accepts key:value pairs. In the example above, we pass through a dummy text string, “QCP Test Value”, with the newValue key. ProductList.extended can hold field values, as well as an array of JSON objects.

When this product is added to the bill of materials (BOM), we can view its associated info in the custom object “BOM Data”, which is held at the quote line of the configurable product.

BOM Data

{"total":150,"items":
[{"id":"01t5f000003tQdAAAU","quantity":5,"bomType":"
Sales","extended":{"newValue":"QCP Test
Value"},"name":"Item
3","description":"","partnerId":"01t5f000003tQdAAAU","
productCode":"headlessItem3","externalId":"","product
Family":"","uom":"","type":"ACCESSORY","price":30,"extP
rice":150,"level":0,"rollUpPrice":150}]}

To leverage this extended information, we will need to use the Quote Calculator Plugin. To start, navigate to the Custom Scripts item in Salesforce.



Here, you can write a script to leverage the extended information from CPQ and use it to manipulate fields in SFDC. The following script is the sample script used in this instance.

```
export function onBeforeCalculate(quote, lines) {
 var result;
 var resultValue;
 var product_code = "headlessItem3";
 if (lines != null) {
  lines.forEach(function (line) { //Parsing all quote lines to
 find BOM Data object
   if(line.record["LGK__BomData__c"] != null){
    var configJson = JSON.parse(line.record["LGK__BomData__c"]);
```

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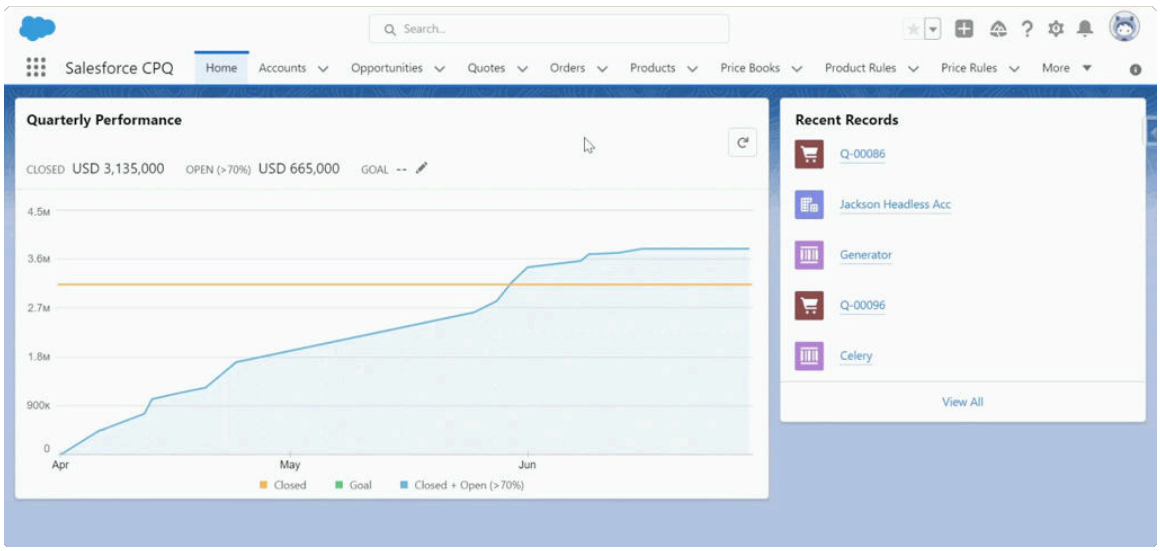
```
    var itemsJson = configJson["items"]; //Create JSON object
 containing all items in BOM data
    itemsJson.forEach(function(itemsLine){ //For each item in
 the BOM Data
     if(itemsLine["productCode"] == product_code){ //Checking
 for item "headlessItem3"
      result = itemsLine["extended"]; //Parses extended
 information to find "newValue"
      resultValue = result["newValue"]; //Assigning keyed value
 of "newValue"
     }
    });
   }
  });
  lines.forEach(function (line) { //For each line in the quote
   if (line.record["SBQQ__ProductCode__c"] ==
 product_code){ //Checking for the line item "headlessItem3"
    line.record["Test_Text__c"] = resultValue; //Setting the
 quote line field "Test Text" with the value of resultValue
   }
  });
    }
    return Promise.resolve();
};
```

Any quote fields or quote line fields referenced by the custom script must be explicitly defined in the appropriate inputs on the custom script record. Our sample script references three quote line fields: LGK_BomData c, SBQQ_ProductCode c, and Test_Text c.

Once your script has been written, define it in the Salesforce CPQ settings. Follow these steps:

1. In Setup, search for “Installed Packages” using Quick FInd.
2. Next to “Salesforce CPQ”, click **Configure**.
3. Select the Pricing and Calculation tab.
4. If necessary, deselect Use Legacy Calculator.
5. Select the Plugins tab.
6. Define your custom script in the Quote Calculator plugin, and then click `Save`.



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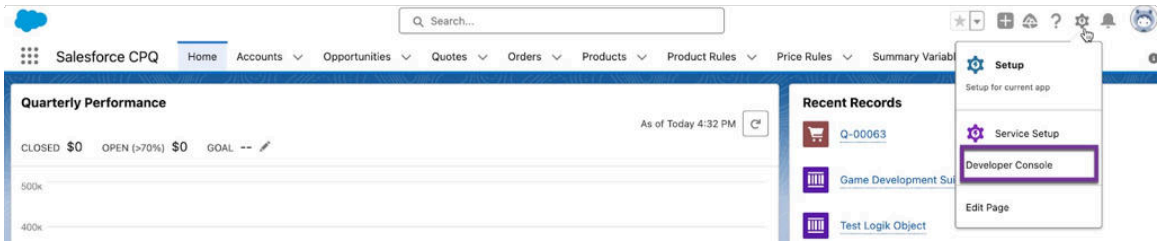
When you navigate to your quote and trigger any action that performs a calculation in SFDC (such as clicking “Calculate”), the Quote Calculator Plugin runs and modifies fields as designated.

Use case: Using Apex to call or test CPQ APIs

Learn how to use Apex to call or to test CPQ APIs.

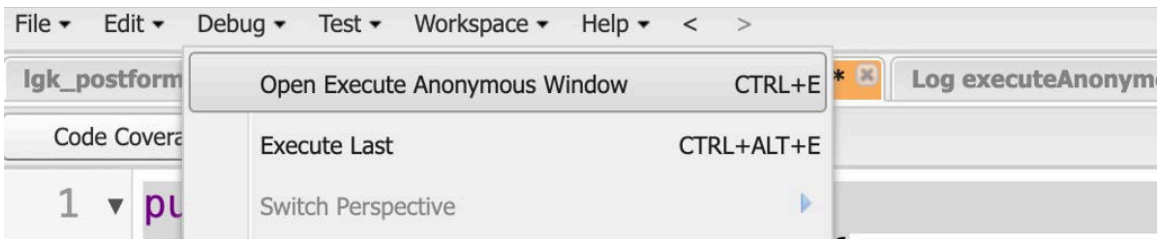
The easiest way to test Apex code for use of CPQ is through the developer console in SFDC.



To test the script from in the console, the code must be wrapped in a larger class with the “exec” function. For example:

```
public class testGetConfig { public static void exec() {
```

Save the code, and then in the Debug menu, click Execute Anonymous Window.



In the execute anonymous window, execute the code `functionName.exec();`

Example Apex code to call a CPQ API

The following code is an example of an Apex class that will get information about a potential configuration:

```
1 public class testGetConfig {
2  public static void exec(){
3
4   HttpRequest httpRequest = new HttpRequest();
httpRequest.setEndpoint('https://
tenant.sector.logik.io/api/[config id here]');
httpRequest.setTimeout(5000);
5
6   httpRequest.setMethod('GET');
 httpRequest.setHeader('Content-Type', 'application/json');
7
8   httpRequest.setHeader('Authorization', 'Bearer [INSERT TOKEN
 HERE]');
httpRequest.setHeader('Origin',
 'https://tenant.sector.logik.io/');
9
10   Http http = new Http(); HttpResponse httpResponse;
11
12   httpResponse = http.send(httpRequest);
```

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```
13
14   }
15 }
```

This code would be executed as `testGetConfig.exec();`.

Use case: Displaying the CPQ native UI via direct URL

Learn how to initialize a configuration UI using a URL instead of an external library.

This article provides an outline of how a CPQ Configuration UI can be initialized using a configuration URL rather than relying on an external library (such as easyXDM).

The base configuration URL is in the format `https://{tenant}.logik.io/ui/configure/{configurableProductId}`, where:

- {tenant} is the CPQ tenant that you are using, which can be found in Salesforce or if using CPQ headless, the base URL of the Admin experience
- {configurableProductId} is the Product ID of the CPQ Configurable Product to use for the configuration

Example configuration URL: `https://demo6.demo.logik.io/ui/configure/01t5f000006QKynAAG?v=1`

Configuration URL query parameters

Additional settings and data can be passed via URL query parameters.

Configuration URL query parameters
Parameters described, along with their valid values

Parameter	Description	Required	Values / Notes
v	Version	true	1
pid	Pricebook ID		Salesforce Pricebook ID
id	Configuration ID		Logik UUID of existing configuration to load
lid	Quote Line ID		Salesforce Quote Line ID
qid	Quote ID		Salesforce Quote ID
log	Log Execution (Flightpath)		None | Available | Active This parameter is case sensitive.
cm	Committed Configuration ID		When a contracted order is amended, CPQ identifies the prior configuration ID. That ID then becomes

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Configuration URL query parameters

Parameters described, along with their valid values

(continued)

Parameter	Description	Required	Values / Notes
			the committed Configuration ID.
fields	Fields		Array of field objects. For example, `[{"variableName":"textField1","value":"tes{…}]` In JavaScript, use encodeURI to ensure any special characters are escaped
ac	Action Context		null or "Amendment"
e	Editability		One of: • "Tm9uZQ" (None) • "QXZhaWxhYmxl" (Available) • "QWN0aXZl" (Active) This parameter is case sensitive.
layout	Layout Variable Name		Name of the layout to load from the blueprint of the configurable product
return	Return URL		URL to set window.location to on save or cancel. Needs to be encoded and URL-safe
rt	Runtime Token	See note below	Runtime token from CPQ Admin Setup
rta	Runtime API URL		Needs to be encoded and URL-safe. Highly recommended if using the runtime token parameter. Use encodeURI in Javascript to ensure that any special characters are escaped, especially when calling an API.

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Configuration URL query parameters
Parameters described, along with their valid values

(continued)

Parameter	Description	Required	Values / Notes
currency	Currency ISO Code		

Note: When using the runtime token (rt) parameter, it is highly recommended to also include the rta as well to ensure that all of the requests can be authenticated when using the Firefox or Safari browsers.

If you are not accessing the configuration URL where you have already authenticated (via Salesforce or directly), the runtime token will be required to authenticate. If you are accessing the configuration URL before authenticating through the associated SFDC environment or accessing the configuration URL for a headless environment, the CPQ tenant URL needs to be listed as an origin for the leveraged runtime client. For example, `https://<yourLogikUrl>.test.logik.io`.

If the version parameter is not included, the UI will not load, and you will receive the following error: "Error: A version must be specified."

If a return URL is not included, the UI will broadcast a postMessage up to the parent, with the UUID on save (such as `{"uuid": "8b88c843-d10b-468b-8c49-17f8c9698799"}`) and an empty object on cancel (`{}`).

Using the configuration URL

The configuration URL can be used either as the top level window or in an iframe on a page.

Unlike when using the easyXDM example to initialize a configuration, configuration data will not be sent to the browser console in Javascript when using the configuration URL.

Considerations for using the configuration URL as the top level window URL:

- On the save or cancel actions, the CPQ UI will make the call to the CPQ backend to save or cancel the configuration. These calls can be viewed in the Network tab of the browser to see the data being sent and returned.
- If a return URL is included, the UI will attempt to set the window location to that URL on save ("Quote") or on cancel.

Considerations for using the configuration URL in an iframe:

- If a return URL is included, the UI will attempt to set the window location to that URL on save ("Quote") or on cancel. If a return URL is not included, the CPQ UI will broadcast a postMessage up to the parent, with the UUID on save (such as `{"uuid": "8b88c843-d10b-468b-8c49-17f8c9698799"}`) and an empty object on cancel (`{}`).
- For either implementation, after executing the save or cancel action, the configuration is removed. Subsequent save actions will result in a 404 error with an error message: "No Rules Engine found for Tenant with Config ID '<Logik UUID>'. Subsequent cancel actions will also result in a 404 error.

Configuration result

The result of the saved Configuration can be accessed by using the GET API to retrieve the BOM data.

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Postman Collection with Config API URL

The result can be sent to a downstream system via Webhook. See Webhooks.

Use case: Modifying layout text with SLDS styles

Learn how to implement styles in the Salesforce Lightning Design System to control the appearance of text.

Using Salesforce Lightning Design System (SLDS) styles, admins have some control over the appearance of text in the CPQ configurator UI. Note that this functionality is not fully supported and may be limited in a number of scenarios. Consult this Salesforce documentation for the available SLDS styles.

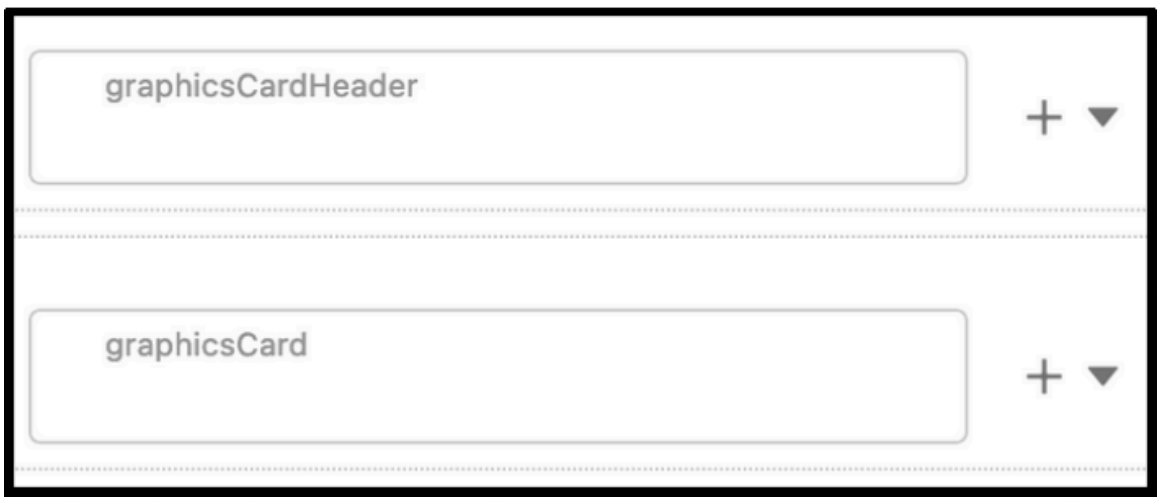
Due to the lack of complete support, utilizing an SLDS class will affect everything in the field. That means if you use "slds- text-title_bold", everything in the field will be bolded. Therefore, consider whether you can use SLDS styling for your use case, as a new field will need to be created for us to insert the class and isolate the styling. A good use case as a result is using styles to make headers, and we'll use that as the basis for this article.

If we want to make a header using SLDS, the first step is to identify which field(s) you want a header for, and make sure they're displayed in the layout. Then, from the layout screen, navigate to the field and remove its label. This will leave you with just the field's variable name.



Next, create a new text field and give it some text. This new field will be placed above the existing field and essentially act as its "header". Place it in the layout and remove its label. Your layout should resemble this example.

Note: Instead of creating a new field, you can also just add text directly to the layout. In the image below, you would click the down arrow to create the text. However, unlike when using fields, you wouldn#t be able to conditionally hide the text.



Finally, in the layout, hover over the new field you created that will act as the header, and click the gear to bring up the Field Properties. For Class Name, add the desired SLDS class. In this example, we have used `slds-text-heading_large`.

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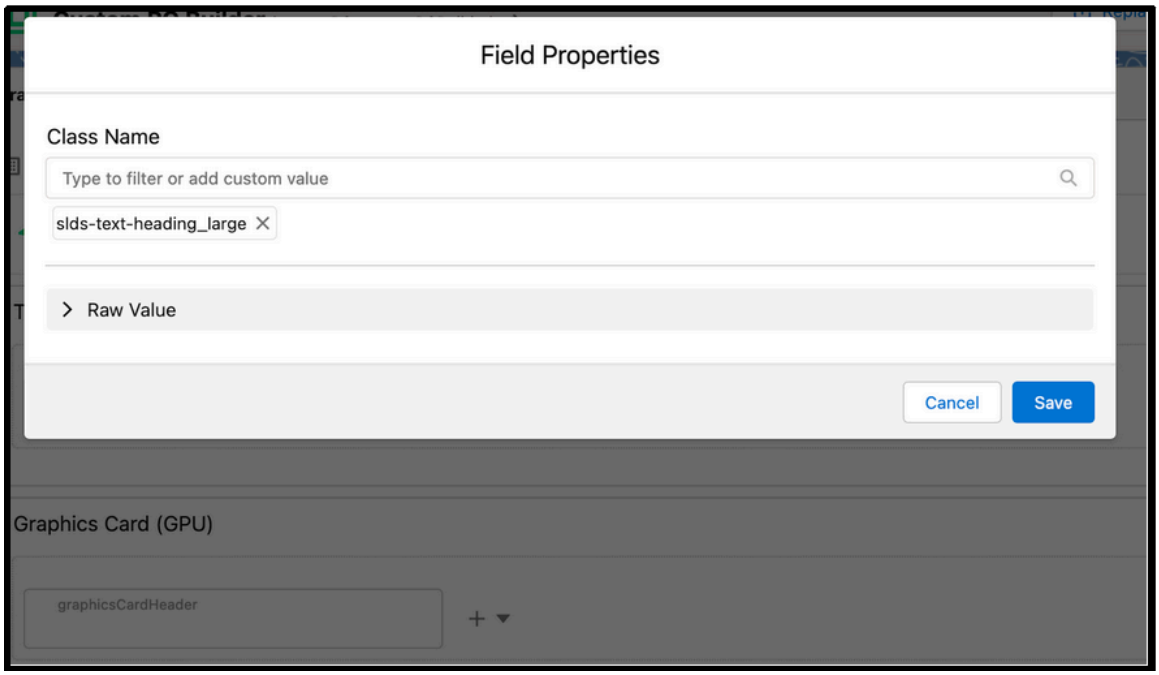
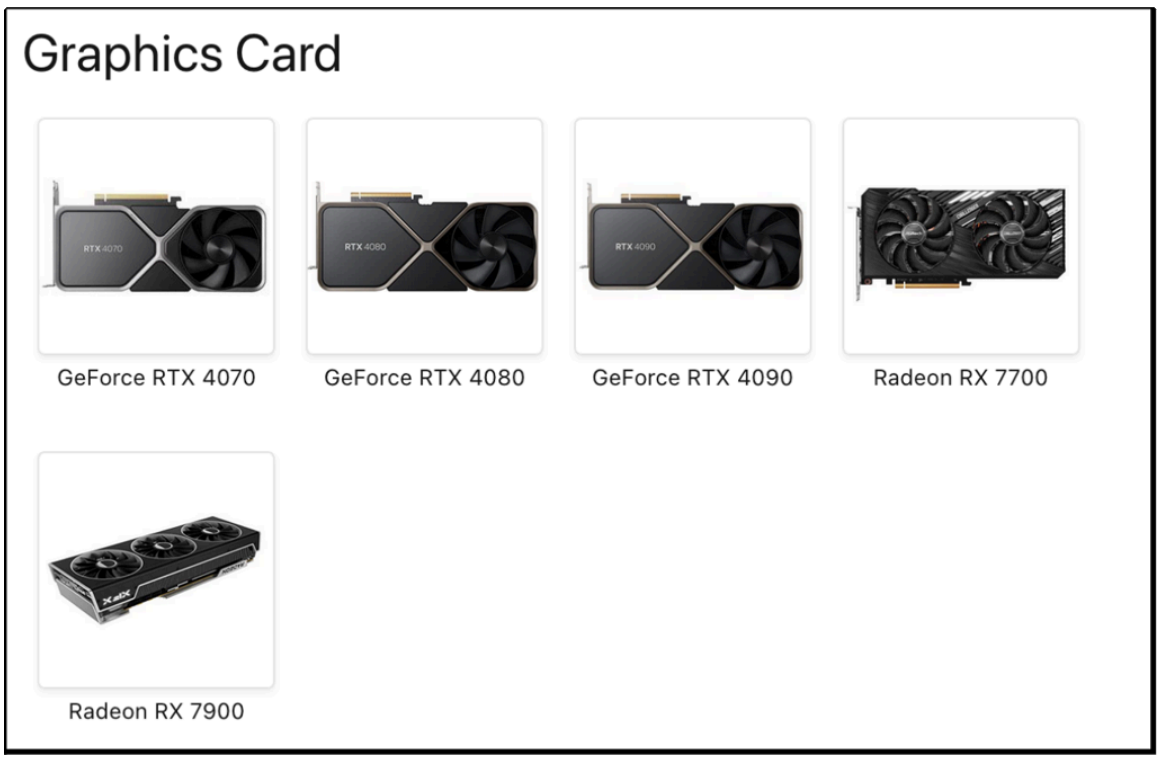


Redeploy your blueprint and you're done. Open an applicable product in the configurator to see the result.



Modify a product subscription with ramped pricing and quantities

Add pricing or quantity ramps to quote line items to set incremental changes during the life of a contract.

In the CPQ configurator, you can modify the configuration of a product subscription so that prices and quantities change during the term of the subscription. This is called ramped pricing because the price or quantity increases or decreases during the term of the contract.

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To enable the ramped pricing feature, select the **Enable Ramps** check box on the **Pricing** tab of the product offering configuration page.

When you create a quote for a configurable product, you can set ramped pricing for offerings within the product. Select a quote line item, and then select **Ramps**. A **Price ramps for [product offering]** dialog appears that contains the following fields:

- Start date
- End date
- Term (months)
- Ramp type
- Segments
- Annual % increase

If the start date, the end date, and the term are not already specified in the quote line, exit the price ramps dialog, enter them there, and save the quote line. You can modify them later when you set up a ramp. In the price ramps dialog, for the ramp type, select **Yearly** to change the pricing each year, **Quarterly** to change the pricing each quarter, or **Custom** to specify another period (ramp segment) at which prices are to be adjusted. Ramp segments are created according to the term of the contract and the ramp type. For example, if the term of the contract is 36 months (three years), and you select **Yearly** as the ramp type, three segments are created: one for each year of the contract.

In the **Annual % increase** box, enter the increase to go into effect each year. If you enter 10, the unit price will increase by 10% each year.

Click **Create**, and the segments display with price changes according to the figure that you entered.

In each segment, the **Quantity** field is editable. For example, to specify a contract during which 1 unit is purchased the first year, 2 units are purchased the second year, and 4 units are purchased the third year, set the quantities accordingly in the three annual segments. To set a quantity ramp with no change to pricing during the term of the contract, enter 0 in the **Annual % increase** box and modify only the quantity in each ramp segment.

Note: By default, ramps are hidden in a product's list of line items. To display the ramps in the line items view, set the hierarchy toggle at the top of the list. Then, select **conditions** and remove the default conditions for the view.

Related topics

Configurable products

Using Order Management

ServiceNow Order Management provides a centralized platform to create and manage customer and service orders throughout their entire life cycle. It automates the complex process from order capture and enrichment through to fulfillment and closure, promoting seamless coordination between sales, operations, and technical teams.

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Overview of the order life cycle

Access the Order Management capabilities from the CSM/FSM Configurable Workspace to capture and manage orders. A typical order life cycle is a structured, multiphase process that guides a customer's request from initial submission to final delivery and fulfillment.

1. Creating orders

   The order life cycle begins when a customer's request is submitted. This could be from a salesperson creating a quote that's then converted to an order, a sales agent directly capturing an order through the workspace, a customer placing an order online through the Business Portal, or an order being created via an API from another system. This phase focuses on getting all the customer-facing details, including what was ordered, pricing, and customer information, into the system.

2. Enriching orders

   If order enrichment subflow is configured for a product offering, then order enrichment tasks are created. The fulfillment agent captures additional details required to fulfill the order. This phase prevents errors from propagating further into the process. Not all orders need enrichment.

3. Approving or rejecting orders

   The fulfillment manager reviews the order, order lines, and pricing details and approves or rejects the order.

4. [System] Order decomposition

   This is a critical step for businesses selling complex products or services. The single, high-level order is automatically broken down into smaller, actionable service orders or fulfillment tasks based on how the process admin has configured order decomposition. For example, a customer's order for a telecom bundle would be decomposed into separate tasks for IT provisioning, a field technician, and the billing department. This process translates the customer's request into a detailed operational plan.

   View product, service, or resource orders for tracking the fulfillment process, verifying that all required tasks and suborders are created correctly, and confirming that the order progresses through its life cycle as expected. For more information, see View domain orders.

5. [System] Order orchestration

   The system orchestrates the fulfillment of each individual product, service, and resource orders. Tasks are automatically created and assigned to the correct teams and systems, and the application tracks their progress.

   Work orders are created if you have an integration with Field Service Management.

6. (Optional) Inflight order changes

   Inflight order changes come into the picture after an order has been submitted and is actively being processed, but before it has been completely fulfilled and closed. These changes are a form of MACD orders (Modify, Adds, Changes, and Deletes) that occur during the fulfillment life cycle.

7. Order fulfillment

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Fulfillment agents complete order tasks assigned to them. Fulfillment managers monitor the fulfillment process and manage issues using features such as Jeopardy Management to alert teams about potential delays and Fallout Management to handle errors.

As each fulfillment task is completed, the service or product is activated or delivered to the customer. This can involve anything from a physical delivery to the electronic provisioning of a digital service. Once all products and services are activated and delivered, the order is officially closed. The system updates the order status to reflect completion and updates creates sold product records.

8. Managing order fallouts

   Manage failures that may take place during order fulfillment due to errors and exceptions. These exceptions include incorrect data, connectivity problems, inadequate inventory supply, or other unforeseen issues.

9. Monitoring order jeopardy

   Proactively monitor and mitigate order delivery delays, dynamically track task progression to predict potential order fulfillment delays, and alert service delivery teams when fulfillment plans exceed or are expected to exceed committed completion times by monitoring the jeopardy status.

10. Managing post-fulfillment order changes

    Order agents can make the following post-sale changes to the orders after an initial order has been placed and fulfilled:

    - Change
    - Disconnect
    - Suspend
    - Resume

Related topics

Configuring Order Management

Order types in Sales Customer Relationship Management

Action types for customer and service orders

Order life cycle states

Methods of creating orders in Sales Customer Relationship Management

Reviewing customer or partner accounts

Now Assist for Order Management

Order Management reference

Order types in Sales Customer Relationship Management

Customer orders and service orders are the two main type of sales orders in ServiceNow Order Management. Learn about their differences and how to select an appropriate order type for your use case.

Use customer orders for ordering products or services. Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates. By using this process, you ensure that service orders are correct

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and handled efficiently throughout the entire fulfillment process. The following table compares customer and service orders and lists the differences between the two.

Aspect	Customer order	Service order
Definition	Orders for products (tangible or digital) that a customer wants to purchase or change.	Orders for services that are non commercial in nature and only require technical fulfillment. Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates.
Order record structure	• Customer order record with one or more line items based on the product offering. • Includes product specification, characteristics, and values.	• Service order record with one or more line items based on service specification. • Includes service specification, characteristics, and values.
TMF APIs for order capture	TMF622: Product Ordering API	TMF641: Service Ordering API
MACD order options	• Add • Change • Delete	• Add • Change • Disconnect • Suspend • Resume
Decomposition	• It's based on product, service, and resource specification, and rules. • Upon approval, order is decomposed into product, service, and resource orders. • Can create multiple domain orders (product, service, resource) per line item.	• It's based on service specification and rules. • Upon approval, order is decomposed into service and resource orders. • Typically creates service and resource orders per line item.
Unique roles	• Order agent [sn_ind_tmt_orm.order_agent] • Order fulfillment manager [sn_ind_tmt_orm.order_fulfilment_manager]	• Service order agent [sn_ind_tmt_orm.service_order_agent] • Service order manager [sn_ind_tmt_orm.service_order_manager]
Inventory impact	Sold products	Product inventory
Suitable for	All industries	All industries, highly preferred for the telecommunication industry

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Differences between the pre- and post-approval service orders

Like customer orders, captured service orders also have an ID with a prefix of ORD(nnn). The **Order Category** field in the order forms indicates if the order is for a **Product** (a customer order) or a **Service** (a service order). These labels enable you to identify the type of order.

When you approve a captured service order for fulfillment, the post-approval decomposition process generates actionable service orders and resource orders. You may see a single service order, multiple service orders, and resource orders that are associated with your approved service order.

- Service orders with a prefix of SO(nnn) are referred to as domain orders. These orders, and their related resource orders, with a prefix of RO(nnn), must be fulfilled to complete the service order line items on the captured service orders.
- The resource order manages the resources required to fulfill the services that the customer is requesting.
- These domain orders manage the fulfillment of the requested service orders.

To learn more, see Order decomposition.

Order types for service orders

The following are the two key fulfillment actions for service orders:

- Deliver: Involves providing the ordered items to the customer once the order is ready.
- Qualify: Validates whether a service or product can be fulfilled before actual execution.

Service qualification request orders with fulfillment type as Qualify can only be created in the ServiceNow Order Management system using APIs from external qualification request systems. When you capture an order using Order Management, the orders are created with the fulfillment type as Deliver.

Related topics

Service qualification requests

Action types for customer and service orders

Learn how you can take various types of actions for your customer orders. Action types include move, add, change, disconnect, suspension, resume, or no-change of services.

By using an order action type, you can define the type of actions that you want to do with an order. The following table lists the order action types.

Order action types

Order action type	Description
Add	Add a customer order that isn't associated with an existing order from the same customer. This customer order results in new order management and fulfillment activities. For example, you place a new order for a home internet service.
Change	Change an existing order, which changes a previously ordered or fulfilled product or service. This order action type includes the following scenarios:

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Order action types (continued)

Order action type	Description
	• Addition of a child product specification that the customer didn't previously order. • Deletion of an optional child product specification that the customer already has. For example, you upgrade the download speed of your home internet from 100 Mbps to 1000 Mbps. • Change characteristics or service location for existing products. • As part of the fulfillment workflows, define a PONR (Point of No Return) step for each service or resource order.
Disconnect	Disconnect an existing customer service order. For example, you can disconnect your home internet service.
Suspend	Product or service order to temporarily inactivate the product inventory of its order line items.
Resume	Product or service order to activate the product inventory of its order line items that were previously suspended.
No change	Order line items with No change action are included in the order for informational purpose only. For example, an order contains multiple items, but only one of those items must be changed (such as the speed, which has changed from 100 Mbps to 1000 Mbps), which affects the parent line item. However, all the other line items in the order remain unchanged.

Note: The Move action type has been deprecated and can't be used.

Related topics

Suspend and resume products and services

Managing post-fulfillment order changes

Order life cycle states

Learn about the order states from initial capture through enrichment, decomposition, fulfillment, and completion.

1. A new order gets created in the Draft state.
2. After you review and submit the order, either of the two things happen:
   - If post-capture order enrichment is configured, enrichment tasks are created, and the order state changes to Enrichment in progress.

     If you're blocked on order enrichment tasks, change the order state to Enrichment on hold. When you're unblocked, change the order state back to Enrichment in progress.
   - If the details captured while creating the order are sufficient to process the order and no enrichment is required, then the order state changes to New.

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3. When the order is in the New state, you can either approve or reject the order. Accordingly, the state changes to either Acknowledged or Rejected.
4. The order in the Acknowledged state then undergoes decomposition. Domain orders are created and fulfillment flows are triggered and the order state changes to In progress.
5. If the order is successfully fulfilled, the order state changes to Completed. If there are issues during order processing, then the outcome depends on how the issue was handled. The scenarios and their outcomes are listed in the following table.

Scenario	State	Outcome
More information needed to process the order	Awaiting information	○ If additional information is received, the order state changes to In progress. ○ Or else, the order state changes to Accessing cancellation.
Inflight order change	Revision in progress	○ If compensation plan is triggered, then the order state changes back to In progress. ○ Or else, the order state changes to Accessing cancellation.
Issues during order processing	On hold	○ If the issue blocking the order processing is resolved, then the order state changes back to In progress. ○ Or else, the order state changes to Accessing cancellation.

6. After the cancellation request is reviewed and processed, orders in the Accessing cancellation state change to Canceled.

Methods of creating orders in Sales Customer Relationship Management

Orders can be created by agents, customers, or using APIs in ServiceNow Order Management. Irrespective of where or how you create orders, all orders can be managed, tracked, and fulfilled using Order Management.

Order capture by the agents

Order agents and service agents can capture orders for existing customers from the CSM/FSM Configurable Workspace. Sales agents can create orders by converting an approved quote. The following table lists the various order creation channels and their benefits.

Order capture channels for agents

Channel	Persona	Benefit
Converting a quote to an order	Sales agents	The quote-to-order conversion supports post-quote workflows such as order capture, fulfillment, and contract creation. Benefits include:

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Order capture channels for agents (continued)

Channel	Persona	Benefit
		• Reduced errors from manual data handling • Consistency across systems by using a unified data model • Support for complex product configurations and pricing strategies, including bundles and multi-currency pricing
Creating orders from Accounts page	Order or service agents	The Accounts Information tab provides a 360-degree view of customer interactions, including quotes, contracts, entitlements, and previous orders. Creating orders from this context promotes: • Better-informed decisions based on historical data • Fewer errors due to pre-filled fields and validated account details • Faster order initiation based on pre-existing account data
Creating orders from Customer Orders or Service Orders list view	Order or service agents	Alternate way to create an order for an account or a consumer with a different set of contact information or parameters.

Order creation using TM Forum (TMF) APIs

Most of the service orders that you process are captured from third-party customer order management systems through the Service Order Open API. The Service Order Open API is a ServiceNow implementation of the TM Forum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API.

Order creators and order integrators for a Communications Service Provider (CSP) company can use the following TMF APIs to create orders:

- TMF622: Product Ordering API
- TMF641: Service Ordering API

Note: You need a Telecommunications Service Management subscription to create orders using TMF APIs.

Order creation using Service Exchange

Your ServiceNow instances can be integrated with the instances of your customers by using Service Bridge. With this integration, you can create and publish product offerings to your customer's instances. Enterprise customers can then submit requests for products or services, which you can then fulfill using Order Management. For detailed benefits on using the Service Bridge applications, see Exploring Service Exchange.

Order creation by B2B customers

Business-to-Business (B2B) customers can leverage self-service capabilities provided through the Business Portal to browse products and submit orders. These orders are then processed

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by the order and fulfillment agents. For more information, see Create orders from the Business Portal.

Post-capture order record generation

When you capture or directly enter a customer or service order, the corresponding order record is generated in the ServiceNow AI Platform. The order record has one or more associated order line items that describe the product or service and the action (Add, Change, Disconnect) to perform any required service for the item. The order line also contains the following elements:

- The details of the product or service being added, updated, or deleted.
- For Add type orders, the order line item holds the details of the product specification, with its required characteristics and characteristic values.
- For Change and Disconnect type orders, the order line holds the details of the product inventory that you're updating or disconnecting.
- The order line item can have a location and related information such as customer contacts detail.

Related topics

Creating orders in Order Management

Convert quotes into orders

Creating orders in Order Management

Familiarize yourself with the steps for creating customer or service orders in Order Management using the CSM/FSM Configurable Workspace.

The following illustration lists the high-level steps for creating a fresh order with the Add action type. At this stage, the order agents focus on capturing commercial details such as quantity, product configuration, and pricing for placing an order. Fulfillment agents capture technical details required for fulfilling the order in the order enrichment stage.

Order creation process

1. Initiate the order process from the CSM/FSM Configurable Workspace.
2. Input delivery information, including the shipping and billing preferences.
3. Select and include desired products into the order using the product catalog.

   Customize configurable products using the product configurator.
4. Review order line items and customize product specifications such as quantity, options, or attributes.

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5. (Optional) Apply manual price adjustments.
6. (Optional) Include any products that are covered under warranties, service plans, and so on.
7. Finalize and submit the order for further processing and fulfillment.

Note: If you add a sales agreement while creating the order, only the products listed in the sales agreement are available for selection.

Create an order in Order Management

Create a product or service order for an account or consumer in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select **New**.
5. On the form, fill in the fields.

Create a new Order form

Field	Description
Account	The customer account for which you want to create an order.
Consumer	The consumer for which you want to create an order.
Order Type	The type or order you want to create. The available options are: ○ Product ○ Service
Contact	The name of the contact for the order.
Deal type	Indicates the type of deal associated with the order: ○ Direct: The seller engages directly with the customer, with no intermediary partner involved. ○ Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor.
Order action	This option should be set to **Add** to create a new order.
Route to market	Identifies the exact sales channel used to execute the deal: ○ Direct ○ Reseller ○ Distributor
Channel partner	(Optional) The name of the organization selling a product or service.

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Note: The fields displayed on the form change depending on whether you select account or consumer.

6. Select **Create**.

Result
The order is started and the product catalog opens.

What to do next
Browse the product catalog and add products and services to the order. For more information, see Add products or services to an order in Order Management.

Related topics
- Order types in Sales Customer Relationship Management
- Action types for customer and service orders

Filter product catalog by location

Agents can filter products in the catalog by using the location function in Order Management. The location filter helps agents be more efficient when creating orders.

Before you begin
Location-based product transaction capability must be activated to enable location-based filtering in Order Management. For more information Activate location-based transactions.

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

Procedure
1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order you want to work with.
   The order opens in the **Catalog** tab with the **Select a location** field available.
5. Select a location from the Service location field.
   The products in the catalog are filtered according to the selected location.

Related topics
- Configuring location-based product transactions

Add a sales agreement to an order in Order Management

Add a sales agreement to an order to set pricing, filter catalog options, and streamline product configuration.

Before you begin
Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

About this task
A sales agreement is a contract to purchase a defined set of products and services for a fixed price. With a sales agreement:

- Terms are defaulted for the order.
- Price lists are defaulted based on the pricing terms.

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- The order catalog#is filtered for products and options.
- Agents can configure product bundles for orders.
- Agents can move quickly through the order process.

See Using Sales Agreement Management and Create a sales agreement to learn more about creating a sales agreement.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order.
5. Select the more actions icon , and then select **Order details**.
6. In the Customer Order form, select the sales agreement you want in the **Sales Agreement** field.
7. Select **Update**.
   The sales agreement with its product offerings and price lists is added to the order.

What to do next

Add products or services to an order in Order Management

Related topics

Sales Agreement Management

Configure Sales Agreement Management

Add products or services to an order in Order Management

Add order lines for products or service orders using the product catalog and product configurator in Order Management.

Before you begin

Note: Check your entitlements to see if the product configurator is available.

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

About this task

The product catalog displays tiles that contain product information. Simple products have an **Add** button that adds the product with no options available to the order.

Products with options have a **Customize** button that opens the product configurator, which lets you select product options.

When the#product configurator opens you can select from the available options for the product or service. The product configurator consists of three columns.

- The product hierarchy displays product catalog items and child products associated with the product.
- The option selection displays any available options for the product, service, order lines, and order tasks.
- The Current Selection displays the selected products options and the pricing.

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Depending on your configuration, you'd either see a CPQ Configurator or product configurator. To learn more about these, see Using the CPQ Configurator and Using the legacy product configurator.

As you configure your product, use the following options:

Option	Description
Reprice	Resets the pricing and updates the total price when you make changes. If cascading pricing is enabled, pricing information is cascaded from parent to child line items. See Control cascading quantity values in child product offerings for more information.
Validate Related Items	Validates the product and prices when changes are made.
Add	Adds the product to the order after you've configured it.

Note: If you added a sales agreement while creating the order, only the products listed in the sales agreement are available for selection.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order.
5. In the **Catalog** tab, choose a catalog from the drop-down menu.
6. Add products to your order.
   - Select **Add** to add a simple product.
   - Select **Customize** to add products with configurable options.
7. Select the **Line items** tab to view products and services in your order.

Related topics

Filter product catalog by location

Set up and review order lines

Order quantity support

Learn how you can support and fulfill your customer orders for multiple instances of a product or service. You can create multiple domain orders that equal the order quantity for each instance of the product or service. This way, you can efficiently decompose and manage the fulfillment of your customer orders.

Example of order quantity

An instance of a product or service refers to an ordered item with a unique set of order characteristic values, such as the speed and memory size. A customer might order the same top-

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level product or service for different locations, but each might differ in their order characteristics. For example, if a customer orders a router for one of their locations, it might have a memory size selection that varies from the same router model that was ordered for another location. Order Management supports this order quantity processing for the following scenarios:

Support for the order line item quantity that is provided by the customer when they order an item

If your customer places an order with more than one instance, the Quantity field on the order line item captures the number of instances of your customer order line items. The order decomposition process then creates the same number of product or service orders and manages the fulfillment process for each order independently.

Support for the catalog-driven characteristic quantity

In this scenario, the decomposition process decomposes a product or service order into the required number of domain orders. These domain orders are based on the quantity mapping that you define in the product catalog between the source and target specifications that are used in a product offering. The quantity mapping in the specification relationship triggers the decomposition process to create the required number of domain orders for the fulfillment process.

Support for the characteristic based quantity

In this scenario, you accept and support your customer order that has the information for order characteristics value which impacts the quantity of the domain orders. So, the order decomposition process refers to following information to create the required number of domain orders.

- Specification relationship with quantity characteristic
- Characteristic mapping

Set up and review order lines

Once products and services are added to an order in Order Management, you can set up order lines with order characteristics, pricing adjustments, and other items.

Before you begin
Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.order_approver, sn_ind_tmt_orm.order_viewer, or sn_ind_tmt_orm.order_fulfillment_manager

About this task
Product and service order lines items contain the product or service that you have added to your order. You can also make the following changes and updates to the order line items.

- Details - shows the details of the order including the name and address fields for the order.
- Order Orchestration - shows the order orchestration details in a node map view.
- Order Characteristics - add characteristics to a product and service orders.
- Order Line Item Contacts - add a contact for each product order line item.
- Order Line Related Items - connect this order line item with other order line items
- Pricing Adjustments - add pricing adjustments to a product order.
- Products Orders - lets agents create product orders and add them to the current order.
- Order Tasks - tasks that are assigned to complete the orders.

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- External product Inventories - connect to external product inventories.
- Involved Parties - add multiple involved parties to a customer order, each with a specific role.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you're working with.
5. Select the order line tab and choose the order line item that you want to update.
6. Select the tab that you want and fill in the fields.

Field	Description
Details	Details include shipping address and product information. Details tab also contains pricing, general information, and contract start and end dates.
Order Orchestration	Open this tab to see the steps needed to execute the order.
Order Characteristics	Characteristics are the options available.
Order Line Item Contacts	Add contacts that enable agents to find more information about an order.
Order Line Related Items	Connect this order line item with other order items.
Pricing adjustments	Agents can adjust product pricing.
Product Orders	Shows the product orders that are part of this order. Also lets agents add products to the order.
Order Tasks	Shows order tasks that must be completed.
External Product Inventories	Agents can view external product inventories.
Involved Parties	Add entities assigned with defined roles in an order, such as billing, shipping, entitlement, and partner participation.

7. To add related items for your customer orders with horizontal relationships, do the following actions.

   a. On the **Order Line Related Items** tab, select **New**.

   Note: Only those product specifications that are available for a selection appear.

   b. In the Related order line items list, select the order line items to add.

   c. In the Related product inventory list, select the product inventory to add.

   d. Select **Save**.

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The order line item is configured. Review the order line item details and submit to start the fulfillment process for the new product.

8. Select **Save** to save the changes to the order line.

Related topics

Review and submit a product or service order in Order Management

Add a header discount to an order

Apply a percentage-based discount to an order. You can apply it to the entire order or specific line item types. The order line items automatically inherit the designated discount percentage as a manual adjustment on the order line level.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

You can only add discounts to a quote while the quote is being crafted. Once the quote is approved or closed, discounts are no longer available.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select your order.
5. Select the **More Actions** icon and select **Apply header discount**.
6. In the Order header discount window, select how to apply the discount:
   - **Apply discount to all order lines**: Apply discounts for the entire order, including all order lines.
   - **Retain existing line-level manual adjustments and discount remaining lines**: Apply discounts to all the order line items except those with manual price adjustments.
7. In the **Order header discount %** field, enter the discount percentage.

   Note: You can't enter a negative percentage or a percentage higher than 100%.

8. Select **Apply**.

What to do next

Review and submit a product or service order in Order Management

Price adjustment breakdown on order lines

Order agents can view the price adjustments that were applied to the base price in the price list to reflect attribute adjustments and any custom adjustments that you added through the pricing plan, and see how the net price was calculated while processing orders.

Where to find the price adjustment details

The unit base price, unit list price, and unit adjustment details are listed on the Pricing section of the Order Line Item Details page.

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The Price Adjustments tab on the Order Line Item page displays the manual price adjustments that were applied to an order line item. For information about the fields on the list view, see Price adjustment fields.

Price adjustment example

To understand price adjustment and the terms used, let's consider a scenario where a customer is purchasing an API Edition license from a provider.

- Unit Base Price: The price defined in the Price List, say $1000.
- Attribute Adjustment: The customer opts for the "Professional Plus Edition" version of the product with Price Point as List Price which costs them additional $200.
- Volume adjustment: The customer receives a discount of $50 when they purchase 100 licenses. Here as well, the Price Point is the List Price.
- Price Point: The Price point is the entity on which the price adjustments were applied. It could be the List Price or Net Price.
- Unit List Price: The Unit List Price is calculated as $1000 + $200 - $50 = $1150.
- Customer also receives a premier account discount of $100 with Price Point as Net Price.
- Unit Net Price: The Unit Net Price is the final price after all adjustments have been applied. This is calculated as $1150 - $100 = $1050.

Related topics

Configurable pricing plans

Add subscription pricing to an order

Add contract pricing to an order or order line items including start and end dates in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In an order, you can set the contract start date and end date, or you can enter a term and the contract end date is automatically calculated.

Subscription pricing can be added at the order header level or at the order line item level.

See Subscription revenue metrics for more information about how contract pricing works.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Orders** > **All**
3. Select the order that you're working with.
4. Select the More Actions icon and select **Order details**.
5. In the **Order Details** tab, add a **Contract start date** and a **Contract end date**.
   When the dates are entered, the following information automatically updates.

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Field	Description
Total monthly recurring price	Shows the monthly recurring price based on the dates entered in subscription pricing.
Total annual recurring price	Shows the total annual recurring subscription pricing based on the dates entered.
Total amount	Shows the total amount of the subscription pricing according to the contract start and end dates.
Term	Shows the number of months the subscription is valid based on the contract start and end dates.

6. Select **Update**.

Related topics

Order details page - Dates fields

Add covered products to order line items

Enhance orders by adding covered products such as contracts or entitlements at the order line level.

Before you begin
Role required: sn_ind_tmt_orm.order_agent or sn_ind_tmt_orm.order_manager

About this task
Order agents can add covered products to an order line during the order capture process. Covered products refer to offerings that act as entitlements or contracts linked to a primary product, such as a warranty purchased with a phone. They are not standalone products but provide additional value or service to the main product. In the product offering record, covered products are marked with Entitlement as the offering type. You can only link the entitlement to a specific product, sold product, or install base item associated with the account.

You can add multiple covered products to an order line item.

Procedure
1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you're working with.
5. From the **Line items** tab, select the entitlement or contract type of order line to open the order line record in its own tab.
6. In the Covered Product form, select **New**.
7. In the Create New Covered Product form, select the covered product line item you want to add. You can add either of the following covered products types to a line item:

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- **Covered sold product**: Add a sold product to an entitlement/contract type of order line to establish a coverage relationship between them.
- **Covered order line item**: Add a covered order line item to the order line.
- **Covered install base item**: Add an install base item to the order line.

8. Select **Save**.

> **Note:** You can't modify a covered product added to an order line. To make changes, delete the covered product by selecting **More Actions icon** > **Delete** and add the covered product again by selecting **New**.

9. On the order line item page, select the contract start date and the contract end date.
10. Change the state to **Complete**.
A contract is created with the contract details for the order line.

Related topics

Add Covered Products using Contracts and Entitlement Workflow

Review and submit a product or service order in Order Management

Review all the order line items as the next step in the process to create a product order. Edit the order details as needed before submitting it for fulfillment approval.

Before you begin

Role required: sn_ind_tmt_orm.order_agent, order_approver

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to submit for approval.
5. Select **Review & Submit**.
6. Review the order line items details and configurations.

Review order form

Field	Description
Order Line	Unique system-assigned number of the order line item with a prefix ORDL.
Product Offering	Product offering that the customer is ordering for fulfillment.
Product Specification	Product specification that is associated with the order line item.
Qty	Product quantity.
Unit list price	Price of a product or service as defined in the Price List Line.

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Field	Description
Cumulative monthly price	Total monthly recurring charges for this order line item. An example is a monthly line charge.
Cumulative annual price	Total yearly recurring charges for this order line item.
Cumulative one time price	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Cumulative net price	Total price for this order line item.
Total monthly recurring price	Aggregated monthly cost of all recurring charges associated with an order line item or subscription contract.
Total one time price	Aggregate cost of all non-recurring charges associated with an order line item. These are typically setup fees, installation charges, or product costs that are billed once rather than on a recurring basis.
Total amount	Aggregate cost of all charges, both, one-time and recurring, associated with the entire order. It is a calculated field that reflects the final payable amount after applying quantity, pricing, and adjustments.

Note: You can't manually adjust the amounts that appear in the pricing fields. They only change if you change the characteristic values for the order line items.

7. **Optional:** To update the configuration or quantity for an order line item, select the Edit icon .
   You're redirected to the configurator UI for making updates.
8. **Optional:** To delete an order line item, select the Delete icon .
9. Save any changes or updates and select the **Reprice** to reset the total pricing.
10. After reviewing the order, select **Submit**.
    The state of the order changes from Draft to New. The order progresses to the next step of the order life cycle.

Note: For orders that include recurring or entitlement offerings, ensure that required contract details such as the contract start date, contract end date, and term are populated before submitting the order. These details are validated during order approval.

What to do next

For complex orders, capture technical details. For more information, see Capture order enrichment details for complex fulfillment.

If order enrichment tasks don't apply, move to order approval. For more information, see Approving or rejecting orders.

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Create a request definition

Create a request definition and configure it into an order task to help your agents provide additional order attributes for the order fulfillment from the CSM/FSM configurable workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Request Definition Setup** > **Request Definition**.
4. On the form, fill in the fields.

Create New Request Definition form

Field	Description
ID	Unique identifier for the request definition. **Note:** You can't modify an ID after the request definition is created.
Task type	Task table that is associated with the service request. **Note:** You can create new order tasks only in the Order Task [sn_ind_tmt_orm_order_task] table.
Name	Name to identify the request definition.
Task Fields	Fields of the Task table.

5. Select **Save**.
6. Repeat Step 2.
7. Navigate to **Request Definition Setup** > **Request Definition Characteristic**.

Request Definition characteristic form

Field	Description
Request definition	
Specification	Name of the product specification.
Characteristic	Name of the product characteristic that you want to capture the information from the customer order.
UI Visible	Option that designates if the **UI Visible** field appears as true in the Request Definition

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Field	Description
	characteristics table and the characteristic appears in the Order Task form. If you clear the check box, the field value appears as false, and the characteristic doesn't appear in the order task form.
Mandatory	Option that designates if the **Mandatory** field appears as true in the Request Definition characteristics table. Your agent must provide the characteristic value in the order task form to close the order task. If you clear the check box, the field value appears as false and your agent can close the task without providing any characteristic value in the order task form.
Read-only	Option that designates if the **Read-only** field appears as true in the Request Definition characteristics table, and you can't edit the characteristic value in the order task form. If you clear the check box, the field value appears as false in the Request Definition characteristics table and you can edit the characteristic value in the order task form.

8. Select **Save**.

Enriching orders in Order Management

Order enrichment is a post-capture stage in the Order Management life cycle that enables fulfillment agents to gather additional information from customers for complex orders before submitting the order for approval.

Overview of post-capture order enrichment

The order enrichment process is designed to improve fulfillment accuracy and help prevent potential delays or fallouts for complex product or service orders. Fulfillment agents collect additional, context-specific information from customers that is not required during initial order capture because these details don't affect product selection or pricing. The order enrichment process helps the order agents to create basic order entries quickly without needing to wait for technical details that are crucial for fulfillment.

Not all orders require enrichment. For complex offerings such as elevator installations, critical details like installation location and door configuration may not be available during initial order placement. Capturing this information later helps the fulfillment agents to have the necessary data for executing the order efficiently and accurately.

How the order enrichment process works

After an order is captured by an order agent, the system checks whether the Order Enrichment Flow Policy is configured for the product or service in the decision tables. If the Order

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Enrichment Flow Policy is configured, enrichment tasks are automatically created against the order lines that require enrichment and are assigned to the appropriate fulfillment agent. At this stage, the state of the order and its line items change to Enrichment in progress. If an order line doesn't qualify for enrichment, it's state changes to New.

Next, the agent then contacts the customer to collect the required details and captures them using the configurator UI. For example, if a customer orders elevators, the fulfillment agent must know the following site details before they send out install technicians:

- Door configuration (for example, side-opening, center-opening)
- Building entrance width
- Electrical rating

Only the information necessary for fulfillment is displayed in the configurator UI and stored in the order record.

The fulfillment agent reviews and closes each task after capturing the required additional details for order decomposition and fulfillment. When the order enrichment is completed, the state of the order line items and the parent order changes to New.

The fulfillment agent or manager can now approve or reject the order.

Benefits

- Improved accuracy: Reduces delays or fallouts caused by incomplete or incorrect data.
- Higher conversion rates: Enables customers to place orders quickly without needing all technical details upfront.
- Operational efficiency: Ensures that fulfillment agents have the correct data at hand.
- Customer engagement: Builds trust through multi-step collaboration rather than one-time transactions.

Configuration requirements

Order enrichment tasks are only created if the enrichment process is explicitly configured in the Order Enrichment Flow Policy in the decision tables for a product or service offering. This process ensures that enrichment is applied selectively and only when necessary. For more information, see Configure order enrichment flows using Decision Tables.

Capture order enrichment details for complex fulfillment

Collect additional order details and technical information necessary for order decomposition and fulfillment, promoting accurate delivery and helping prevent delays or fallouts for complex products or services.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_agent

About this task

You can enrich order and order line items that meet the following conditions:

- The Order Enrichment Flow Policy is configured for this product offering
- The order has been captured, reviewed, and submitted by an order agent
- The order and order line items are in the Enrichment in progress state

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Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon .
3. Navigate to the order enrichment task using either of the following options.

Navigation option	Steps
From Customer Orders	**a.** Navigate to **Customer Orders** > **All**. **b.** Select the order record that's ready for en richment, which is indicated by the Enrich ment in progress state. **c.** View the order enrichment tasks by select ing the **Order Tasks** tab. **d.** Select the order enrichment task to open the task record and view its details.
From Order Tasks	**a.** Navigate to **Order Tasks** > **All**. **b.** Select the order record that's ready for en richment. This is indicated by the Enrichment in progress state. **c.** Select the order enrichment task to open the task record and view its details.

4. Select **Configure**.
5. Capture the additional information that you gathered from the customer in the configurator UI. Depending on the product configuration, you can choose from a value range, a drop-down menu, or enter text in the configurator UI.
6. **Optional:** Adjust the quantity by entering a value in the **Quantity** field.
7. Review the quantity and other details in the Current Selection pane before proceeding.
8. Select **Update**.
   You're redirected back to the enrichment task Details page.
9. To mark the task as complete, select the **Closed complete** option from the **State** drop-down menu and select **Save**.
   You're redirected back to the **Order Tasks** tab where you can see new set of tasks that are asynchronously created.
10. Complete all the enrichment tasks in a similar manner.
11. **Optional:** View the summary of your selections for each enrichment task by going to its **Order Task Characteristics Values** tab.
    The **Characteristic Options** tab displays all the available options for that product characteristic.

Result

The order record is updated with all necessary fulfillment details. The order state changes to New. The fulfillment manager can now approve or reject the order.

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What to do next
Approve orders in Order Management

Approving or rejecting orders

Fulfillment managers bridge the gap between order intake and execution by reviewing the order information and deciding whether an order is ready to proceed or requires further review.

Approval workflow

To begin the approval process, start by reviewing the order and its line items thoroughly. Verify that all required fields such as order number, customer account details, contact information, pricing, critical dates, and product or service specifications are complete and accurate. The order must be in a New state to be eligible for approval.

As part of this review, the system validates key order details such as contract dates to ensure the order meets approval criteria before it can proceed.

Next, validate the order against your organization's approval criteria. The approval criteria could include checks such as:

- Accuracy of order details
- Completeness of required fields
- Compliance with business rules such as discount thresholds, contractual terms, or inventory availability
- Validity of associated agreements or entitlements

Throughout the process, maintain clear documentation and communication. If any issues arise, coordinate with relevant teams to resolve them before approval, promoting a smooth transition from order intake to fulfillment, and minimizing delays or fallout.

You can make corrections or updates to order characteristics before approval. Once the order passes all checks, proceed to approve it. This action updates the order status to In progress, which triggers the fulfillment workflows such as decomposition into domain orders, tasks, assignment to teams, and scheduling. The system logs the approval action and updates revision fields to reflect the change.

Rejection workflow

Begin by carefully reviewing the order details against your organization's rejection criteria checklist. The following is a list of common rejection triggers:

- Missing or incorrect data
- Policy violations such as unauthorized discounts or invalid entitlements
- Inventory constraints
- Fraud or risk flags

Once a rejection decision is made, update the order status to Rejected in the system. This action automatically halts any associated fulfillment workflows, stopping the order from being processed further. It's important to document the reason for rejection clearly using work notes so that the requester or relevant teams understand what must be corrected.

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Reevaluating rejected orders

A rejected order can be corrected and resubmitted for reevaluation by the order agent. If all issues are resolved and the order meets approval criteria, you can approve the order. Approving a rejected order updates the status back to In progress, enabling fulfillment to resume.

Validate the related items of a customer order for its compatibility

Validate the related order line items of your customer order, which includes the horizontal specification relationships, to make sure that the order-related information is correctly generated to fulfill your customer order.

Before you begin

A horizontal specification relationship is defined by defining a compatibility rule between the product, service, or resource specifications in a product catalog.

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

After you define a compatibility rule, when you capture a customer order, you can validate the order related items before you approve the order. For this validation, you review the specification relationships of the order line items and the order input data of your customer when you created the order.

Validations occur at two levels:

1. Validations before the order approval. If these validations fail, the order decomposition process doesn't stop. The following validations take place:
   - Source specification and source specification configuration
   - Compatibles validation
   - Compatibles quantity validation
2. Validation at the time that a domain order is closed. If this validation fails, the order fulfillment process stops. The following validations take place:
   - Source specification and source specification configuration
   - Compatibles validation
   - Compatibles quantity validation
   - Compatibles configuration

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to validate.
5. To validate the related items of the customer order, select the more actions icon and select **Validate Related Items**.

Option	Description
If the validation is successful	The ServiceNow AI Platform displays the fol lowing message:

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Option	Description
	Provided related inventory/order line items are compatible. This message confirms that the order information doesn't require any additional input and you can proceed to the next steps of the order fulfillment.
If the validation is unsuccessful	The ServiceNow AI Platform displays a message that confirms whether the order information requires additional details for its decomposition. You can provide the required information to proceed for the next process of the order fulfillment.

Note: For change and disconnect type of customer orders, the following message is displayed for the validation of the related items of the customer order: `This validation is not applicable for order line items with change or disconnect action.`

What to do next

Approve orders in Order Management

Note: Upon approving for the change and disconnect type of order requests with horizontal relationships, the ServiceNow system analyzes its impact on the product inventory relationships and displays a message if it invalidates the existing relationships due to the impact of the requested change by the customer.

Approve orders in Order Management

Approve an order in Order Management to begin decomposition and fulfillment process.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_approver

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to review and approve.
   Orders ready for approval are in the New state.
5. Review the order line items.
6. **Optional:** Select **Reprice** to recalculate prices when updates are made to an order line item.
7. **Optional:** To add more products to this order, select **New**.
8. Delete selected order line items by selecting **Delete**.
   When you delete an order line item, the prices are recalculated.

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9. **Note:** Before approving an order, the system validates contract information based on the order line type. For recurring or entitlement offerings, the **Contract start date**, **Contract end date**, and **Term** are required before the order can be approved. For one#time offerings, **Contract start date** and **Contract end date** must be empty. If these conditions are not met, the order cannot be approved and must be updated by an agent before approval can proceed.

   When you're satisfied with the order details, select **Approve**.

Result
The order is approved and the order state changes to In progress while it's being validated, before it enters fulfillment.

Reject orders in Order Management

Reject a customer or service order in scenarios where the customer request is invalid, the product or service is no longer available, or the pricing or terms are incorrect.

Before you begin
Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_approver

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to reject.
   Only the orders in the New state can be rejected.
5. Select **Reject**.

Result
The order is rejected and its state changes to Rejected. Rejected orders can be made available to the order agents to address issues after changing the state of the order and order line items to the Draft state.

Order decomposition

Order decomposition is the process of breaking down an approved customer or service order into a set of smaller, manageable domain orders for fulfillment. This process is driven by definitions in the product catalog to ensure that all necessary components are provisioned correctly. Learn about the decomposition process for customer and service order and their differences.

Overview of order decomposition

When an order is approved, the system breaks down the commercial elements of an approved order into its smaller, actionable technical components called domain orders (product, service, and resource orders) for fulfillment. Decomposition defines the Bill of Material for an ordered component. The decomposition is guided by specifications, specification relationships, and decomposition rules defined in the product catalog. Decomposition rules (often exclusion rules) determine when domain orders should or should not be created, based on characteristics or options present in the order line item. Decomposition establishes hierarchical relationships between source and target specifications, generating the necessary product, service, and resource orders.

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For example, consider the SD-WAN Service Package from the demo data. For this product, specification relationships and decomposition rules determine which product, service, and resource orders are generated based on the order's characteristics.

During order decomposition, work orders are created for product or service orders that need further action. For example, installation of a device at the customer site. You must close the order tasks and work order tasks associated with the domain orders to proceed with order fulfillment. Fallout records are created if you manually close the domain orders.

Hierarchy of domain orders

The domain order hierarchy is structured as follows:

Product order (Parent)

Defines the commercial intent of what is being sold. It is based on a product specification that includes brand, pricing, terms, and other product-related materials. The product order initiates the fulfillment process by triggering associated service and resource orders.

Service order (Child of product order)

Manages the fulfillment of a specific service specification. It outlines the technical realization and delivery of the service, often involving multiple service and resource orders.

Resource order (Child of service order)

Handles the provisioning of physical or logical resources required to deliver the service. It is based on a resource specification and may include multiple resource orders depending on the complexity of the service.

Each product order can have multiple service orders, and each service order can have multiple resource orders, depending on the relationships defined in the product specification.

The role of specification relationships and decomposition rules

The following core components drive the decomposition process:

- Specifications: Define the attributes of products, services, and resources.
- Specification relationships: Define how different specifications are related to each other.
- Decomposition rules: Provide conditional logic for the decomposition process.

Decomposition runs on the specification associated with the order line item and its hierarchy. The type of relationship between specifications determines the outcome.

- If the relationship is of type Bundles, Realized as, or Requires, decomposition process creates the following types of orders for the target specification:
  - A corresponding customer-facing service order (CFS), which is a service order that is generated for performance of customer-faced services.
  - A resource-facing service order (RFS), which is a service order that is generated for internal use of resources required to perform the actual services for the customer.
  - Resource order.
- If the relationship is of type Composed of, decomposition does not occur for that relationship.

Decomposition rules function as exclusion rules. They are used to prevent the creation of certain domain orders if the incoming order does not contain a specific characteristic or characteristic option. This allows for optional components within a product or service offering. For example, a

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rule can be set to only generate a service order for a specific feature if the customer explicitly selected that feature during the ordering process.

Specification relationships and decomposition rules can be defined to exclude domain orders when certain characteristics are not present. For example, if a customer or service order does not include a required characteristic such as Tenancy or WAN Optimization, the related domain order is not generated.

The decomposition process uses the source specification (defining the relationship) and the target specification (being defined to), with rules mapped to specific characteristics and values.

When the attribute value is increased, more number of CFS/RFS is created.

When the attribute value is decreased, it decreases the number of CFS/RFS.

Customer order vs. Service order decomposition

While the fundamental principles of decomposition remain the same, there are key differences when decomposing a service order compared to a customer order. The most significant difference is that service order decomposition does not generate product orders. The process is focused exclusively on the fulfillment of services and their underlying resources. The decomposition of a service order generates a specific set of service and resource orders:

- Customer-Facing Service (CFS) Order: A service order for the performance of a customer-facing service.
- Resource-Facing Service (RFS) Order: A service order for the internal use of resources required to perform the actual service for the customer.

The scope of service order decomposition is focused on the logical breakdown of services. It does not typically involve concepts like staggered or quantity-based decomposition, which are more common in customer orders that may include physical products with variable quantities and complex, multi-stage fulfillment cycles. The key differences are listed in the following table.

Comparing decomposition of customer and service orders

Aspect	Description	Customer order	Service order
Trigger	Action that triggers order decomposition	Approval of a customer order by fulfillment manager	Approval of a service order by service order manager
Basis for decomposition	Basis on which the domain orders are generated	Based on specifications, specification relationships, and the decomposition rules that are defined in the product catalog between the product, service, and resource specifications.	Based on specifications, specification relationships, and the decomposition rules that are defined in the product catalog between the service, and resource specifications.
Domain order generated	Type of domain orders	Product, service, resource orders	Service and resource orders only
Staggered decomposition	The process that allows domain orders to be created at a later stage, based on updated information such as customer	Yes	No

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Comparing decomposition of customer and service orders (continued)

Aspect	Description	Customer order	Service order
	needs, service availability		
Quantity-based decomposition	The process that supports splitting orders based on quantity, handling changes in order quantity, and managing inventory updates or cancellations for in-flight orders	Yes	No
Example	-	SD-WAN Service Package • Bundles multiple product specifications. • Decomposition creates a parent product order and multiple child product and service orders, with rules to include or exclude based on characteristics like Tenancy or WAN Optimization.	Managed firewall service Decomposition creates a customer-facing service order (CFS), multiple resource-facing service orders (RFS), and resource orders, based on relationships and characteristics present in the order.

Additional features in customer order decomposition

Customer order decomposition supports the following additional features:

- Staggered decomposition: Customer orders may use staggered decomposition, creating domain orders at later stages based on updated information such as service availability or customer needs.
- Quantity-based decomposition: Customer orders can be decomposed into multiple domain orders based on order quantity, supporting revisions, and fulfillment of multiple instances.
- Support for change orders: Customer order decomposition supports updates to quantity characteristics, enabling upgrades, downgrades, and inventory management during fulfillment.

Fore more information, see Customer order decomposition.

Order decomposition examples

Examples using demo data illustrating how customer and service orders can be decomposed under diverse conditions help you to understand the decomposition process. The conditions include optional characteristics, quantity-based decomposition, staggered fulfillment, and exclusion rules that support complex order management and fulfillment workflows.

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Specification relationship and decomposition rule example

The Managed Firewall service demo data is an example of a customer facing service specification that has a Requires relationship with the following three resource-facing service specifications:

- Firewall administrator
- Firewall and DMZ
- Threat and Intrusion Prevention service

The decomposition process creates an RFS service order only when the corresponding characteristic is available in the order line item for the Managed Firewall service specification.

After receiving a service order for adding a Managed Firewall service, a service manager reviews and approves it. This process triggers decomposition, which creates the RFS service orders and resource orders. The service order has one order line item for the Managed Firewall service, which includes all of its characteristics. The service order decomposition process creates the following:

- A CFS service order for Managed Firewall service.
- Three RFS service orders for all three RFS specifications.
- Three resource orders for resource specifications.

Next, the ServiceNow AI Platform triggers a fulfillment workflow for the decomposed service and resource orders. This workflow generates the required order tasks for fulfilling the domain orders and uses decision tables to identify the workflow for a decomposed order. The selected workflow is based on various attributes in the original service order. These attributes include the specification category, and an order line item action (Add, Change, or Delete), among others.

To learn more about decision tables, see Decision tables :

Example of an order decomposition that is based on specification relationships

Specification relationships define the relationships between a product, service, and resource. When you define specification relationships, you can optionally create decomposition rules to specify how a customer order is decomposed, fulfilled, and delivered to your customer.

The best way to view a decomposition rule is as an exclusion rule. You use decomposition rules to specify to exclude domain orders from being created when you receive a customer order that doesn't contain a characteristic or characteristic option. For example, in the SD-WAN Service Package demo data, the following occurs:

- A specification relationship is defined between the SD-WAN Controller product specification and its service specifications.
- The service specification details the services that are required for the product. When an order is received for the SD-WAN Controller product, a product order and a service order are generated for the SD-WAN Controller Service.

Decomposition runs on the specification that is associated with the customer order line item and its hierarchy of specifications. It works as follows:

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- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, a product, service, or resource order is created for the target specification when the customer order is decomposed.
- Decomposition establishes the hierarchical relationship between the source and targets while generating the product, service, and resource orders.
- If the specification relationship is of a Composed of type, decomposition doesn't happen.

The SD-WAN Service Package demo data is an example of a composite product specification that bundles three other product specifications within it:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security

The SD-WAN Service Package defines the following relationships:

- SD-WAN Service Package has a Bundles relationship with an SD-WAN Controller
- SD-WAN Service Package has a Bundles relationship with an SD-WAN Edge Device
- SD-WAN Service Package has a Bundles relationship with SD-WAN Security

When a customer order is received for the SD-WAN Service Package, and that order is approved, decomposition is triggered. The customer order line item for the SD-WAN Service Package has a single product order for the SD-WAN Service Package. That SD-WAN Service Package Product order has three child product orders:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security (if the option security product was ordered)

Example of order decomposition that is based on defined decomposition rules

When you define specification relationships, you can optionally create decomposition rules. With a decomposition rule, you can specify to exclude domain orders from being created when you receive a customer order that doesn't contain a specific characteristic or characteristic option. The following example shows that the SD-WAN Controller Tenancy product characteristic was designated as optional.

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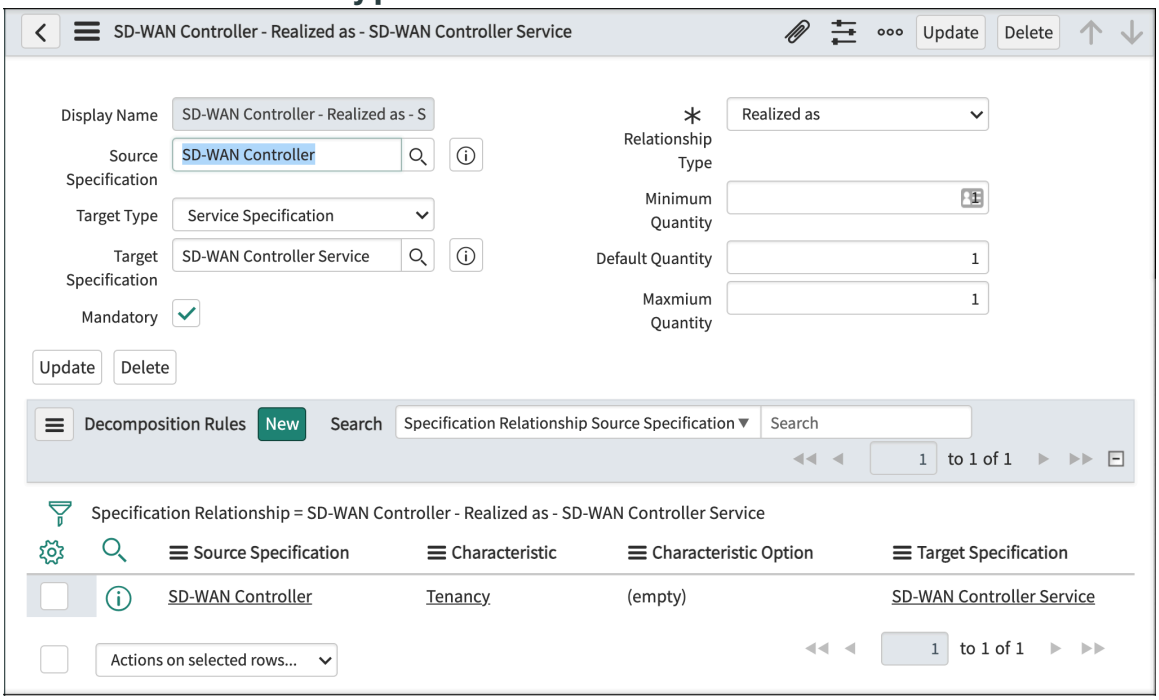
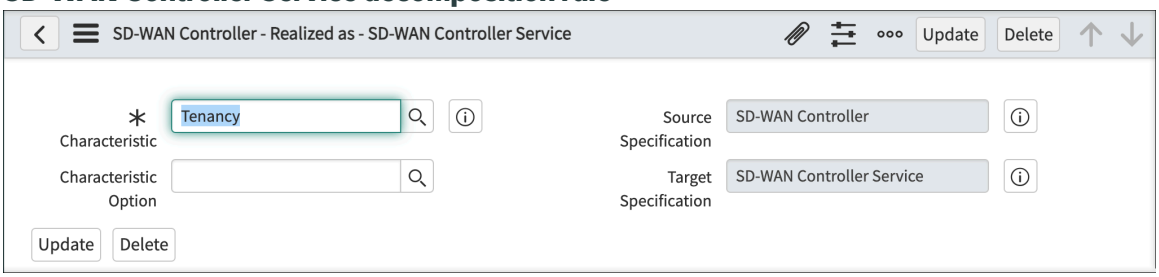
SD-WAN Controller Tenancy product characteristic



In the example, you see that a decomposition rule was defined for the SD-WAN Controller product specification relationship to the SD-WAN Controller Service. This rule excludes the specification when a customer does not select the **Tenancy** option.

SD-WAN Controller Service decomposition rule



When a customer places an order and doesn't select the **Tenancy** option, the related service order doesn't generate for it.

Example of order decomposition that include references to characteristics and options

You can define the decomposition rules for a specification relationship and include references to a characteristic and characteristic option. The following elements comprise the specification relationship:

- The source specification is the specification that defines the specification relationship.
- The target specification is the specification that the relationship is being defined to.
- Both values are automatically defined when you create the decomposition rule from the specification relationship.

If the characteristic and value are present on the order line, the ServiceNow AI Platform applies the decomposition rules to Add and Change type orders. They are not applied to customer order line items with a Disconnect (Delete) order action.

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In this example, the SD-WAN Edge Device is a product specification and SD-WAN Security is a service specification.

- The SD-WAN Edge Device has a characteristic called WAN Optimization and has a Realized as relationship with SD-WAN Security.
- There is a decomposition rule for this relationship with WAN Optimization as the characteristic.

If you receive an order for the SD-WAN Service Package that doesn't include the WAN Optimization characteristic, the decomposition rule prevents the generation of an SD-WAN Controller Service service order. The rule designates that the decomposition of that service order only happens if that characteristic is ordered.

Order decomposition for order line-item quantity and order quantity characteristics changes

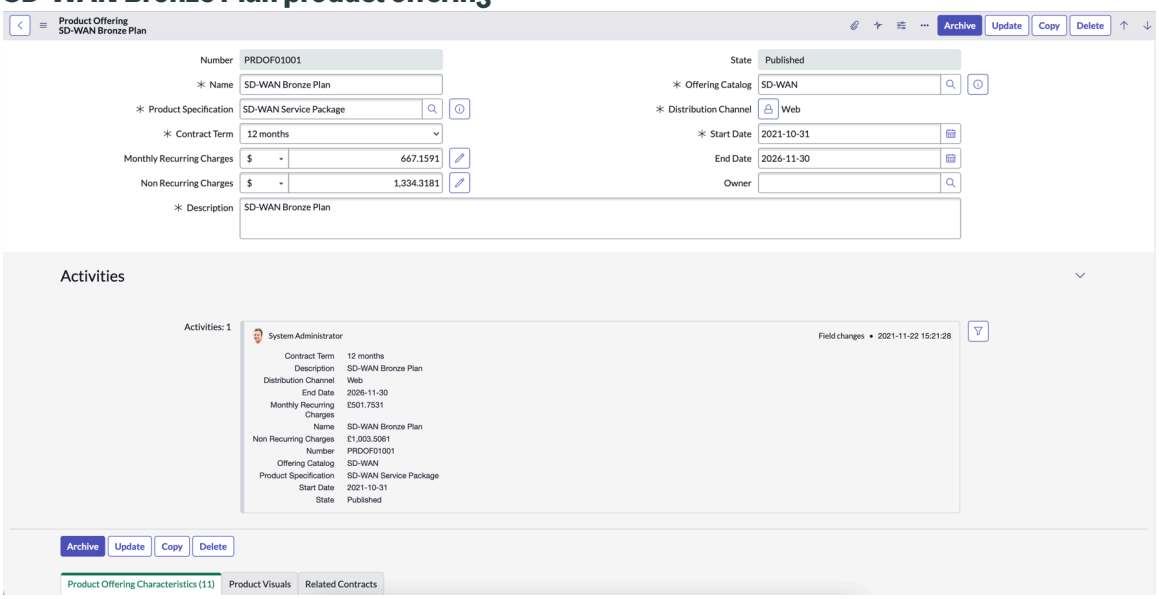
When order decomposition process uses the order quantity information from the order capture process to create multiple product orders that match the line item quantity for a customer order. An agent then fulfills each instance of the product separately, which create the inventory records for each of the fulfillment instances.

When a customer submits an order for three instances of the SD-WAN Service Package product and you approve the order, the decomposition process creates three product orders for the SD-WAN Service Package including one product order for each order line item. Each product order in the SD-WAN Service Package creates three child orders for the products and services for the order fulfillment process.

Example of staggered decomposition

The following example describes the staggered decomposition process for a product offering called SD-WAN Bronze Plan.

SD-WAN Bronze Plan product offering



The SD-WAN Bronze Plan product offering uses a product specification, called an SD-WAN Service Package (as shown in the following example), that has three target specifications:

- SD-WAN Edge Device
- SD-WAN Security
- SD-WAN Controller

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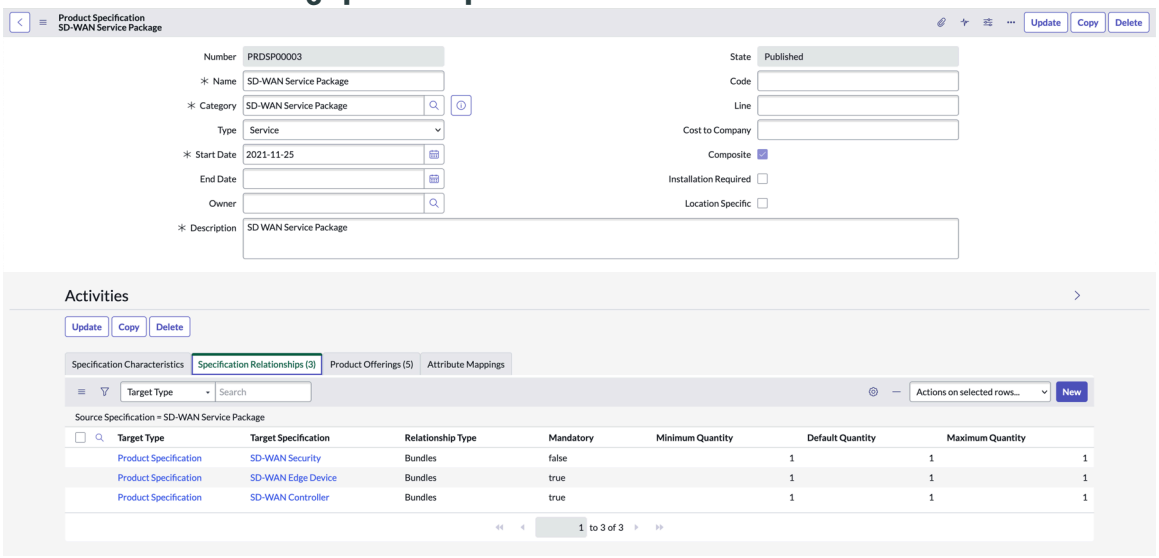
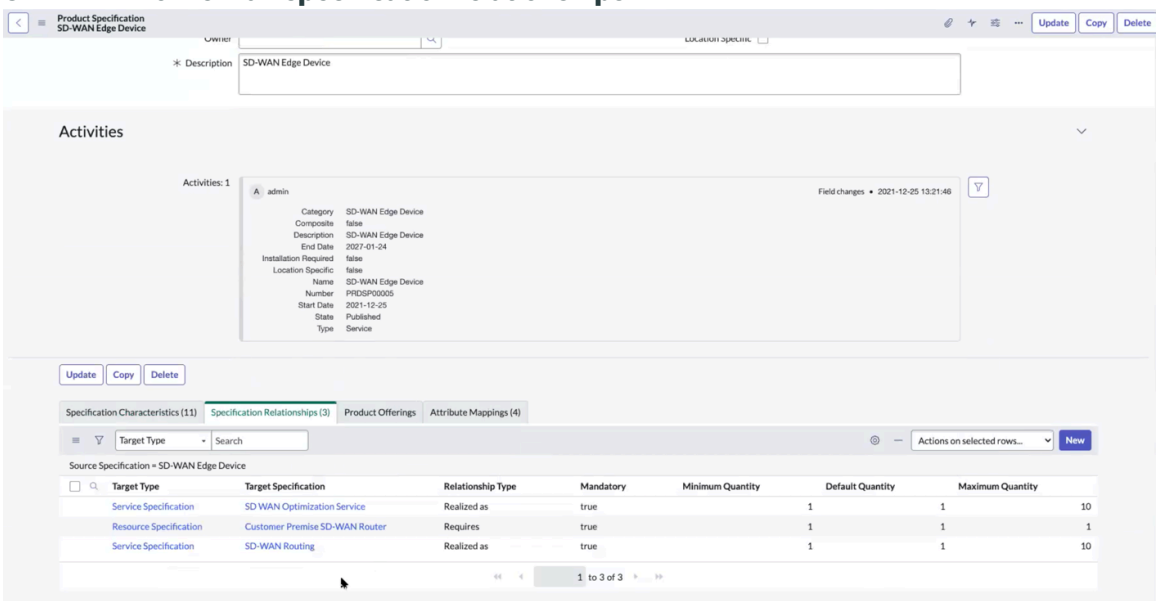
SD-WAN Service Package product specifications



The SD-WAN Edge Device product specification has specification relationships with SD WAN Optimization Service and SD-WAN Routing, and the underlying decomposition rules don't have any values for WAN Optimization and Routing characteristics.

SD-WAN Bronze Plan specification relationships



The following example shows the decomposition rules for the product offering for the SD-WAN Bronze Plan.

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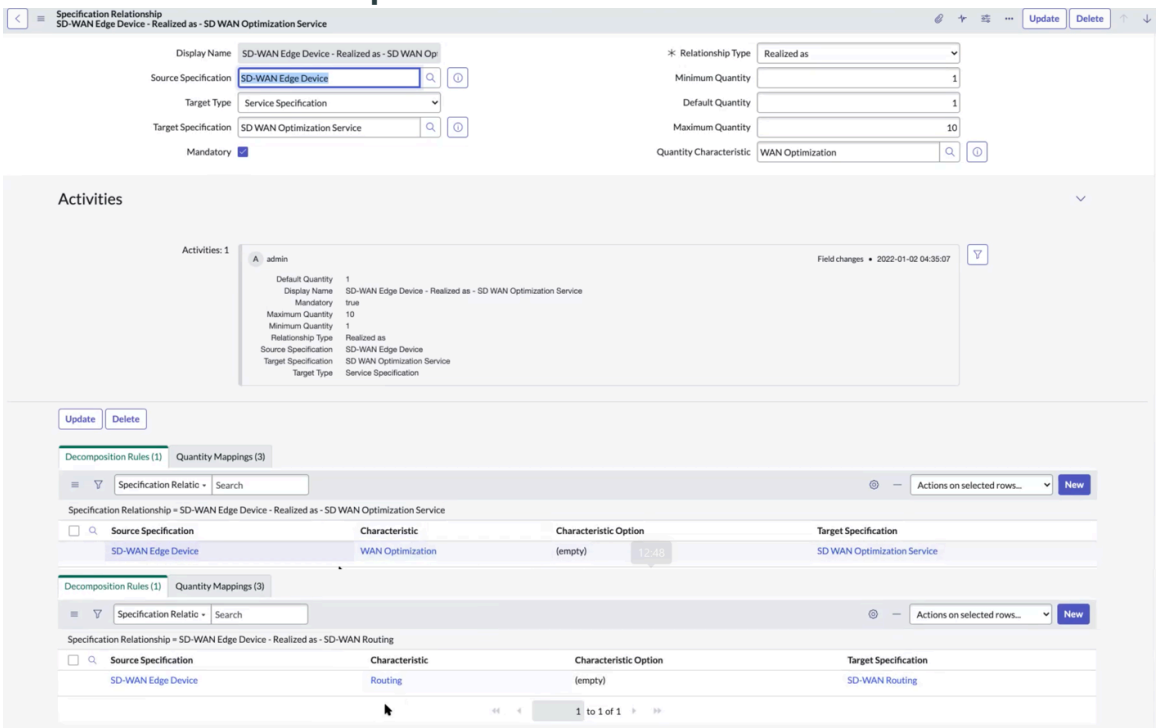
SD-WAN Bronze Plan decomposition rules



When your customer places an order for the SD-WAN Bronze Plan product offering and you approve this customer order, decomposition begins with the creation of the domain orders as per the defined specification relationships and decomposition rules. Because this customer order doesn't have the values for these characteristics for Routing and WAN Optimization, the decomposition rule doesn't create the service orders.

However, as a part of the order fulfillment process, the information for Routing and WAN Optimization must be available. When your fulfillment agent provides the values for these characteristics, the decomposition rule creates the necessary service orders and the order decomposition completes.

Staggered decomposition

Learn how you can stagger the decomposition for your customer orders. You can decompose your customer orders in multiple iterations by using the available information at the domain level, rather than decomposing an entire customer order at one time after it is approved for fulfillment.

Staggered decomposition helps you fulfill your customer orders even when service and resource orders were created from different factors, such as a customer's need, availability of the services at a customer's location, and so on. Staggered decomposition creates the domain orders (product, service, and resource orders) at a later stage during the order fulfillment process. The decomposition process is based on the latest information.

However, the one-time order decomposition process (before the staggered decomposition) works well when the products and services have the necessary information and order approval to create the domain orders for the order fulfillment.

The following diagram shows how the staggered decomposition process works in comparison to the standard order decomposition. You can start the decomposition process with the information that you already have for your order and order line items. The decomposition process skips the domain orders (product or service or resource orders) that you don't have the required information for at this time. When you add this information later, the decomposition process triggers and completes the processing for the remaining domain orders.

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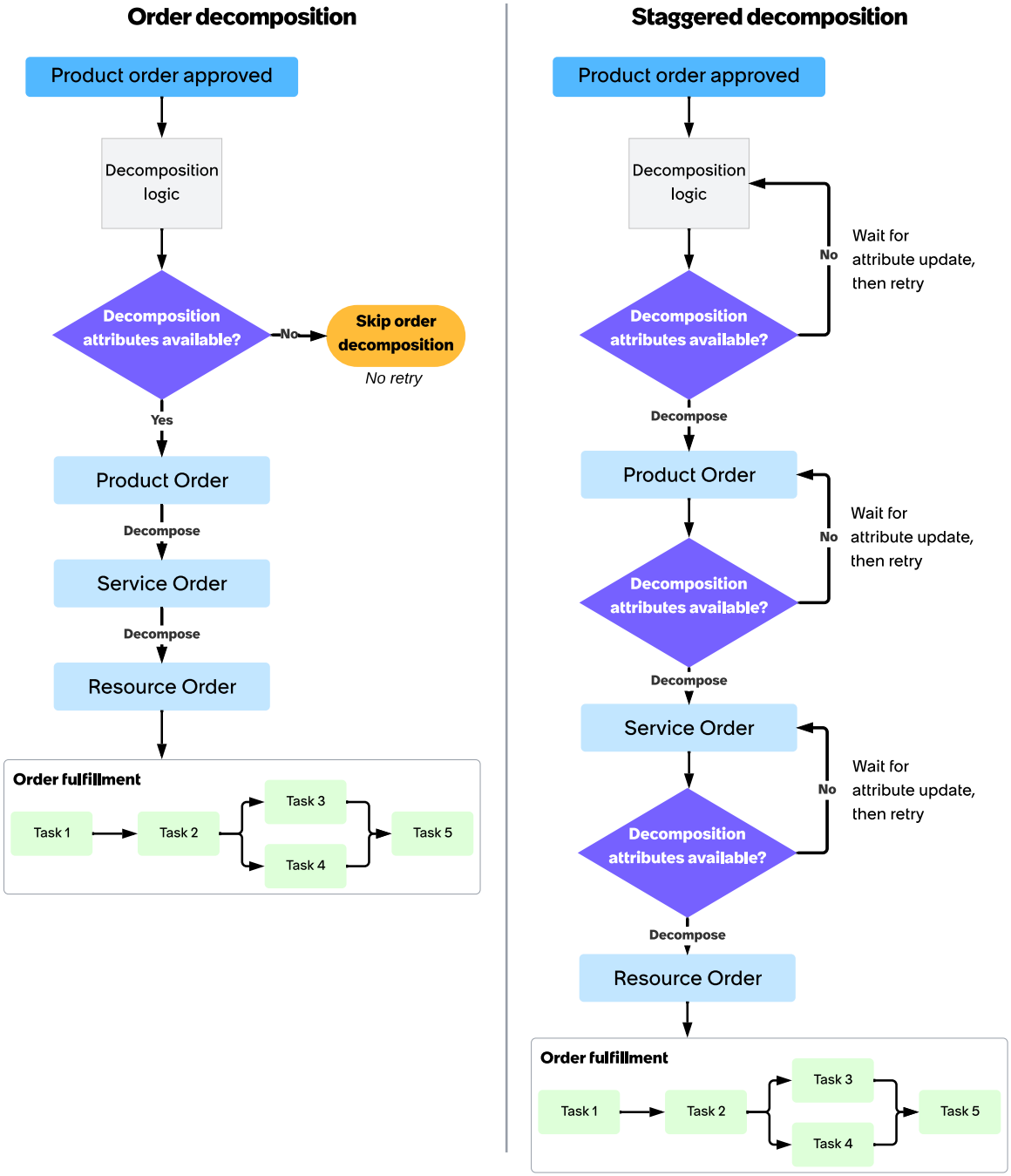
Decomposition process



Contrast to earlier decomposition processing

Before staggered decomposition was available, order decomposition processing started immediately after a customer order was approved for fulfillment. Order decomposition was based on the specification relationships and decomposition rules that were defined in the product catalog.

If the decomposition rule depended on any characteristic value that was not available at the time of order decomposition, the order processing skipped the decomposition of orders. However, in staggered decomposition, with the initial decomposition, the decomposition automatically triggers again for the skipped orders when the dependent characteristic value is available. The characteristic value can be set by your order fulfillment users or by the attribute propagation rules.

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How staggered decomposition works

To support order decomposition in a staggered manner, you can use this method to retrigger the decomposition process for the skipped domain orders when the characteristic values are assigned in the corresponding decomposition rules.

When you approve an order, the order decomposition process starts. The decomposition process creates domain orders by using the information that is available from the order, order line items, and catalog definition. It also evaluates the decomposition rules to create the target domain orders. If the decomposition feature fails to evaluate the decomposition rules due to the unavailability of characteristic values, the decomposition is stopped for those domain orders.

When the characteristic values are available either from a user's action or from an attribute propagation rule, the decomposition process is retriggered. The process then creates the required domain orders and completes the order decomposition. If you again update the characteristic value after the order decomposition is complete, it does not trigger the decomposition for the domain order.

To understand staggered decomposition with the help of an example, see Customer order decomposition.

View domain orders

View product, service, or resource orders for tracking the fulfillment process, verifying that all required tasks and suborders are created correctly, and confirming that the order progresses through its life cycle as expected.

Before you begin

Role required: sn_ind_tmt_orm.fulfillment_agent, sn_ind_tmt_orm.fulfillment_manager, or process admin

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select an order for viewing domain orders.
5. From the **Line items** tab, select an order line item.
6. Select one of the following options depending on whether your order is a customer or service order.
   - Customer order: Select **Product Orders** tab to view product orders associated with the order line.
   - Service order: Select **Service Orders** tab to view service orders associated with the order line.
7. Select the product or service order record to view the associated child objects.
8. View the service and resource orders by navigating to the **Service Orders** and **Resource Orders** tabs respectively.
9. Select **Associated Move Domain Order** tab in the related list to view the cease domain order and provide domain order.

   When a move order is raised, you can view these domain orders in the related lists:

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- Cease domain order: Shows a domain order linked to an old inventory from the existing service location.
- Provide domain order: Shows a domain order linked to a new inventory in the new service location.

10. Select **Associated Composed of Item** tab in the related list to view the cease composed of item and provide composed of item.

    When a move order is raised, you can view these composed of items in the related lists:

    - Cease composed of item: Shows old composed of Items from the existing service location.
    - Provide composed of item: Shows new Composed of Items in the new service location.

Customer order decomposition

Learn about the customer order decomposition, including quantity-based decomposition, handling change orders with updated quantity characteristics, and support for quantity revisions in in-flight orders.

Quantity-based decomposition

Quantity based decomposition enables you to decompose your order into separate domain orders as per the order quantity to manage the fulfillment process and independently. This method also supports:

- Revision of order line item quantity for in-flight orders to fulfill customer's request to modify (increase or decrease) the quantity of the order.
- Support for change of product order to fulfill a customer's request to update the quantity characteristics. It leads to either the creation of new product inventories or the cancellation of existing product inventories.

Support for a change order with an update for quantity characteristics

When you receive a customer request to revise an order through changing a product characteristic or characteristic value, you can upgrade or downgrade an existing product inventory. As a part of the fulfillment process, you either create new product inventories or cancel existing product inventories.

- If a change in a quantity characteristic option leads to additional new product inventories, the decomposition process creates the domain orders for the target specification and inventories for the fulfillment process.
- If a change in a quantity characteristic option leads to the cancellation of some existing inventories, the decomposition process creates the domain orders needed to manage both the cancellation and changes to the inventories.
    - The fulfillment process notifies the order fulfillment manager to identify the inventories require cancellation or update.
    - The decomposition process sets the **Needs Attention** field to **True** for the domain orders.
    - The order fulfillment manager then views these orders in the Needs Attention widget. The order fulfillment manager can wait to open the domain orders, select the product inventories for cancellation, or update it to resume the order decomposition and fulfillment process.

Support for quantity revision for in-flight orders

When the order fulfillment process is in progress, and you receive a request to revise to increase or decrease an order line item quantity, it is captured as a quantity change. To incorporate the

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revision, the decomposition process then either creates additional domain orders (referred to internally as a `+ve change`) or cancels the existing domain orders (referred to internally as a `+ve change`) for the order fulfillment.

- If the order revision request is for an increase to the order line item quantity, the decomposition process creates new domain orders to match the updated order line item quantity.
- If the order revision request is for a reduction in the order line item quantity, the decomposition process initiates the cancellation process for some of the domain orders to match the reduced order line item quantity.

Related topics

Order quantity support in Order Management

Order orchestration

Order orchestration begins after a customer or service order is decomposed into smaller, individual product and service orders. The primary goal of order orchestration is to promote accurate, timely, and efficient fulfillment of orders.

Order orchestration is a strategic framework and set of coordinated processes that define how an organization fulfills customer orders or service requests. The Order Management application automates the complex, multi-step fulfillment of customer and service orders by breaking them into smaller product, service, and resource tasks corresponding to the domain order. These tasks are executed across various systems, both internal and external to ServiceNow.

Order orchestration involves the coordination and optimization of multiple functions and resources, including inventory management, order processing, shipping, and delivery.

Supporting systems

Effective orchestration relies on integrated technologies such as the following:

- Order management systems: Centralized platforms for handling order data and workflows.
- Warehouse management systems: Tools for tracking inventory, storage, and fulfillment operations.
- Transportation management systems: Solutions for planning, executing, and optimizing the movement of goods.

Steps in an orchestration plan

An order orchestration plan typically includes the following steps:

- Order capture and validation: Receiving and verifying customer orders.
- Inventory check and allocation: Verifying stock availability and assigning inventory.
- Supplier and carrier coordination: Engaging third-party vendors and logistics partners.
- Fulfillment and delivery tracking: Monitoring shipment progress and delivery performance.

Using the order orchestration UI

By using the order orchestration user interface (UI), you can make sure that you do all the tasks that are required to fulfill your customer orders. You can also view the complete order hierarchy, the status of the associated decomposed orders, the order line items, and the order tasks.

As an order fulfillment manager or agent, the order orchestration UI is your command center for managing the end-to-end fulfillment process. Use the order orchestration UI to track all domain

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orders and order tasks for an order, order line item, or domain order. You can also use the UI to review and resolve any issues for related order tasks and domain orders.

Accessing the UI

You can access the order orchestration UI in the following two ways:

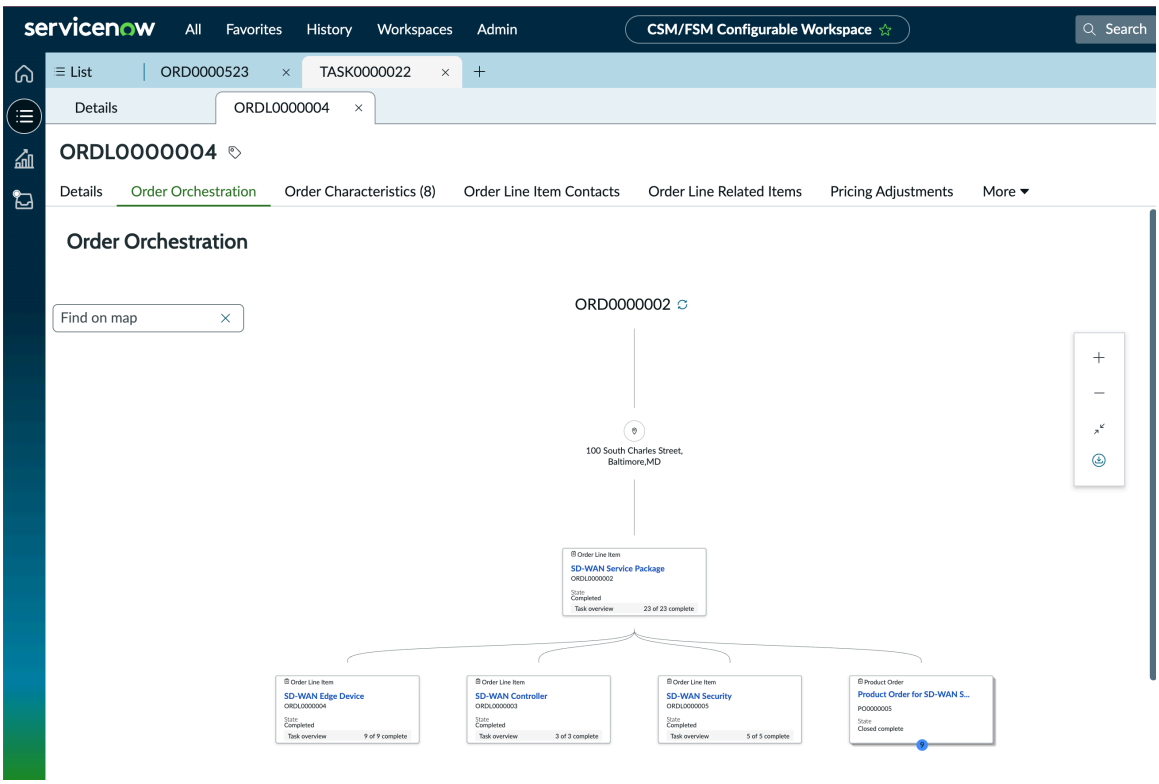
- From the Order Details page: Go to the Order breakdowns section and select **View order orchestration**.
- From individual order lines: Open an order line item, then navigate to the **Order Orchestration** tab.

Use the order orchestration UI to see:

- A pictorial representation that shows the hierarchy of all order line items, domain orders, and order tasks for an order, order line item, or a domain order.
- The dependencies between the domain orders and order tasks.
- The current state of the associated order line items, domain orders, and order tasks in the hierarchy.

The following image shows the order orchestration UI:

Order orchestration UI



By using the order orchestration UI, you can perform the following actions:

- View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
- Open a node in the hierarchy and view the additional details.

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- Determine the current state of the associated order line items, domain orders, and order tasks.
- Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

Fulfilling multi-site orders

The order orchestration UI is especially helpful when you fulfill customer orders that involve multiple products that are fulfilled at multiple locations. For example, a customer orders the SD-WAN Service Package for their San Jose, San Diego, Denver, and Dallas locations. That means that there's a minimum of three order line items for each of the four locations:

- One line item for the SD-WAN Service Package
- One line item for the SD-WAN Controller product
- One line item for the SD-WAN Edge product

If the same customer also orders an optional SD-WAN Security product for each location, there would be an extra four order line items. That is, there's one order line item for each of the four locations (San Jose, San Diego, Denver, and Dallas).

To initiate the fulfillment process for a multi-site order, the Order Management application decomposes the order into multiple domain orders for fulfillment. The domain orders are the product, service, and resource orders that are generated during decomposition. Each decomposed order has a corresponding fulfillment flow with several order tasks. To fulfill an order by the delivery dates that you promise to your customer, you must complete all the related domain orders and resolve all the related order tasks on time.

Related topics

Order fulfillment

Review an order orchestration plan

Managing order fallout

Managing inflight order changes and cancellation requests

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled. By using inflight change order management, you can designate when you permit such changes. You can also assess the impact of the requested changes for an order or order line item, and automatically generate a plan to compensate for them when you approve the revision or cancellation request.

Overview of inflight order changes

An inflight order is an order that is in the process of being orchestrated and fulfilled but has some work pending. Inflight changes and cancellations can occur in large enterprise orders. An inflight order change refers to a change that is issued for an order line item that is currently undergoing fulfillment and pending completion.

Enterprise order management is complex. It can take weeks or months to fulfill a multi-site order. Enterprise orders can involve the large-scale purchases of products and services, often for multiple locations around the world. Inflight orders can go through revisions that incorporate changes that are submitted by customers or identified by internal personnel during the order fulfillment process.

To revise an inflight order or order line items that have already been decomposed to suborders, service provider employees have to assess the impact of the requested changes. If there is no data-driven process and framework, users try to manage the changes with manual tasks

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that can lead to delays in the order delivery process and result in poor customer and employee experiences.

By using inflight change order management, you can determine how to manage changes for customer orders that are still being fulfilled. By managing inflight changes, your organization can reduce operational costs and deliver a better customer experience.

You can use an inflight change to modify a customer order that is still in fulfillment. You define a point of no return (PONR) after which the order can't accept any change. After an inflight change is received and approved, order management dynamically assesses the impact of the requested change and automatically generates a plan to orchestrate the order correctly. With Order Management, your organization can manage the inflight changes more easily, reduce operational costs, and deliver a better customer experience.

Types of Inflight order changes

Order change requests typically originate from your customers for purchased products and services or from internal personnel, such as order fulfillment agents, when they are managing their fulfillment. When you submit an inflight order revision, you assign a change type to track the types of order changes that are submitted by users. The ServiceNow AI Platform supports Characteristic, Contact, Quantity, related items, and Price change types.

Order revision or cancellation is a two-step process. First, an operator makes the required updates or requests that an order or order line item is to be canceled. Next, when the order is created, an order fulfillment or service order manager approves the revision or cancellation request.

Customer-initiated requests

Based on the types of customer requests, you update an inflight order to do the actions that are listed in the following table.

Customer-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location.	A customer supplies a new email address or the name and telephone number of a new corporate contact.
Incorporate changes that are related to pricing details.	A customer requests a reduction to a non-recurring charge or a monthly recurring charge on an order line item.
Add a product or service to an order.	A customer wants to add a new item to an existing order.
Increase or decrease the quantity of order line items in a product or service order.	A customer wants a higher or lower the quantity of an existing order.
Add, change, or cancel a product or service, or product or service options, in a related domain product or service order.	A customer wants to update the characteristic value of a product or service that the customer ordered at an earlier date. For example, the customer wants to change the speed of an internet service from 100 Mbps to 500 Mbps.
Incorporate changes that are applicable to the related items of a product or service order.	A customer wants to add or change an item to an order that has horizontal relationships.

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Customer-driven order changes (continued)

Type of change	Example
	To learn more, see Horizontal relationships between products.

Fulfillment user-initiated requests

To expedite the completion of the order fulfillment process, the order fulfillment or service order agents and managers often request changes to product, service, or resource orders. Based on the types of internal requests, you update an inflight order to do the actions listed in the following table.

Fulfillment-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location.	A customer supplies information about a new corporate contact person on a pending delivery of an enterprise order.
Add, change, or cancel a product, including product options, in a related domain product order.	A customer orders a modem that is incompatible with the higher-speed 500-Mbps internet service that the customer ordered. It requires replacement by another modem model.
Add, change, or cancel the service domain orders and product inventory.	A customer wants to change the characteristics value of a product or service. For example, the customers wants to change the Firewall Security Service from Standard to Basic.
Add, change, or cancel a service, including service options, in a related domain service order.	A customer wants to change the standard warranty of 90 days to an extended service policy.
Add, change, or cancel a resource, including resource options, in a related domain resource order.	Revised installation instructions are available for a product that the customer ordered.
Incorporate changes that are applicable to the related items and product inventory of a product or service order.	A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Horizontal relationships between products.

Inflight Order Change processing

When a user or order fulfillment manager attempts to make any of these changes, the Inflight Change Order function proceeds through a structured processing sequence as shown in the following diagram. Inflight change requests include:

- Adding or removing a product
- Updating product characteristics options
- Updating contact or billing information

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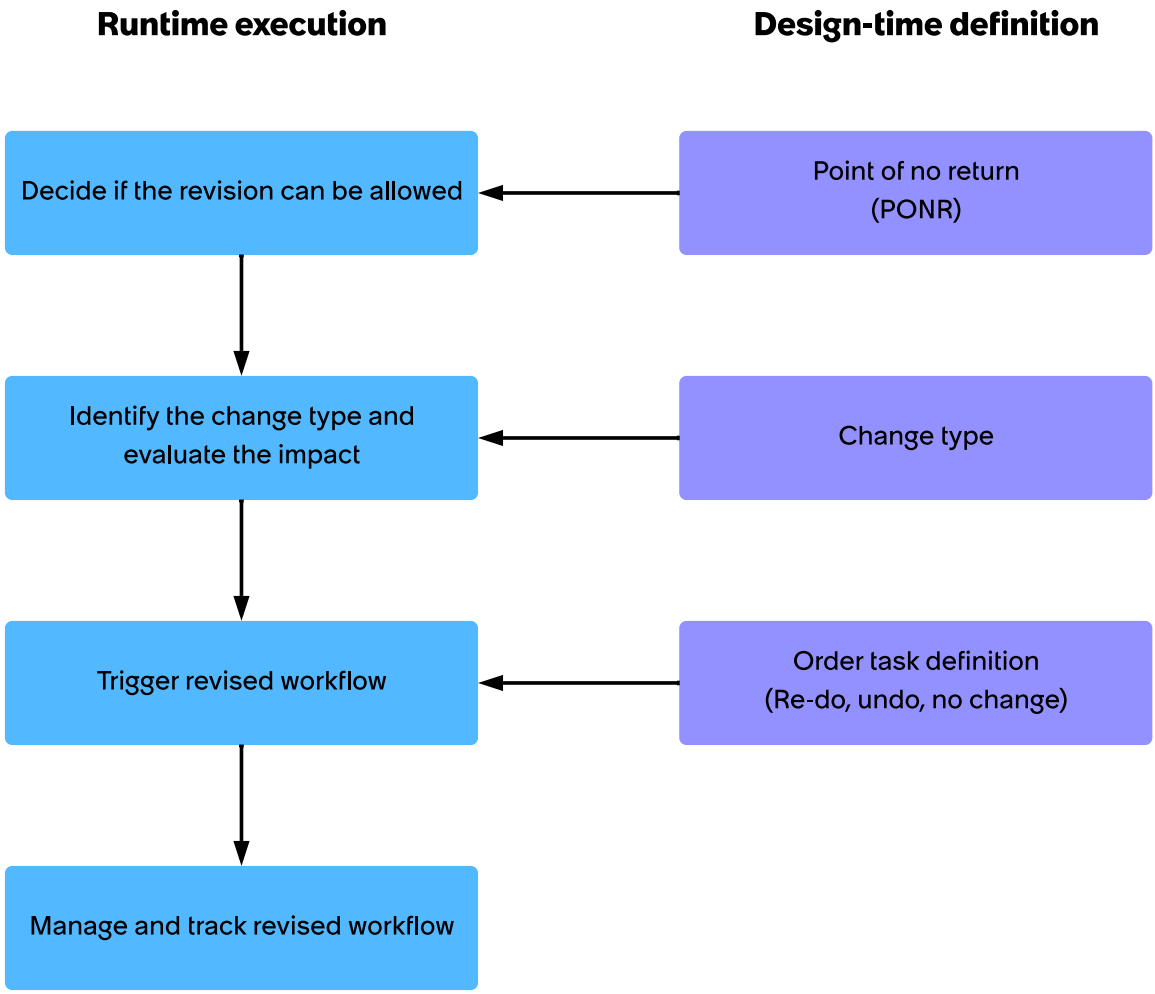
Inflight order change high-level approach



The sequence for inflight change order processing is as follows:

1. The Inflight Change Order function determines where in the processing cycle the order is. You can only create inflight order revision and cancellation requests for orders that are in an In Progress state.
2. The ServiceNow AI Platform then determines whether the proposed revision can safely be made to the in-progress order. It evaluates the Point of No Return (PONR) status for the order and its current stage in the fulfillment process.

   The PONR flag represents the no or go point at which you can't change an order:

   - You can make an inflight change only for order line items with an In Progress state.
   - You can't make inflight changes for an order that has already been decomposed into its domain product, service, or resource orders, and product installation has already started.

   Note: You can find the **PONR** option when you are viewing or maintaining customer or service orders in the Customer Order and Order Line Item forms.

3. After an operator makes the requested changes, this functionality evaluates the type of change and its magnitude and impact on the fulfillment process as follows:

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- Simple informational changes, such as contact data, may or may not impact the fulfillment as configured in the orchestration plan.
- If the customer requests to delete an ordered product or service, the impact of the changes, if permitted, would be greater, depending on its progress in the order fulfillment process.

4. The ServiceNow AI Platform then creates a compensation plan to trigger the tasks to fulfill the revised scope of the order as follows:
   - The compensation plan creates the automated revisions that are required to the fulfillment workflow to adjust to the requested order changes.
   - If the customer adds products or services to the order, the compensation plan generates additional order tasks to handle the fulfillment of the newly ordered items.
   - For a product substitution, the compensation plan generates an undo task to release the old product or service and a redo task for assignment of the new product or service. After the old product has been released, it can be sold to another customer.
   - For a product characteristic change, the compensation plan undoes some tasks to revert the work that is not applicable for a new characteristic value or option. The compensation plan can also include a few tasks that are required for some of the completed tasks. There could also be a few existing tasks that are unaffected by the revisions that were submitted as part of the order revision.
5. A manager can then track the revised workflow. By using the Inflight Order Change functions, your organization can gain the following benefits:
   - Reduced manual intervention that is required to manage an inflight change order.
   - Reduced time to create a revised plan for a change, which results in faster order fulfillment cycles.

Inflight order change example

For the top-level SD-WAN Service package, the PONR only occurs before the testing and turn up stage. A customer or internal fulfillment personnel can't change the ordered item after that point.

For subordinate products, such as the SD-WAN Edge device, the order can be changed before the Customer Premise Equipment (CPE) configuration completes. If CPE delivery is initiated but doesn't complete, and a product substitution is requested, the Inflight Change Order function can do the following actions:

- Generate an undo task for the original item.
- Generate a redo task for the replacement item.
- Create undo and redo tasks for the Prepare and build CPE configuration and Allocate and Assign CPE tasks that are completed before revision. The Inflight Change Order function can generate these undo and redo tasks because the CPE delivery task is not complete for the replacement item.

After the CPE configuration is complete, no further changes are allowed in the order for that device. This scenario also applies to the SD-WAN Controller and SD-WAN Security selections.

Key inflight order change and cancellation request fields

Learn how the ServiceNow AI Platform uses key fields in the Customer Order and Order Line Item forms to track your order changes and cancellation requests. You can see how these fields operate and what information they show you when you revise or request a cancellation of an order, or order line items.

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Point of no return (PONR)

The **PONR** (Point of No Return) option on the Customer Order and Order Line item forms indicates the PONR state for the order or order line item. While fulfillment is in process, you can use the PONR option to determine if you can revise or request cancellation of an order or an order line item. You can only do these actions for orders and order line items that are in an In Progress state and have yet to reach the PONR stage.

Note: The **Revise Order** and **Cancel Order** buttons are enabled only for order or order line items in this state.

Learn what happens with the **PONR** option:

- If you select the PONR option, it indicates that you can't revise or request a cancellation for the order or order line item while fulfillment is in progress. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
- If the check box is cleared, you can still revise or request a cancellation for the order or order line item.

Note: The **PONR** option is a system-assigned flag that you can't manually update.

By using the SET PONR action in Workflow Studio, your administrator can manually configure the PONR state in the fulfillment workflow. For example, in the demo data for the SD-WAN Edge product specification workflow, the PONR action is available after the Initiate CPE delivery task.

Version

A customer or service order can go through multiple revisions during its fulfillment cycle. The **Version** field tracks the number of times that you revised or requested a cancellation of the order or order line item during the fulfillment process. A new order without any revisions has a version of 1 and automatically increments for each inflight revision.

Revision Operation

The **Revision Operation** field indicates the type of revision operation, if any, that is taking place in the current version of the order or order line item. The types of revision are as follows:

None

No update or cancellation is taking place for the order or order line item. This setting is the default for new orders and is applicable for orders without any Inflight revisions.

Update

A Contact, Characteristic, Quantity, or Price inflight revision has been submitted for the order or order line item.

Cancel

An order or order line item is canceled, or in the process of being canceled.

Change Type

When you submit an inflight order revision, the ServiceNow AI Platform automatically assigns a change type for the tracking of the order changes that are submitted by users. Characteristic, Contact, or Price types are standard in the ServiceNow AI Platform.

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The change types are automatically assigned to the order or order line item when an order fulfillment or service order agent makes the following types of changes.

Assigned change types

Type of change made	Assigned change type
Changes any of the order characteristics.	Characteristic
Adds, changes, or deletes the order contact information.	Contact
Changes any price field.	Price
Changes made to the order line item quantity for a product or service order. To learn more, see Order quantity support in Order Management.	Quantity
Changes made to the order line item quantity for a product or service order due to the change in characteristic value. To learn more, see Order quantity support in Order Management.	Quantity mapping characteristics
Changes made to the related order line items and related product inventory for a product or service order.	Related items

Note: Your administrator can also define additional change types for tracking purposes.

The related Inflight Order Line Item Changes [sn_ind_tmt_orm_inflight_order_line_item_change] table contains the following columns to track the revisions that were submitted for order line items.

Inflight Order Line Item Changes table columns

Column	Description
Order Line item	Identifier for the changed order line item.
Order Line version	Latest change version for the order line item. It tracks the number of times that you revised or requested a cancellation of the order line item during the fulfillment process.
Change Type	Type of change performed on the order line item. **Characteristic** Change made to any of the characteristics on an existing order line item. **Contact** Changes made to the contact information on an existing order line item. **Price** Changes made to the pricing information on an existing order line item. **Quantity**

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Inflight Order Line Item Changes table columns (continued)

Column	Description
	Changes made to the order line item quantity for a product order. **Other change types** Additional change type that is defined by your administrator.
Updated by	Name of the person who updated the order line item.
Updated	Date and timestamp for the order line item change.

State when initiating and approving inflight order revisions

When you initiate, and then approve, inflight order revisions, the affected order, order line items, domain orders, and order tasks go through different states.

When initiating an inflight order revision

To initiate an inflight order change, click **Revise Order** in the Customer Order form or in the Order Line Item form. The following actions take place:

1. The customer or service order moves from an In Progress to a Revision in Progress state.
2. The associated order line items move from an In Progress state to a Revision in Progress state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an inflight order revision

To approve an inflight revision, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The updated order and order line item information triggers the decomposition process as follows:
   - The decomposition process may create additional domain product, service, and resource orders to incorporate the characteristic changes that were submitted as part of an inflight order change.
   - It may also cancel existing domain orders that are not relevant to the requested change. For example, if a customer upgrades their purchased internet service to a higher speed, it would create a domain order for a modem that supports the higher speed service. It then would cancel the existing domain order for the modem that only supported lower speeds.
2. The customer or service order moves from a Revision in Progress state to an Acknowledged state. When the order decomposition is complete, it then moves back to an In Process state.
3. The associated order line items move from a Revision in Progress state to an Acknowledged state. When the order line item decomposition is complete, they then move back to an In Process state.
4. The associated product, service, and resource domain orders change from an On Hold state to a Scheduled state. The associated subflows change the state again during fulfillment processing.

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New domain orders may also be created, based on the revisions that were submitted by the customers. They remain in either the Draft or the In Progress states, depending on the configuration of the fulfillment flow for the parent domain order.

5. The ServiceNow AI Platform refreshes the fulfillment flows for all the decomposed orders. The ServiceNow AI Platform also reassesses all order tasks, depending on the sequencing of the tasks in the corresponding fulfillment workflow. The associated order tasks then move to one of the states that are listed in the following table:

Assigned order task states

State	Description
Scheduled	An order task moves to this state and remains there until processed, as per the fulfillment workflow.
In Progress	If an order task was in an In Progress state at the time you initiated the inflight order revision, it remains in this state. If the task requires a re-execution to perform a redo or undo action, it can also move from a Closed state to an In Process state.
Closed Complete	If an order task was in a Closed Complete state at the time you initiated the inflight order revision, it stays in this state. It stays in this state as long as the task isn't in an inflight configuration due to other changes that were submitted as part of an inflight order revision.

6. After the order decomposition is complete and the fulfillment flow restarts, order fulfillment agents can go ahead and work on the associated order tasks to complete fulfillment.

State when initiating and approving order cancellation requests

When you initiate and approve an order cancellation request, the affected order, order line items, domain orders, and order tasks go through different states during processing.

When initiating an order cancellation request

To initiate a cancellation request, you click **Cancel Order** in the Customer Order form, or **Cancel Order Line Item** in the Order Line Item form. The following actions take place:

1. The order moves to an Assessing Cancellation state.
2. The associated order line items move to an Assessing Cancellation state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an order cancellation request

To approve an inflight revision or cancellation request, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The decomposition process is triggered with the updated order and order line item information.
2. The order moves from an Assessing Cancellation state to a Cancellation in Progress state.
3. The associated order line items move to a Cancellation in Progress state.

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4. The associated domain product, service, and resource domain orders move from their current state to an On Hold state.
5. The associated order tasks move to an On Hold state.

Cancel orders

Cancel an inflight order, or order line item when a customer requests it or your internal personnel determine an order cancellation is necessary.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

You can only cancel orders that are in the In progress state. You can delete orders or order line items from orders that are in Draft or New states. To learn more, see Delete orders.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All** to cancel a product or service order respectively.
4. Select an order you want to cancel.

   Note: If the **PONR** option is selected, the **Cancel Order** button is turned off because it is too far along in the process to request a cancellation.

5. Select **Cancel Order**.
   When you request an order cancellation, the following actions take place:
   - The **State** field changes to Assessing Cancellation.
   - The **Version** field increments to the next version number.
   - The **Revision Operation** field is set to Cancel.
   - Notification messages appear if there are any conditions that are preventing cancellation of the order. A designated manager must approve the order cancellation.
6. In the customer order, make the required changes, and then select **Save**.

What to do next

A designated manager must approve the order cancellation. To learn more, see Review and approve order revisions or cancellation requests.

Revise orders

Revise order line items to update product quantity for ongoing orders.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

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Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All** to revise a product or service order respectively.
4. Select an order you're working with.

   Note: If the **PONR** option is selected, the **Revise item** button is turned off because it is too far along in the process to revise.

5. Select the line items you want to revise from the **Line items** tab.
6. Select **Revise item** on the confirmation pop-up that follows.
7. Make the required revisions to the order line item and select **Update**.
   When you revise an order line item, the following actions take place:
   - The **State** field changes to Revision in progress.
   - The **Version** field increments to the next version number.
   - The **Revision Operation** field is set to Update.
   - If there are any associated order tasks, their state fields change to On Hold.

What to do next

A designated manager must approve the order revision. To learn more, see Review and approve order revisions or cancellation requests.

Delete orders

Delete order or order line items if you no longer require them to be part of the order.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All** to delete a product or service order respectively.
4. Select an order or order line items you want to delete.

   Note: If the **PONR** option is selected, the **Cancel Order** button is turned off because it is too far along in the process to request a cancellation.

5. Select **Delete** from the More actions icon .

Review and approve order revisions or cancellation requests

Review a customer or service order that has a pending revision or cancellation request so that you can make sure that the order is correct and complete. You can also approve the order and order line item revisions or cancellations requests.

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Before you begin
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_manage, sn_ind_tmt_orm.service_order_agent

About this task
When you approve a revised order, it enables it to continue in its modified state through the rest of the fulfillment process. When you approve a cancellation request, it finalizes the cancellation and prevents the order from continuing through fulfillment processing.
To learn more about how the states of orders change when you approve them, see Key inflight order change and cancellation request fields.

Procedure
1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order you want to revise.
5. Select the customer order or service order that you want to approve revisions or cancellation requests for.
6. In the customer order or service order, review the revision or cancellation request, and then click **Save** if you made any changes.
7. To formally approve the order revision or cancellation, click **Approve**.

Result
Orders with unapproved revisions have a Revision in Progress state. When you approve them, their state changes to In Progress. Orders with unapproved cancellation requests have an Assessing the Cancellation state. When you approve them, their order state changes to Cancellation in Progress.

Order fulfillment

Learn about the order fulfillment process and tools available for monitoring and tracking order tasks so your teams can fulfill orders efficiently, handle exceptions in a timely manner, and drive customer satisfaction.

Order fulfillment process

Order fulfillment tasks are the actionable units that drive the completion of domain orders (product, service, resource) in Order Management. For each domain order, a subflow is initiated to coordinate its fulfillment. The specific subflow is selected using a decision table (Product/Service/Resource Order Fulfilment Policy) based on the type of the domain order. This subflow is responsible for defining order tasks and their dependencies, managing the state of the domain order, and notifying SOM when the tasks are ready for tracking in Jeopardy Management.

1. Task creation
    - Order fulfillment tasks are automatically generated as part of the orchestration plan when an order is approved and decomposed into domain orders.
    - Each domain order (product, service, resource) can have multiple associated tasks, created based on product specifications, decomposition rules, and subflow logic.
    - Order tasks are created in parallel or in sequence, with dependencies managed via subflow configuration.
2. Task assignment

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- Tasks are automatically assigned to fulfillment agents or teams responsible for execution using the orchestration logic. Fulfillment managers can manually reassign tasks as needed.
- SLA definitions and jeopardy management policies are linked to tasks to monitor progress and flag delays.

3. Task execution
   - Fulfillment agents perform the required actions for each task, such as provisioning, configuration, shipment, or installation.
   - Fulfillment managers track the progress of tasks and domain orders in real time using tools like the timeline view and order orchestration UI, which provide visibility into task status, dependencies, and risk indicators.
   - Agents update task status, add notes, and resolve issues as they work through the fulfillment steps.
4. Monitoring and exception handling
   - Agents periodically monitor the progress of all fulfillment tasks and the overall order.
   - If a task encounters an issue such as missing information, system error, or delay, it can be escalated or flagged for jeopardy management.
   - Notifications are sent to relevant stakeholders if tasks are delayed or require attention.
5. Task completion and closure
   - After the required actions for a task are completed, agents update the task status to Complete.
   - Closing all tasks associated with a domain order triggers the closure of the domain order itself.
6. Order closure
   - When all fulfillment tasks and domain orders are closed, the overall order is marked as complete.
   - Final updates are made to the sold products or product inventory, and customer records as needed.

Tools for tracking order fulfillment

Provide powerful tools to fulfillment agents and managers for monitoring and managing the entire order fulfillment life cycle. The order timeline view and the order orchestration UI enables users to track order line items, domain orders, and order tasks for any given order, all in a single, unified workspace.

The timeline view offers a comprehensive, Gantt-style visualization of all order line items and associated tasks for an order. Fulfillment agents and managers can see the current status of each task, including jeopardy indicators that highlight at-risk items, estimated durations, and dependencies between tasks. This view allows users to quickly assess progress, identify bottlenecks, and take proactive action to expedite fulfillment. By consolidating all relevant information such as order lines, domain orders, and tasks into one interface, agents no longer need to navigate multiple forms or lists, streamlining their workflow and improving operational efficiency. To learn more, see View an order timeline.

The order orchestration UI provides a hierarchical, expandable view of how fulfillment tasks are grouped and related by domain helping you to visualize how order line items, domain orders, and order tasks are structured and interconnected. Fulfillment agents and managers can drill down into specific domains or tasks, understand relationships and dependencies, and view summary information such as duration and jeopardy status. The order orchestration UI displays the dependencies between domain orders and order tasks, helping you understand which

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tasks must be completed before others can begin. You can also view the current state of each associated order line item, domain order, and order task within the hierarchy, making it easy to identify progress, spot bottlenecks, and address issues proactively. This tool is especially valuable for complex orders that span multiple domains, as it clarifies how tasks are sequenced and coordinated. The orchestration UI complements the timeline view by offering deeper insight into the structure and flow of fulfillment activities, empowering users to resolve issues and optimize task execution without losing sight of the broader order context. For more information, see Using the order orchestration UI.

Related topics

Manage work orders

View an order timeline

View Gantt chart timelines that display the status of a domain order and order tasks, show dependencies between order tasks, and identify tasks that are in jeopardy.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace.**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to view.
5. In the **Order breakdowns** section of the order, select **View order timeline**.
   The **Timeline** tab opens and displays the order tasks for the order line items and columns for the order task state and jeopardy status, if Jeopardy Management is enabled. Tasks in jeopardy are flagged with the jeopardy icon. For each task, a timeline shows the start and end dates of the task and any dependencies.
6. To change the information or elements displayed in the timeline view, use these options.

Option	Description
Add or change columns	**a.** Select the gear icon . **b.** In the **Columns** tab of the Personalize pane, select the items to display or dese lect the items that are no longer displayed. **c.** Select **Apply**.
Change the timeline elements displayed	**a.** Select the gear icon . **b.** In the **Timeline** tab of the Personalize pane, select the items to display or suppress, such as bar labels, child lines, domain or ders, critical path, or dependency lines. **c.** Select **Apply**.

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Option	Description
Adjust the time scale used	In the time scale drop-down, select the time view, such as day, week month, or year. The time scale for the Gantt charts changes immediately.

Review an order orchestration plan

Track the progress of an order in the fulfillment process by reviewing the orchestration plan for the order, its order line items, and domain product, service, or resource orders. By using the order orchestration UI, you can easily identify and resolve any delays or fallouts so that you can do the order fulfillment process more efficiently.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_manager

About this task

By using the order orchestration UI, you can perform the following actions:

- View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
- Open a node in the hierarchy and view the additional details.
- Determine the current state of the associated order line items, domain orders, and order tasks.
- Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

To learn more, see Using the order orchestration UI.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders**.
   - To view all customer orders, select **All**.
   - To view only open, unfulfilled customer orders, select **Open**.
4. Select an order you want to fulfill.
5. Access the order orchestration UI for a selected order, order line item, or domain order by performing the respective task from the following table.

Task	Description
Review the orchestration plan for an entire customer order	In the Customer Order form, under Order breakdowns, select **View order orchestration**.
Review the orchestration plan for a customer order line item	**a.** On the Order Details page, select an order line item from the **Line items** tab. **b.** Select the **Order Orchestration** tab.

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Task	Description
Review the orchestration plan for a domain order associated with a customer order line item	To view the orchestration plan for a domain or der (product, service, or resource), perform the following steps: **a.** On the Order Details page, select an order line item from the **Line items** tab. **b.** Navigate to the one of the following tabs for which you want to view the orchestration details: ▪ **Product Orders** ▪ **Service Orders** ▪ **Resource Orders** **c.** Select the **Order Orchestration** tab.

6. On the order orchestration UI, review the visual representation of the order, including all domain product, resource, service orders, order tasks, and their current states as described in the following table.

Order orchestration details

Field	Description
ORD	Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Address, city, state	Orchestration plan hierarchy level that represents the individual shipping locations for the domain orders of an order line item.
Order line item	Orchestration plan hierarchy level that contains the individual order line items that are associated with each shipping location. An order line item can also contain child line items, which are shown in the order hierarchy. Each order line item contains the following elements: **Description** Description of the product or service ordered on this line item. **Order line item identifier** System-assigned customer or service order line item number. **Task overview** Overview of the total number of domain orders and order tasks that are associated with the order line item that have been fulfilled.

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Field	Description
Domain orders and order tasks	Orchestration plan hierarchy level that contains the individual domain orders and order tasks for an order line item. A domain order can also contain child domain orders, which are shown in the order hierarchy. Each domain order or order task contains the following elements: **Type** Type of related transaction: ○ Domain order - Product Order, Service Order, or Resource Order ○ Order Task **Description** Description of the product or service on this domain order or order task. **Identifier** System-assigned domain product or order task number. **State** Current state of the domain product or order task. To learn more, see: ○ Customer order states ○ Service order states

What to do next

Review and close fulfillment tasks

Related topics

View an order timeline

Review and close fulfillment tasks

Review and update the fulfillment tasks that are associated with an order, or order orchestration plan, so that you can make sure that all tasks are properly completed.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager, or sn_ind_tmt_orm.service_order_manager (for service orders)

About this task

If you encounter issues with resolving or completing an order task, you can create fallout records. Fallout records enable you to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

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- Its **State** field changes to On hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On hold. A work order note with the message A `fallout record FOnnnn has been created` also appears.

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see Managing order fallout.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Order tasks**.
   - To view all open order tasks, select **All**.
   - To view only the tasks that are assigned to you, select **My order tasks**.
4. Select the order task that you want to work on.
   You can also directly access the task records for an order from the order orchestration UI. To learn more about accessing the UI, see Order fulfillment.
5. For each order task, set the status by selecting an option from the **State** drop-down menu and update the work notes, as required.
6. On the Order Task form, review the order task details and update as needed.

   For information about the field descriptions, see Order Tasks form.
7. When you finish reviewing and updating the order task or encounter issues that are preventing its closure, perform one of the actions from the following table.

Action	Description
Save the updated order task	Select **Save**.
Delete the order task	Select **Delete** from the more options icon .
Create a fallout record	Select **Create Fallout** from the more options icon . To learn more, see Create a manual fallout record.

Result

After your agents complete all fulfillment tasks for the entire customer order, the following actions occur:

- The **State** field for the customer order is automatically set to **Completed**.
- The **State** field for each of the individual customer order line items is set to **Completed**.
- Corresponding sold products or product inventory records are created depending on the configuration.

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What to do next

Create MACD orders directly from the sold products. For more information, see Request post-sale change orders.

Creation of sold product and product inventory records

Learn how the Order Management application creates and maintains the customer product and service inventory. By using this application, you can maintain an accurate inventory of your customer products and services.

Customer product data record creation

Sold product records are created and added to the Sold Product [sn_install_base_sold_product] table after an order line is marked as closed complete. Product inventory records are created and added to the Product Inventory [sn_prd_invt_product_inventory] table after an order is decomposed, completed, and fulfilled. Product inventory records are created for products with specifications. Depending on how your admin has configured the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property, either sold products or product inventory records are created. For more information, see Configure customer product data management.

The Product Inventory table extends the Sold Product table. Only the items from the product inventory are available for change, disconnect, suspend, or resume type orders.

New order workflow

The new order workflow is as follows:

1. After the fulfillment or service order manager approves the order, the product inventory record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active in the product inventory record.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.

Change order workflow

The change order workflow is as follows:

1. After the fulfillment manager or service order approves the order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.
4. If the change order included a request to disconnect a product or service, the associated product inventory record moves to an Inactive state after the order is complete.

   You can create orders with action type as disconnect for product inventory records that are in Active or Suspended states.

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For suspend type orders, the end state is Suspended after the suspend workflow is completed. Product inventory state changes from Active to Suspended after all tasks and jobs have finished.

For resume type orders, the end state is Active after the resume workflow is completed. Product inventory state changes from Suspended back to Active after all tasks and jobs have finished.

Related topics

- Customer Life Cycle Management Workflows
- Managing post-fulfillment order changes
- Request post-sale change orders

Horizontal relationships between products

By using a compatibility rule, you can define the horizontal relationships between your product, service, and resource specifications.

When you create a product catalog, you can create a vertical relationship, which is the relationship between your parent and child entities. As a product catalog manager, you can also enable a horizontal relationship, which is a relationship between a product to product, product to service, or product to resource, by defining compatibility rules in the product catalog.

Using a horizontal relationship

The compatibility rules include the horizontal relationships between your product, service, and resource specifications. Your customers can place orders for enterprise products where a product can depend on another product in the same or different product offering, like a sibling or a peer.

Let's look at an example of a horizontal relationship, such as the relationship between the Voice over Internet Protocol (VoIP) and an internet service. VoIP requires an active internet connection but VoIP and an internet service are defined in a different product hierarchy. With a horizontal relationship, you can define a relationship between VoIP and an internet service in the product catalog to support the order creation process for VoIP and to fulfill the order.

Managing order fallout

Order fallout occurs when an order encounters an error in its normal fulfillment flow. Learn how Fallout Management enables you to identify, investigate, and resolve order issues so that orders can be processed to completion.

Overview of order fallout

Order fallout refers to the failures that occur due to errors and exceptions that may take place during order fulfillment. Fallout is a task-type object created to support scenarios where an order fails to proceed. These exceptions include the following:

- Incorrect data
- Connectivity problems
- Inadequate inventory supply
- Other unforeseen issues

Some issues could originate in inbound and outbound external systems that integrate with Order Management. A single order task can have multiple types of fallout issues.

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The following table provides examples of fallout errors and exceptions that can occur during order processing.

Fallout errors and exceptions

Type of failure	Description
Failures in downstream fulfillment systems	Fulfillment system can't process the request due to incorrect or missing data.
Failure to complete system interaction in a timely manner	Timeouts that occur during system interactions.
Failure in connection	• Network connectivity issue. • Unable to locate or route a request to a target system.
Unavailable inventory	Inventory stock isn't available in the Enterprise Resource Planning (ERP system) to fulfill certain items on the order.

Order fallout management flow

With Fallout Management, you can track each order fallout and automatically trigger the actions and interventions that can resolve your order fallout in a timely manner. The following diagram shows the order fallout management flow. Fallout Management processes order fallout through the following stages:

1. Identify and classify order fallout: Detect orders that have encountered errors or exceptions and classify the type of fallout.
2. Notify and assign order fallout: Route the fallout record to the appropriate team and notify them to begin investigation.
3. Resolve order fallouts: During runtime execution, fallout can be resolved through one of two paths:
   - Manual intervention: An agent investigates and resolves the fallout directly.
   - Automated process followed by manual intervention: An automated process attempts resolution first. If the automated process cannot resolve the fallout, it is escalated for manual intervention.
4. Verify and close order fallout: Confirm the issue is resolved and close the fallout record so the order can continue to fulfillment.

Fallout Management enables you to identify the orders in a failed state. Fallout tasks can be triggered and automatically routed to the appropriate team to investigate, diagnose, and resolve the underlying issue that is stopping order fulfillment.

Fallout Management tools

The Fallout Management function includes the following tools:

Order fallout tracking

With this tool, you can assign a unique number to each order fallout to track the progress of the fallout, from inception through resolution. By using an Order Fallout dashboard, a designated order fallout manager can view the status of all open fallout records. To learn more, see Review a fallout record.

Fallout resolution

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With this tool, you can use the ServiceNow AI Platform features such as routing, notifications, and Workflow Studio to process order fulfillment exceptions in an automated manner. To learn more, see Creating automated fallout records.

For example, your customer orders a router, but insufficient inventory quantities are available in your ERP system to reserve the item and fulfill the order.

- You create a fallout record for tracking and investigative purposes. This record places the customer order line item on hold.
- An order fulfillment agent can follow up to determine what is causing the shortage. It can be due to the unavailability of the host ERP system or because of an actual stock outage for the ordered item. If it's due to a stock outage, someone can take remedial action to contact the customer, reorder the item, or find a suitable replacement.

After you resolve the issue, you can restore the customer order line item back to a normal state for completion of the order.

Without a fallout management process, your order fulfillment personnel would have to analyze and resolve these fallout issues manually. These additional tasks would result in a longer fulfillment process and could lead to poor customer and employee experiences.

Creating automated fallout records

With Fallout Management, a provider can create automated fallout records for specific order tasks so that your orders can continue processing through to completion.

To enable creation of automated fallout records, you configure an order fulfillment workflow in the Workflow Studio.

- To do so, use the **Create fallout** action when defining processing scenarios and conditions.
- You can define workflows for the parent records that the order tasks originate from. Generally, order tasks originate from the customer or service orders and order line items.

To learn more, see Flow Designer.

You might encounter the following scenarios when you are attempting to fulfill customer and service orders.

Scenarios of fallout failures with downstream systems

This fallout scenario could be a situation where failures are expected to be temporary and resolved over time. Ideally, order processing should not be affected, and work should resume after the network and system resources come back online. A typical scenario is as follows:

- The order task sends a request to an external or provisioning system.
- The response from the external system comes back as `Timeout` or `Unable to reach`.

You can requeue the task to be sent to the downstream system for processing, up to a predefined number of times. If the error persists after the predefined number of times, you should change the status of the order task to Failed, and then create an incident. You can define a workflow that automatically creates a fallout record whenever you send or retrieve order data to or from an external system that is not available.

Scenarios that involve data problems

If data problems originate with an order that you captured from an external order system, you should revise the order there. You then submit the revised order to the Order Management for

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Telecommunications, Media, and Technology application. If data problems originate with the tasks that are executed earlier in the process, you can do the following actions:

- Create an exception from the order task.
- Enable the revision of the existing order.
- Create an order task.

Inventory availability issues

You can define a workflow that automatically creates fallout records whenever inventory availability issues prevent the fulfillment of order line items.

External system issues

Even when the right data structure is submitted in an external system, errors can happen due to the business logic that is implemented in the external system.

Create a manual fallout record

Create a fallout record manually for an order task that has a condition or issue that prevents it from being completed.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager

About this task

You can create manual records as needed basis so that you can raise awareness of an issue or condition that is preventing order fulfillment. By creating a record manually, you can also assign it to a person for resolution.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All**.
4. Select and open an existing customer or service order.
5. To view the line item details, select **Line Items** where (n) represents the number of the total number of line items for the order.
6. In the Order Line Items form, select the order line item that you want to review.
7. Select the **Order Tasks** tab.
8. In the Order Tasks form, select the order tasks that you want to review.
9. When you finish updating the order task, or encounter issues preventing its closure, select the more options icon ••• and then select **Create Fallout**).
10. On the form, fill in the fields.

    For information about field descriptions, see the Create Fallout form fields section in Field descriptions for Fallout Management.

11. Select **Save**.

Result

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

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- Its **State** field changes to On hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On hold. A work order note with the message A `fallout record FOnnnn has been created` also appears.

Related topics

Fallout Management data model

Flow Designer

Flows

Create a flow

Review a fallout record

Review a fallout record to make sure that the detailed information is correct and complete.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

You select fallout records to review in CSM Configurable Workspace. You can also review and track all fallout records for a specific order by using the **Fallouts (n)** icon where n is the number of fallouts. This icon appears when you view the related fallout record.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to view.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
5. To view the associated order line item, select **Open Context Record**.

What to do next

Update a fallout record

Update a fallout record

Review the detailed information for a selected fallout record to verify that the information is correct and complete. You can change the fallout type, state, or priority. You can even assign it to a specific person to follow up on.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

If you have a fallout agent role, you can change the state of the fallout records, create work notes in them, or assign them to other users.

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Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to update.
5. On the Fallout form, update the required fields.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
6. Select **Save**.

Resolve order fallouts

Learn how to close the order fallout tasks in Order Management so that you can progress with order fulfillment.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to view.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
5. **Optional:** Enter a work note to as you work with the fallout task.
6. Close the fallout task by selecting **Closed complete** from the **State** drop-down menu.
7. Select **Save**.

What to do next

After resolving a fallout task, review and close the order fulfillment task. For more information, see Review and close fulfillment tasks.

Monitoring order jeopardy

Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

When Jeopardy Management is added to fulfillment task flows, Jeopardy Management tracks the time to complete tasks and creates a predictive assessment of the risk level to the fulfillment plan. If a task is taking longer than the defined time, jeopardy alerts are shared.

The following table describes where you can view the jeopardy status.

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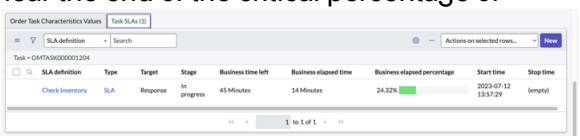
View jeopardy status

Option	Description
In Jeopardy enabled order forms, look for the **Jeopardy Level** column	Look for jeopardy status in the **Jeopardy Level** column of the order status form. Jeopardy levels include Low, Medium, High, and Critical.
Order timeline view	1. Navigate to **Customer Order** > **All** and select an order you're working with. 2. On the Order Details page, select **View order timeline** from the Order breakdowns section.
Order orchestration view	Navigate to **Customer Order** > **Order** > **Order Line Item** > **Orchestration**. Each Orchestration tile shows the task and Service Level Agreements (SLA) progress.
SLA Definition Progress Bar	Navigate to **Customer Order** > **Order** > **Order Line Item** > **Task** > **SLA** and view the status bar. The status bar shows the SLA progress, for example: • Green: SLA progressing on its time line. • Red: Task is near the end of the critical percentage of allotted time. 

Managing post-fulfillment order changes

Efficiently handle a variety of post-fulfillment changes to maintain service quality and operational accuracy after initial order fulfillment. These changes include canceling, suspending, resuming, disconnecting, and modifying orders. Each change type has distinct workflows, dependencies, and impacts on inventory and service states.

After an initial order is fulfilled, existing customers may want to disconnect, suspend, or resume a product or service or change specifications or location for a product they've purchased. For example, a customer might want to disconnect their current 4G connectivity and upgrade it to 5G connectivity. You can manage such requests by creating orders with action type as Change, Move, Disconnect, Suspend, and Resume. For more information, see Action types for customer and service orders.

When you change a product or service inventory record, the ServiceNow AI Platform creates the order line items from the specifications that you have defined. In a change service order inventory, the order line items are created only for your selected service inventories. If you select inventories that are top-order parent items, the order line items are created only for the parent items, not for the child order items. When the additional product is added to the change order, an inventory record is created for the added product. The new inventory is mapped to the new hierarchy.

When you're canceling a product or service order inventory, the ServiceNow AI Platform creates the order line items according to the specifications that you have defined. To cancel a product order inventory record, if your selected inventories are top-order parent items, the order line items are created for both the parent items and the child order items. If your selected inventories are child-order items, the order line items are created only for the child items.

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As a part of post-fulfillment order changes, Return Merchandise Authorization (RMA) is also possible through modify, add, change, and disconnect (MACD) has a part of out of box process. For more information about RMA, see Return Merchandise Authorization.

Validation is required to successfully create the move order. To complete the validation and approve the move order, check the following:

- All the associated child line items of the move order must have the move operation selected as **true** and the Order line action must have one of the actions **Change** or **Add** or **Disconnect**.
- All the associated child line items of the move order the service location must be the same.
- All the inventory associated with a product being moved must be available in the move order.

For

The process to capture post-sale modification requests is similar to order capture and fulfillment. The high-level steps are as follows:

1. Create an order with the required action type.
2. Select product inventory items that you want to modify from the catalog.
3. Review and submit the order for approval.
4. Approve the order.

   The order is decomposed and order tasks are created.
5. Fulfill the orders by closing the order tasks, domain orders, and work orders, if any.

You can also manage post-sale change requests from the customer accounts page, not only for products and services sold to a customer, but also to contracts and entitlements associated with the products and services. For more information about customer life cycle workflows, see Customer Life Cycle Management Workflows.

Request post-sale change orders

Learn how to create orders for disconnecting, suspending, resuming products or services and changing specifications, characteristics, or service location for orders after an initial order has been fulfilled.

Before you begin

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All** to create a product or service order respectively.
4. Select **New**.
5. On the form, fill in the fields.

Create a new Order form

Field	Description
Account	The customer account for which you want to create an order.

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Field	Description
Consumer	The consumer for which you want to create an order.
Order Type	The type or order you want to create. The available options are: ○ Product ○ Service
Contact	The name of the contact for the order.
Order action	The available options include: ○ Change - For changing product specifications or service location. ○ Disconnect - For disconnecting an active product or service. ○ Suspend - For suspending an active product or service. ○ Resume - For resuming a disconnected or suspended product or service.
Channel partner	(Optional) The name of the organization selling a product or service.

Note: The fields displayed on the form change depending on whether you select account or consumer.

6. Select **Create**.
   The product catalog displays your available inventory which includes all the product or services that are ordered by your customer and successfully fulfilled by you.
7. Select **Manage** for a product inventory item you want to manage.
8. For changing order quantity, specifications, or characteristics for a product offering, perform the following steps.
   a. On the Modify order page, review the product configurations and select **Modify**.
   b. Using the product configurator, select the new product characteristics or specifications or revise quantity.
   c. Select **Update**.
      Order line items are created with Order line action as Change.
9. For disconnecting, suspending, or resuming products or services, perform the following steps.
   a. On the Modify order page, review the details and select one of the following options from the **Modify** drop-down menu.

Option	Description
Disconnect	Disconnect an active or suspended product or service.
Suspend	Suspend an active product or service.
Resume	Resume a suspended product or service.

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b. Enter suspension start and end dates for suspend requests and select **Suspend**.
If you do not specify a date, the suspension is effective immediately. For more information, see Suspend and resume products and services.

10. Review the order lines by selecting the **Order Line Items** tab.
11. Verify the order details by selecting **Review & Submit**.
12. Select **Submit** to place the order.
The order state changes to New and is available for approval.

Related topics

Suspend and resume products and services

Move order

The move order helps agents to change the location for product inventory at the order line level.

The move order is triggered from the TMF 622 and 641 APIs.

When the action is **Change** and move operation is **true**. Two sets of domain orders and composedof items are created with the action state **Add** and **Change**. The inventory hierarchies present in change domain order are got replicated for add domain order. If the Order Characteristics values are available for change domain order, it gets replicated for add domain order.

The state of inventory for an add domain order becomes **Installation pending**.

The state of inventory for change domain order becomes **Change pending**.

If the move order is canceled for all the product inventory records before the PONR, then all the product inventory records that are associated with the move order are changed to **Active** state from **Change Pending** state.

For all the product inventory records that are in **Activation pending** state are moved to the **Inactive** state, after cancellation is completed.

On successful completion of the order, the old inventory with state **Change pending** becomes **Inactive**. The new inventory with state **Activation pending** becomes **Active**.

Suspend and resume products and services

You can use suspend and resume actions to temporarily suspend or inactivate your product and service inventories. That way, you can capture a customer's suspend request and resume the products and services later.

About suspend and resume actions

You can temporarily suspend or inactivate your product and service inventories. The suspend and resume requests are managed as orders with the changes in the inventory of the product and service orders during the order decomposition and fulfillment process. An order suspension and resume action can occur immediately or at a future date.

With suspend and resume actions, you can do the following tasks:

- Ingest and fulfill the suspend product and service orders.
- Ingest and fulfill the resume product and service orders for suspended inventories.

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- Support future-dated suspend and resume orders by using a scheduler.
- Manage the product inventory state for suspend and resume scenarios.

How the Suspend and Resume actions work

The process for the suspend and resume actions is as follows:

1. A customer order of type Suspend or Resume is received in the order management system. After reviewing the order details, a fulfillment manager approves the customer order.
2. When a customer order is approved, a new Product Inventory Operations [sn_prd_invt_product_inventory_operations] table is created as a related list in the order line items form. In case of scheduled scenario, as part of fulfillment process the state of the product inventory operations record marks to Scheduled state for order line items.
3. A pre-configured scheduler tracks the Product Inventory Operations table to check for any future scheduled date of the customer order:
   - If your customer order contains order line items with a future date (a date value for the `committedDueDate` field on the order line items form), the suspend or resume action starts on the scheduled date.
   - If your customer order doesn't include any date for the suspend or resume action, it starts immediately at the time of closure of the orders.
4. At the time of order closure, the following changes occur:
   - For a scheduled scenario, the scheduler picks up the record with a Scheduled state from the Product Inventory Operations table on the scheduled date and marks the record state to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
   - For an immediate scenario, the state of the record in the Product Inventory Operations table is updated to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
5. The inventory state in the Product Inventory Operations table is updated to Canceled in the following two scenarios:
   - During the inflight changes or due to the cancellation of any order line items.
   - The dates for both the suspend and resume operations are scheduled, but the date for the resume operation is before the date of the suspend operation.

Additional validations and scenarios

When the order line items for the suspend or resume actions are combined with the change or disconnect actions in a single order and the inventory state of any order line item is in a pending state, the order approval fails. The reason is due to the approval validation for the change or disconnect order.

Note: During the order approval for suspend or resume or no change actions, the product inventory should not be in the Installation Pending state.

In the order creation process for the suspend or resume actions, the `committedDueDate` field value on the order line item form can be a past date, present date, or a future date. If it's a past or present date, the inventory state should be set as Active for the suspend action and set as Suspended for the resume action.

If the `committedDueDate` field value of the customer order line items is invalid (the date field value exceeds the calendar date) for the suspend or resume action, it's then considered as an immediate action.

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In the suspend or resume type of customer orders, the parent order has precedence over a child order. If the parent order is scheduled for an immediate suspend or resume action, but the child order is scheduled for any future date, the entire inventory hierarchy is considered for the immediate action.

If the top order line item for suspend or resume action is scheduled for a future date, the entire inventory hierarchy is then considered for the suspend or resume action. Child order line items are considered for suspend or resume action when they're combined with a change or a no-change action.

For an inflight change of the suspend or resume type order, only Cancellation is supported. If an order line item or the entire order gets canceled, the Product inventory Operations record is marked as Canceled during the order fulfillment process. The state change doesn't occur for the Product inventory record.

In the order creation process for the suspend or resume action, you can use the external inventory ID in the payload instead of the system-generated ID for the inventory.

Managing service orders

Learn how to qualify and manage service orders, work with external product inventory, and manage outbound requests.

External product inventory ID

You can use a product inventory ID from external Configure, Price, and Quote (CPQ) systems in the Order Management application to complete the order fulfillment flow for various actions on the product and service orders.

Overview of external product inventory ID

If you're using the Order Management application, you can use the enhanced TM Forum's Open APIs to create, change, disconnect, suspend, and resume product and service orders. After the order capture and fulfillment process, the system-generated IDs are created against the product inventory records to manage any future requests on the inventory for different order action types.

Using an external ID

With the support of an external inventory ID, you can do the following tasks:

- Capture the external product inventory ID in the Order Management system through the Product and Service Order APIs.
- Store the external inventory ID in a new table for new orders and associate them with the product inventory records that were created after the order fulfillment. Also, update the ID in the external product inventory table for any inflight revisions during the order fulfillment process.
- Allow external CPQ or southbound systems to use the external inventory ID to submit, change, disconnect, suspend, and resume orders on the product inventory in the order management system.

Note: You can also map the external product inventory ID with the product inventory record by using the Product Inventory Open API. For more information, see Product Inventory Open API.

Review the external product inventory details for a customer order

Review the external inventory details of the customer orders that you've received from the external Configure, Price, and Quote (CPQ) system during the order capture process.

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Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select an order you want to view.
5. View the external product inventories that are currently associated with an order line item by selecting the customer order line item.
6. Select the **External product inventories** tab.
7. On the form, review the fields values.

Note: To create a new external product inventory table, select **New**. On the Create New External product inventory form, fill in the fields.

External product inventory form

Field	Description
Number	Unique system-assigned number of the external inventory ID.
External product inventory ID	External product inventory ID from the CPQ system.
Order line item	Order line item number against which the external inventory ID is captured.
State	State of the external product inventory ID: **Valid** When the order was closed, the state of the external product inventory ID was updated to Valid. **Invalid** During the inflight order changes, the state of the external product inventory ID was updated to Invalid. **Note:** The state of the external inventory ID is updated after the order fulfillment is complete (the order state is Closed Complete).

8. Save or delete the product inventory details.

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Action	Description
Save the external product inventory details	Select **Save**.
Delete the external product inventory de tails	Select the options icon ••• next to the **Save** button, and then select **Delete**.

Create outbound requests for service orders

As a provider, create an outbound request for the service orders. You can interact with the external Service Order Management (SOM) or Technical Order Management (TOM) systems to manage the end-to-end order fulfillment process.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

The outbound requests are enabled through the bi-directional integration over a REST API between Order Management for Telecommunications, Media, and Technology and the external systems.

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon ☰.
3. Navigate to **Service Orders** > **All**.
4. Select a service order and open it.
5. Select **Create Outbound Fulfillment Request**.
6. Select **OK** on the Initiate Fulfillment Request pop-up window.
   - A record with a new request ID is created in the Outbound Requests related tab with the state as Not Applicable. The order agent can view the details of this new record in the Work notes.
   - If the request action is successful, the order agent updates the state of this new record to Pending. If the request action is unsuccessful, the order agent deletes this new record. The agent can reselect the UI action to reinitiate the outbound request.
   - If the Service Order Outbound Policy decision table in the decision builder has identified the configuration of the domain service order as hierarchical, records are also created for the hierarchy of the individual service order with the same request ID. If it's non-hierarchical, a record is created only for the individual service order.

   Note:

   During any inflight order changes or order enrichment changes, the Updates available field on the domain service order form gets a tick mark and the existing UI action label changes to **Revise Outbound Request**. In this revised outbound request, the information that is related to the changes in the domain service order is also sent to the external systems.

7. Select the outbound request record to see the details of the received order response from the external system as shown in the following table.

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Outbound Request form

Field name	Description
Number	Unique system-assigned outbound request number, starting with a prefix of FO.
State	State of the outbound request: **Not applicable** Created, but not in use yet. **Fulfilled** The service order fulfillment is completed. **Pending** The service order has encountered an error and is waiting for a resolution. **Error** The service order has encountered an error and is waiting for a resolution.
Source record	Record from which the outbound fulfillment request was triggered.
Table	Name of the table that is referenced in the request context.
Request ID	Outbound request ID that is generated by the Order Management for Telecommunications, Media, and Technology application.

Orders for 5G sliced networks

A communication service provider (CSP) can define 5G services in the technical catalog and manage the creation and fulfillment of these orders for a sliced network.

Network slicing

Network slicing refers to a method of partitioning a physical network into multiple, separate networks. These separate networks are called slices.

By slicing a 5G network, a CSP can do the following tasks:

- Create and manage the slice templates with the required slice attributes in their product catalog.
- Support slice specifications by using the slice templates to define the slice services.
- Support the ingestion of slice orders from external systems through the existing product order API.
- Decompose the slice orders and trigger the fulfillment workflows for the decomposed orders.
- Trigger the southbound slice orders with southbound attributes toward southbound systems, such as Network Slice Management Function (NSMF), by using the service order open API.

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How a slicing order is managed

A product catalog administrator creates templates in the product catalog by defining the template characteristics and template characteristic options. When the product catalog administrator is finished creating the templates, they publish it to the product catalog. With this process, the product catalog administrator can create templates for the various types of slices with the slice attributes and attribute values for the 5G network services.

Next, the product catalog administrator maps the slice templates with the various specification categories. The product catalog administrator does the mapping by using the Template Selection Policy decision table in the Decision Builder. The mapped templates are automatically filled in the service specification form when a user selects a specification category. .

Note:

- If a specification category is mapped with multiple templates, the latest published template is considered to be in the service specification.
- If a specification category is not mapped with any templates, the default category-template mapping is considered to be in the service specification.

The product catalog manager then uses the templates to define the new specifications for the 5G services.

After the 5G service specifications are created, they can be used in the slice order creation and fulfillment process. The 5G slice ordering process follows the existing order approval, decomposition, and fulfillment process in the Order Management application.

Service qualification requests

Use the Technical Service Qualification API to evaluate a service request for feasibility and availability before you submit an order for fulfillment in the Order Management application.

Service qualification request overview

If orders are submitted without feasibility checks, the order fulfillment process may be delayed and lead to cancellations and order fallouts. When you make feasibility checks a part of the pre-ordering process, the order fulfillment process is more efficient, and unnecessary delays can be avoided.

Let's understand this with an example. A communication service provider wants a broadband service at 3000 Main Street, Santa Clara, CA. As a part of the service delivery process, the service provider determines the technical feasibility of whether a given service can be delivered to their customers. This request then goes to the external inventory systems, which would do a further feasibility check based on the capacity, resources, and other parameters and send a response back to the order management system. The response regarding the qualified response can vary, or if the qualification isn't met, alternate proposals could be provided.

The key capabilities of the Technical Service Qualification process are as follows:

- Confirm service availability before placing an order and meet customer expectation.
- Confirm service availability by sending technical service qualification requests.
- Process and coordinate technical service requests and responses with external inventory systems via APIs.
- Aligned with the Service Qualification Management TMF 645 Open API.

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Use cases

The Technical Service Qualification process enables the service order managers to perform the following activities:

- Support the creation of technical service qualification request via open TMF APIs so that they can enable external systems to submit qualification request to ServiceNow system for qualification process.
- Decompose service qualification request in to underlying services as per the product catalog definition so that they can perform qualification for all underlying services to qualify the parent service.
- Trigger service qualification requests for both parent and child services to external systems in TFM-aligned standard so that they can support interoperability with external systems to get the feasibility studies performed for service qualification request.

Qualification process

Customer orders that have the fulfillment type as **Qualify** are captured from third-party customer order management systems through the Technical Service Qualification Open API. You can use this API, which is a ServiceNow implementation of the TMF645 API, to request the qualification of services for:

- One or more service specifications with characteristics.

  For example, you can make a qualification request to check if Voice over IP (VoIP) and Access Service with a download speed of 1 GBPS could be delivered at a specified address.

- Service specifications that use location information of an existing inventory.

  For example, you can make a qualification request to check if VoIP and 4000 TV services can be delivered at the same location of an existing and active Access Service.

- Upgrading or downgrading an existing service.

  For example, you can make a qualification request to check if the download speed can be upgraded to 500 Mbps for an existing Access Service.

Order fulfillment managers can review customer orders that are captured through this API and confirm the availability of services before submitting requests for delivery. The requests are then sent to the external inventory system for approval and the customer order is updated with the result.

1. A qualification requester system sends a qualification request for a customer facing service (CFS) into the ServiceNow Order Management system using the TM Forum Open API for Service Qualification (TMF645).

   An order is created in Order Management with order type as service and fulfillment type as Qualify.

   Order line items are automatically created based on the service specification relationship.

2. The system decomposes the order line items into resource facing domain orders (RFS) based on catalog definition.
3. The Order Management system coordinates and processes the technical service qualification request and returns the response to the external inventory system.

Review and approve service qualification requests

Review and approve customer orders captured through the Technical Service Qualification API.

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Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.service_order_manager, sn_ind_tmt_orm.service_order_agent

Procedure

1. Navigate to#**Workspaces** > **CSM/FSM Configurable Workspace**#.
2. Select the List icon .
3. Navigate to **Service Orders** > **All**.
4. Select an order with the Order type as Service and Fulfillment type as Qualify.
5. Select **Approve**.
   The State field changes to **In Progress** and order decomposition occurs and service orders are generated for each customer order line Item.

   Note: During order decomposition, only service orders are created, resource orders are not generated for service qualification requests.

6. Navigate to the **Line Items** tab, select a parent line item in the list and select **Qualify Order**.

   Note: The **Qualify Order** option is available only on the top order line items in the hierarchy.

   - The Result field is updated to **Pending** and the Process Qualification Request subflow subflow is launched. After the subflow has been executed, depending on the response from the external inventory system, the Customer Order Result field is updated to one of the following:
     - Qualified: Requested service is available.
     - Alternate: Requested service is not available but an alternate proposal is available.
     - Unqualified: Requested service and alternate proposals are not available.
     - None: If any errors occur during the execution, the result is updated to None.
   - The following business rules are invoked to derive the result:
     - Update Line Item Qualification Result: Propagates result from domain order to order line item.
     - Update Qualification Result on Order: Propagates result from top order line items to the customer order.

     The Customer Order Result status is based on the status of the domain order and order line items. If the order line items have different or mixed results, the Result status is derived as follows:

Domain order	Order line item result
All domain orders are set to Qualified.	Qualified
All domain orders are set to Alternate.	Alternate
All domain orders are set to Unqualified	Unqualified
All domain orders are set to None	None

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Top Order Line Item	Customer Order Result
All top order line items are set to **Qualified**.	Qualified
At least one top order line item is set **Alternate** and no items are set to **Unqualified**.	Alternate
At least one top order line item is set to **Unqualified**	Unqualified
At least one top order line item is set to **None**	None

Manually updating the qualification request

You can manually update the Result field in two ways:

- Update the *qualificationresult* field inn the *api/sn_ord_qual_mgmt/qualification/checkServiceQualification/processResult* API for all the order line items.
- Update the Result field on the Domain Order, Order Line Item, and top Order Line Item forms. The Result field on the Customer Order is also updated.

Data model changes

The following forms have been updated to process service qualification requests:

- Customer order
  - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
  - Fulfillment code: Readonly field.
- Order line item

  Result: Can be None, Qualified, Unqualified, Alternate, or Pending.

- Domain order
  - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
  - Unavailability reason

Process Qualification Request subflow

The Process Qualification Request subflow generates a qualification request based on the customer order, sends the request to the third party inventory system, and executes the integration request.

Generate a qualification request

In the first step of the subflow, a TMF-641 compatible payload to be sent to the inventory system is generated. The *serviceQualificationItem* list in the payload consists of the service order information, the hierarchy, and all the characteristics. A sample payload is shown in the following example:

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In this example, you can see that the *serviceQualificationItem* has multiple service orders and you can also see the hierarchy or the parent and child relationships between them.

Execute integration request

This step launches the Order Qualification Request integration request type from the Spoke selector. The payload information specified in the first step of the subflow and the top order line item from the customer order are accepted as inputs. This information is then sent using an API call to the third party inventory system and the response is received either synchronously or asynchronously and Result field is updated in the customer order.

If the response is received asynchronously, the response should be passed to the Process Qualification Response. Along with the result, if the response has additional information related to alternate service proposal or eligibility unavailability reason, this information is updated for the corresponding service order. A sample response is shown here:

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In this example response, the *qualificationresult* is set to Qualified for all the service orders in the hierarchy and the final *result* is also set to Qualified.

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Edit the Order Qualification Request

Use the Order Qualification Request integration request type in the Order Management for Telecommunications application to process the customer order qualification requests and retrieve the results from the external inventory systems.

Before you begin

Role required: admin

About this task

The Order Qualification Request type is used to integrate order management with third-party inventory systems. You can specify the following information:

- Integration request inputs: Inputs for the customer order qualification request which include the top order line item and payload details.
- Integration request definition: Definition for the condition and the subflow that invokes the API call to the third-party inventory system.

Procedure

1. Navigate to **All** > **Spoke selector** > **Request type**.
2. Click the **Order Qualification Request** integration request type.
   In the Order Qualification Request integration request type page, you can see the Demo Order Qualification Implementation request definition listed under the Integration request definitions tab. This is a sample request definition that invokes the Demo Order Qualification (Mock Response) subflow, simulates the response from a third-party inventory system, and updates the qualification request.

   You must add a new request definition, specify the conditions and create a subflow that you can use to invoke the API call to the third-party inventory system. You can create one or more request definitions depending on the number of external systems being used.
3. Click **New** to add a new request definition.

   Note: To add a new request definition, you must be in the Order Management for Telecom, Media and Tech scope.
4. Enter the name for the request definition and specify the conditions.
5. In the Request adapter field, select the subflow that will communicate with the third-party system to update the customer order and click **Submit**.
   - Each request type can have multiple request definitions. For example, if you have multiple inventory systems or vendors, depending on the system you want to invoke, you can add multiple request definitions for each system. You must create a separate spoke to interact with each vendor or third-party system, create a flow in the spoke, and point the request adapter to this flow.
   - For more information on how to create a spoke, see Spokes. As shown in the demo subflow, ensure that the response from the third-party system passed to the Process Qualification Response block.
   - When the Process Qualification Request subflow is invoked, the response from the third-party inventory system is received either synchronously or asynchronously, and the Result is updated in the customer order.

Alternate proposal for service orders

Learn how you can provide alternate proposals if a service qualification isn't met.

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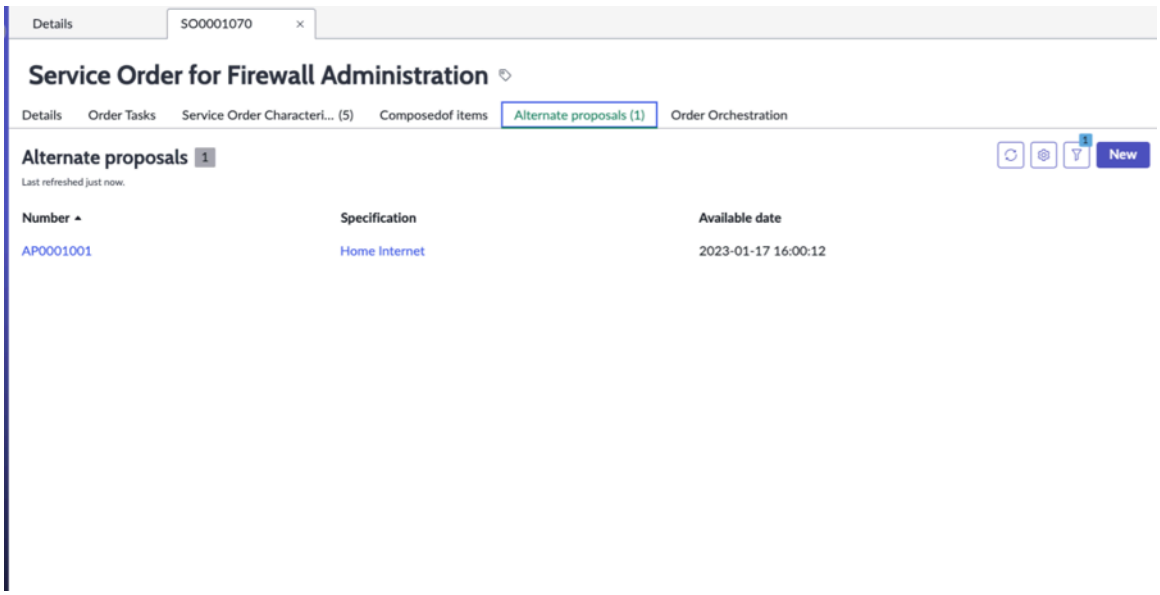
Qualification requests can be created for a service specification using information from existing inventory. If the requested service with the specified characteristics or date is not available, an alternate proposal may be provided. The alternate proposal can be similar to the requested one or may be the same service but available on a different date.

When you receive an alternate qualification request and click **Qualify Order** in the top level order line item form, the Result field is updated to **Alternate** and a list of alternate proposals are listed in the Alternate proposals related list. A single service order can have multiple alternate proposals. This list can also be manually updated by the service order agent.

Note: When you initiate a new qualification request is initiated and receive an alternate proposal for a service order, any existing alternate proposal entries will be deleted before new entries are created.

Navigate to the **CSM/FSM Configurable Workspace**, click a service order with Fulfilment type as **Qualify** and select the **Alternate proposal(s)** tab.



Select the Number link to view the alternate proposal. It contains the following information:

Field name	Description
Number	Number of the alternate proposal.
Domain order	The domain order for which the alternate proposal is created.
Specification	The alternate service specification that has been proposed.
Available date	The date on which the alternate proposal will be available.
Order characteristics	The specification characteristics (in JSON format) provided as part of the alternate proposal in the response from the inventory system.

Reviewing customer or partner accounts

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management application to get a better perspective about the activity that is associated with a customer's or partner's account.

As an order agent, manager, or fulfiller, you can use your customer's or partner's account Information to gain a clear understanding of the contact, order, customer service, product

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inventory, and installed base item activity for an account. With this information, you can track the following types of information:

- How many service contracts have been created or renewed for the account.
- How many customer and service orders have been submitted by the customer, and what are their current states of fulfillment.
- How many active requests or customer service cases the account has, and what are their current states.
- What products and equipment the customer has ordered or has installed at their sites. By using this information, your order agents can gain insights into what additional products or services they can sell to the customer.

Note: To learn how to create new customer accounts, see Configure accounts and contacts in Customer Service Management (CSM).

Review an account using the 360 View

Review a customer or partner's account by using the 360 View in the Order Management application. You can track the service contracts of your customers or partners. You can also view customer and service orders, cases, products, and equipment to see how you can improve your customer service.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab, select **Customer**, and then select **Accounts**.
3. In the Accounts list, select a customer account.

   Note: You can also access an existing customer account by selecting a customer account link in the Account column of the Orders, Customer Orders, or Service Orders lists in the Configurable Workspace Lists.

4. In the Account Information form, in the Customer Summary section, review the general customer details for the selected account.

Account Information form - Customer Summary section

Field	Description
Account	Name of the customer or partner, and the name of the primary contact for the account. To view the details for the primary contact, including the account, title, email, phone numbers, and time zone, select the contact name.
Contacts	Name of each contact for the account.

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Field	Description
	○ To access the Customer Contacts form so that you can view all contacts for the account, select **View All**. ○ To view the details for a contact when you are in the Customer Contacts form, select the contact name.
Contracts	Name of the contracts, if any, that are associated with this account. ○ To view the details for a contract, select the contract number. ○ To view all contracts for the account, select **View All**.

5. In the Overview section, in the **Customer Orders** field, review the customer and service orders for the selected account.

Account Information form - Customer Orders section

Field	Description
Customer Orders (n)	(n) represents the total number of customer and service orders for this account.
Number	System-assigned identifying number for the order. ○ To access the Customer Order form and view the order details for a customer order, select the order number. ○ To access the Service Order form and view the order details for a service order, select the order number. ○ To access the Customer Orders form to view all orders for the account, select **View All**. To view the detailed information for an order when you are in the Customer Orders form, select the order number.
Order Type	Type of order: **Product** Order for a product that you sell. **Service** Order for a product that you sell.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.
State	State of the product or service order. To learn more, see these two topics:

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Field	Description
	○ Customer order states ○ Service order states.

6. In the Cases section, review the customer service cases, if any, for the selected account.

Account Information form - Cases section

Field	Description
Number	System-assigned identifying number for the customer service case: ○ To view the details for a customer service case, select the case number. ○ To view all the customer service cases for the account, select **View All**.
Short description	Short description of the customer service case.
Contact	Name of the customer contact that is associated with the customer service case. To view the details for the contact, select the contact name.
State	State of the customer service case. To learn more, see Case states.

7. In the Product Inventory section, review the product inventory items for the selected account.

Account Information form - Product Inventory section

Field	Description
Product Inventory (n)	(n) represents the total number of the product inventory items that were ordered for this account.
Number	System-assigned identifying number for the product inventory item: ○ To view the details for a product inventory item, select the product inventory number. ○ To view all the product inventory items for the account, select **View All**.
Specification	Product specification that is associated with the product inventory item. To view the details for a specification, select the specification number.
Location	Current location for the product inventory item. *(empty)* denotes that the product inventory item hasn't yet been installed at the customer site.

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Field	Description
State	State of the product inventory item. *Installation Pending* denotes that the installation of the product inventory item is pending at the customer site.

8. In the Installed Base Items section, in the Product Inventory section, review the installed base items for the selected account.

Account Information form - Installed Base Items section

Field	Description
Installed Base Items (n)	(n) represents the total number of the base items that were installed for this account.
Number	System-assigned identifying number for the installed base item: ○ To view the details for an installed base item, select the installed base item number. ○ To view all the installed base item numbers for the account, select **View All**.
Configuration Item	System-assigned identifying number for the configuration that is associated with the installed base item. To view the details for a configuration item, select the configuration item number.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.

Using order operations applications

Learn how to use order operations applications.

Manage cases

Case management provides a structured and efficient approach to handling a wide variety of service requests, incidents, and inquiries. It encompasses the processes and tools used to manage individual cases from initiation through resolution, ensuring that service delivery is consistent, timely, and aligned with organizational goals.

Using Lead-to-Cash Process Management

Sales process managers can use Lead-to-Cash Process Management to create sales process records and monitor and track sales processes through a consolidated dashboard.

Overview of creating and monitoring sales processes

Access the Lead-to-Cash Process Management application from the CSM Configurable Workspace to create sales process records and monitor the sales process using the sales process dashboard.

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- Create a sales process record

  Create a sales process record to monitor and track sales activities for a customer account.

- Navigating the sales process dashboard

  Become familiar with the sales process dashboard so you can navigate and use the dashboard to monitor the sales process.

- Monitoring and tracking sales activities

  Monitor and track sales activities for a customer account after you have created a sales process record.

- Create and manage task checklists

  Create checklists to ensure thoroughness, consistency, and prevent errors while completing routine tasks and processes such as fulfilling orders.

- Add attachments for a sales process record

  Attach files, documents, images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

- View and send emails in Lead-to-Cash Process Management

  View consolidated emails for all hard-linked entities monitored in a sales process record and compose emails from the sales process dashboard.

- Linking, delinking, and link conversion conditions

  Become aware of the conditions for linking, delinking, and hard or soft-linking records on the node map.

- Create business process tasks

  Create business process tasks to track miscellaneous tasks at the sales process record-level.

Create a sales process record

Monitor and track sales activities for a customer account by creating a sales process record in Lead-to-Cash Process Management.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select **New**.
5. On the form, fill in the fields.

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Create new sales process record form

Field	Description
Short description	A brief summary of the business process record used for quick identification in lists and notifications.
Business process	A business process that you want to monitor such as order-to-cash.
Account	Customer account for which you want to monitor the sales activities.
Assigned to	(Optional) Person responsible for managing and monitoring the sales process record.
Business entity	The top-level sales entity that you want to monitor, for example, opportunity. Quotes and orders related to that entity are automatically included in the node map.

When you select a business entity, all similar entities related to the selected account are displayed.

6. Select the records you want to monitor directly under the sales process record.
7. Select **Save and Open**.
   A dashboard containing a hierarchical node map and details section related to the selected records is displayed.

What to do next

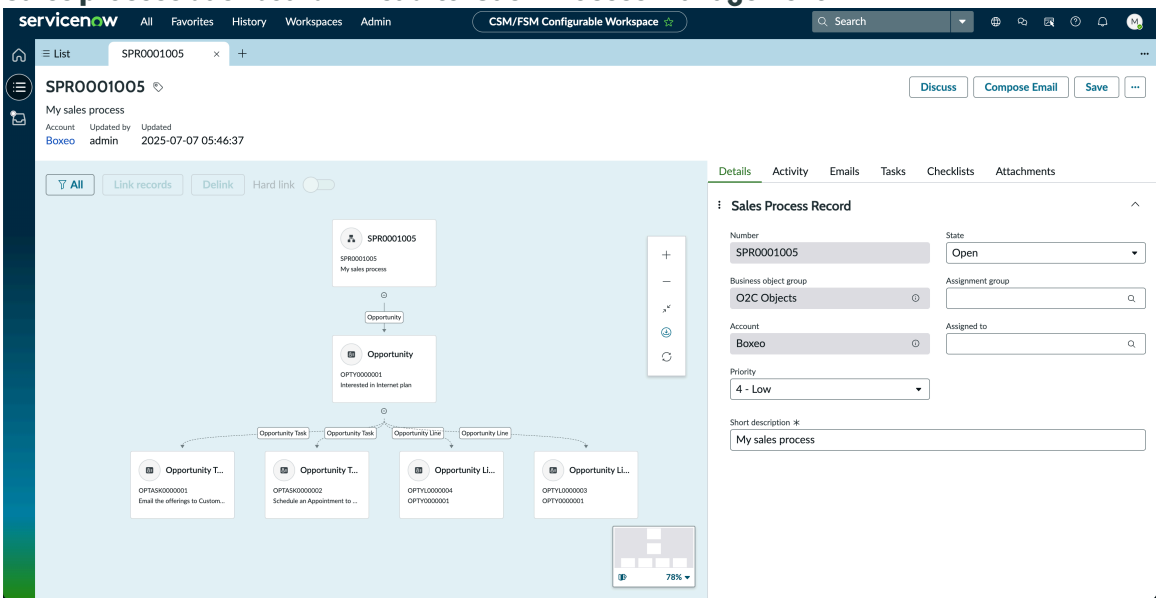
Track and manage sales process using the sales process dashboard. For more information, see Navigating the sales process dashboard and Monitoring and tracking sales activities.

Navigating the sales process dashboard

Become familiar with the various elements that make up the sales process dashboard in the Lead-to-Cash Process Management application.

The sales process dashboard in the Lead-to-Cash Process Management application offers a consolidated view of sales activities across entities such as opportunities, quotes, and orders.

Sales process dashboard in Lead-to-Cash Process Management



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Node map elements

The hierarchical node map visually represents the relationships of sales entities. Sales process managers and contract admins can dynamically manage this map by linking or delinking records, converting soft links to hard links for active monitoring. The following table describes the function of node map elements.

Node map elements

Element	Function
Filter icon	Filter link by types to view associated nodes. You can filter to view all nodes or hard-linked nodes.
Link records	Link more sales records to the selected node. To add more records, select **Link records**, then select a **Business entity** on the Link records pop-up window. Select specific records that you want to link and select **Link selected**.
Delink	Delete child record and its hierarchy. To delink a record, select a link connecting a parent node and its child nodes you no longer want to monitor, and select **Delink**.
Hard link	Enables you to convert soft links to hard links and vice versa. To convert a link, select it and select the **Hard link** toggle switch.

By default, only three levels are displayed on the node map when you open a sales process record in the CSM Configurable Workspace. Admins can increase or decrease the number of levels displayed. For more information, see Customize hierarchical node map levels for Lead-to-Cash Process Management.

Only 250 nodes can be displayed on the node map at a time. If you have more than 250 nodes, collapse some nodes and then expand and view the other nodes.

Details pane

A details section consolidates all relevant operational elements—tasks, emails, checklists, and attachments—into a single pane.

Note:

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard.

Related topics

- Monitoring and tracking sales activities
- Create and manage task checklists
- Add attachments for a sales process record
- Manage attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

Monitoring and tracking sales activities

Monitor and track sales activities for a customer account after you have created a sales process record.

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The **Details**, **Activity**, and **Tasks** tabs provide the following information when you select a node on the Lead-to-Cash Process Management sales process node map:

Sales entity details for an account

Access key information about a sales process record such as the record number, state, the agent assigned to the record, account, and priority, and additional details for related sales entities such as the product offering, quote date, pricing information, and so on to expedite decision making and issue resolution.

Activities

View a running history of updates such as field changes or the availability of new file attachments, enabling you to stay informed about the sales process record without having to switch contexts. Activities can only be viewed for a sales process record.

Filter, search, and sort activities using the Filter , Search and Sort icons respectively.

Task assignment and status

View a consolidated list of tasks that provides information about hard-linked entity records that are monitored using the sales process record, including business process tasks. The information includes the task's status, description and the agent assigned to it. You can also search and filter tasks using the task ID, short description, or state through the search box and Filter icon .

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard. For example, you can display tabs such as **Line Items for an Opportunity** and **Line Characteristics for Opportunity Line** containing the respective record details.

By accessing the sales data and using integrated communication channels such as sidebar discussions and emails, you can promote record completeness and accuracy, and support downstream processes such as order fulfillment, revenue recognition, and reporting.

Related topics

- Create and manage task checklists
- Add attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

Create and manage task checklists

Create and manage checklists to track progress on completing routine or repetitive tasks and processes such as fulfilling orders.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.

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5. Select the **Checklists** tab.
6. Select **Add item**.
7. Enter a task in the **Checkbox** field.
8. Repeat the steps to add more tasks to your checklist.

   To remove a task while creating the checklist, select the Delete icon next to the task entry.
9. Select **Save**.
   You can add more tasks to your checklist by selecting **Edit**.
10. **Optional:** Modify a saved checklist by adding or deleting items.

    a. In the sales process record on the dashboard, select **Checklists**.

    b. Select **Edit**.

    c. Add or delete an item.

    - To delete an item, select the Delete icon next to the task entry.
    - To add an item, select **Add item** and provide the task name.

    d. Select **Save**.

Add attachments for a sales process record

Attach files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

Before you begin
Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

About this task
You can attach files only to a sales process record. To add attachments to child records, you must navigate to the respective entity's record page.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Upload files.

> **Note:** The default maximum file size is 1 GB, but this may vary based on the size limit set by your admin on your ServiceNow instance.

Method	Action
Drag and drop	Drag and drop the file from your system to the Attachments pane.

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Method	Action
Select a file from your system	**a.** Select **Select file**. **b.** In the browse files pop-up window, select the file. **c.** Select **Open**.

7. Select **Upload**.
8. **Optional:** Attach more files by selecting the Add icon.

What to do next
Download, rename, or delete attachments. For more information, see Manage attachments for a sales process record.

Manage attachments for a sales process record

Rename, download, or delete files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

Before you begin
Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Select the attachment.
7. Select the More actions icon for the attachment entry.
8. Select the desired action.
   - Download
   - Delete
   - Rename

   Tip: For bulk deletions or downloads, select the files or select **All Files** and then select the action.
9. **Optional:** Select an attachment to preview it.

View and send emails in Lead-to-Cash Process Management

View consolidated emails for all hard-linked entities monitored in a sales process record and compose emails from the sales process dashboard.

Before you begin
You can compose and send emails related to a sales process record by default. To compose emails for child entities such as an opportunity or quote, you must be granted access to those

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entities. For more information, see Setting conditions for enabling email access in Lead-to-Cash Process Management.

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select the sales process record.
5. View emails from all hard-linked entities tied to the sales process record by selecting the **Emails** tab.
6. Compose and send the email.
   a. Select **Compose Email**.
   b. Enter the list of recipients.
   c. Draft your email.
   d. Select **Send email**.

Linking, delinking, and link conversion conditions

Several conditions can enable or disable you from linking, delinking, and hard or soft-linking records in Lead-to-Cash Process Management.

Difference between hard and soft-linked nodes

Links can be toggled between hard and soft types based on whether they need to be actively monitored.

Hard-linked nodes

A hard link is an active monitoring connection established by the sales process manager. When a record is hard linked, it's actively tracked, and its emails and tasks are consolidated and visible in the sales process record. Hard links are represented by solid lines in the node map.

Soft-linked nodes

A soft link is a passive connection based on database relationships. Records that are soft linked aren't actively monitored by the sales process manager, and their emails and tasks aren't consolidated in the sales process record. Soft links are represented by dotted lines in the node map.

Conditions for linking and delinking records

Linking records: You can link records to all hard-linked nodes, including those records that are converted from soft links to hard links.

Delinking records: You can delink only hard-linked records and they must meet either of the following conditions:

- The target node was added using the Link Records flow
- The target node is a top-level entity

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Conditions for converting link types

Hard links cannot be converted to soft links if they meet the following conditions:

- The target node was added using the Link Record flow.
- The target node has immediate hard-linked child nodes but only one hard-linked source node.

Soft links can be converted to hard links only if the source node has at least one hard-linked record.

Create business process tasks

Track tasks for sales process records in Lead-to-Cash Process Management such as the closure of all linked opportunities or generating orders.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Lead to Cash Process Management** > **Business Process Tasks**.
4. Select **New**.
5. On the form, fill in the fields.

Business Process Task form

Field	Description
Number	Unique ID of the business process task record.
Business process record	The sales process record.
Parent	(Optional) Parent record of the selected object. In this case, another business process task.
Priority	The order in which the task should be addressed. The available options are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low ○ 5 - Planning
State	State of the task record. The available options are: ○ Open ○ Work in Progress ○ Closed Complete ○ Closed Incomplete ○ Closed Skipped

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Field	Description
Assignment group	User group to assign to the task.
Assigned to	The sales process manager to assign to the task.
Short description	(Optional) A brief description summarizing the task.
Work notes	(Optional) Records activities by internal users.

6. Select **Save**.

What to do next

Monitor the business process task from the sales process dashboard. For more information, see Monitoring and tracking sales activities.

Using post-sales engagement applications

Learn how to use post-sales engagement applications.

Customer Life Cycle Management Workflows

Modify, suspend, resume, or disconnect the sold products and their complete hierarchy.

Using Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management) to enable admins and channel partners to use the self-service Partner portal.

As an Enterprise Partner Relationship manager or a channel partner you can use the Partner Portal to do any of the following tasks.

- Get a 360° view of the Partner portal.
- Add and manage staff members.
- Submit an inquiry to connect with the enterprise.
- Access knowledge base articles and engage with the community.

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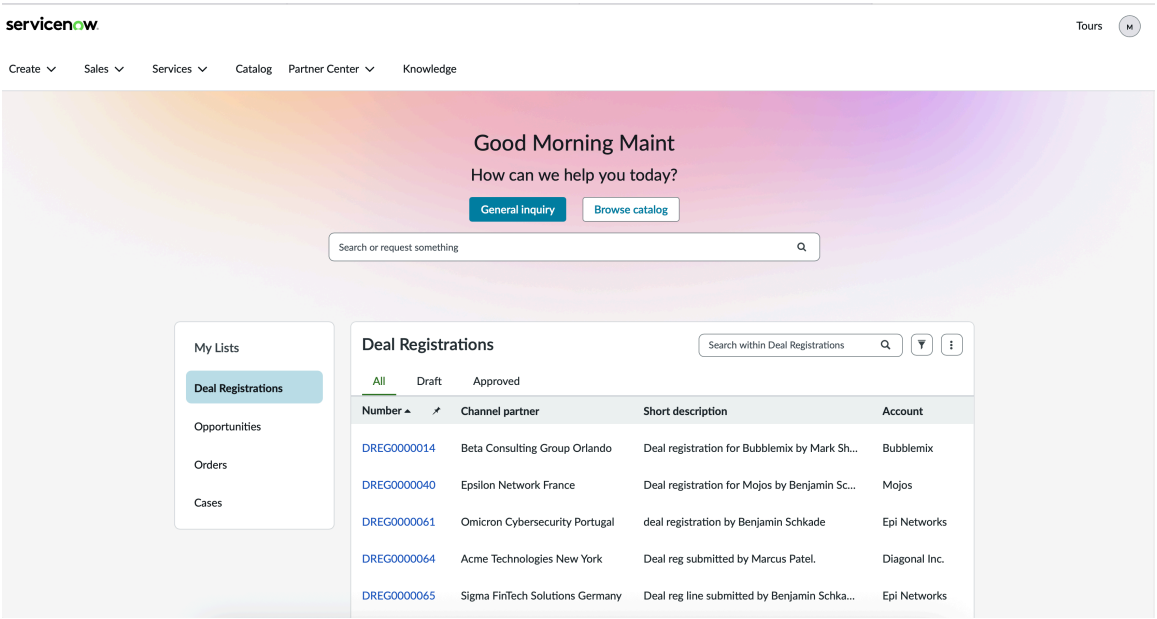
Partner Portal



From the Partner Portal, you can use and access the following features.

Partner portal home page for logged-in users

Task	Description
Create	Allows channel partners to create deal registrations or cases. To learn more about creating deal registrations, see Register a deal on Partner portal.
Sales	Overview of deal registrations and opportunities. View deal registrations in the **Draft**, **Submitted**, and **Approved** states. View a list of all active opportunities and their detailed analytics.
Services	Provides access to all cases and quick links to open cases that require action.
Catalog	List of all services that can be performed by a channel partner.
Partner Center	List of all the channel partners.
Knowledge	Select **Knowledge** on the header to view the kb_home page. You can search the knowledge base or view a list of top-rated or most viewed knowledge base articles.

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Partner portal home page for logged-in users (continued)

Task	Description
General Inquiry	Raise concerns or queries with the enterprise. To learn more about general inquiry, see Raise an inquiry on Partner Portal.
Browse catalog	List of all catalog forms.
Cases	Provides access to all cases and quick links to open cases that require action.
My Lists	Lists of deal registrations, opportunities, orders, and cases associated to the channel partner. Select **Opportunity** to view detailed information about the line items and activity associated with an oportunity.
Quick Links	Links to knowledge articles and other information.
Tours	View a tour for additional guidance on how the Partner Portal works. Your administrator determines whether tours appear on pages.
Profile menu	Select your profile picture to view your profile or log out of the Partner portal.
Search	Search for support articles and other requests. Enter a search word or term and select **Search** to view the results.

Related topics

- Raise an inquiry on Partner Portal
- Register a member on Partner portal

Raise an inquiry on Partner Portal

Raise a query or concern with the enterprise on the Partner Portal.

Before you begin

Role required: sn_prm.enterprise_partner_rel_manager, sn_prm.external_partner_manager or sn_prm.external_partner_ associate

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **My requests**.
3. From the drop-down, select **Submit a request**.
4. Select **General Inquiry**.

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5. On the form, fill in the fields.
   To learn more about the fields on the inquiry form and their descriptions, see General Inquiry form.
6. Select **Submit**.

Related topics

Using Partner Relationship Management

Register a member on Partner portal

Register a member on Partner portal

Register a new partner member or transfer existing staff within a partner organization.

Before you begin

Role required: sn_prm.enterprise_partner_rel_manager, sn_prm.external_partner_manager, sn_prm.enterprise_partner_admin

About this task

Assign each member of staff certain responsibilities and accesses to perform daily operations and tasks.

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **My requests**.
3. From the drop-down, select **Submit a request**.
4. Select **Register Member**.
5. On the form, fill in the fields.
   To learn more about the fields on the member registration form and their descriptions, see Member registration form.
6. Select **Submit**.

Related topics

Using Partner Relationship Management

Raise an inquiry on Partner Portal

Register a deal on Partner portal

Register a deal on the Partner portal to update its state and trigger the end-to-end life cycle of the deal.

Before you begin

Role required: sn_prm_dr.deal_reg_ui

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Requests**.

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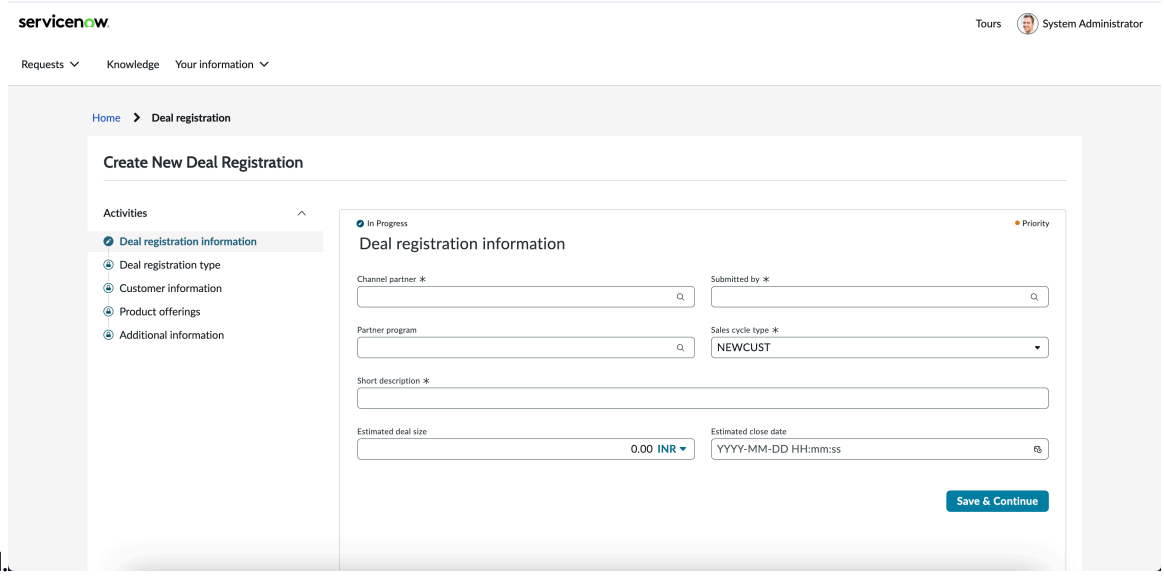
3. From the drop-down, select **Submit a request** > **Register a deal**.



4. On the **Create New Deal Registration** screen, enter the required information on the **Deal registration information** form.
   To learn more about the fields on this form, see Deal registration table fields.
5. On the **Deal registration type** screen, select the preferred deal registration type.
   The deal registration types are listed based on the channel partner and partner programs selected in the Partner Program deal type relationship (sn_prm_dr_pp_deal_type) table.
6. On the **Customer information** screen, select an existing account or create an account or consumer.
   To create an account, select **Can't find account details?** and fill in the fields. To learn more about the fields, see Deal registration table fields.
7. On the **Product offerings** screen, select the list of product offerings that the customer is interested in.
   This is an optional step and can be skipped.
8. On the **Additional information** screen, provide a description of the deal registration.
   You can also add attachments to support additional information.
9. Select **Review** to review all the details and select **Submit**.
   As an agent you can update the status of the field on the **CSM/FSM Configurable Workspace**.
   To learn more, see Update deal registration record.

Result

A deal registration is created with an associated account, a channel partner, and a partner program. The state of the deal registration is **Submitted**. Multiple deal lines with an associated product offering are also created. You can also view the list of all deal registrations, along with the deals in **Draft** and **Approved** states on the Partner portal home page.

Note: Select **Actions** from the details page to edit or delete the deal registration. You can only delete deal registrations that are in the **Draft** state.

Related topics

Update deal registration record

View opportunity analytics on Partner portal

View detailed analytics related to all the opportunities associated to a channel partner on the Partner portal.

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Before you begin
Role required: sn_prm_opptym.oppty.parnter_ui

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Sales** > **Opportunities**.
3. In the **Opportunity Analytics** you can view an overview of all the opportunities by stage and revenue.

Opportunity Analytics

Analytics	Description
Estimated Total Revenue	The total value of all active opportunities.
Opportunities By Stage	Breakdown of opportunities across sales stages and the number of deals at each stage.
Opportunities Past Estimated Closed Date	The number of opportunities that are past the estimated closed date.
Active Opportunities	Number of active opportunities that are not yet closed or lost.
Stalled Opportunities	Opportunities with no significant activity or progress for a defined period, indicating potential risk.
Opportunities created from Deal Registrations	Number of opportunities that are converted from a deal registration.

4. You can also view all the active opportunities from highest to lowest.
   To learn more about the fields on the Opportunity list, see Add and view the details of an opportunity.
5. View all the opportunities that the user has access to from the **All Opportunities** tab.

Using lead-to-cash foundation applications

Learn how to use lead-to-cash foundation applications.

Using product catalogs

The product catalog provides a visual display of the available product offerings that can be added to a Sales Customer Relationship Management transaction, such as an opportunity, quote, or order. Use the catalog interface to add simple products and complex products that can be further customized.

Agents use the Catalog tab (related list) for a transaction in the CSM Configurable Workspace to open the product catalog. Customers engaged in self-service transactions such as placing orders, use the product catalog in the Business Portal.

Note: When you start a lead, the Catalog tab displays only simple products that can be added and don't require further customization.

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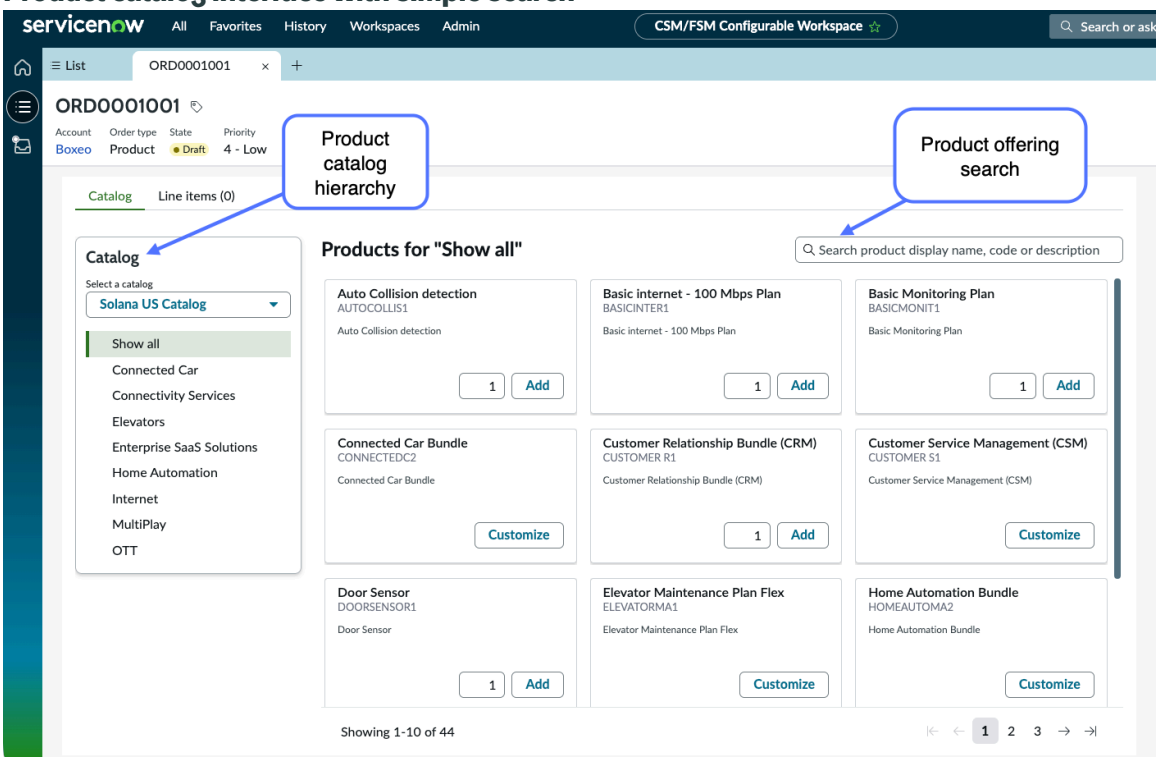
Starting with the Product Catalog Management Core v17.0.0 release, the product catalog interface supports semantic search queries powered by AI Search, in addition to keyword searches.

Product catalog interface with simple search

The product catalog interface enables agents and customers to find product offerings by navigating product catalogs and categories. Or, they can use the search bar to match by product name, code, or description.

Product catalog interface with simple search



The catalog view has the following features for selecting products:

- **Catalog navigation tree**: Catalog and a list of its categories used to organize product offerings. Selecting a category filters the display and shows only the product tiles for that category.
- **Search bar**: Option for finding product offerings using simple searches by product name, code, or description. The search feature displays the product tiles that match the product name, code, or search string (description).
- **Product tiles**: Cards that depict each product, which has a brief description, optional image, and an option to add or customize the product offer. The **Add** option displays when the product is a simple (fixed) product offering. The **Customize** option displays for configurable product offerings that have different options and attributes that can be selected. Selecting **Customize** opens the product configurator for configuring the product offering.

Product catalog interface with AI Search

AI Search in the product catalog interface enables agents and customers to find relevant product offerings by using semantic search queries, in addition to keyword searches.

Entering a query term or phrase in the search bar finds all catalog items that contain sedan as a characteristic, any parent products containing child products with this characteristic, and related products that have semantic similarity. In AI Search, semantic similarity means that the context of

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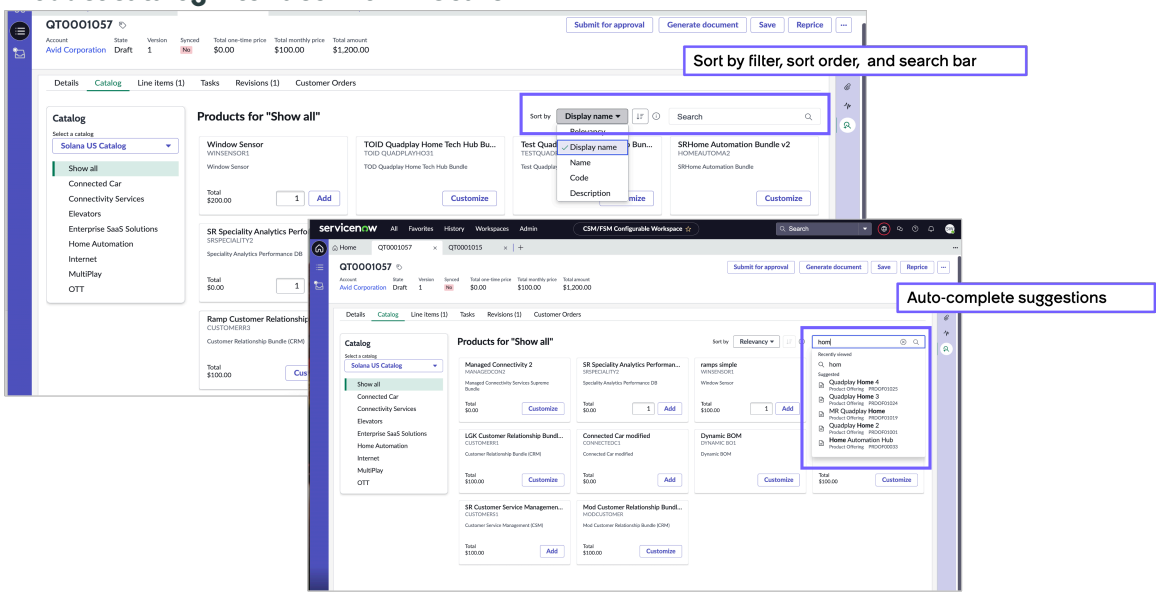
the query, such as the user, the catalog selected, and the terms entered, are evaluated to return the most useful catalog items first.

AI Search provides other features to enhance the search process:

- **Search query language options**: Use Boolean operators, wildcards, and multi-term and quoted phrases in queries to broaden or narrow search results.
- **Auto-complete suggestions:** When you start entering text in the search bar, AI Search displays auto-complete suggestions to help you get directly to the results you need. Suggestions may include recent search queries, recently viewed search results, or search queries or results that match the terms you're typing into the search bar.
- **Auto-corrections of misspelled or incomplete words**: If your queries contain misspelled words or are incomplete, AI Search automatically replaces those search query terms with correct spellings, based on the search sources (product offerings and service specifications). Typo corrections are shown above search results.
- *Sort by filter*: Organize how search results are returned, for example, by relevancy or product description. Control the order, descending or ascending, in which the results are displayed.

Product catalog interface with AI Search



For more information on search queries and the search query language that you can use to find catalog items, see Use AI Search in product catalogs.

Note: Check your entitlements to determine if you have access to this feature.

Use AI Search in product catalogs

As an agent or customer, use AI Search queries in the product catalog to find relevant product offerings or service specifications. For example, you can search by product offering characteristics or other attributes, when adding products in Sales Customer Relationship Management transactions.

Before you begin

Role required: sales agent, order agent, customer

About this task

With AI Search, you can use semantic queries to find relevant product offerings or service specifications for a transaction. Your queries can contain terms or phrases to find catalog items. AI Search considers the context for your search, such as the user intent, to return appropriate

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results. As you enter your query, AI Search provides various features to make your search more efficient.

- **Auto-complete suggestions**: When you start entering text in the search bar, AI Search displays auto-complete suggestions to help you get directly to the results you need. Suggestions may include recent search queries, recently viewed search results, or search queries or results that match the terms you're typing into the search bar. Select one of the suggestions from the list to display the product offering.
- **Auto-correction (typo handling)**: If your queries are incomplete or misspelled, AI Search automatically replaces misspelled search query terms with spellings found in indexed content. Typo corrections are displayed above search results.
- **Search result order**: You can use the Sort by filter to organize your results by Relevancy, Display name, Code or Description.

Procedure

1. Access the product catalog through a Sales Customer Relationship Management transaction, such as a quote created in the CSM Configurable Workspace or an order created in the Business Portal.
2. Select the Catalog tab to open the catalog interface, then choose the appropriate catalog.
3. In the sort filter, select how you want your search results to be listed:
   - **Relevancy**: Lists the most relevant records first, based on rank and order. You cannot change the order of the results (ascending or descending). This option is selected by default.
   - **Display name**: Lists results by the Display names for each product offering.
   - **Code**: Lists products by a Code that was assigned to each offering, either system-created or set by the product catalog admin when the product offering was created.
   - **Description**: Lists results by the Description for each product offering.

   You can use the ascending or descending filter to further order the results by Display name, Code, or Description.
4. Enter a search term in the search bar, then press **Return** to generate the search results
   As you're entering a query, auto-complete suggestions are displayed if your query matches any indexed terms. You can select one of the suggestions to display the product offering.The following table provides examples of terms, phrases, and operators that you can enter in your queries.

Search query language

Search query	Description
Search by query terms	Specify terms and quoted phrases in the search query to find products that contain the same terms or phrases. ○ Single-term search: Enter a specific term to find all catalog items that contain the term. For example, `sedan` finds any products that contain this characteristic, parent products containing child products with this characteristic, and related products that have semantic similarity to this search term or results.

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Search query	Description
	○ Multi-term search: Enter multiple words in a phrase to find catalog items that contain any of the terms in a phrase. For example `connected car` returns catalog items that contain the terms `connected` and `car`. ○ Quoted phrase search: Use double quotes to return catalog items for a specific phrase, such as `"connected car"`. **Note:** AI Search ignores letter case for search query terms and phrases.
Search using Boolean operators	Separate query terms and phrases with Boolean operators to override the default matching logic for the search query: ○ OR: Enter this Boolean disjunction operator to find products that contain any of the terms or phrases separated by OR. ○ `-` (hyphen): Enter this Boolean negation operator to exclude products containing the term or phrase that immediately follows the hyphen.
Search using wild cards	Use wildcard operators to find records that contain indexed terms matching a wildcard pattern: ○ `%`: Enter this single-character wildcard operator in a search query term to match any one character in an indexed term. For example, `fib%r` finds all products with the word `fiber`. ○ `*`: Enter this string wildcard operator in a search query term to match any string of zero or more characters in an indexed term. ○ `***`: Enter this universal wildcard operator to find all indexed terms. **Note:** The `%` and `*` operators must follow at least three non-wildcard characters to get appropriate results. Otherwise the search returns only the catalog items that are an exact match.

5. Do one of the following:
   - If the search results returned a product that you want to add, select the product offering so that it can be added as line item to the transaction. If the product that you select is customizable, the configurator opens so that you can configure the offering.
   - If you want to continue with another query, select **Clear** to remove the current search and sort option, then enter a new query in the search bar. The search query and sort option are cleared. The sort option is reset to Relevancy, which is the default value.

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Related topics

AI Search query language

Customer self-service using the Business Portal

Business-to-business (B2B) customers can use the Business Portal to browse product catalogs, create product orders, create and view order cases, manage invoice and invoice cases, and request for quotes.

Creating orders using the Business Portal

The Business Portal uses the product catalog to let customers browse and configure products. Customers can also build orders and submit them for fulfillment.

- Create orders from the Business Portal
- View an order on the Business Portal

Creating and viewing order cases

Customers can create and view order cases for orders or order line items using the Business Portal.

- Request updates for one or more orders
- Request updates for items in a single order
- View order case details
- Request order changes using Now Assist Virtual Assistant
- Request order changes via calls

Creating requests for quotes (RFQs)

Customers can request for quotes for products or services they're interested in via the Business Portal. They can specify budget and pricing preferences, and submit quote requests without engaging a sales agent. Simplify the RFQ life cycle from submission and internal review to quote generation and customer acceptance, ensuring faster turnaround times and improved transparency.

- Submit a request for quote from the Business Portal
- View requests for quotes (RFQs) on the Business Portal
- View quotes from the Business Portal
- Create quotes from request for quotes (RFQs)

Managing invoices and invoice cases

From the Business Portal, customers can view their invoices and invoice line details, including quantities, billing and shipping locations, and product information. If they notice a discrepancy such as a quantity mismatch, incorrect part number, or wrong billing or shipping location, they can submit a dispute using the self-service playbook, which guides them through the process step by step. They can dispute multiple line items on a single invoice, or raise issues across multiple invoices at once. For more information, see:

- View invoices on the Business Portal
- Dispute a specific line item on an invoice against your account using the Business Portal

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- Dispute multiple invoices against your account using the Business Portal
- View invoice case details in the Business Portal

Access the Business Portal

Customers can access the Business Portal from their instance to browse products and create orders.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Go to your instance and select the URL.
2. Edit the instance URL and append **/business_portal** to the end after the com.
   The Business Portals opens.

Create orders from the Business Portal

Browse products in a product catalog and create orders in Order Management.

Before you begin

Role required: sn_customerservice.customer

About this task

The following illustration describes the process to create orders from the Business Portal:

Self-service order checkout process

Procedure

1. Log in to the Business Portal.
2. Browse the product catalog, select products, and add them to the cart.

   a. Select **Product Catalog**.
   If you are a contact of an account with an active sales agreement, only the products listed in the sales agreement are displayed.

   b. Browse the products in the catalog.

   c. If a product you want to order has specific configurations, select **Customize** and select the product options.

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d. Enter the quantity of the item you want to order in the **Quantity** field.

e. Select **Add** to add products to the cart.

3. Review the cart contents.

a. Select the Cart icon .
The information listed in the following table is displayed.

My cart fields

Field	Description
Number	Unique cart ID.
State	State of the cart.
Created	Cart creation timestamp.
Qty	Product quantity.
Unit list price	Price of a single item.
Cumulative monthly price	Total cost of a product and its child items, if any, over a month.
Cumulative one time price	One-time price of the product and its child items, if any.

b. If you need to modify the quantity or customization for a product in the cart, select the Edit icon and modify the details.

c. If you want to delete an item, select the Delete icon .

4. Optional: Add instructions for your order in the **Instructions** field.

5. Optional: Save a copy of your cart in PDF format by selecting **Download**.
The default filename contains the cart ID. The PDF content and format is based on the Sales Cart Demo Template document template.

6. Check out.

a. Select **Proceed to Checkout**.

b. On the Terms and conditions page, select the confirmation checkbox after reading the terms and conditions of the seller and select **Continue**.
The terms and conditions are fetched from the Sales Cart Terms and Conditions Default document template.

c. On the Shipping details page, review the shipping and billing addresses and modify them if necessary by selecting the Edit icon .

Note: The address that you specify while checking out is only used for that order. It doesn't change your stored address in the seller's system.

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d. Select **Continue**.

e. Verify the details on the Review page and select **Submit**.

Result
The order is created and you're redirected to the Order details page. You can view your account details, order amount, order lines, and so on.

Related topics
View an order on the Business Portal

Modify terms and conditions for the sales cart

View an order on the Business Portal

Customers can view their orders using the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **View submitted request** > **View orders**.
   The View order window has the following controls.
   - To search for orders - use the search option.
   - To sort, and filter orders - use the filter.
   - To export as a PDF, Excel, or CSV - use the Action icon  .
   - To open an order - select the order number.
   - To navigate back to the main window - use the breadcrumbs.

Related topics
Create orders from the Business Portal

Submit a request for quote from the Business Portal

Browse products and submit a request for quote (RFQ) based on your budget and pricing preferences for those products directly through the Business Portal, eliminating the need to engage a sales agent.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Browse the product catalog, select products, and add them to the cart.

   a. Select **Product Catalog**.
   If you are a contact of an account with an active sales agreement, only the products listed in the sales agreement are displayed.

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b. Browse the products in the catalog.

c. If a product you want to order has specific configurations, select **Customize** and select the product options.

d. In the **Quantity** field, enter the quantity of the item you want to order.

e. Select **Add** to add products to the cart.

3. Review the cart contents.

a. Select the Cart icon .
The information listed in the following table is displayed.

My cart fields

Field	Description
Number	Unique cart ID.
State	State of the cart. For more information, see Request for quote (RFQ) states.
Created	Cart creation timestamp.
Qty	Product quantity.
Unit list price	Price of a single unit of product or service before adjustments.
Cumulative monthly price	Total cost of a product and its child items, if any, over a month.
Cumulative one time price	One-time price of the product and its child items, if any.

b. If you need to modify the quantity or customization for a product in the cart, select the Edit icon and modify the details.

c. If you want to delete an item, select the Delete icon .

4. Create the Request for quote.

a. Select **Request for quote**.
A request for quote record is created in the Draft state starting with the prefix RFQ.

b. On the Details form, fill in the fields.

Create request for quote - Details form

Field	Description
Quote required by	Date and time by which you require the quote from the seller.

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Field	Description
Overall budget	Allocated spend capacity for purchasing the selected products in US dollars (USD).
Short description	Note to the seller about your quote request.

c. Select **Continue**.

d. On the Selected products page, review the products that you've added to the quote request.

e. **Optional:** Specify a cumulative target price to propose the total amount you'd like to pay for each top-level product.

i. Select the Edit icon.

ii. In the **Cumulative target price** field, enter a value.

iii. Select **Update**.

5. Verify the details on the Review page.
6. Select **Submit**.

Result
The state of the quote request changes to Submitted.

The RFQ is submitted for further processing and you're redirected to the Request for quotes details page that displays the list of your submitted quote requests.

What to do next
View the quote details on the Business Portal after the sales agent reviews and generates a quote for your request. For more information, see View requests for quotes (RFQs) on the Business Portal.

Related topics
View quotes from the Business Portal

View requests for quotes (RFQs) on the Business Portal

Access, review, and track all your submitted quote requests directly from the Business Portal without having to contact a sales agent.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View request for quotes**.
3. Select an RFQ record to view its details.
4. View the pricing information, product offering, quantity ordered, and other details by selecting the **Request for quote lines** tab.
5. View the order instructions, billing, and shipping details by selecting the **Other information** tab.

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6. Check the status of your quote request in the **State** field in the RFQ header section. For more information, see Request for quote (RFQ) states.
7. If the agent has converted the RFQ to a quote, a **View quote** button is available for you to view the quote details.

Related topics

View quotes from the Business Portal

View quotes from the Business Portal

View quotes generated for your account directly from the Business Portal. The list includes quotes generated from requests for quotes (RFQs) submitted by you and quotes created offline by a sales agent via the CSM Configurable Workspace.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View quotes**. The following table provides the details displayed on the list view.

Quotes list view on the Business Portal

Column	Description
Number	Unique, system-generated quote ID starting with the prefix QT.
Short description	Brief description about your quote request.
Contact	Primary contact person for the account.
Quote date	Date on which the quote was created.
Expiration date	Date on which the validity of the quote ends.
Term (months)	Duration of the contract or subscription expressed in months.
State	Status of the quote. For more information, see Request for quote (RFQ) states.
Contract start date	Date when the contract becomes effective.
Contract end date	Date when the contract ends.
Total one-time price	Aggregate of all one-time charges across quote lines.
Total monthly price	Sum of all monthly recurring charges for the quote.
Total annual price	Sum of all annual recurring charges for the quote.
Total amount	Overall deal value, including all one-time and recurring charges.

3. Select a quote record number to view its details.

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Create quotes from request for quotes (RFQs)

Create quotes from RFQ requests submitted by your customers via the Business Portal so you can share the quote with them and expedite the quote-to-order process.

Before you begin

Role required: sn_sales_common.sales_agent

About this task

To create a quote from an RFQ, you must first assign an RFQ record to an agent and change its state to In review.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Request for Quotes** > **All**.
4. Select the RFQ record.
5. Assign the RFQ to an agent.
   a. Select the Search for Record icon of the **Assignment group** field and select an assignment group.
   b. Select the Search for Record icon of the **Assign to** field and select the agent's name.
6. In the **Status** field, select **In review** from the drop-down menu.
7. Select **Save**.
   The **Convert to quote** button becomes available.
8. Review the RFQ details such as address, pricing information, notes, and RFQ line item details.
9. After you've verified the information, select **Convert to quote** to generate a quote.
   A quote record is created in the Draft state starting with the prefix QT. A success message containing a link to the quote ID is displayed. Your customers can view the quote from the RFQ record via the Business Portal.
10. **Optional:** View the generated quote in one of the following ways:
    - Select **View quote**.
    - Select the quote ID hyperlink from the success message that's displayed.

    The latest revision of the quote is displayed.

What to do next

View quotes, generate PDFs share to share quotes with customers for acceptance, create sales agreements, or convert quotes to orders to continue the sales process. For more information, see Using Quote Management.

Related topics

View requests for quotes (RFQs) on the Business Portal

Request updates for one or more orders

Request changes to the expected order fulfillment date and shipping location for one or more orders or to draw attention to an issue by creating an order case from the Business Portal.

Before you begin

Role required: sn_customerservice.customer

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Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.

   a. On the form, fill in the fields.

   Create New Order Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Scope of request	This option should be set to **Order header details, multiple orders** to create a case for one or more orders.
Priority	The available assigned priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

   b. Select **Next**.
   An order case is created with its State as Draft.

4. Select the orders that you want to add to the order case.

   a. On the Add and specify changes form on the order case page, select **Add**.

   b. On the Add orders to case window, select one or more orders and select **Add**.
   Order case lines are created corresponding to the order records.

   c. Select the order case lines you want to edit and select **Edit**.

   Select a single order case line to make specific changes to a specific order. Select multiple order case lines to make the same changes for all orders.

   Note:

   If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit**, and select **Delete** to remove it from the list of items to be modified.

   d. Modify any or all of the values in the Edit item dialog box.

Field	Description
Requested expected date	The date you want your order to be fulfilled.

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Field	Description
Requested shipping location	The location to which you want your order to be shipped.

e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the order case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The order case is created with the order case lines corresponding to the orders you updated, and the state of the order case changes to New.

Request updates for items in a single order

Request changes for the expected order fulfillment date, shipping location, or quantity for specific items in an order by creating an order case from the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.

a. On the form, fill in the fields.

Create New Order Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Scope of request	This option should be set to **Specific order lines, single order** to create a case for specific order line items in a single order.
Order number	The order for which you want to create the case.
Priority	The available assigned priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

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b. Select **Next**.
An order case is created with its State as Draft.

4. Select specific order items that you want to add to the order case.

a. Select **Add** on the Add and specify changes form on the order case page.

b. On the Add orders line items to case window, select the order items for which you want to create a case and select **Add**.
Order case lines are created corresponding to the order items you selected.

c. Select the order case lines you want to edit and select **Edit**.

If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit** and select **Delete** to remove it from the list of items to be modified.

d. Modify one or more of the values on the Edit item dialog box.

Field	Description
Requested expected date	The date you want your order to be fulfilled.
Requested shipping location	The location to which you want your order to be shipped.
Requested quantity	The quantity of the item you want to purchase.

e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the order case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The order case is created with the order case line items corresponding to the order line items you updated, and the state of the order case changes to New.

View order case details

View the list of order cases and their state from the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My Order Cases** from the Categories menu to view order cases.
4. Select a case to view its state and other details.

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Order case states

State	Description
New	A new order case that is submitted.
Draft	The order case that has not yet been submitted. Order case lines in the Draft state can still be modified.
Work in Progress	The order case is being handled by the sales agent.

View invoices on the Business Portal

Access your invoices and invoice line details from the Business Portal to track billing information and identify discrepancies.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View invoices**.
   The following table provides the details displayed on the list view.

Invoices list view on the Business Portal

Column	Description
Number	Unique, system-generated invoice ID starting with the prefix ARINV.
Short description	Brief description about your invoice.
Invoice date	Date on which the invoice was created.
Due date	Date on which the invoice is due for payment.
Account	Name of the customer or business entity in the business-to-business (B2B) model.
Customer contact	Primary contact for your account.
Billing location	The billing address that appears on the original invoice.
Shipping to location	Reference to the location to which the order on the invoice is shipped.

3. Select an invoice record number to view its details.

Related topics

Dispute a specific line item on an invoice against your account using the Business Portal

Dispute multiple invoices against your account using the Business Portal

View invoice case details in the Business Portal

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Dispute a specific line item on an invoice against your account using the Business Portal

Challenge discrepancies in invoiced quantity, part number, billing location, or shipping location for a single invoice line item via the Business Portal using the playbook experience.

Before you begin

Role required: sn_customerservice.customer

About this task

This task describes how to create an invoice case using the playbook experience in the Business Portal. The playbook experience enables you to dispute various invoice discrepancies depending on the scope you select, including quantity, part number, billing location, and shipping location issues.

Creating invoice cases using the Now Assist panel limits disputes to quantity issues only. For more information, see Dispute invoice issues using Now Assist Virtual Assistant.

Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **Submit a request** > **Submit a case** > **Submit an invoice case**.
3. Create a new invoice case.
   a. On the form, fill in the fields.

Create New Invoice Case form

Field	Description
Account	The account for which you're creating the case.
Request source	This option should be set to **Specific invoice lines, single invoice** to dispute one or more invoice lines from a single invoice.
Contact	The name of the customer contact for this case.
Invoice	The invoice you want to dispute.
Priority	The urgency level assigned to the invoice case. The available priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

   b. Review the details before proceeding to the next step.
   All fields become read-only after once you select **Next** and go to the Add and specify changes page.

   c. Select **Next**.
   An invoice case is created with its State as Draft.

4. Select the invoice lines that you want to add to the invoice case.

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a. On the Add and specify changes form on the Create invoice case page, select **Add**.

b. On the Add invoice line item to case window, select one or more invoice lines and select **Add**.
For a description of the Add invoice line items to case list view, see Invoice line item details on Business Portal.
Invoice case lines are created corresponding to the invoice records.

c. Select the invoice case lines that you want to edit and select **Edit**.

Select a single invoice case line to make specific changes to a specific invoice. Select multiple invoice case lines to make the same changes for all invoices.

Note:

If you no longer want to change an invoice case line item, select it, select the drop-down button next to **Edit**, and select **Delete** to remove it from the list of items to be modified.

d. Modify any or all of the values in the Edit item dialog box.

Field	Description
Disputed quantity	The quantity you believe should have been invoiced instead of the amount shown in Invoiced quantity.
Disputed part number	The correct part number if the Invoiced part number is incorrect.
Disputed billing location	The correct billing location if the Invoiced billing location is incorrect.
Disputed shipping location	The correct shipping location if the Invoiced shipping location is incorrect.

e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the invoice case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The invoice case is created with the invoice case lines corresponding to the invoices you updated, and the state of the invoice case changes to New.

What to do next
Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

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Related topics

Invoice case details on the Business Portal

Dispute multiple invoices against your account using the Business Portal

Challenge discrepancies in billing or shipping locations that affect multiple invoices via the Business Portal using the playbook experience.

Before you begin

Role required: sn_customerservice.customer

About this task

This task describes how to create an invoice case using the playbook experience in the Business Portal. The playbook experience enables you to dispute various invoice discrepancies depending on the scope you select. For multiple invoices, you can report billing location and shipping location issues.

Creating invoice cases using the Now Assist panel limits disputes to quantity issues only. For more information, see Dispute invoice issues using Now Assist Virtual Assistant.

Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **Submit a request** > **Submit a case** > **Submit an invoice case**.
3. Create an invoice case.
   a. On the form, fill in the fields.

Create New Invoice Case form

Field	Description
Account	The account for which you're creating the case.
Request source	This option should be set to **Invoice header details, multiple invoices** to dispute multiple invoices against your account.
Contact	The name of the customer contact for this case.
Priority	The urgency level assigned to the invoice case. The available priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

   b. Select **Next**.
   An invoice case is created with its state as Draft.
4. Select the invoices that you want to add to the invoice case.

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a. Select **Add** on the Add and specify changes form on the invoice case page.

b. On the Add invoices to case window, select the invoices for which you want to create a case and select **Add**.
For a description of the Add invoices to case list view, see Add invoices to case list.
Invoice case lines are created corresponding to the invoices that you selected.

c. Select the invoice case lines that you want to edit and select **Edit**.

If you no longer want to change an invoice case line item, select it, select the drop-down button next to **Edit** and select **Delete** to remove it from the list of items to be modified.

d. Modify the billing or shipping location, or both, on the Edit item dialog box.

Field	Description
Disputed billing location	The correct billing location if the Invoiced billing location is incorrect.
Disputed shipping location	The correct shipping location if the Invoiced shipping location is incorrect.

e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the invoice case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The invoice case is created with the invoice case line items corresponding to the invoices you updated, and the state of the invoice case changes to New.

What to do next
Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

Related topics
Invoice case details on the Business Portal

Resume an invoice case in Business Portal

Pick up an invoice case where you left off by resuming draft invoice cases from Business Portal.

Before you begin
Role required: sn_customerservice.customer

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Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. From the Categories list, select **My Invoice Cases**.
4. Select the invoice case to resume.

   Note: Invoice cases must be in the Draft state to edit and submit.

5. Select the **Process** tab.
6. Submit your invoice case using the invoice creation playbook.
   - Dispute a specific line item on an invoice against your account using the Business Portal
   - Dispute multiple invoices against your account using the Business Portal

Result
The invoice case is created and its state changes to **New**.

What to do next
Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

View invoice case details in the Business Portal

View invoice case details, status, activity history, and attachments from the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My invoice cases** from the Categories menu to view invoice cases.
4. Select a case to view its state and other details.

   For a description of the Invoice case lines list view, see Invoice case details on the Business Portal.

   For more information about invoice states, see Invoice case states on Business Portal.

What to do next
Communicate and share supporting documents for an invoice case from Business Portal

Communicate and share supporting documents for an invoice case from Business Portal

Stay engaged on your invoice dispute case by communicating with a billing specialist and uploading supporting documents, such as proof of delivery or receipts, directly from the Business Portal to help expedite resolution.

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Before you begin
Role required: sn_customerservice.customer

About this task
After an invoice case is created either through the Now Assist Virtual Assistant or manually via the playbook experience, you can use the invoice case record in the Business Portal to stay engaged throughout the resolution process. View case history or send messages to the billing specialist handling your case and respond to any requests they raise using the Activity tab. Upload supporting documents, such as proof of delivery, goods receipt notes, or any other evidence relevant to your dispute, using the Attachments tab.

You can use these tabs proactively without waiting to be contacted, for example, to share additional context or upload documents immediately after your case is created.

Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My invoice cases** from the Categories menu to view invoice cases.
4. Select a case for which you want to provide information.
   For a description of the field values, see Invoice case details on the Business Portal.
5. **Optional:** View the case history and add comments from the **Activity** tab.
6. **Optional:** Upload supporting documents using the **Attachments** tab.

   You can drag files or use the Add attachments icon to browse and upload files from your system.

Extending Order Management with ServiceNow applications and integrations

You can use various ServiceNow store applications and integrations to further extend the capabilities of Order Management.

Applications and integrations for extending Order Management

Application or integration	Description
Order Management for providers with Service Exchange	Enable service providers and their customers to use Order Management to place and fulfill complex orders, including certain types of MACD orders, over Service Exchange.
Order Management integration with Field Service Management	Create field service work order requests automatically with Order Management, and track them in Field Service Management.
Order Management integration with Service Portfolio Management	Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Service Portfolio Management.

Order Management for providers with Service Exchange

The Service Exchange Order Management for Providers application enables service providers to use Order Management to create product offerings and service specifications that Service

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Exchange consumers can order from service catalogs in their ServiceNow instances. Order agents and fulfillers can then complete the orders and requests on the provider instance.

Overview of Order Management for providers with Service Exchange

The Service Exchange Order Management for Providers application supports the sales order and fulfillment process over Service Exchange. Published product offers and service specifications generate remote record producers (RRPs). These remote record producers create the remote catalog items that your consumers can order from the Service Portal on their instance.

The workflow for generating these remote record producers involves these basic steps:

- Product catalog admin or manager creates the product offerings and service specifications on a provider instance, specifying the distribution channel as Service Exchange and indicating that product offers are sellable items. When the offerings and service specifications are published, remote record producers (RRPs) are generated automatically to create the remote catalog items.
- Service Exchange admin associates consumer criteria to the remote record producers.
- Service Exchange admin reviews and activates the remote record producers on the provider instance. These remote record producers publish the remote catalog items to the service catalog on a consumer instance.
- Consumers request services using the remote catalog items on the service portal in their consumer instance. The requests automatically create a provider task for fulfilling the requests on the provider instance.
- On the provider instance, the order and order lines are created for order managers to approve and agents to fulfill.
- On the consumer instance, consumers receive updates on the order state and worknote comments from order agents.

Features

- Support simple and bundled product offerings with composite specifications.
- Support service specifications.
- Support quantity orders for order line items and selection of optional products and services.
- Synchronize product and service inventory records, which can be viewed by consumers in their instance.
- Allow consumers to:
  - Suspend, resume, and disconnect orders
  - Cancel an order from the consumer instance if the order hasn't reached the point of no return (PONR).

Benefits

- Automates the generation of remote record producers that publish offerings and service specifications to a remote catalog.
- Enables faster order fulfillment on the provider instance and improves order accuracy.
- Facilitates communication by updating comments between the provider and customer instance as well as sharing frequent order status updates.

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Order state mapping

During order processing, note that order status states correspond to certain provider task states.

Order and provider task states

Order state	Provider task state
Draft	Received
Submitted	Received
Enrichment in progress	Received
Enrichment on hold	Received
New	Received
Acknowledged	Work in Progress
Scheduled	Work in Progress
Rejected	Awaiting info
In progress	Work in progress
Revision in progress	Received
Awaiting information	Awaiting info
On hold	Awaiting info
Assessing cancellation	Cancelled
Cancellation in progress	Work in Progress
Cancelled	Cancelled
Completed	Closed

Next step

As a Service Exchange admin, review the setup tasks in Configuring Service Exchange Order Management for Providers.

Configuring Service Exchange Order Management for Providers

Configure the Service Exchange Order Management for Providers application, which enables providers to use Order Management to create and fulfill product orders over Service Exchange. Providers publish the product offerings and service specifications as remote catalog items so that consumers can order from the Service Catalog on their own instance.

Configuration overview

Follow these tasks to set up the Service Exchange Order Management for Providers application, which uses Order Management to create product offerings and service specification and publish them ServiceNow in your provider instance as remote record producers. Service Exchange admins can then activate these remote record producers to make the products and services available from the Service Catalog on consumer instances.

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Setting up the Service Exchange Order Management for Providers application

Configuration step	Description	Role
Install Service Exchange for Providers	Install the Service Exchange for Providers application from the ServiceNow Store. For more information on configuring this application, see Configure Service Exchange for Providers.	Admin
Install Service Exchange for Consumers	Install the Service Exchange for Consumers application from theServiceNow Store. For details on configuring this application, see Configure Service Exchange for Consumers.	Admin
Install Service Exchange Order Management for Providers	Install the Service Exchange Order Management for Providers application from the ServiceNow Store.	Admin
Create a product offering for a remote catalog item	In the provider instance, create the product offerings to be added as remote catalog item to the service catalog for your consumers.	Product catalog admin or manager
Create a service specification for a remote catalog item	In the provider instance, create the service specification for a service to be added as a remote catalog item to the service catalog for your consumers.	Product catalog admin or manager
Associate consumer criteria to a remote record producer	In the provider instance, review the remote record producer and associate the customer criteria that entitles the catalog item for eligible Service Bridge consumers.	Service Exchange provider admin
Associate consumer criteria to the remote record producer for managing inventory.	Review the remote record producer for managing inventory and associate the customer criteria.	
Activate the remote record producer	In the consumer instance, activate entitlements for the remote record producers.	Service Exchange consumer admin
Retire a remote catalog item	Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer and removes the	Product catalog admin or manager

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Setting up the Service Exchange Order Management for Providers application (continued)

Configuration step	Description	Role
	item from the service catalog on the consumer instance.	

Install Service Exchange Order Management for Providers

You can install the Service Exchange Order Management for Providers application (sn_sb_pro) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they're not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the Service Exchange Order Management for Providers application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Service Exchange Order Management for Providers:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Find components installed with an application . .

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Exchange Order Management for Providers application ((sn_sb_pro)) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Create a product offering for a remote catalog item

Create a product offering in a Service Exchange provider instance. When you publish the product offering, a remote record producer is created for the remote catalog item.

Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

About this task

When you're creating the product offering, use the **Distribution channel** field to set the channel to Service Exchange.

Procedure

1. In the CSM Configurable Workspace on the provider instance, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings**.
3. Select **New**.
   On the Details tab, fill in the fields.

Create New Product Offering form

Field	Description
Number	System-assigned number for the product offering.
Name	Alternative name for the product offering to help differentiate it from similar product names.
Display name	Name of the product offering that is added.
Offering type	Offering entity. Select one of the following types: ○ Product: A product entity that an agent can add to an order using the CSM Configurable Workspace. ○ Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent.
Offering sub-type	Type of entitlement: ○ Warranty ○ Extended warranty ○ License ○ Subscription
Sellable	Option indicating that the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item. **Note:** If you're using the Service Exchange Order Management for Providers application, select this option for a product offering. Only sellable product offers create remote catalog items. Offers with bundled configurations are not supported.

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Field	Description
Description	Short description of the product offering. The description helps the order agent understand the product when placing an order.
Start date	Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select **OK**.
End date	Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon to choose the end date and time, then select **OK**.
State	State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as the channel.
Owner	Person responsible for the product offering.
Code	System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes.
Product specification	Product specification to associate with the product offering. It provides a functional view of a product offering that drives order fulfillment. **Note:** Only published specifications appear.
Product model	Name of the product model.
Copy child specification characteristics	Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification.
Pricing method	Pricing method for the product: ○ One-time: A single fee for the product. ○ Recurring: A fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee.

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Field	Description
	Note: Pricing information is not visible on the consumer instance. If a default or other price list is configured for an offer, the price is calculated and updated only on the provider instance.
Periodicity	Recurring pricing: Monthly or annually.
Monthly recurring charges	Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices.
Non recurring charges	Charges that are applied once. Supported for backward compatibility. Use price lists to define prices.
Create contract	Option that indicates to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts.
Contract term	Length of the contract: ○ 12 months ○ 24 months ○ 36 months ○ 48 months ○ 60 months
Version	Version number that is assigned to this product offering version.
Initial version	Name of the product offering at the time you created the initial version.
Previous version	Name of the previous version of the product offering, For example: ○ When you create the initial version of the product offering (for example, version 1), this field is empty. ○ When you create a version (version 2) with a slightly different name, the name of the product offering at its initial creation appears here. ○ When you create a subsequent version (version 3), the name of the product offering as it was at version 2 appears here. You can't change this field.

4. Select **Save**.
5. Add additional characteristics to your product offering, if needed.
6. **Optional:** Add product visuals to your product offering.

   a. In the Product Visuals tab, select **New**.

   b. Enter a name for the visual.

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c. To select an image file to upload, select **Click to add**.

d. To set your image as the primary image for the product, select **Set Primary**

Note: You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.

7. When you finish creating the product offering version, select one of the following actions.

Action	Description
Publish	Publish the draft product offering so that you can use it in a product catalog: ○ When you publish it, its state changes from Draft to Published. ○ After you publish a product offering, you can't change or delete it, unless you create a version for it.
Update	Update the product offering with the new data that you added, but don't publish it for use in a product catalog.
Copy	Copy the data in this product offering so that you can create a product offering from it. For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Of fering v3, but with a separate version track. When you use the Copy function, it creates a base version product offering and sets the val ues in these fields: ○ **Version**: 1 (base version) ○ **Initial Version**: Premium SD-WAN Offering v3 ○ **Previous Version**: blank

What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

Create a service specification for a remote catalog item

Create a service specification on a Service Exchange provider instance. When you publish the service specification, a remote record producer creates the remote catalog item for the service specification.

Before you begin

Define the characteristics, characteristic options, and specification categories before you create a service specification.

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

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About this task

When you create a service specification for a service request, use the **Distribution channel** field to set the channel to Service Exchange. When the service specification is published, a remote record producer is created for the specification.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** > **Service specifications** and select **New**.
   On the Details tab, fill in the form.

Service Specification

Field	Description
Number	Auto-generated ID for the service specification.
Name	Name of the service specification.
Version	Version number that is assigned to a specification: ○ When you create the initial version, 1 appears in this field, and can't be changed. ○ When you create subsequent versions of the specification, the next incremental number appears in this field after you select **Create New Version**. For example, 4 appears in this field if 3 was the previous version number.
Display name	Display name that appears for the specification when this version of the specification is in effect. ○ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ○ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: ▪ SD-WAN Edge Device is the name of the specification. ▪ Version 2 is the current version of the specification.
Category	Specification category that the service specification belongs to.

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Field	Description
	○ If the selected category that belongs to 5G services doesn't have any matching slice templates, the system checks for existing templates. ○ If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification.
Type	Type of service specification: **Customer Facing** Customers can create a ticket or a case for the service. When you select this type, the **Distribution channel** field is displayed to specify how the service is provided, for example web. **Note:** Only Customer Facing Service specifications are eligible for remote catalog creation. **Resource Facing** Services are required for a resource to function properly. **Not Applicable** Service specification is not customer facing or resource facing.
Sub type	Sub-type of the specification. Choose **Slice** to define 5G network service specifications. **Note:** ○ When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table. ○ If you select None as the sub type, you can manually specify a template.
Start date	Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It's informational only and isn't used for actual processing.
End date	Date up until which the specification is valid. Use this field when you create a version to indicate when it's no longer in effect. It is

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Field	Description
	informational only and isn't used for actual processing.
Template	Templates that you've defined if you're using 5G services. **Note:** When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics as per the new template that you've selected.
Description	Description for the service specification.
State	State of the service specification. **Draft** Unpublished draft service specification that is assigned when you first create the specification record. **Published** Published service specification that is assigned when you formally publish it for use in a product offering. **Retired** Service specification that is retired and can no longer be used to create another specification version. **Archived** Service specification is no longer used in the ordering or fulfillment process.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as distribution channel.
External code	Service code of the specification.
Line	Service line of the specification.

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Field	Description
Cost to company	Cost to the company for this service specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the service specification is a parent specification composed of multiple child specifications.
Installation required	Option indicating that someone must install the service on site.
Location specific	Option indicating that this service specification requires the location details for fulfillment and installation.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ○ When you create the initial version of the specification (for example, version 1), this field is empty. ○ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ○ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

3. Select **Save** and then **Publish**.
   A remote record producer creates the remote catalog item for the specification.

What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

Associate consumer criteria to a remote record producer

In the provider instance, associate the appropriate consumer criteria to the remote record producer created for a remote catalog item. The consumer criteria determines which consumers are entitled to the catalog item. Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

Before you begin

By default remote record producers are available to all consumers. If you have specific criteria for certain users, define the consumer criteria for Service Exchange users. For more information, see Creating entitlements in Service Exchange for Providers.

Role required: sn_sb.admin or admin

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Procedure

1. In your provider instance, navigate to **All** > **Service Exchange Provider** > **Administration** > **Remote Catalog Items**.
2. Select the remote record producer for the product offering or service specification that your product catalog admin or manager created.
   Review the record to validate that it was created as expected.

   Note: A remote record producer, Manage Inventory, is created automatically when a product offering or service specification for a remote catalog item is published. You must associate the consumer criteria to this remote record producer so that your consumers can manage the product or service inventory from the service catalog on a consumer instance.

3. Navigate to the **Consumer Criterias** tab.
4. In the record for the Active criteria, under the **Remote consumer criteria** column, select and save the criteria to be associated to the catalog item.
5. Select **Publish**.
   Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

What to do next

Activate the entitlements for the remote record producer.

Activate the remote record producer

Activate the remote record producer in a Service Exchange consumer instance.

Before you begin

Role required: sn_sb.admin or admin

Procedure

1. In the consumer instance, navigate to **All** > **Service Exchange Consumer** > **Provider Connections**.
2. Select the Number link to navigate to the Provider connection record.
3. In the Remote record producers tab (related list), select the remote record producer to be activated.
4. In the Remote record producer page, select **Activate**.
   The product offering or service specification is now available in the Service Catalog in remote record producer format.

Retire a remote catalog item

Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer. When the remote record producer is retired, the remote catalog item is removed automatically from the service catalog on the consumer instance.

Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

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Procedure

1. In the CSM Configurable Workspace on the provider instance, select the **List** view.
2. Navigate to the published product offering or service specification to be retired.
   - To retire a product offering, navigate to **Offerings** > **Product Offerings** and select the product offering to be retired.
   - To retire a service specification, navigate to **Specifications** > **Service specifications** and select the service specification to be retired.
3. Select **Retire**.
   The product offering or service specification is set to the Retired state. The state of the associated record producer for the item changes from Published to Retired, and the product catalog item is deleted automatically from the service catalog.

Creating orders from Service Portal catalog items

When consumers use the Service Portal on their instance, they can place orders for catalog items that have bundled product specifications. They can also cancel an order, and review and manage product and service inventory.

Orders for bundled products

Service Exchange remote catalog items can include bundled products that have composite components with different characteristic options that can be selected, including quantity.

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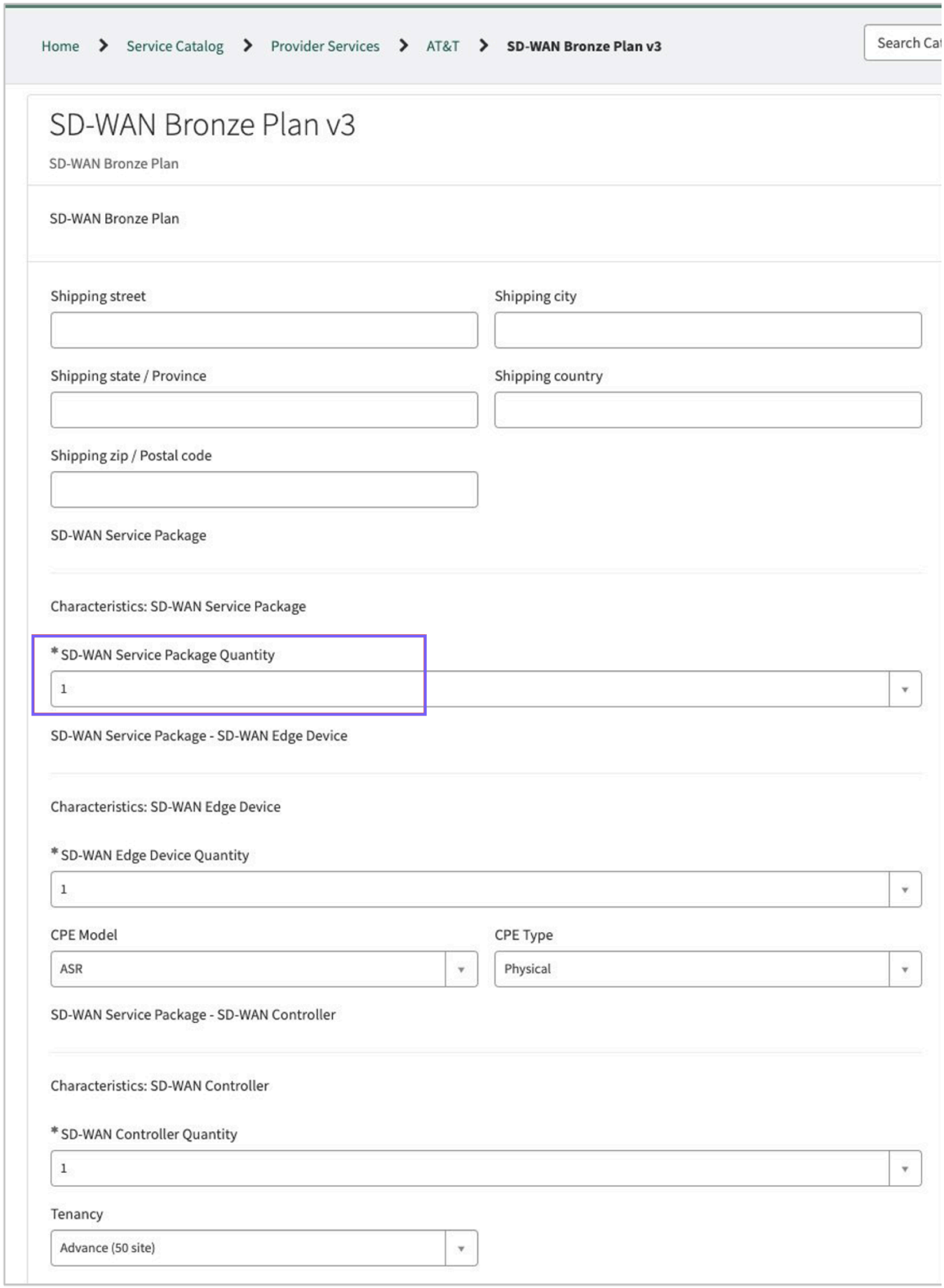
Example bundled product in service catalog



Cancelling an order

Consumers can cancel an order, if the order hasn't reached the point of no return (PONR). If the PONR has been reached, the consumer receives a status message indicating that the order can't be cancelled.

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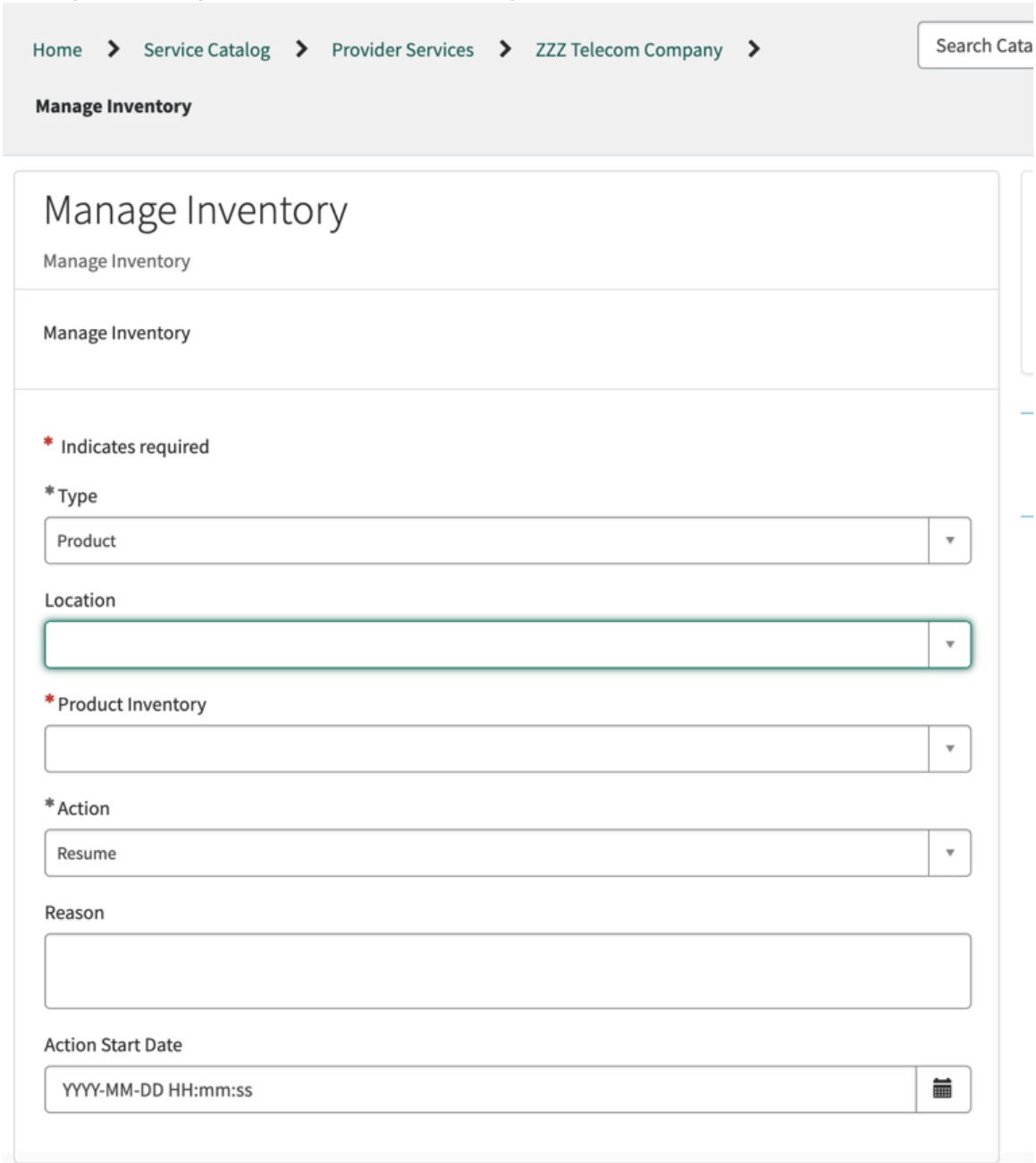
Managing product or service inventory

Consumers can view and manage the product or service inventory for products and services. They can use the **Location** field to filter the **Inventory** view by particular location. Consumers can also perform disconnect, suspend, or resume actions.

Manage inventory example in service catalog



Order Management integration with Field Service Management

Provides an integration between the Order Management and the Field Service Management applications. This integration is available to all ServiceNow customers with the Order Management (com.sn_ind_tmt_orm) plugin, Field Service Management Configurable Workspace (com.snc.uib.fsm_agent_workspace) plugin, and Field Service Management (com.snc.work_management) plugin.

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Order Management-FSM integration overview

This integration enables automatic and manual creation of work orders from the Order Management application to the Field Service Management application. This integration ensures collaboration between the Order Management and the Field Service Management applications to support the end-to-end order fulfillment process. Work orders are created for an order that requires field service work by field agents. The order fulfillment agents and managers can more efficiently manage order tasks and work order dependencies.

Key features

- Automation of work order creation, updates, and tracking.
- UI-based manual triggering of work order to Field Service Management. Schedule field service work and communicate work note updates to field service dispatchers and agents.
- Synchronization of information between Order Management and Field Service Management for status, work note, customer details, and other updates.
- Tracking and managing the end-to-end workflow of orders and associated work orders in the fulfillment process.

Configuring automatic creation of work orders

You can enable automatic creation of work orders from Order Management for Telecommunications, Media, and Technology to Field Service Management. Work orders are created for domain orders and order tasks. To configure the automatic creation of work orders, configure the decision tables in the decision builder.

Customer orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table.

After an order is approved by the manager, a work order is automatically created if the conditions that are defined in the decision builder are met. If required, the manager can also select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Configure work order creation for a domain order

Add a condition in the decision tree for automatic creation of work orders for domain order. The conditions are specified in the Work Order Policy for Domain Order decision table.

Before you begin

Role required: admin

About this task

Customer Orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For conditions not defined in the decision table, the manager can select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.

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2. Select the **Work Order Policy for Domain Order** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select an action from the Domain Order Action list.
5. Select a template for the condition in the **WO Template** column.
6. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision table is met, a work order is automatically created for a domain order. For more information on decision tables, see Use decision tables.

Configure work order creation for order task

Add a condition in the decision tree for automatic creation of work orders for order tasks. The conditions are specified in the Work Order Policy for Order Task decision table.

Before you begin

Role required: administrator

About this task

For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table. After an order is approved by the manager, a work order is automatically created if the conditions are met that are defined in the decision builder.

Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.
2. Select the **Work Order Policy for Order Task** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select **Add** for Domain Order Action.
5. Select a Request type for the order task in the **Request Type** column.
6. Select a template for the service package in the **WO Template** column.
7. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision tree is met, a work order is automatically created for an order task. For information, see Decision Builder user interface.

Synchronization of information between Order Management and Field Service Management - Workflow scenario

The integration between Order Management and Field Service Management provides support for the end-to-end order fulfillment process. The following scenario shows the seamless synchronization of data, customer information, status, and other updates between Order Management and Field Service Management.

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Scenario

After the order fulfillment manager approves the order in Order Management, work orders are automatically created in Field Service Management for conditions that are specified in the decision tree. As the field service agents work on those work orders, the order fulfillment agent can see the updates in the Work Notes section of that Domain Order. An agent cannot close a domain order unless all the work orders associated with it are closed. This workflow shows synchronization of information between Order Management and Field Service Management.

1. An order fulfillment agent creates a new customer order in the Order Management workspace.
2. The agent then selects the location for which the order needs to be placed. For multiple locations, multiple order line items are created.
3. The agent then reviews and places the order.
4. The order fulfillment manager approves the order. The order line items have domain orders as part of the order fulfillment flow. According to the configurations in the decision table, work orders are automatically created in Field Service Management.
5. The agent can view the work orders created for the domain orders in the **Details** tab. In the Activity section, the agent tracks all the updates for the work orders in the work notes.
   - When the status of a work order changes in Field Service Management, the details are displayed in the work notes of the Order Management workspace.
   - If a work order is canceled, the work order status is displayed in the Order Management work notes section.
   - In case of inflight changes, the work order is automatically updated. The current status and the updated information are displayed in the work notes section.
6. The agent can edit an order line item if required. If the agent selects the **PONR** (Point of No Return) option, no changes can be made to the order line item in the workflow anymore.
7. After all the work orders are closed, the order fulfillment manager can review the all the work orders and close the domain order.

> **Note:** The agent cannot close a domain order unless all the work orders associated with that domain order are closed.

Order Management integration with Strategic Portfolio Management

The Order Management application provides an integration with the ServiceNow® Strategic Portfolio Management (SPM) application enables project oversight of complex order fulfillment tasks.

Use this integration to handle order line items, planned order tasks as projects, create project at the order level, create program, reuse program, create site project and reuse site project in the SPM.

Features

- Automates the creation of SPM programs, site projects, and projects based on program and project oversight rules, enabling project managers to track order fulfillment activities within a project in SPM.
- Enable fulfillment agents, managers, and project managers to view related lists that show the relationship between an order line item and project, site locations and site projects, domain order and project task, and order task and project task.

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- Supports tracking and synchronization of one or more order tasks.
- Supports staggered/in-flight orders for new tasks created as part of staggered decomposition or in-flight changes. Uses predefined planned order tasks that enable synchronization between order fulfillment and project tasks.
- Closes project tasks automatically when child tasks and associated order tasks or domain orders are completed or canceled.
- Supports an agent to create project at the order level to manage large projects.
- Maps the project specification tasks to the order tasks.
- Supports creation of a single program at customer order level, single site projects at site level to manage site workflow across different products on that site and sub projects for top line items with the ability to reuse a single program across multiple customer orders.
- Automates the creation of site projects for different location or product combination. Define a mapping to auto create program, site project and sub projects for customer order, site and product.
- Synchronizes status and updates between project tasks and Order Management tasks, giving project managers real-time visibility through state changes, notes, and comments.

Benefits

- Gives project managers end-to-end project oversight of complicated orders, such as long-running orders that require delivery to a specific customer account with multiple locations.
- Manages risks by identifying issues that affect project dependencies and timely order fulfillment.
- Eliminates manual tracking of order status between SPM and Order Management applications. Reduces inefficient communication between project managers, fulfillment agents and managers, and other project stakeholders.
- Unifying orders by creating site projects as a parent projects for projects created for the same location.
- Manage large projects at an order level and not at individual line items.
- Supports site projects that can be across different products on a customer site and sub-projects for each product.
- Enables to see the details of project task and status for domain orders and order tasks.
- Configurable mapping to auto-generate programs, site projects, and sub-projects from customer orders, sites, and products.

Strategic Portfolio Management integration workflow

The workflow shows how the Strategic Portfolio Management integration works.

How the SPM integration works

The Order Management integration with Strategic Portfolio Management uses the Project Portfolio Management (PPM) standard application in SPM to track fulfillment tasks as projects in your organization. This integration also works with the Customer Project Management application if you want to track customer order fulfillment tasks as customer projects automatically.

Configuration

Admins set up the SPM integration by configuring these items:

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- Project templates: Create the PPM project and site project templates that are used to generate the SPM projects automatically for orders requiring project oversight. Project templates also define the planned tasks for order delivery.
- Order Management project oversight conditions and rules: Set the conditions and decision rules that determine the orders that qualify for project oversight and the project templates used to create those projects. You use different Project Management Oversight decision tables to specify the conditions and rules for order lines, site locations, domain orders, and order tasks and the appropriate project template to be used.
- Field mapping in CSM table maps: Associate Order Management fields to SPM project fields by configuring the field mapping in the CSM table maps.
- Property for automatic closure of project tasks: Control the automatic closure of project tasks when associated child tasks are completed by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.
- Property for program and site project reuse: Use the system property *sn_ind_tmt_orm.reuse_existing_program_and_project_enabled* to reuse the program and site project for the following conditions:
  - If the program is created for the same account.
  - If the site project is already created for the same location.

  Set the property to true to reuse the program and site project.

  If the property is set to false, a new program and site project will be created for the new order.

SPM integration flow

After an order line is created and approved, Order Management performs the following processing steps.

- Project oversight determination: Qualifies the order line for project oversight.
  - Checks that the order line is valid and that the PPM Standard application is installed.
  - Reviews the project oversight conditions and decision rules for order lines.
  - If the order line matches the conditions, automatically creates the project and project tasks using the specified project template.

  Note: If multiple order lines are eligible for oversight, the system creates multiple projects.

- One-time synchronization: Synchronizes the order line with the project, establishing the relationship between the order line and the project.
- Site project oversight determination: Qualifies the site location for site project oversight.
  - Checks that at least one order line project should be created.
  - Reviews the site project oversight conditions and decision rules for site location.
  - If the offering and site location matches the conditions, automatically creates the site project and site project tasks using the specified site project template.

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  - Site projects are created on *pm_project table*.
  - Establishing the relationship between the site project and site location in the relationship table.

  To configure site project oversight for product offering, see Configure project oversight for Product offering.
- Project task oversight determination: After Order Management decomposes the order line item into domain orders and order tasks, it does the following:
  - Checks the project oversight conditions for domain orders. If a domain order meets the project oversight conditions, create the associated project and planned tasks using the project template task specified.
  - Checks the project oversight conditions for order tasks. If order tasks meet the project oversight conditions, create the associated project and planned tasks using the project template task specified.
  - Links domain orders and order tasks back to the parent project, synchronizing attributes from the domain orders and order tasks to the project tasks.
- Order task state changes: As order task states change in Order Management, synchronizes the state and status with corresponding project tasks in SPM so that project managers and other project stakeholders can view the changes in real time.
- Updates to project notes and comments: Use the task relationship table **task_rel_task** to synchronize between the order task and project task. Automatically updates project notes and project task notes when fulfillment managers or agents post work notes and comments in order line items, domain orders, and order tasks.
- Synchronization: Use the **csm_table_map** table to synchronize the work note fields between order task, domain order, and project task. It is possible to configure synchronization for fields such as name, work notes, description, and others as required.
- Project task closure: Automatically closes project tasks for order tasks, including child tasks, that have been completed in Order Management.

Plugins activated for the Strategic Portfolio Management (SPM) integration

The Strategic Portfolio Management (SPM) integration is included with the Order Management application.

The integration requires the following plugins, which are activated by users with the admin role:

Strategic Portfolio Management plugins

Plugin	Description
PPM Standard plugin (com.snc.financial_planning_pmo)	Activates the Project Portfolio Management Standard application, which installs Financial Management and the Project Portfolio Suite. The suite includes various applications for handling projects in your organization, such as Program Management, Project Management, and Demand Management. For more information on the Project Portfolio Suite, see Project Portfolio Suite with Financials.

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Strategic Portfolio Management plugins (continued)

Plugin	Description
Customer Project Management plugin(com.snc.csm_ppm)	Activates the Customer Project Management integration with the PPM Standard application. This integration enables customer project managers to create and manage complex projects with multiple tasks. This integration also provides end users with visibility into those projects. For details on Customer Project Management, see Integrating with Customer Project Management.

Access controls in the SPM integration

The SPM integration supports certain access controls for users with the following roles.

SPM integration access controls

Role	Access controls in SPM integration	Contains roles
• Order fulfillment agent [sn_ind_tmt_orm.order-fulfillment_agent] • Service order agent [sn_ind_tmt_orm.service_order_agent]	Order fulfillment agents have read access to product orders, product order tasks, service orders, and resource orders. Service order agents have read access to service order requests, service orders, resource orders, and related fulfillment tasks. Agents have access to the following project information: • Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table. • Read access to the Order Line Item and Order Task related lists in PPM. • Read access to the Order task to Project Task related list in Order Management.	• it_project_user • sn_customerservice.projectmanager (if using Customer Project Management)
• Order fulfillment manager [sn_ind_tmt_orm.order_fulfillment_manager] • Service order manager [sn_ind_tmt_orm.service_order_manager]	Order fulfillment managers receive orders, review order line items, verify that orders are ready for fulfillment, and then approves orders. Service order managers ensure that service orders are ready for fulfillment and then approve them. Managers can:	sn_ind_tmt_orm.order_creator

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SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles

	• Post notes and comments on order lines and order tasks to communicate with the project manager.
	• View the relationship between a project and an order line item, project tasks, and order tasks. Managers have the following access to project information:
	  ○ Read access to the Order Line Item to Project Relationship table.
	  ○ Read access to the Order Line Item and Order Task related lists in PPM.
	  ○ Read access to the Order task to Project Task related list in Order Management.	

IT project user [it_project_user]	• Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table. • Read access to the Order Line Item and Order Task related lists in PPM. • Read access to the Order task to Project Task related list in Order Management. • Read access to the Project Template Creation table.	sn_ind_tmt_orm.order_viewer
IT project administrator [it_project_admin]	• Configure access to all Project Management features. • Read and write access to the Project Template Creation table. • Read and write access to the Order Line Item related list in PPM. • Write access to the Order Task related list in PPM.	• it_project_user • sn_ind_tmt_orm.order_creator

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SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	• Read access to the Order Line Item to Project Relationship table. • Write access to the Order task to Project Task related list in Order Management.	
Administrator [admin]	• Creates the PPM project templates used to generate the projects for orders that require project oversight automatically. • Configures the mapping between order tasks and planned project tasks associated with project templates • Specifies the conditions and decision rules for determining project oversight and the project templates used to create those projects. • Controls automatic closure of project tasks	

Configuring the Strategic Portfolio Management integration

Configure the Strategic Portfolio Management integration so that order delivery tasks in Order Management can be tracked as planned project tasks in SPM.

As an admin, follow these tasks to set up the SPM integration.

Configuration step	Description
Activate PPM Standard (Project Portfolio Management)	Install the PPM Standard (com.snc.financial_planning_pmo) plugin. If you're tracking customer projects, you must also activate the Customer Project Management (com.snc.csm_ppm) plugin. For information on setting up Customer Project Management, see Integrate with Customer Project Management using Guided Setup.

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Configuration step	Description
	Note: If you installed the Order Management application before activating the PPM Standard or Customer Project Management plugins, you must repair the Order Management (com.sn_ind_tmt_orm) plugin to get the plugin-dependent updates and demo data for the SPM integration.
Create project templates and project template tasks	Use the Project Portfolio Management application to create the project templates for order lines and project template tasks for domain orders and order tasks.
Configure field mapping between orders and projects	Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects and programs in SPM.
Set up project oversight conditions and decision rules	Configure the conditions and decision rules for determining the order lines, domain orders, and order tasks that qualify for project management and order tasks that qualify for project management oversight. You also specify the project templates to be used to create those projects.
Control the automatic closure of project tasks	Manage the automatic closure of project tasks when related child tasks are completed or cancelled.

Creating project templates and project template tasks

You create the project templates and project template tasks that Order Management uses to instantiate projects for order lines and associated domain orders and order tasks.

In the SPM integration, project templates define the structure of a project for order lines and the project planned tasks that map to the order fulfillment tasks for the order line. You specify project templates and project template tasks in the project oversight decision rules. Order Management uses these rules to determine which order items require oversight and the project template or project template tasks used to create the projects.

As an admin or user with the it_project_manager role, you create project templates and the project template tasks in Project Portfolio Management. For more information, see Project templates and Create a project template. The demo data with the Order Management application includes project templates that you can copy and change as needed.

Note: When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

Before creating project templates and project template tasks

Before you create your project template and project task templates for the SPM integration, consider the level of project oversight required for customer orders to be fulfilled. For example, in the following SD-WAN fulfillment flow, the top order line is SD-WAN Service Package, which

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defines the order line project to be created. Next, identify the domain orders and then the order tasks that require project task oversight.

Setting up project oversight conditions and decision rules

As an admin, you create and maintain the conditions and decision rules that determine whether an order item qualifies as a project that can be tracked in Strategic Portfolio Management. You also specify the project template that Order Management uses to create that project for the order item.

Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order tasks. These forms have a decision table for specifying the conditions and rules to be applied when Order Management determines eligibility for project oversight. These conditions include Specification, Account, Location, and Offering that an order line must match.

For example, in the Project Oversight Management for Order Line Item form, you use the decision table to add or change condition columns. You also specify the decision rules, including the project template, to be applied.

For more information on adding or changing conditions in decision tables, see Decision Builder user interface.

Note: If Order Management demo data is installed, the decision table for each project oversight form displays the condition columns and the decision rows added for demo data. You can add, change, or delete the condition columns and decision rows as needed.

Configure project oversight for order lines

Specify the conditions and decision rules that qualify an order line for project oversight. You also specify the project template used by Order Management to create the project for the order line.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Line Item Decision Builder to add or change the conditions and decision rules that must be met for an order line to be tracked as a project. For example, if you want projects to be created for order lines that have a particular product, customer account, and location, you can add condition columns for **Specification**, **Account**, and **Location**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Order Line Item** decision table.
   The Order Line Item is displayed in the **Inputs** and the **Project Template** column in the **Results**.
3. Add a condition that an order line must match.
   a. Select **Add Condition column**.
   b. On the form, fill in the fields.

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New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For order line items, the table is Order Line Item [sn_ind_tmt_orm_order_line_item].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Order Line Item table, such as **Account**, to specify a customer account.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

   c. Select **Save**.

   d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.
   a. Select the **Add** action and enter the conditions that the order line must match and the project template for creating the project.
   b. Select **Save**.
   c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template to create projects for order lines that match the conditions and decision rules defined in the Project Oversight for Order Line Items decision table.

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Configure project oversight for domain orders

Specify the conditions and decision rules that qualify domain orders for project oversight. You also specify the project template task used by Order Management to create the project for domain orders.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Domain Order Decision Builder to add or change the conditions and decision rules that a domain order must meet to be tracked as a project. For example, if you want projects to be created for domain orders for a particular product, you can add a condition column for **Specification**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Domain Order item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

   a. Select **Add Condition column**.

   b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Domain Order [sn_ind_tmt_orm_domain_order].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Domain Order table, such as **Specification** (Domain Order.specification) to specify a product.
Condition type	Data type selected for the condition column.

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Field	Description
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

> **Note:** If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template tasks. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for domain orders that match the conditions and decision rules defined in the Project Oversight for Domain Order decision table.

Configure project oversight for order tasks

Specify the conditions and decision rules that qualify order tasks for project oversight. You also specify the project template task used by Order Management to create the project for order tasks. The project template task defines the project tasks for the order tasks.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Task Decision Builder to add or change the conditions and decision rules that an order task must meet to be tracked as a project. For example, if you want projects to be created for order tasks for a particular request type, you can add a condition column for **Type**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Order Task item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

a. Select **Add Condition column**.

b. On the form, fill in the fields.

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New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Order Task [sn_ind_tmt_orm_order_task].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Order Task table, such as **Request Type** (Order Task.request_type) to specify a request type.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

> **Note:** If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template task. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

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Result
The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

Configure project oversight for Product offering

Specify the conditions and decision rules that qualify the product offering for site project oversight. You also specify the project template task used by Order Management to create the project for product offerings.

Before you begin
Role required: admin

About this task
Use the Site project management oversight for product offering Decision Builder to add or change the conditions and decision rules that a product offering and location must meet to be tracked as a site project.

For example, if you want site projects to be created for a specific location, you can add Specific Location in the result section.

Procedure
1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Site Project Management Oversight for Product Offerings** decision table.
   The Product Offering item is displayed in the **Inputs** and the **Project Template Task** and Location columns in the **Results**.
3. Add a condition that a Product Offering must match.
   a. Select **Add Condition column**.
   b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For Product Offerings, the table is Product Offering [sn_prd_pm_product_offering].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table.

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Field	Description
	To evaluate a particular field, select **Field** and choose a field from the Product Offering table, such as **Specification** (Product Offering.specification) to specify a product.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions, Site Project template, and location.

> **Note:** The location doesn't has to be the full location. If the full location isn’t found, it looks for the parent location.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Choosing a project template task when duplicates exist

As an admin, when you're configuring the decision rules for domain orders and order tasks, you may find that there are multiple project template tasks with the same Short description. It may be difficult to determine the correct project template task to select.

For example, the following decision table for Project Oversight for Domain Order shows two options with the same name for the project template task: Product Order for SD-WAN Security. This project template task has the same **Short description** for two different project template tasks, one for SD-WAN Package and the other for SD-WAN Customer Product Bundle.

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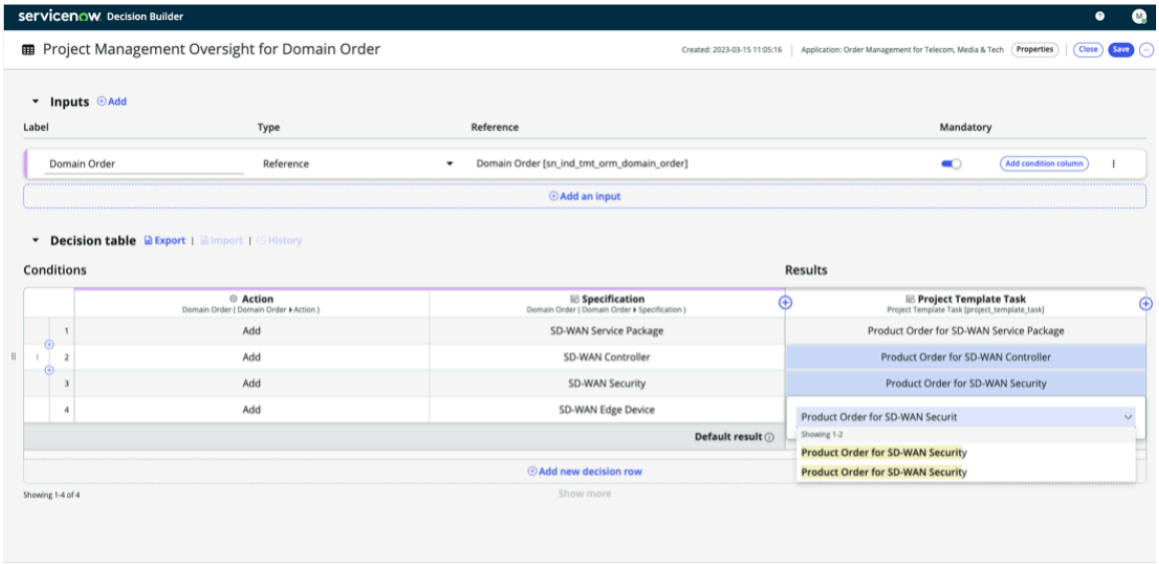
Duplicate project template tasks in Project Management Oversight for Domain Order



You can determine the appropriate project template task by finding and verifying the sys_id of the project template task to be used. For more information, see Verify the sys_id of a project task template.

Verify the sys_id of a project task template

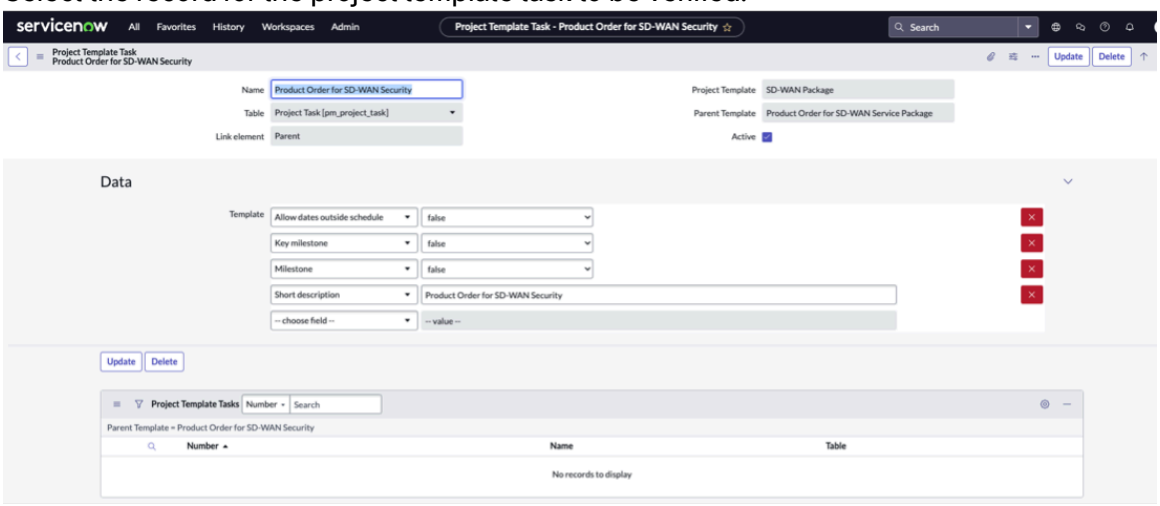
Determine if you're using the correct project task template for domain orders or order tasks by checking the sys_id of the project template task.

Before you begin

Role required: admin

Procedure

1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified.



   For example, in the Project Template Task record for Product Order for SD-WAN Security, which belongs to the SD-WAN Package project template, the sys_id is 183910354fcd2110c5ff2624b2ce0b49.

3. Check the value of the sys_id in the associated Decisions table entry.

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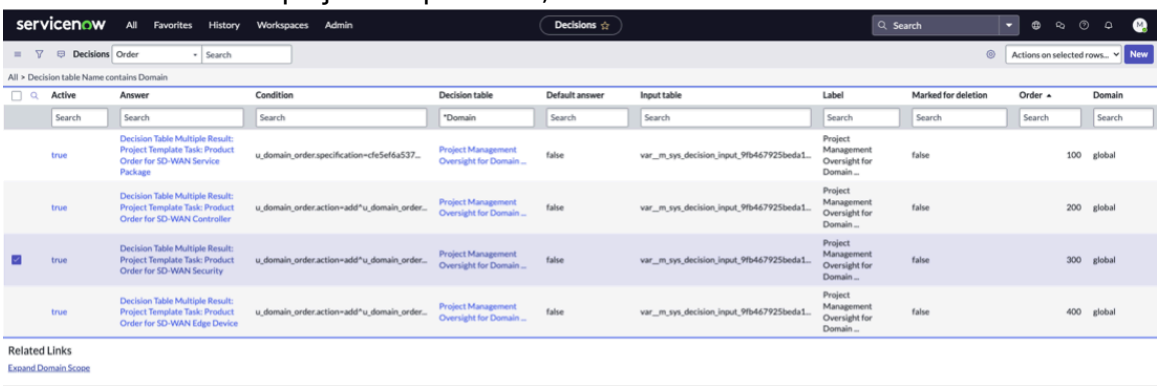
a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.

b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.

c. In the record for the project template task, select the **Answer** column.



The resulting record for the **Answer** field opens.

4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.

5. Review the XML and locate the sys_id value in the file.



The sys_id value should match the sys_id of the project template task determined in Step 1. If the sys_id doesn't match, proceed to the next step.

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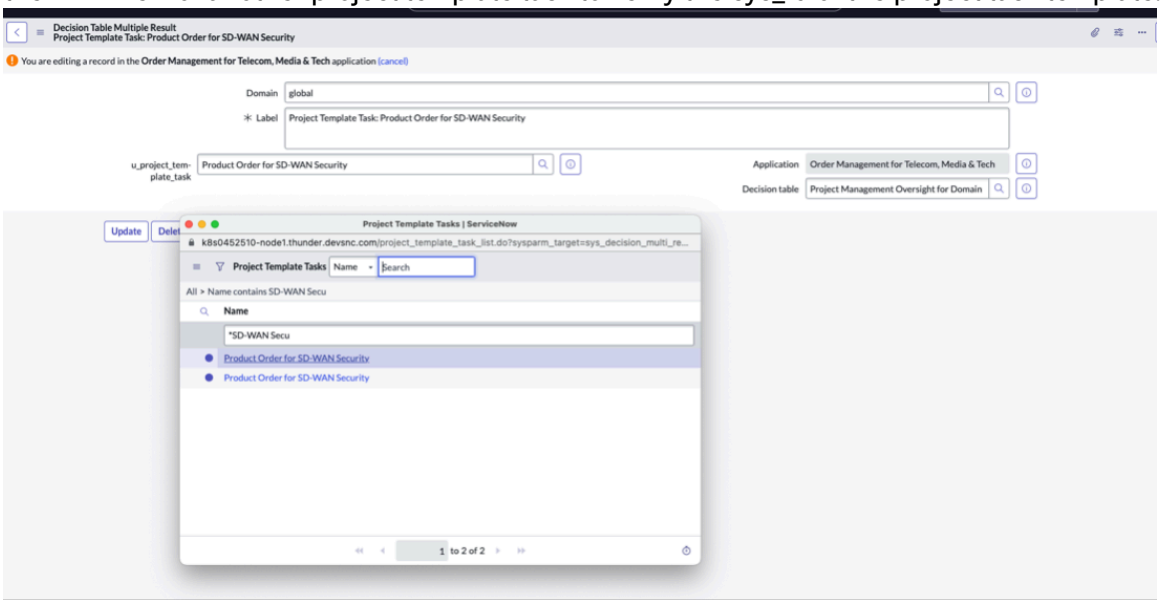
6. In the Decision Table Multiple Result record, select the **u_project_template_task** and check the XML view of another project template task to verify the sys_id of the project task template.



Configure field mappings

Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in Service Portfolio Management.

Before you begin

Role required: admin

About this task

Order Management provides Customer Service Management table maps for associating order line items, domain orders, and order tasks to projects and project tasks in SPM. The tables that you configure depend on whether you're using the PPM Standard application to track projects in your organization or the Customer Project Management integration to track customer projects.

- If you're using PPM, configure the field mapping for these CSM table maps:

Table maps for PPM

Table map	Source table	Target table
Order Line Item to Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Project [pm_project]
Domain Order to Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Project Task [pm_project_task]
Order Task to Project Task	Order Task [sn_ind_tmt_orm_order_task]	Project Task [pm_project_task]

- If you're using Customer Project Management, configure the field mapping for these CSM table maps:

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Table maps for Customer Project Management

Table map	Source table	Target table
Order Line Item to Customer Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Customer Project [customer_project]
Domain Order to Customer Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Customer Project Task [customer_project_task]
Order Task to Customer Project Task	Order Task [sn_ind_tmt_orm_order_task]	Customer Project Task [customer_project_task]

The source and target tables in each table map are pre-populated.

Note: If you installed demo data for Order Management, the field mapping for the **Source Field** and **Target Field** display the values used for demo data. You can use the existing field mapping or change it as needed.

Procedure

1. Navigate to **All** and in the filter enter `csm_table_map.list`.
2. Do one of the following:
   - If you're using PPM, select the Order Line Item to Project table map.
   - If you're using Customer Project Management, select the Order Line Item to Customer Project table map.
3. Go to the **Basic Field Mapping** related list and define a field mapping.

Note: If Order Management demo data is installed, the **Source Field** and **Target Field** values in the Basic Field Mapping related list display the mapping for demo data. You can use the mapping or change it as needed.

Option	Steps
Define a new field mapping	**a.** Select **New**. **b.** In the **Source Field**, select an item from the source table. For example, select an item such as **work_notes** from the Order Line Item [sn_ind_tmt_orm_order_line_item] table. **c.** In the **Target Field**, select an item from the Project [pm_project] table, such as **Project Name**. **d.** In the **Active**,select **True**. **e.** Select **Submit**. In this example, the order line **Short Description** is used as the **Project Name** in SPM.

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Option	Steps
Change an existing field mapping	**a.** Select the field mapping record. **b.** In the **Source Field**, select a different item from the Order Line Item source table, as needed. **c.** In the **Target Field**, select a different item from the Project target table, as needed. **d.** Select **Update**.

4. Do one of the following:
   - If you're using PPM, select the Domain Order to Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.
   - if you're using Customer Project Management, select the Domain Order to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Domain Order source table and map it to the **Short Description** field in the Project Task target table.
5. Do one of the following:
   - If you're using PPM, select the Order Task to Project table map if and repeat Step 3 to define a new field mapping or update an existing mapping.
   - If you're using Customer Project Management, select the Order Task to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Order Task source table and map it to the **Short Description** field in the Project Task target table.

Result
The fields in the Order Management source tables are mapped to the fields in the SPM target table.

Changes made to a synchronized field in order task or domain order will automatically be reflected in the corresponding synchronized field in project task.

Control automatic closure of project tasks

Manage the automatic closure of projects in the SPM integration by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.

Before you begin
Role required: admin

About this task
In the SPM integration, Order Management closes project tasks automatically when all associated order tasks are completed and there are no open child tasks that have project task dependencies. If a project task has open child tasks, Order Management doesn't automatically close the project task. You can use the *sn_ind_tmt_orm.project.task.auto.closure* property to suppress or reactivate the automatic closure of project tasks.

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Procedure

1. Navigate to **All** and in the filter, enter `sys_properties.list` and press **Enter**.
2. Search for and open the *`sn_ind_tmt_orm.project.task.auto.closure`* property.
3. In the **Value** field, set the value for the property.
   - To suppress automatic project task closure, enter `false`.
   - To reactivate automatic project task closure, enter `true`.
4. Select **Update**.
   Automatic project task closure in the SPM integration is immediately suppressed or reactivated based on the value that you entered. If automatic closure is suppressed, any order task-to-project task updates occur only when order tasks are in an in-progress state.

Managing inflight order for site projects

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled.

When you create an inflight order with a new site and new product offering, it creates new site project and new sub-projects for the offerings using the same program.

When you create an inflight order with new product offering for existing site project using the same program, it creates new sub-project for the new product offering. An existing site project is reused and it will not create new site project. The site project tasks and templates may be updated to reflect newly added products.

Cancel order for site project

When a product offering on an inflight customer order is canceled, the corresponding sub-project and all associated tasks must be automatically closed.

If all product offerings (or all related sub-projects) under a parent project are closed, the main parent project must also be automatically transitioned to a terminal state. In such cases, its status much be updated to **Closed Skipped**.

If the parent site project is canceled, all linked child projects and associated product offerings under that site project are closed automatically.

All records moved to a terminal state are set to **Closed Skipped**.

Does not delete any records as part of this process.

Tracking order tasks and associated projects

With the SPM integration, project managers and fulfillment agents or managers can track projects in Strategic Portfolio Management that have associated order tasks in Order Management.

Tracking projects for planned order tasks in SPM

As a project manager, you can review and update projects that have been created for tracking planned order tasks using the Project Portfolio Management application in SPM. When fulfillment managers and agents update or complete order tasks, Order Management automatically synchronizes project states between SPM and order line items, task and domain order states, and project task and order task states as fulfillment managers and agents complete order tasks.

A project manager has the it_project_manager role for tracking and updating projects.

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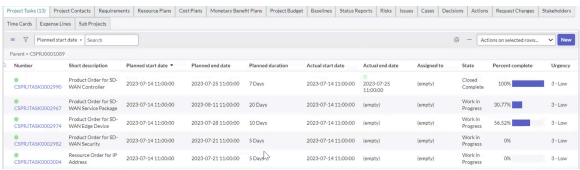
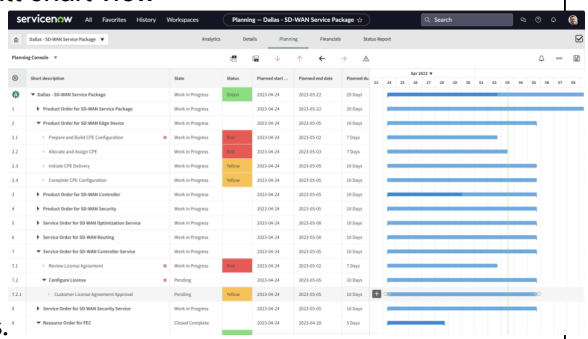
Project manager tasks

Task	Details
Review an order fulfillment project and state	1. Navigate to **All** > **Projects** > **Project Workspace**. 2. Select the project for the order item. **Note:** The **Project Name** is the name assigned when Order Management created the project using the specified project template. 3. Select the **Details** tab then scroll down to the **Project Tasks** tab to review project tasks, State, and Percent complete, 
Review the project state and project task state to assess the project status	1. Navigate to **All** > **Projects** > **Project Workspace**. 2. Select the project for the order item. 3. Select the **Planning** tab. The Gantt chart view displays. 
Review notes and comments on order tasks from fulfillment agents and managers	1. Navigate to **All** > **Projects** > **Project Workspace**. 2. Select the project for the order item. 3. Go to the **Notes** tab and view the comments and status updates from Order Management.

Tracking fulfillment tasks that have associated projects in Order Management

As a fulfillment agent or manager, you can view the relationship between a project and order line item, project tasks, and order task in the Configurable Workspace. You can also post notes and additional comments on order lines and order tasks to communicate with the project manager responsible for project oversight of the order management tasks.

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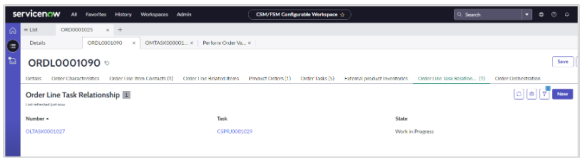
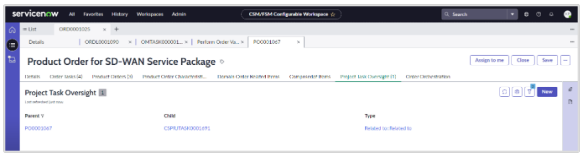
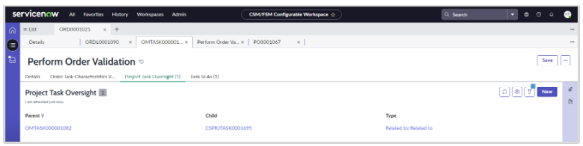
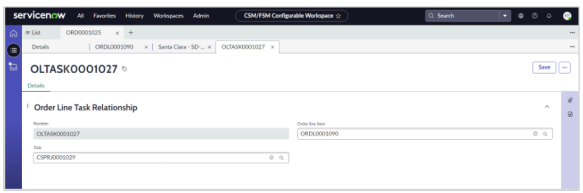
Fulfillment agent or manager tasks

Task	Example
View order line-to-project relationship in order line item form	
View project task-to-domain order relationship in domain form	
View order task-to-project task relationship in order task from	
View **Details** tab in order task relationship to see task number, project number, and order line item number relationship	

Order Management diagnostics capability

Agents can use ServiceNow® Order Management diagnostics capability to diagnose and resolve service issues related to order tasks and domain orders.

Install these plugins:

- Sales Customer Relationship Management plugin
- Service test management plugin

  For more information about service test management, see Setting up a test group and Setting up test definitions.

Diagnose and resolve an order task

As a customer service agent, review, diagnose, and resolve, and close an order task for the service-related issue experienced by the customer.

Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, **Test and turn up** must be selected in the request type.

The decision table enables the Test and turn up to configure the trigger for any request definition. This default feature is shipped only for Test and turn up task.

About this task

The order task progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair,

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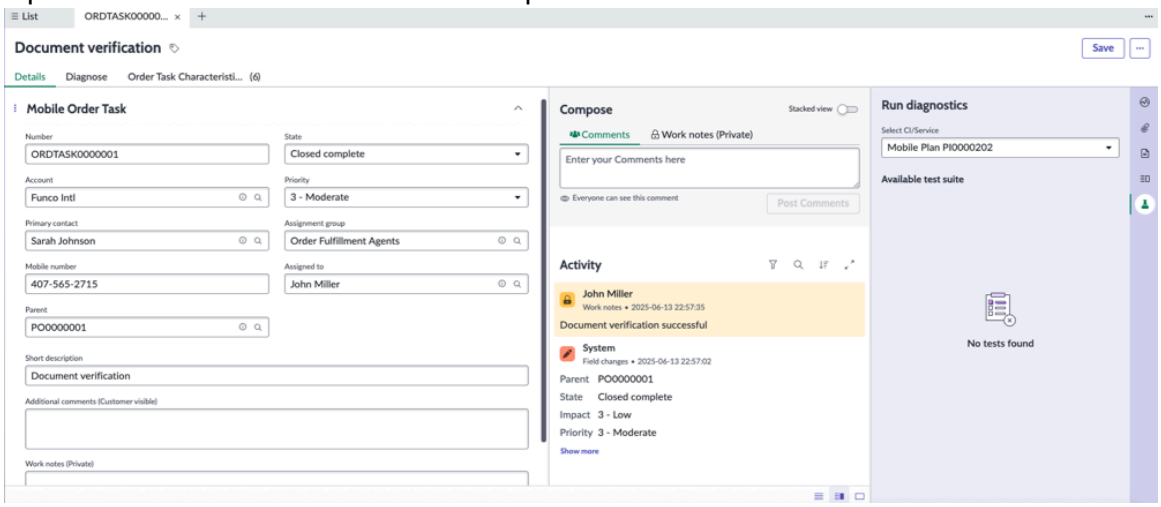
creating a task to fix the identified issue. The agent follows the instructions in the repair task to address the problem areas. Once the repair is complete, the task is retested to confirm that the issue is resolved. Finally, the order is moved to the next step toward delivery based on the customer's feedback.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Order Tasks** > **All**.
4. Open an order task that is in the New or Open state.



5. Review and verify the order task.
   a. In the **Details** tab, review and verify the general details for the order task.
6. Diagnose the order task to identify the root-cause of the problem.

   The decision table can be configured to control the visibility of the Diagnose and Run Diagnostics contextual panel tabs. For more information about decision tables, see Decision Tables.

   a. To generate the test results, select **Run diagnostics** from the contextual panel.

   b. In the run diagnostics panel, select **CI/Service** from the drop-down list.

      The drop-down list shows the current product inventory linked to the parent record of order task.

   c. Expand the cards in the **Available test suite**.

   d. In the manual test, select single/multiple tests.
      In the automated test, selection of test isn't available. The subflow that is configured for the test group would be invoked.

   e. Select **Configure**.

   f. In the Configure tests, fill the test-required characteristics form to activate the **Run test** button.

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g. **Optional:** In the test, select an option either to **Run test** now or to **Schedule test** for later.

h. Select **Run test**.

i. In the diagnose tab **Test results** section, select **Refresh list** icon.

j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

The failed tests indicate that the issues causing the order task to be identified and need repair.

The maximum number of rows to the group is limited to 20 rows. To configure the maximum number of rows more than 20 rows to the group, see Presentational List Usage.

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

   A Repair task is created for all failed test cases related to the diagnosed order task.

   a. Select the repair task that you want to work on.

   b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.

   c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.

   d. Select **Save** and close the resolution task.

   e. Select **Continue**.
8. To view the characteristics values of the order task, select the **Order Task Characteristics Values** tab.

Diagnose and resolve a domain order

As a customer service agent, review, diagnose, and resolve, and close a domain order for the service-related issue experienced by the customer.

Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, the **Test and Turn up** must be selected in the **Stage**.

The decision table enables the Test and turn up to configure the trigger for any request definition. This out-of-the-box feature is shipped only for Test and turn up task.

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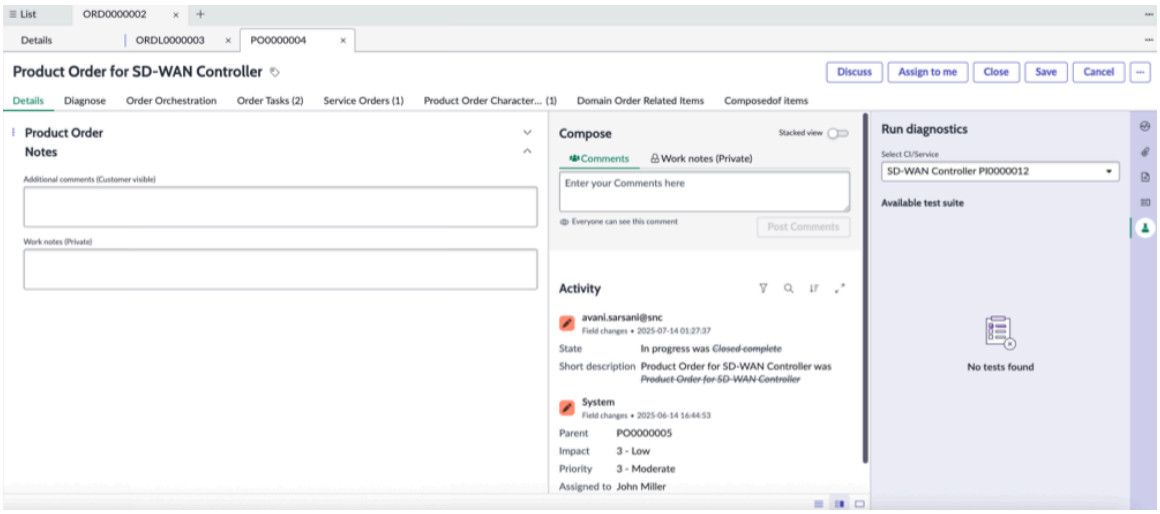
About this task

The domain order progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis stage, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair, creating a task to fix the identified issue. The agent follows the instructions in the repair task to address the problem areas. Once the repair is complete, the task is retested to confirm that the issue is resolved. Finally, the order is moved to the next step toward delivery based on the customer's feedback.

This task is applicable for product order, services, and resources.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Customer Orders** > **All**.
4. In the **Product Orders** tab, open the product order record.



5. Review and verify the domain order.
   a. In the **Details** tab, expand the Product Order task and then review and verify the general details for the domain order.
   b. If necessary, in the Notes section, add **Additional comments** and **Work notes**.
6. Diagnose the domain order to identify the root-cause of the problem.

   The decision table can be configured to control the visibility of the Diagnose and Run Diagnostics contextual panel tabs. For more information about decision tables, see Decision Tables.

   a. To generate the test results, select **Run diagnostics** from the contextual panel.

   b. In the run diagnostics panel, select **CI/Service** from the drop-down list.

      The drop-down list shows the current product inventory and all the child inventories.

   c. Expand the cards in the **Available test suite**.

   d. In the manual test, select single/multiple tests.

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In the automated test, selection of test isn't available. The subflow that is configured for the test group would be invoked.

e. Select **Configure**.

f. In the Configure tests dialog box, fill the test-required characteristics form to activate the **Run test** button.

g. **Optional:** In the test dialog box, select an option either to **Run test** now or to **Schedule test** for later.

h. Select **Run test**.

i. In the diagnose tab **Test results** section, select **Refresh list** icon.

j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

The failed tests indicate that the issues causing the order task to be identified and need repair.

The maximum number of rows to the group is limited to 20 rows. To configure the maximum number of rows more than 20 rows to the group, see Presentational List Usage.

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

   A Repair task is created for all failed test cases related to the diagnosed order task.

   a. Select the repair task that you want to work on.

   b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.

   c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.

   d. Select **Save** and close the resolution task.

   e. Select **Continue**.
8. To view the Orchestration of the domain order, select the **Order Orchestration** tab.
9. To view the tasks of the domain order, select the **Order Tasks** tab.
10. To view the characteristics values of the domain order, select the **Product Order Characteristics Values** tab.
11. To view the details of the service order, select the **Service Orders** tab.

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12. To view the details of the domain order related items, select the **Domain Order Related Items** tab.
13. To view the composed of items, select the **Composed of items** tab.

Integrating CPQ

Learn how CPQ connects with downstream systems and UI frameworks—visualization engines (CDS, kBridge, Threekit), eCommerce storefronts (Shopify, headless), and Salesforce (CPQ, B2B Commerce, Base Package)—to deliver real-time, guided configuration, pricing, and ordering at scale.

With integrations, you can:

- Visualize configurations in real time using 2D/3D viewers (CDS, kBridge, Threekit).
- Transact in your commerce stack via Shopify or headless storefronts with draft orders or add-to-cart flows.
- Sell through Salesforce with CPQ/B2B Commerce, launch the CPQ Configurator from Product2, and persist configuration data to Salesforce objects for quoting and amendments.

Integration categories at a glance

Integration categories

Category	Primary purpose	Where it's configured	Typical data flow
Visualization (CDS, kBridge, Threekit)	Show 2D/3D product visuals that react to user selections	Blueprint → Layout (CSV/Editor)	CPQ fields/sets → viewer (1-way); optional viewer → CPQ (2-way)
eCommerce (Shopify, Headless)	Embed configurator on product/content pages; create carts or draft orders	Shopify app + CPQ runtime client	Storefront → CPQ → cart/draft order
Salesforce (Base, CPQ, B2B Commerce)	Launch/configure from Product2, write BOM/field data, amendments	Salesforce package + CPQ Settings	Quote/Cart ↔ CPQ runtime; optional persistence to CLI/CFD

Limits and behaviors (visualization):

- Sets and product pickers: up to 25 indices/options sent to the viewer
- Active set index: can be published to the viewer when using set repeaters
- Two-way sync: supported for CDS and kBridge (fields; sets require a listener field + parsing rule)
- Threekit supports one-way from CPQ; pair with set repeater guidance where applicable

Related topics

Integrating CPQ with visualization tools

CPQ integration with Salesforce B2B Commerce

Request provisioning of an SFDC org with a CPQ environment

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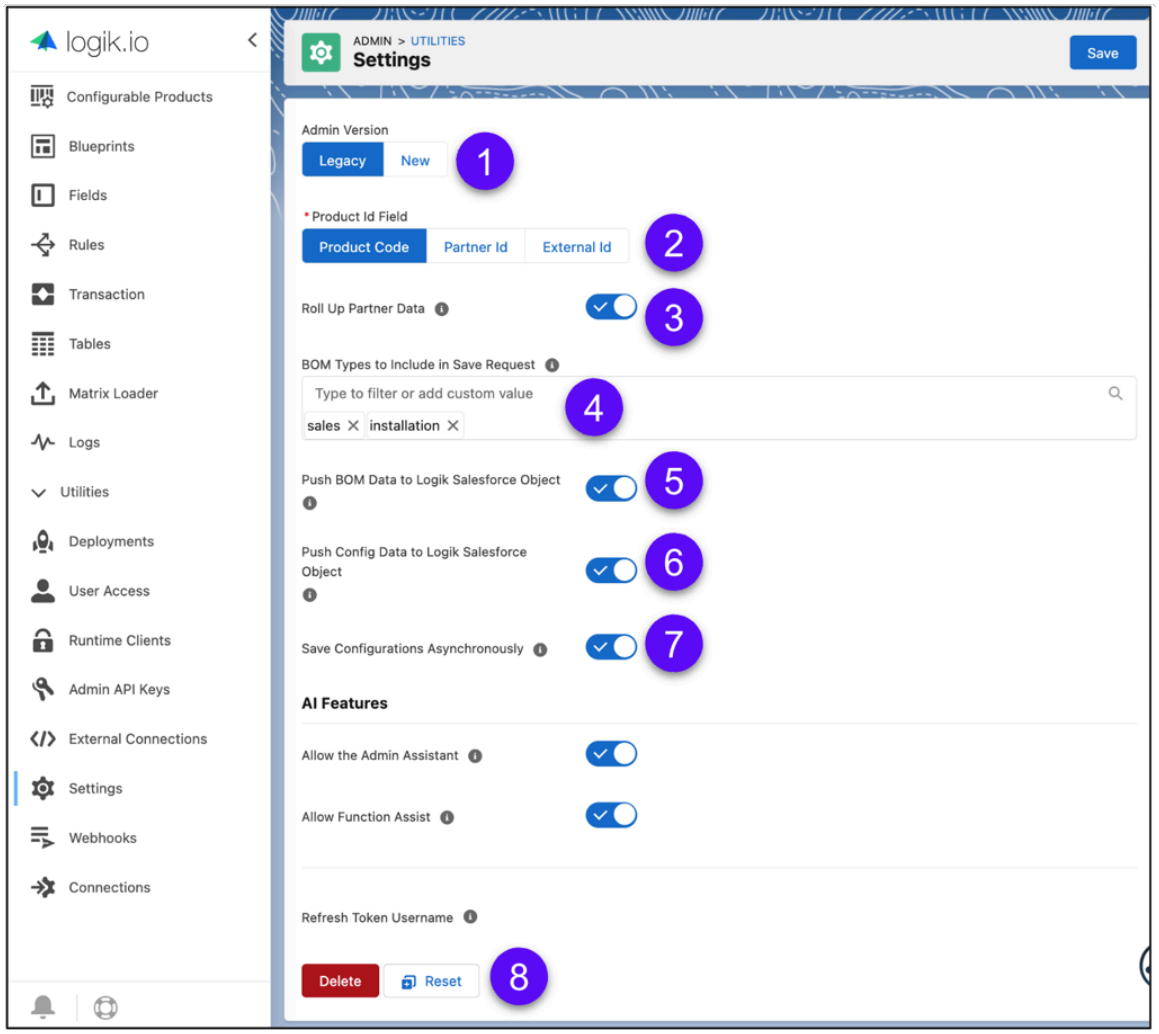
CPQ admin settings

Explore the admin settings in CPQ.

Several settings in CPQ control how CPQ interacts with the rest of your application. To get to the Settings page in CPQ, navigate to the CPQ Admin screen, click the arrow to expand the Utilities section, and then click the Settings tab near the bottom of the menu.



1. Admin Version: Determines which UI theme is used for the Admin interface. The setting is maintained at the user level; each administrator can select their preference. If your CPQ environment contains both Configuration Manager and Transaction Manager, we highly recommend you use the new Admin UI.
   - The new Admin UI introduces top-level navigation and color theming that helps administrators easily identify and access different administration areas.
   - The Legacy setting retains the administration platform UI used since the application's inception.
2. Product Id Field: Determines the field that CPQ uses to match products when using product rules. Select one of the following:
   - Product Code: Corresponds to the `Product2.ProductCode` field in Salesforce
   - Partner Id: Corresponds to the `Product2.Id` field in Salesforce

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> **Note:** the value of this field will change between environments, such as a Salesforce sandbox org and a production org. For ease of migration across environments, consider using either Product Code or External Id.

- External Id: Corresponds to the `Product2.ExternalId` field in Salesforce

3. Roll Up Partner Data: When enabled, this option combines and averages the price for all items with the same partner ID when responding with easyXDM. This makes each line unique in the payload instead of representing the information individually.
4. BOM Types to Include in Save Request: Choose BOM types to include in API request when saving the configuration. Select from the menu or type to enter custom BOM types. The default options are Sales and Manufacturing.

   The following video explains how to include multiple BOM types in API requests: Multi BOM Enhancements
5. Push BOM Data to Logik Salesforce Object: When enabled, CPQ creates records in Salesforce of the LGK `ConfigurationLineItem_c` object containing the BOM data when saving a configuration.
6. Push Config Data to Logik Salesforce Object: When enabled, CPQ creates records in Salesforce of the LGK `ConfigurationFieldData_c` object that contains the config data when saving a configuration.
7. Save Configurations Asynchronously: When disabled, CPQ waits until the configuration is saved in the database before closing the session. When enabled, CPQ starts the save process and immediately closes the session. In most cases, enabling this setting leads to faster workflows, but if a high volume of configurations is being edited simultaneously, disabling this setting ensures that all configurations are saved when returning.
8. Refresh Token Username: This is the user name that CPQ uses for API syncing of configuration line data, configuration data, and to populate the caches for Product2, pricebook, and pricebook entries.

   Salesforce objects are synchronized every thirty minutes. If you have an issue synchronizing product, pricebook, or pricebook entries, reset the user name and wait thirty minutes to see whether the issue has been resolved.

Set up a runtime client

Configure a runtime client. Doing so creates a token that you can use to authenticate runtime calls. This can be useful when CPQ is embedded in a VisualForce page.

Before you begin

Role required: admin

About this task

Runtime clients can be set up that provide a token for authentication of runtime calls when launching CPQ outside of the regular workflow. For example, CPQ may be started through a quote in Salesforce when embedding CPQ in a Visualforce page, Lightning web component, or HTML page.

> **Note:** This authentication can be used only by end users launching a CPQ configuration in runtime. To authenticate admin calls, users should leverage Admin API Keys.

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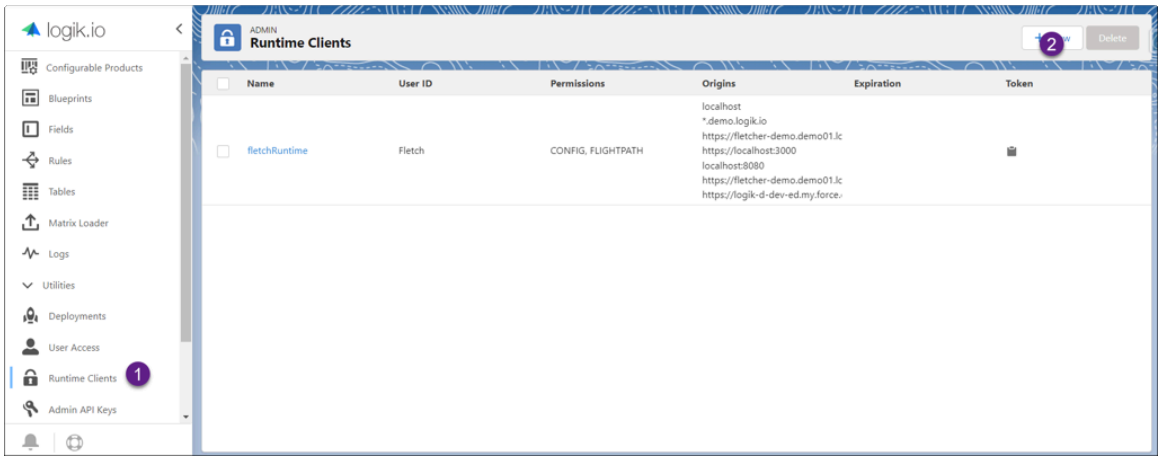
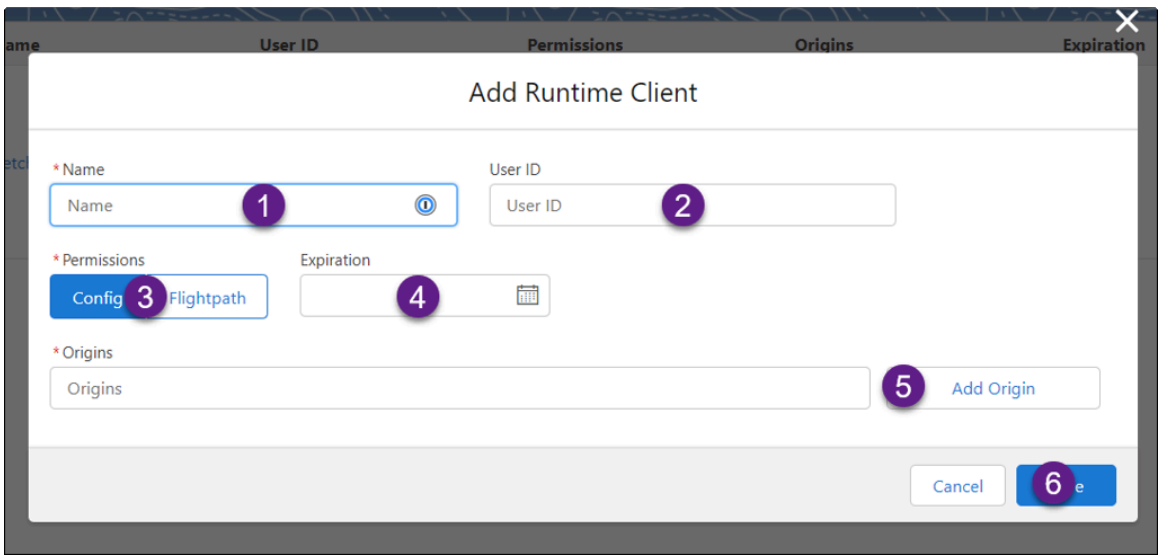
Procedure

1. In the Utilities tab of the navigation pane, click **Runtime clients**.
2. Click **New**.



3. Name the runtime client.



4. Set the user ID.
   Setting the user ID attaches the ID to all calls authenticated by this client. This can help track the origin of the calls.
5. Set whether the permissions apply to Config or Config and Flightpath.
   Config enables launching configurations. Flightpath helps with debugging by allowing for accessing the flightpath data of the configuration.
6. Set an expiration date for the runtime client (optional).
   The expiration date can be changed to extend or shorten the time frame during which this token can be used.
7. Add a URL, such as `https://<yourLogikUrlName>.<sector>.logik.io` or `*.salesforce.com`, and then click `Add Origin`.
   Users must specify the origin of calls made using this token to authenticate. Make sure that the URL has no trailing slash. For example, use *.salesforce.com and not `*.salesforce.com/`.
   You can continue adding origins by repeating this step. When all the origins have been entered, click **Save** (6).

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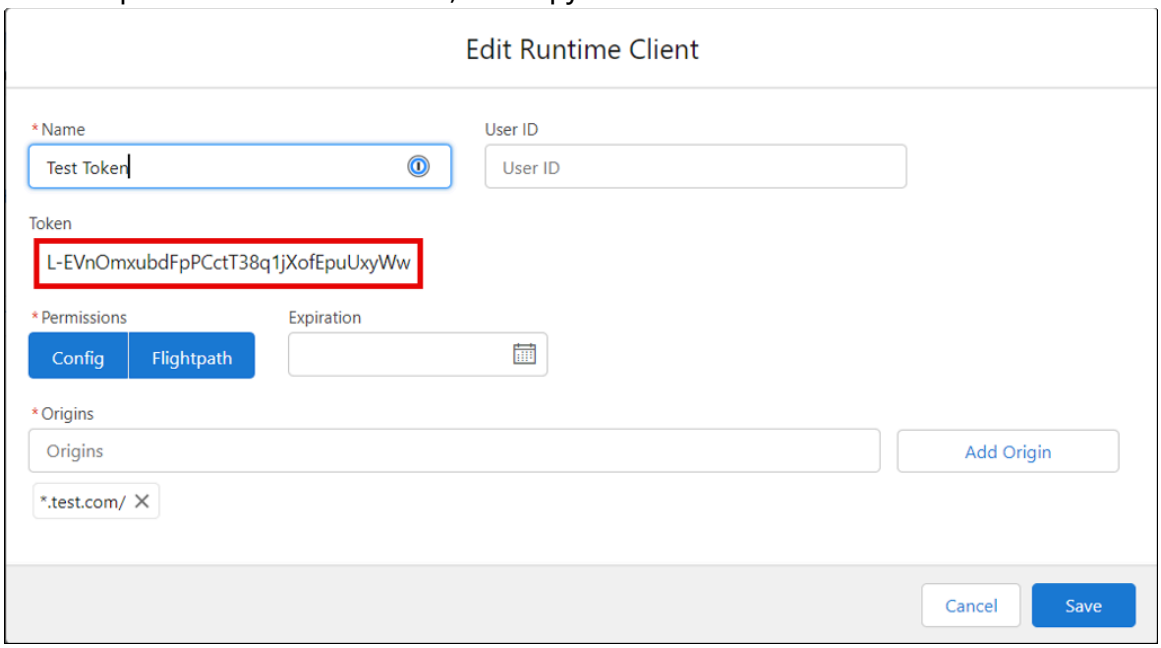
8. Click to open the new runtime client, and copy the token.



Related topics

Use case: Embed CPQ UI in a Salesforce VisualForce page

CPQ: User Access Control

View access types, access areas, and user roles that can be managed via the User Access utility.

Note: This feature must be enabled by support request.

Use the User Access utility to manage access to CPQ Admin. Admin users have full admin access unless their access level is modified via CSV import.

For basic user access in CPQ, see User access.

Access levels

- NONE
- READ
- EDIT
- ADMIN

Access areas

- END_USER
- CONFIG

  Users with ADMIN can use the Matrix Loader, including product filters and the catalog enrichment script MANAGED_TABLES.

- TRANSACTION

  Users with ADMIN can use the Matrix Loader.

- MANAGED_TABLES
- TABLE

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Applies permissions for an individual table listed in addition to any MANAGED_TABLES access level. Examples:

- EX: MANAGED_TABLES: NONE + TABLE “myTable” Edit = ability to edit “myTable” only
- EX: MANAGED_TABLES: READ + TABLE “myTable” Edit = ability to read all tables and edit "myTable"

- DEPLOY
  - Applies all blueprint, transaction, product catalog enrichment, and product filter deploys
  - Roles are either NONE or ADMIN UTILITIES
- UTILITIES
  - Logs, user access, runtime clients, admin API keys, external connections, settings, webhooks, connections
  - Products (for Ecommerce tenants)

Tables

User access can be limited to specific tables via CSV or API.

Note: These are additive permissions with the overall tables permission set, so if the user has read access for all tables, the individual permission of NONE would have no effect.

User roles

- END_USER: This is the only permission for the runtime
- CONFIG_NONE / CONFIG_READ / CONFIG_EDIT / CONFIG_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- TRANSACTION_NONE / TRANSACTION_READ / TRANSACTION_EDIT / TRANSACTION_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- MANAGED_TABLES_NONE / MANAGED_TABLES_READ / MANAGED_TABLES_EDIT / MANAGED_TABLES_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- DEPLOY_NONE / DEPLOY_ADMIN (no EDIT or READ): ADMIN everything deployment related, including Product Filter Rules and Product Catalog Enrichment Deployments
- UTILITIES_NONE / UTILITIES_READ / UTILITIES_ADMIN (no EDIT)
  - READ correlates to GET endpoints
  - ADMIN correlates to everything else

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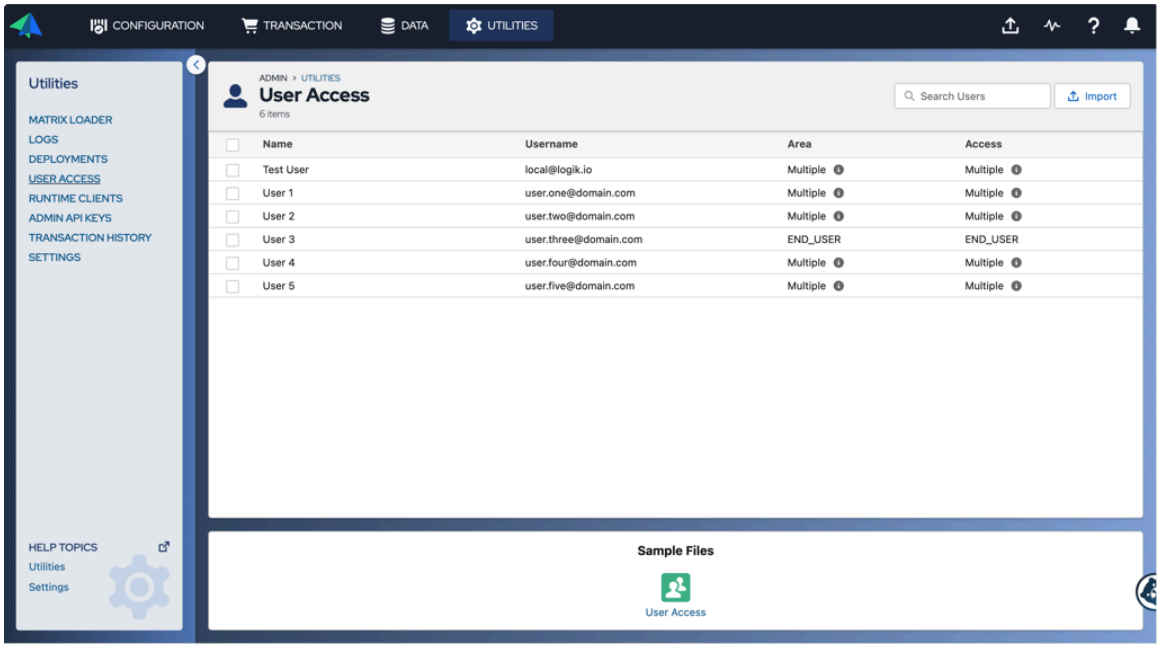
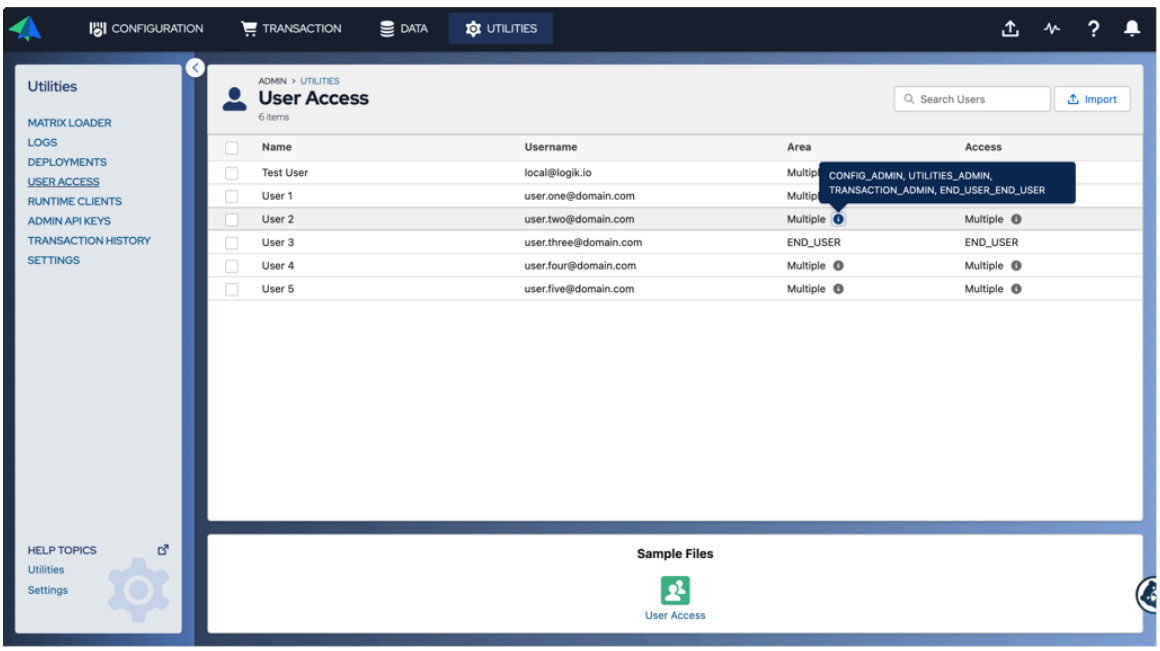
Modifying access controls

Admin users can modify access via CSV upload (Admin > Utilities > User Access). The User Access list shows existing users.



Steps:

1. Hover a tooltip to view a user's access.



2. Create a CSV file to add users, make changes to users, or delete users. (See below for sample CSV files.)

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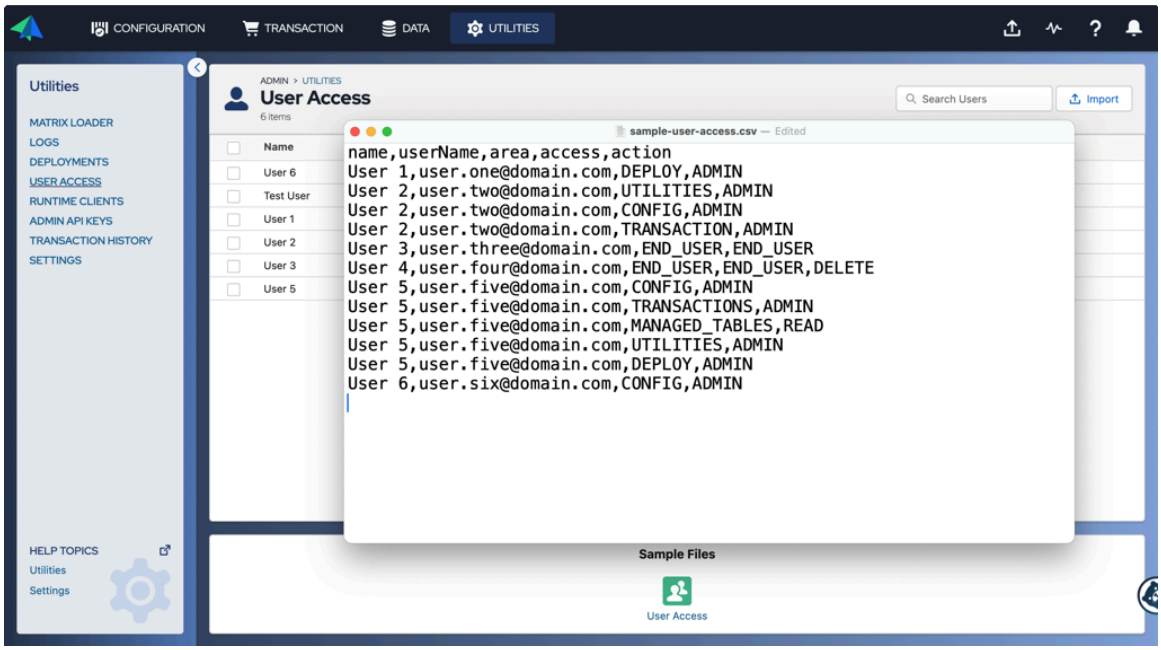
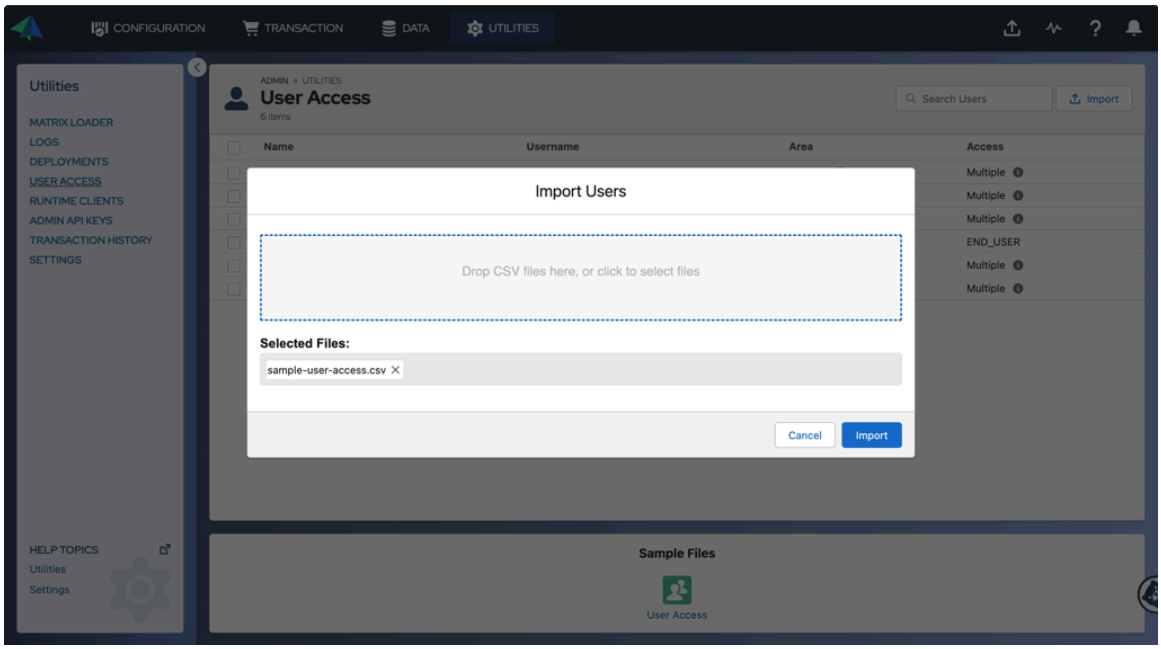


3. Import the CSV file.



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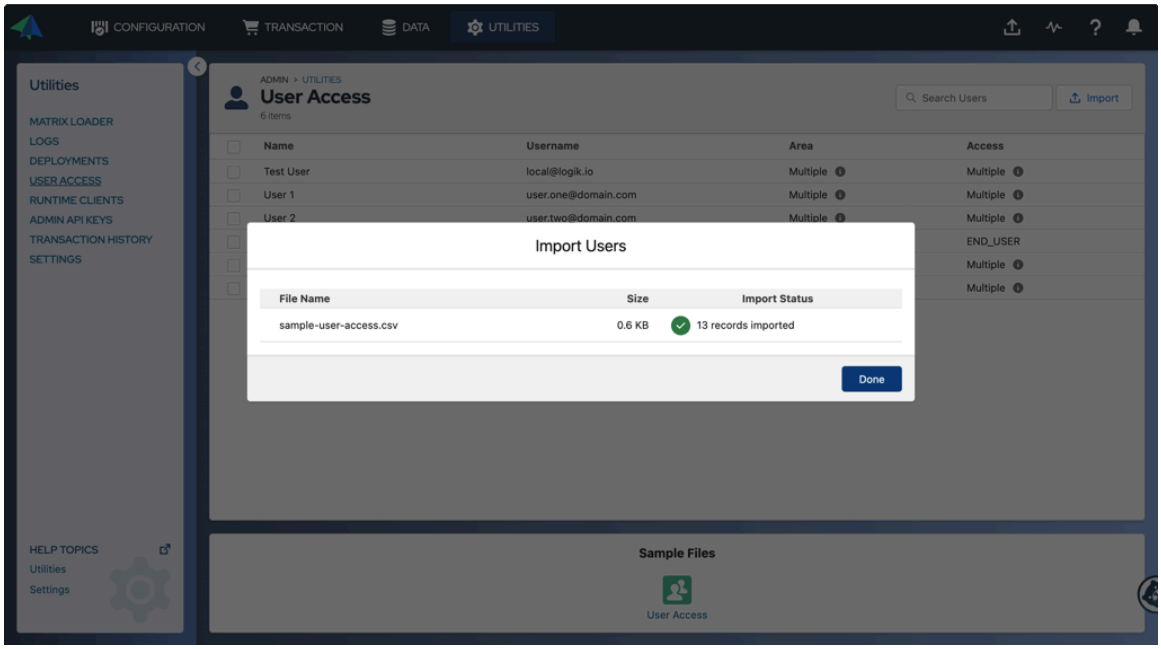
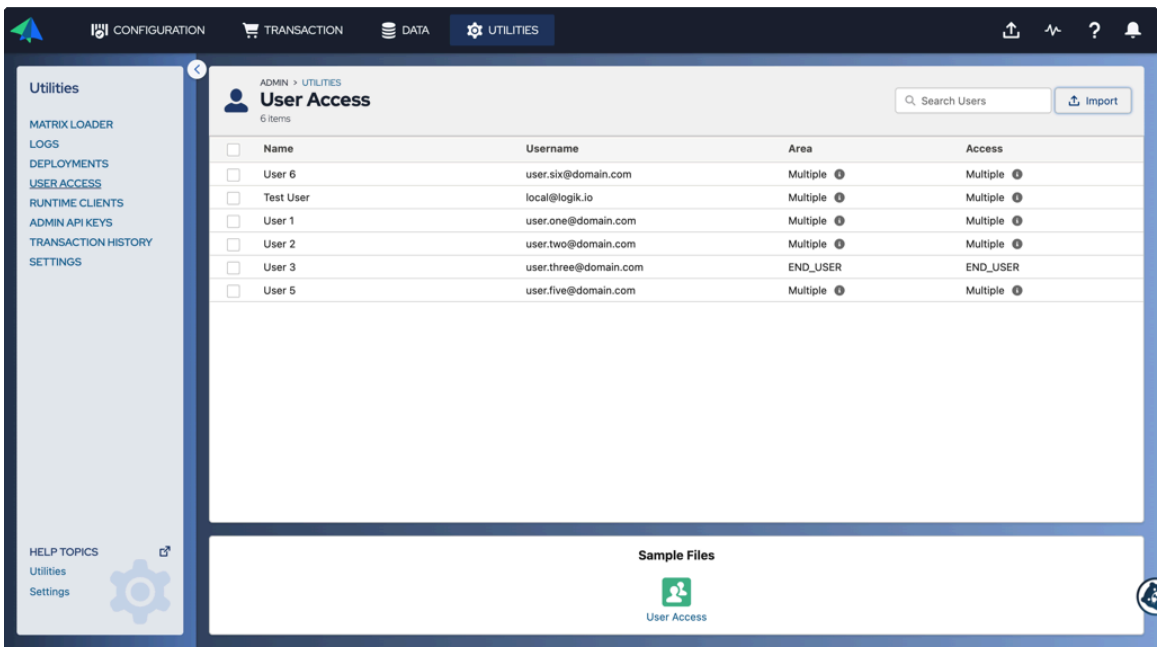
You will receive a message confirming success or failure.



Changes to user list are now made.



Sample CSVs

Default all-access admin CSV:

```
name,userName,area,access,action
User,email@example.com,DEPLOY,ADMIN,
User,email@example.com,UTILITIES,ADMIN,
User,email@example.com,CONFIG,ADMIN,
User,email@example.com,TRANSACTION,ADMIN,
User,email@example.com,MANAGED_TABLES,ADMIN,
```

Example complex-access CSV:

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```
name,userName,area,access,action
User 1,user.one@example.com,DEPLOY,ADMIN
User 2,user.two@example.com,UTILITIES,ADMIN
User 2,user.two@example.com,CONFIG,ADMIN
User 2,user.two@example.com,TRANSACTION,ADMIN
User 3,user.three@example.com,END_USER,END_USER
User 4,user.four@example.com,END_USER,END_USER,DELETE
User 5,user.five@example.com,CONFIG,ADMIN
User 5,user.five@example.com,TRANSACTIONS,ADMIN
User 5,user.five@example.com,MANAGED_TABLES,READ
User 5,user.five@example.com,UTILITIES,ADMIN
User 5,user.five@example.com,DEPLOY,ADMIN
User 6,user.six@example.com,CONFIG,ADMIN
```

CSV adding user to the table "sampleTable":

```
name,userName,area,access,variableName,action
John Smith,john.smith@example.com,CONFIG,ADMIN,,UPSERT
John Smith,john.smith@example.com,TRANSACTIONS,ADMIN,,UPSERT
John
 Smith,john.smith@example.com,TABLE,ADMIN,sampleTableName,UPSERT
Jane Doe,jane.doe@example.com,MANAGED_TABLES,READ,,DELETE
Jane Doe,jane.doe@example.com,UTILITIES,,NONE
```

Using CPQ user access management

Manage access to the CPQ Admin interface. Grant or remove admin rights and troubleshoot access issues.

The User Access utility allows managing access to selected areas of CPQ Admin. Admin users have full admin access unless their access level is modified via CSV import.

Note: The User Access utility is enabled via a support request.

CPQ Admins can control access to the CPQ Admin interface by granting admin access only to specific users. All existing users have admin access, which can be adjusted to end-user access as needed. New users automatically receive end-user access and need to be explicitly granted admin access by a user with admin access.

Note: If a message appears that says "An unknown error occurred" when you try to access CPQ Admin, admin access may not be toggled on. If you encounter this message, contact a user with CPQ admin access to enable your access.

Setting up user access

Admin users can modify access via CSV upload (Admin > Utilities > User Access)

The User Access window displays the users currently in the system. To view a user's access, move the cursor over the user. The access is displayed in a tooltip.

To add, change, or delete users, create a CSV file and import the file into Admin Assist.

- Username: Email address of the user, click to open a modal window for editing access. See 'Edit User' section, below.
- Access: Level of access a user has, can be END_USER or ADMIN,END_USER

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  - END_USER: Can create configurations using CPQ. This is for sales users, partners, and similar roles.
  - ADMIN: Can access the administrative side of CPQ to create and modify blueprints, fields, rules, and other items.
- Toggle Admin Access: Select one or more users using the check box. Toggle Admin Access adds or removes admin access for the selected users, depending on their current access level.
- Import: At the bottom of the user access page is an exportable sample user access file. After making the necessary modifications to the exported file, you can import it using the **Import** button.

Editing a user

Individual users can be edited by clicking their username in the table, which launches an Edit User window.

- Username: email address of the user being edited.
- Enable Admin Access: Toggle for controlling access to the Admin features of CPQ. The toggle to the right indicates that the user has Admin privileges.
- Save / Cancel: Confirm any changes made or cancel to not save.

Additional considerations

Users are created and show up on the User screen in CPQ the first time they access a CPQ instance and go through the authorization provider.

All existing users of a CPQ instance have END_USER and ADMIN access. Admin access can be removed from users that do not require it.

Newly created users have END_USER permissions only. The access level can be changed by an administrator following the above steps.

Troubleshooting

- Once granted access, new users may need to do one or more of the following:
  - Restart the browser
  - Clear the browser cache
  - Remove CPQ session cookies before accessing CPQ Admin
- If users experience login issues after a CSV import, verify that the user names in the CSV match the case used in the user records. If CPQ is integrated with Salesforce, user names should be all lowercase to align with system requirements, as Salesforce does not allow user names to be uppercase.

  If necessary, edit the CSV so that user names are in lowercase, and import the user again.

Related topics

User access

User Access Control reference

User Access Control reference

Control Admin access levels using CSV imports. Assign NONE, READ, EDIT, or ADMIN permissions to specific areas.

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Note: The User Access utility is enabled via a support request.

Access levels

- NONE
- READ
- EDIT
- ADMIN

Access areas

- END_USER
- CONFIG

  Users with ADMIN can use the Matrix Loader.

- TRANSACTION

  Users with ADMIN can use the Matrix Loader, including product filters and the catalog enrichment script.

- MANAGED_TABLES
- TABLE

  Applies permissions for an individual table listed in addition to any MANAGED_TABLES access level. Examples:

  - MANAGED_TABLES: NONE + TABLE “myTable” Edit = ability to edit “myTable” only
  - MANAGED_TABLES: READ + TABLE “myTable” Edit = ability to read all tables and edit "myTable"

- DEPLOY
  - Applies all blueprint, transaction, product catalog enrichment, and product filter deploys
  - Roles are either NONE or ADMIN
- UTILITIES
  - Logs, user access, runtime clients, admin API keys, external connections, settings, webhooks, connections
  - Products (for Ecommerce tenants)
- Access to specific resources

  Tables: Users can be limited to specific tables they have access to. This is done via CSV as well as API.

User roles

- END_USER: This is the only permission for the runtime
- CONFIG_NONE / CONFIG_READ / CONFIG_EDIT / CONFIG_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- TRANSACTION_NONE / TRANSACTION_READ / TRANSACTION_EDIT / TRANSACTION_ADMIN

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  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- MANAGED_TABLES_NONE / MANAGED_TABLES_READ / MANAGED_TABLES_EDIT / MANAGED_TABLES_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- DEPLOY_NONE / DEPLOY_ADMIN (no EDIT or READ): ADMIN everything deployment related, including Product Filter Rules and Product Catalog Enrichment Deployments
- UTILITIES_NONE / UTILITIES_READ / UTILITIES_ADMIN (no EDIT)
  - READ correlates to GET endpoints
  - ADMIN correlates to everything else

Related topics

Using CPQ user access management

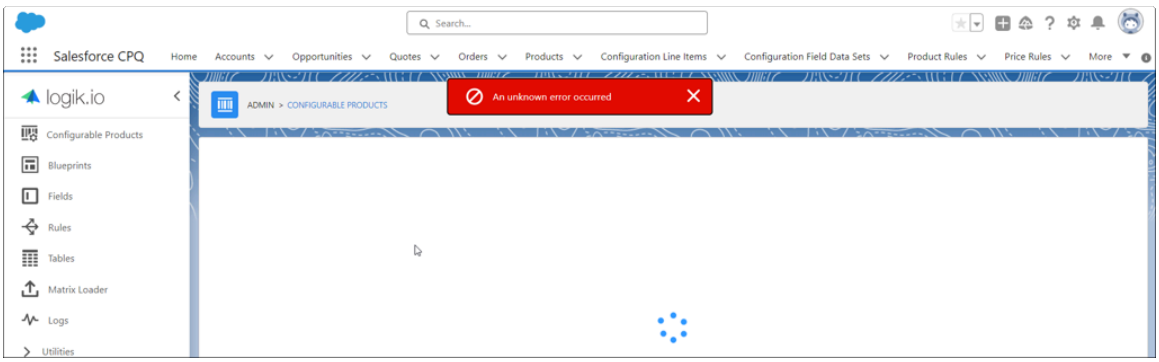
User access

User access

Learn how to grant or revoke admin access for a user. Existing users have admin access by default, while new users have only end-user access.

CPQ Admins can control access to the Admin interface by granting admin access only to specific users. All existing users have admin access, which can be adjusted to end-user access as needed. New users automatically receive end-user access and need to be explicitly granted admin access by a user with admin access.

Note: If you try to access CPQ Admin without admin access enabled, you receive the message "An unknown error occurred." If you encounter this message, ask a user who has admin access to enable your access.



Managing user access

Configure user access by visiting Utilities > User Access.

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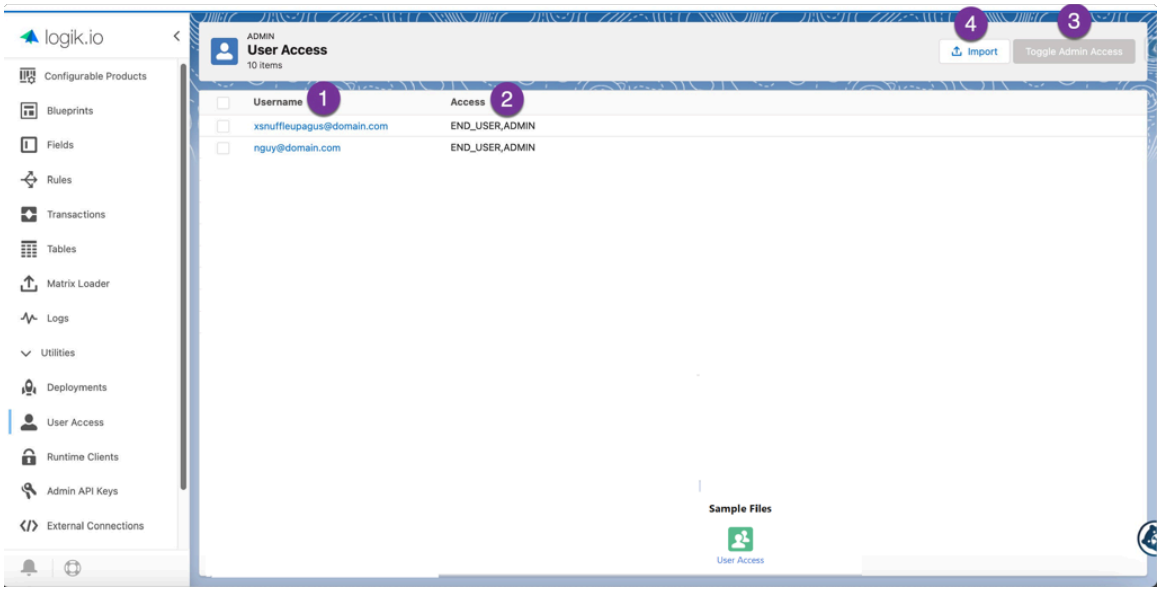
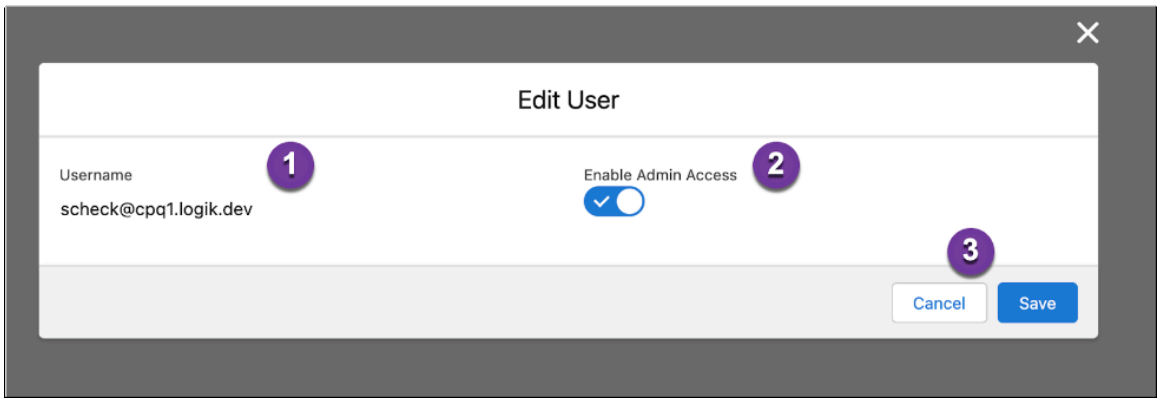


1. Username: Email address of the user. Click to edit (see below)
2. Access: The level of access a user has (END_USER or ADMIN)
   - END_USER: Can create configurations using CPQ. Typical for sales users, partners, and so on
   - ADMIN: Can access the administrative side of CPQ to create and modify blueprints, fields, rules, and other objects
3. Toggle Admin Access: Select one or more users using the checkbox. Toggle Admin Access adds or removes admin access for the selected users, depending on their current access level
4. Import: At the bottom of the user access page is a sample user access file that can be exported. After making the necessary modifications to the exported file, you can import it using the "Import" button

To edit a user, click a username in the table.



1. Username: email address of the user being edited
2. Enable Admin Access: Toggle for controlling access to the Admin features of CPQ. The toggle to the right indicates that the user has Admin privileges
3. Save / Cancel – Confirm changes or cancel

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Note:

- Users are created and show up on the User screen in CPQ the first time they access a CPQ instance and go through the authorization provider.
- All existing users of a CPQ instance have END_USER and ADMIN access. Admin access can be removed from users that do not require it.
- Newly created users have END_USER permissions only. The access level can be changed by an administrator following the above steps.
- If you need additional assistance, please contact support or log a case.

Related topics

Using CPQ user access management

User Access Control reference

Request provisioning of an SFDC org with a CPQ environment

Learn how to submit a request through CPQ Support for environment setup.

Before you begin

Role required: admin

Procedure

1. Install Salesforce CPQ version 244 or later.
2. Provide the email address associated with a user in the org who will serve as the first Admin user.
   This user will grant other users access after they appear in the User Access list of users after attempting to log in.
3. Create a user in the desired SFDC org for CPQ provisioning.
   Set the user's email to provisioning@logik.io. This user should have permissions to install packages. If a CPQ user cannot be created, provide the My Domain URL of the org as well.
4. Log a case by using the Support Center or by sending an email message to support@logik.io with the subject "New Environment Request." Provide the following details:
   - The SFDC org ID (Setup → Settings → Company Settings → Company Information → Salesforce.com Organization ID)
   - A short note explaining that you created a user with email provisioning@logik.io and that we need to retrieve these credentials
   - The My Domain URL of the org and the org ID, if a CPQ user cannot be created

   CPQ Support and DevOps will notify you when the work is complete.

Integrating CPQ with visualization tools

Learn how CPQ connects to third-party visualization engines—CDS, kBridge, and Threekit—to render 2D/3D product views that respond to configuration inputs in real time.

You can perform the following:

- Show live visuals as users configure: colors, dimensions, options, and bundles can update the viewer instantly.
- Coordinate UI + visual states: publish field values, set rows, and selected products to the renderer.
- (Optional) Write back from the viewer: for supported vendors, user actions in the canvas can update fields.

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Supported vendors at a glance

List of vendors

Vendor	Direction	What you can send	What can be written back	Notes
CDS	1-way and 2-way	Fields, Sets (first 25 rows), product pickers (first 25 options), Active Set Index	Fields; Sets via listener field JSON + rule parsing	Good for CAD/2D/3D; flexible mapping objects
kBridge	1-way and 2-way	Fields, Sets (first 25 rows), product pickers (first 25 options), Active Set Index	Fields; Sets via listener field JSON + rule parsing	Real-time 3D with rich event & listener model
Threekit	1-way	Fields, Asset Id (static or via field), Active Set Index (visual focus only)	Not supported (viewer → Logik)	Use for high-fidelity visuals; map fields and asset selection

Note: When sending sets or product pickers, CPQ publishes up to 25 rows/options. Indices and options beyond 25 are not transmitted. When using set repeaters, you can publish an Active Set Index trigger so the viewer shows the row the user is editing.

How the integration works

1. The layout component in the blueprint defines the visualization panel's position and size.
2. Connection settings authorize and route traffic (for example, the script or app URL, the auth token, and the subdomain).
3. The mapping block selects what CPQ data to send:
   - `eventFields` — field variable names and their viewer keys
   - `eventSets` — set variable names (first 25 rows published as an array of objects)
   - `eventProductPickers` — selected options (first 25) as an array of objects
   - `setActiveTriggers` — Boolean fields that indicate the active index in a set repeater
4. (Two-way only) A listener field (CPQ text field) receives JSON from the viewer.
   - Add a determination rule (or enrichment) to parse that JSON and update fields or set rows.
   - If a listener field is present, only mappings explicitly configured for two-way will write back.

Viz Vendor	1-Way Communication					2-Way Communication	
	Field	Set	Set Repeater: Active Index	Product Picker		Field	Set
CDS	✅	✅	✅	✅		✅	✓
kBridge	✅	✅	✅	✅		✅	✓
Threekit	✅		✅				

✅ = supported feature
✓ = supported via implementation. See vendor-specific implementation article.

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Data exchanged

- Fields: Scalar values (text, number, Boolean, picklist selection).
- Sets: Array of row objects (first 25). Use the Active Set Index to keep the visual in sync with the row being edited in a repeater.
- Product pickers: Array of selected option objects (first 25).
- Assets (Threekit): Provide a static `assetId` or an asset-ID field in Logik to enable dynamic asset selection.

Security and environments

- Auth and origin: Use vendor tokens and URLs appropriate to prod vs non-prod. Ensure your CPQ Runtime Client origins match calling domains.
- CSP (Content Security Policy): Allow vendor script or app hosts for embedding and messaging. Coordinate with your security team and CPQ support to add domains.
- Separation of concerns: Keep vendor credentials and tokens out of shared layouts across environments. Swap tokens when promoting.

When to choose which tool

- If you need bidirectional edits in the canvas, choose kBridge or CDS and implement a listener field and parsing rules.
- If you need high-fidelity 3D with asset management and one-way updates, choose Threekit with an assetId or assetId field strategy.
- If you have a heavy set-driven UX, prefer CDS or kBridge for two-way set JSON handling and Active Set Index synchronization.

General guidelines

- Map only what you need: Limit `eventFields`, `eventSets`, and `eventProductPickers` to essential data for performance.
- Design for the 25-item cap: If users may exceed 25 set rows or product picker selections, add guardrails (such as validation, paging, or summarization).
- Normalize for two-way: Define a stable JSON schema for listener payloads and centralize parsing logic in a managed rule or enrichment.
- Promote safely: Externalize environment-specific values such as tokens and URLs. Verify visuals in test before production promotion.
- Troubleshoot systematically:
  - Check admin logs for runtime or script errors.
  - Verify CSP and network access to vendor domains.
  - Use the viewer's console/devtools and CPQ debugger inputs to reproduce states.

Related topics

Integrating kBridge visualization

Integrating CDS or other third-party visualization tools

Integrating Threekit visualization

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Integrating kBridge visualization

Integrate kBridge for real-time 3D visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ supports several different 3D visualization options in the end-user configuration experience. CPQ can be implemented to use kBridge as a visualization component that is updated in real time in the CPQ UI as the user changes configuration inputs (one-way communication). In addition, bidirectional (two-way) communication may be defined so that user manipulations of the graphic update CPQ configuration fields.

The following video shows how to integrate CPQ with kBridge for real-time updates:

KBridge Integration Setup Demo

The integration between CPQ and kBridge is set up in the CPQ blueprint layout definition. The layout definition:

- defines where the kBridge visualization component will be rendered on the CPQ UI
- specifies the kBridge connection
- identifies the CPQ field or set data to be sent

To create a kBridge component, the `kbridge` layout component type can be added in the "type" column of the layout CSV file. Additional properties for the integration are set in the "value" column.

This sample layout CSV file demonstrates the use of the kBridge component and parameter inputs. See row 12.

kBridge_setsv2-layoutCSV

JSON value template

```
scriptUrl: string,
appUrl: string,
token: string,
sessionStartup: object
eventFields: object
eventSets: object
eventProductPickers: object
setActiveTriggers: array
listenerFields: object
height: number
width: number
```

kBridge connection

- scriptUrl: URL for kBridge script
- appUrl: URL for kBridge app
- token: Auth token from kBridge
- sessionStartup: Additional kBridge startup information; work with kBridge, your implementer or kBridge administrator to determine the appropriate values to pass in this parameter for your kBridge setup

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CPQ data

- `eventFields`: Mapping of CPQ fields to kBridge
- `eventSets`: Mapping of CPQ sets to kBridge
- `eventProductPickers`: Mapping of CPQ product pickers to kBridge
- `setActiveTriggers`: CPQ set triggers
- `listenerFields`: For two-way data communication involving one or more CPQ sets, this object specifies the CPQ text field variable name to which a JSON representation of the set(s), manipulated in the kBridge visualization by the user, will be returned to CPQ. The Admin must define a rule that parses the content of the listenerFields and populates the appropriate set inputs.

Note:

- If a blueprint/layout has `eventFields` but not `listenerFields`, every event field has two-way communication.
- If a listener field is added to the blueprint or layout, all event fields will communicate only from CPQ to kBridge.
- Event sets and event product pickers pass information only from CPQ to kBridge, and not from kBridge to CPQ.
- From a data standpoint, event sets and event product pickers data are passed the same way to kBridge (in an array of objects).

Layout size

- `height`: element height in layout, value is in pixels
- `width`: element width in layout, value is in pixels

Example JSON values

```
{
  scriptUrl: 'http://script.location';,
  appUrl: 'http://app.script.location';,
  token: 'abc-123-def-456',
  sessionStartup: {
    type: 'model',
    revisionId: '1234-5678-90'
  },
  eventFields: {
    field1: { name: 'field-1', refChain:
 'world.application.model' },
    field2: { name: 'field-2', refChain:
 'world.application.model' },
    field3: { name: 'field-3', refChain:
 'world.application.model' }
  },
  eventSets: {
    set1: { name: 'set-1', refChain:
 'world.application.model' },
  },
  eventProductPickers: {
    picker1: { name: 'picker-1', refChain:
 'world.application.model' },
  },
```

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```
  setActiveTriggers: ['set.set2.triggerBoolean'],
  listenerFields: {
    listenerFieldName: { name: 'logikTestSet', refChain:
 'world.application.model' }
  },
  height: 800,
  width: 1200,
}
```

- `name` corresponds to the field or rule name in kBridge.
- `refChain` corresponds to the model path of this object in kBridge.

Reference

For a discussion of features available among supported visualization applications in integration with CPQ, see Visualization Integrations: An Overview.

Integrating Threekit visualization

Integrate Threekit for visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ can share field values with Threekit so that Threekit visualization is updated in real time as the user changes CPQ configuration inputs.

Integration between CPQ and Threekit is accomplished in the blueprint layout definition. The following layout CSV file contains a sample of how the CPQ administrator defines where the Threekit visualization will be rendered in the UI, specifies the Threekit environment authorization token, and identifies the CPQ field data to be sent.

Layout_ThreeKit_in_sidebar [Google Sheet]

Notes:

- In the layout definition sample, the Threekit rendering displays in a sidebar BasicContainer positioned on the upper right of the UI.
- The JSON provided in the `value` column of the ThreeKit element row contains the following syntax:

```
{
  "authToken": "3KIT_AUTH_TOKEN",
  "assetIdField": "<LGK field that holds 3KIT Asset ID",
  "apiSubdomain": "exampleThreekitSubdomain"
  "eventFields": {
    "LGK_FIELD1_VARNAME": "3KIT_FIELD1_VARNAME",
    "LGK_FIELD2_VARNAME": "3KIT_FIELD2_VARNAME",
    "LGK_FIELD3_VARNAME": "3KIT_FIELD3_VARNAME"
  }
}
```

- `authToken`: an authorization token provided by the Threekit application environment.

> **Important:** The authToken is how Threekit determines which of its environments will serve the visual asset: production or non-production. Therefore, be sure that the production CPQ environment passes the Threekit production authToken; nonproduction CPQ environments must pass the Threekit non-production authToken.

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When copying a layout from one CPQ environment to another, be aware that this manual edit must be made. Otherwise, non-production Threekit assets may be inadvertently displayed in CPQ production layouts.

- `assetIdField` defines the name of the CPQ text field that holds the Threekit asset IDs, as provided by Threekit. In this way, CPQ can pass a dynamic Threekit asset ID. This helps Threekit optimize image load times. This feature provides flexibility, should the Threekit model need to be broken into two or more asset definitions to facilitate a better user experience.

  Note: If your CPQ blueprint only passes one static Threekit asset ID, you can replace the `assetIdField` parameter with `assetId: <hard-coded Threekit Asset ID>`.

- `apiSubdomain`: The subdomain of your Threekit environment URL.
- `eventFields` contains key-value pairs where each key is the variable names of the CPQ field passed to Threekit. The corresponding values are the variable names, as defined in Threekit.

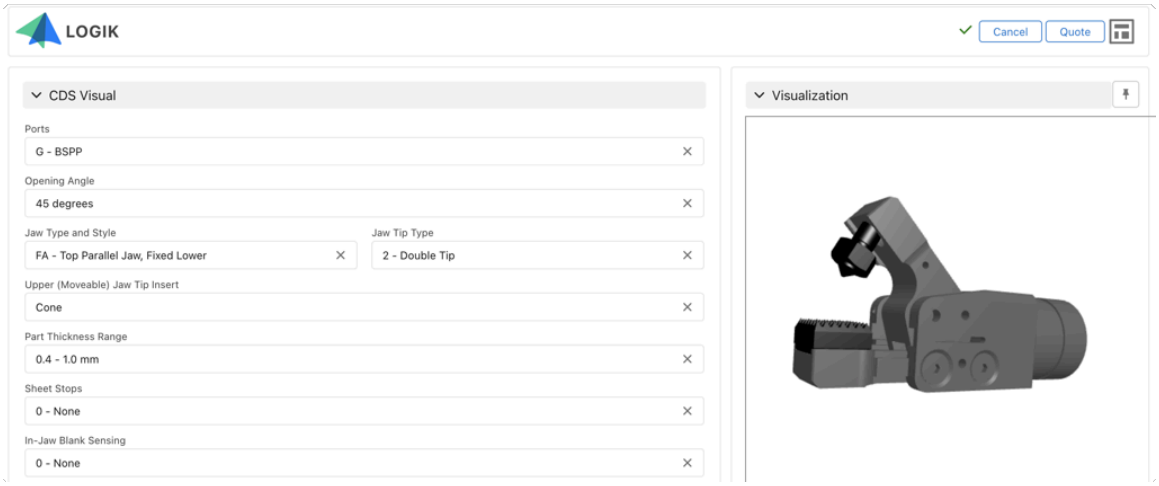
To learn more about the use of Threekit visualization with a set repeater, see Use case: Pairing set repeaters and visualization components

For a discussion of the features available in supported visualization applications in integration with CPQ, see Integrating CPQ with visualization tools.

Integrating CDS or other third-party visualization tools

Integrate CDS Visual or other third-party tools for technical visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ can be implemented to share field values with third-party visualization tools so that visualization is updated in real time as the user changes configuration inputs. This article discusses integrating the CDS Visual tool as an example. Depending on the CDS model setup, the visualization may render as CAD drawings, 2D images and 3D interactive images.



The integration between CPQ and CDS is accomplished in the Blueprint layout definition. The following layout CSV file contains a sample of how the CPQ administrator defines where the CDS visualization will be rendered. It also specifies the CDS environment and CPQ field data to be sent.

Layout_CDS_in_sidebar [Google Sheet]

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Step-by-step guide

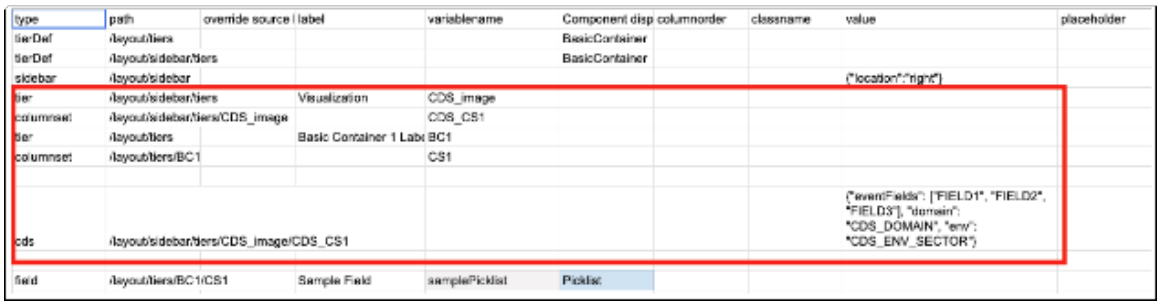
This article can help you decide how to add the CDS configuration.

1. Open the layout editor in your CPQ configurator.
2. Download your CSV layout file.
3. Open your CSV layout file, and add the CDS layout element fields (highlighted in detail below).
4. Re-upload your CSV layout file to CPQ. Your CDS layout element should now be present in the layout.
5. Open the configuration options for your CDS layout element and add in the necessary JSON data lines.

Technical configuration options

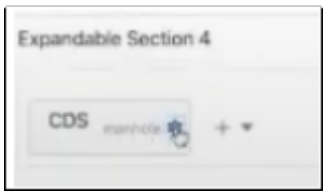
The integration between CPQ and CDS is accomplished in the Blueprint layout definition. The following layout CSV file helps demonstrate how the administrator defines where in the UI the CDS visualization will be rendered. It also specifies the CDS environment and the CPQ field data to be sent.

The layout can be updated directly in the layout editor. In the layout editor, create a new section named CDS in your CSV file using the fields highlighted in red below, and upload the new file to layout.



type	path	override source	label	variablename	Component disp	columnorder	classname	value	placeholder
tierDef	/layout/tiers				BasicContainer				
tierDef	/layout/sidebar/tiers				BasicContainer				
sidebar	/layout/sidebar							{"location":"right"}	
tier	/layout/sidebar/tiers		Visualization	CDS_image					
columnset	/layout/sidebar/tiers/CDS_image			CDS_CS1					
tier	/layout/tiers		Basic Container 1 Labe	BC1					
columnset	/layout/tiers/BC1			CS1					
cds	/layout/sidebar/tiers/CDS_image/CDS_CS1							{"eventFields": ["FIELD1", "FIELD2", "FIELD3"], "domain": "CDS_DOMAIN", "env": "CDS_ENV_SECTOR"}	
field	/layout/tiers/BC1/CS1		Sample Field	samplePicklist	Picklist				

From here, you can open the settings for this layout element, and configure the following fields using the CDS Properties JSON editor:



These properties can be configured in this element. The following table provides the name and description for each element.

Properties of the CDS layout element

Property name	Required	Description
eventFields	no	Array or object of fields to send to CDS. An array will assume the contained strings are both

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Properties of the CDS layout element (continued)

Property name	Required	Description
		CPQ variable names, and CDS variable names. An object will have key:value pairs. The Key is the CPQ variable name, and the value is the CDS variable name. Set fields are allowed to be defined here, using the format: `set.{setVariableName}.{fieldVariableName}`
eventSets	no	Array or object of sets to send to CDS. An array will assume the contained strings are both CPQ variable names, and CDS variable names. An object will have key:value pairs. The Key is the CPQ variable name, and the value is the CDS variable name. The set will be sent as a whole, up to 25 indexes long: `setVariableName: [ { field1: 'value', field2: 'value' } { field1: 'value', field2: 'value' } ]`
eventProductPickers	no	Sends the entire product picker's data as an array of objects to CDS. An array will assume the contained strings are both CPQ variable names, and CDS variable names. An object will have key:value pairs. The Key is the CPQ

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Properties of the CDS layout element (continued)

Property name	Required	Description

		variable name, and the value is the CDS variable name.
		
		The product picker will be sent as a whole, up to 25 indexes long.
		
		Option #1:
		`{ "eventProductPickers": [ "productPicker1", "productPicker2" ] }`
		
		Option #2:
		`{ "eventProductPickers": { "logikProductPicker1": "cdsProductPickerName1", "logikProductPicker2": "cdsProductPickerName2" } }`

domain	yes	Domain of CDS visualization
env	no	Defaults to"qa" if not provided
setActiveTriggers	no	An array of variable names corresponding to a boolean field in a set. The listed fields will serve as a trigger for denoting which index of the set is active when being used in a set repeater. These are required if using a Basic Container or

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Properties of the CDS layout element (continued)

Property name	Required	Description
		Expandable Section as the repeated tier type
height	no	Height of the visualization window in px - defaults to 500
width	no	Width of the visualization window in px - defaults to 500

JSON string formatting

The final JSON string formatting should resemble the following:

```
{

"domain": "exampleDomain", "env": "qa"

"eventFields": ["field1", "field2", "field3"]

}
```

Notes

- In the layout definition sample, the CDS rendering will display in a BasicContainer sidebar positioned in the upper right.
  - CDS can pass CPQ a JSON object to a text field.
  - Use advanced rules to parse the JSON responses from CDS.

- The JSON provided in the 'value' column (column I) of the CDS element row contains the following syntax:

  ```
  {
  "eventFields": [ "FIELD1",
  "FIELD2", "FIELD3"
  ],
  "domain": "CDS_DOMAIN", "env": "CDS_ENV_SECTOR"
  }
  ```

  `domain`: the name of the domain serving your project, as provided by CDS.

  `env`: the name of the environment service for your project, as provided by CDS. Example: "qa".

  The eventFields array contains the variable names of the CPQ fields that are passed to CDS. In the past, the norm has been that CDS will match their variables to the CPQ variable names. Confirm that this is the case for your implementation with CDS.

  `eventFields` must contain all fields that will be communicated between CPQ and CDS (that is, both CPQ fields that control the CDS visual and fields that are passed back to CPQ based on changes made in the CDS visualization).

- Sets can also be passed to CDS, although only the first 25 indexes can be sent. This mirrors the above process except the property name is `eventSets` instead of `eventFields`.
- Array or object of sets to send to CDS:

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- An array will assume the contained strings are both CPQ variable name and CDS variable names.
- An object will have key:value pairs. The key is the CPQ variable name, and the value is the CDS variable name.

- This will be sent as a whole, up to 25 indexes long using the following syntax:

```
setVariableName: [
{
field1: 'value', field2: 'value'
},
{
field1: 'value', field2: 'value'
},
]
```

- Product pickers can also be passed to CDS with a restriction of only the first 25 indexes being able to be sent. This mirrors the above process, except the property name is `eventProductPickers` instead of `eventFields` or `setFields`. The following two syntaxes work:

```
{
  "eventProductPickers": ["productPicker1", "productPicker2"]
}
```

```
{
  "eventProductPickers": {
    "logikProductPicker1": "cdsProductPickerName1",
    "logikProductPicker2": "cdsProductPickerName2"
  }
}
```

- CDS can be set up for two-way communication. One-way communication updates the CDS graphic when the user updates relevant CPQ fields. The second mode allows the user to manipulate the CDS graphic, and CDS will update the relevant CPQ field inputs. For standard fields, CDS writes back to the mapped CPQ field. If CPQ sets are being used in a two-way communication setup, CPQ and CDS administrators will need to coordinate the following setup:
  - The CPQ Admin will define a distinct event field to which set data will be written from CDS.
  - The CDS admin will specify this field as the destination for set data.
  - The CPQ Admin will define determination rules that parse the field and populate the set.

Integrating CPQ with Shopify

The CPQ app for Shopify enables stores to seamlessly manage and sell configurable products using CPQ advanced CPQ (Configure, Price, Quote) features. Installation and setup are streamlined, and robust Admin options are provided for both technical and non-technical users.

The CPQ app for Shopify is a fully featured connector for a Shopify store. The app ensures the entire product catalog is available in CPQ for use with a CPQ blueprint. The app also includes an app block to add a configurator to any page on a storefront without the need to create a dedicated UI. The configurator app block is fully functional out of the box which means customers can start adding configurable products to their cart as soon as the storefront changes are published.

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- The CPQ app brings your entire Shopify product catalog into CPQ, allowing complex configurations for B2C and B2B sales.
- Features an app block to easily add a product configurator to any storefront page—no custom code required.
- Provides live catalog sync from Shopify to CPQ every fifteen minutes (one-way sync).
- Enables Shopify B2B Pricing by deferring to Shopify catalog prices for B2B users.

The CPQ app for Shopify is free to download on the Shopify app store:

Logik# Product Configuration

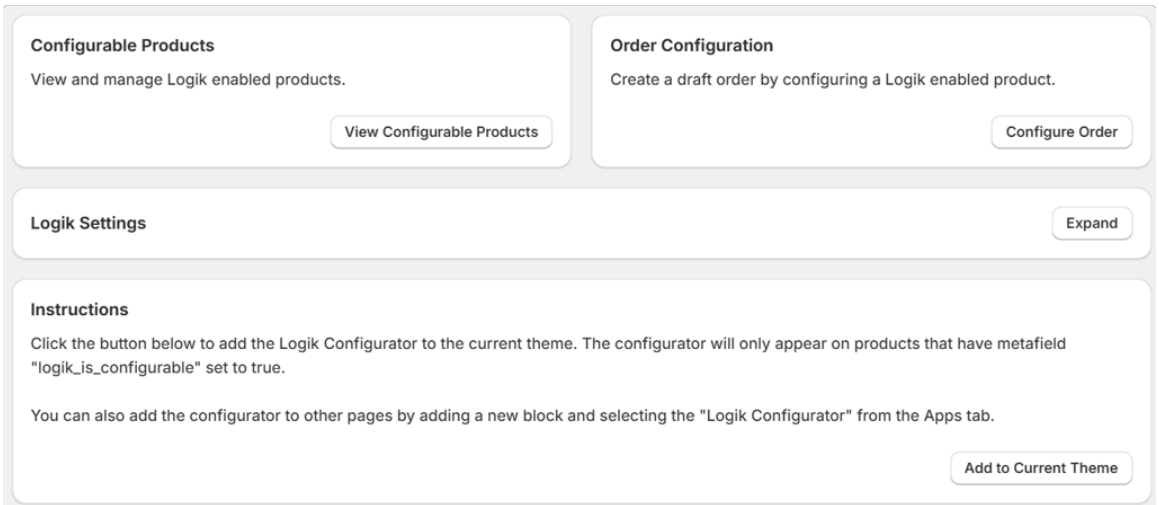
Setup

After downloading the CPQ app it will automatically appear in the Apps section of the store.

To start using the app, the CPQ environment details and a token must be entered in the CPQ settings section of the app landing screen. For more information about creating a CPQ token, see Set up a runtime client.

Note: Ensure the storefront and the Admin URLs are added as an origin for the token. All stores should also include the following static URL to their list of origins: https://shpfy-connect.ecommerce.logik.io.

CPQ app Admin screen overview



- **Logik Settings**: Logik environment settings which is required in order for the configurator to display
- Instructions: This block summarizes at a high level what is needed for a configurable product. The 'Add to Current Theme' button will also automatically place the app block on the product page template.
- Configurable Products: Redirects to a page for **Logik enabled products** in the store catalog
- Order Configuration: Redirects to a Logik specific create order page so that an Admin can add a Logik configurable product to an order

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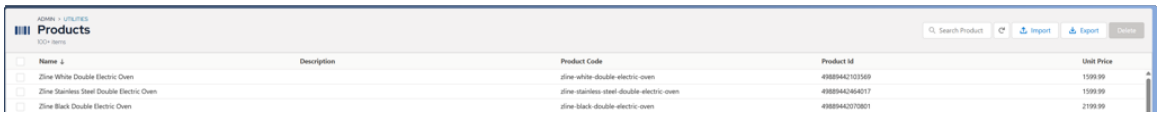
Managing products

When the app is installed and the **Logik settings** have been successfully saved, an automated catalog sync will begin and the custom CPQ attribute is added to the product details Admin page.

Product catalog synchronization

Products are synced down from Shopify to CPQ every fifteen minutes. All products in the store catalog will be synced to CPQ. Changes will be synced the next time the job runs.

Products from Shopify will appear on the Products and Configurable Products table. The Shopify GID is automatically mapped to the Product ID field on the table.



Note: The product syncs are one way. Changes to the product table will not be reflected in the Shopify catalog.

Configurable products

In order for a product to appear on the Configurable Products table as well the configurator to display, a product must have **Logik is Configurable** attribute set to True.



Using Shopify B2B pricing

In order to use Shopify B2B Pricing, all products associated to a CPQ Blueprint must be present in a catalog. The catalog must also have at lease

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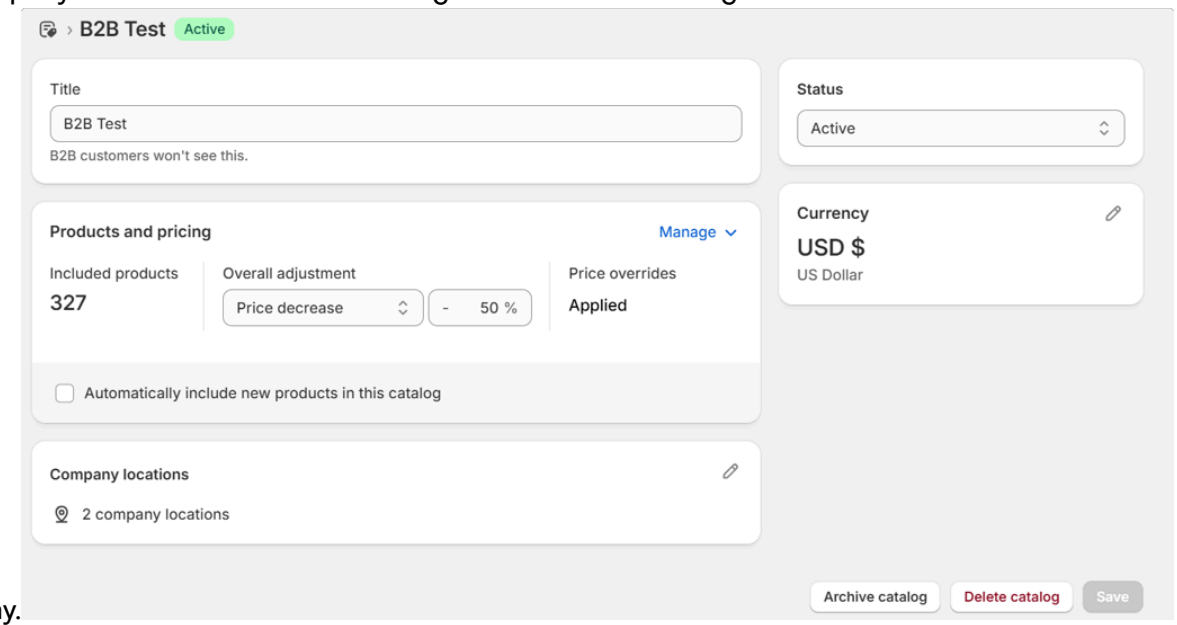
one company location associated to it alongside a user who belongs to that company.



When a user is logged in from an included company location, CPQ pricing will default to the Shopify catalog price. This will overwrite any CPQ price rules for these products. It is recommended that B2B specific blueprints are created to avoid any confusion around pricing in this scenario.

Adding a configurator to a page

The CPQ Configurator can be added to any page via an included app block through the page editor. The app block is automatically added to your store when the app is installed. You can find the block under apps when adding a new page section.

The look and feel of the **Logik configurator** is managed in CPQ Admin through use of the layout editor. However, there are additional options in the CPQ app block. If you encounter issues where the Font is too small or large, that can be modified in the app block settings along with spacing.

Product Pages

For product pages, the CPQ app landing page has a shortcut to directly add the app block to the product page template.

The default behavior on a product page is to use the current product as the configurable product. If the product is **Logik configurable**, the configurator will display. If not, the app block will remain hidden.

However, it is better to create a specific template for a **Logik enabled product** page, since modifications to the page content besides the app block could be needed.

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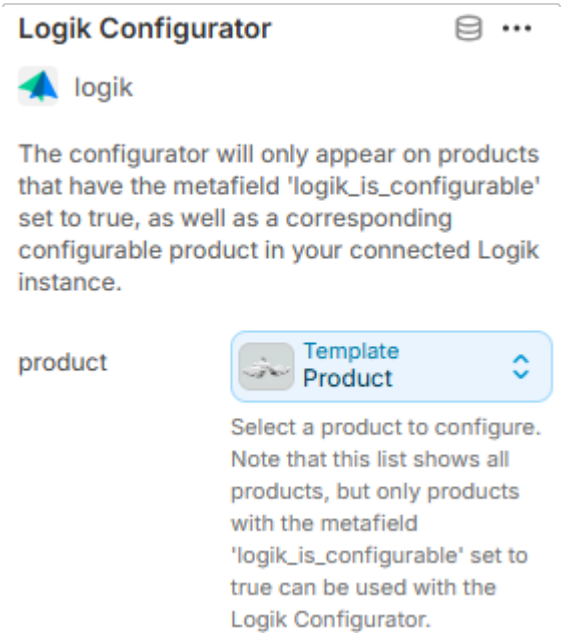
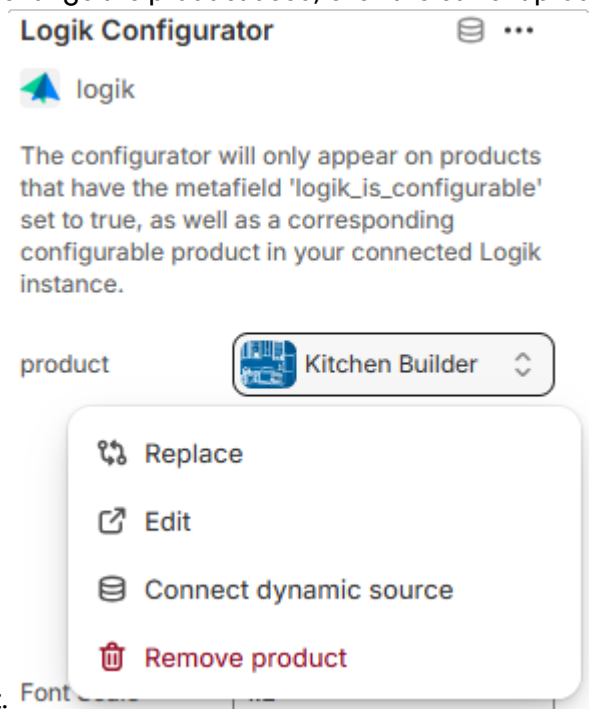


Content pages

When adding a **Logik configurator** to a non-product page, a specific product must be selected for use.

By default, a select option will be displayed. When clicked, a list of all products will be shown. Either click a product or enter a search term. Once selected, the product will be displayed in the app block settings.

To change the product used, click the current product then click ‘Replace’ to reopen the product list.



Add to Cart vs Add to Order

The **Logik configurator** app block provides two options for how it will function. Either the app will add the configuration to the customer’s cart directly, or a draft order of the configuration can

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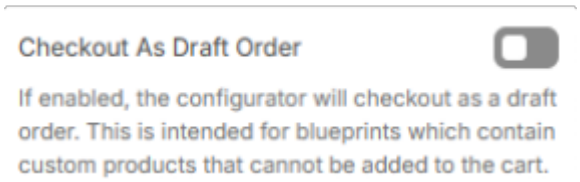
be created for the customer. To control the behavior of the configurator on the page, the option ‘Checkout As Draft Order’ can be enabled or disabled.

When enabled, a customer will need to be logged in. If the customer is currently logged out, the configurator will not be shown and instead a message to inform the customer to login is displayed. Once logged in, the customer can complete the configuration as usual. After completing the configuration, the configurator will close and display a success message. This configuration will then show as a draft order in the Shopify orders screen in the Admin. The customer’s email used to login will be included in the order.



If the setting is disabled, once the configuration is completed. All items included in the configuration are added directly to the customer’s cart and the customer is redirected to the cart page.

Managing configurable products in Shopify Admin

Configurable Products List:

On the Logik app landing page, once the CPQ credentials have been saved, a configurable product section is shown.

Clicking into the page will display a list of all products that are **Logik configurable** and any variants.

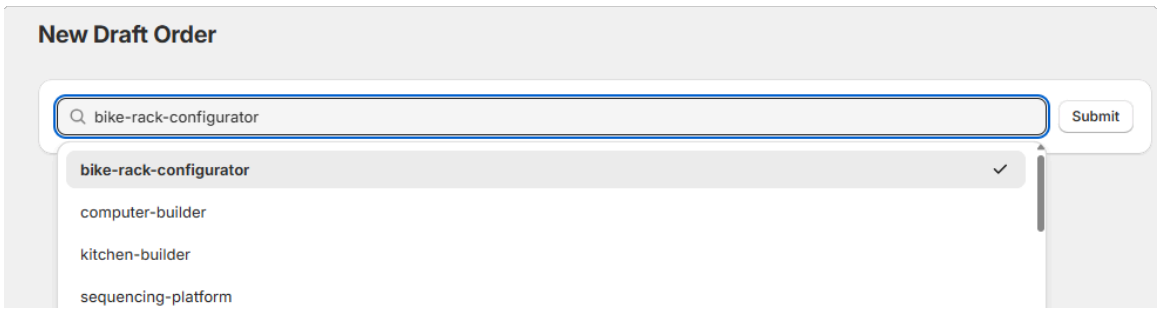
On the Configurable Products page, each product has two buttons. The details button redirects the Shopify user to that product’s details page in the Shopify Admin so they can edit any product details.

The order button will redirect the Shopify user to the Create Draft Order page and open the configurator for the selected product.

Creating a draft order



On the Create Draft Order page, a Shopify user can select a CPQ configurable product to launch it’s configurator. Once a product is selected and the submit button is clicked, the associated blueprint is displayed.



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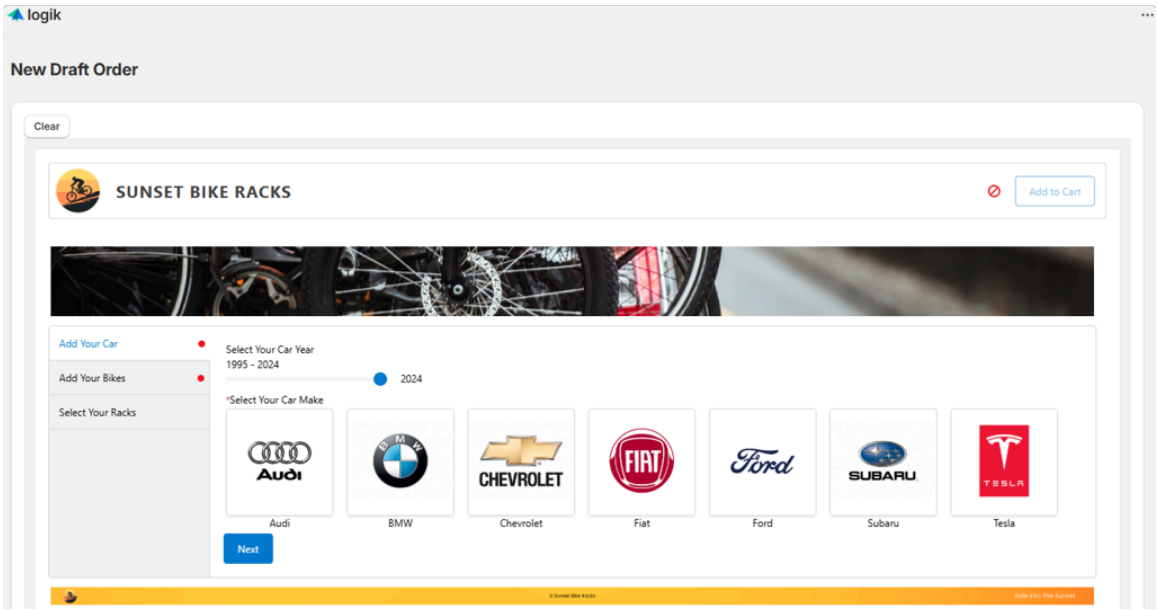
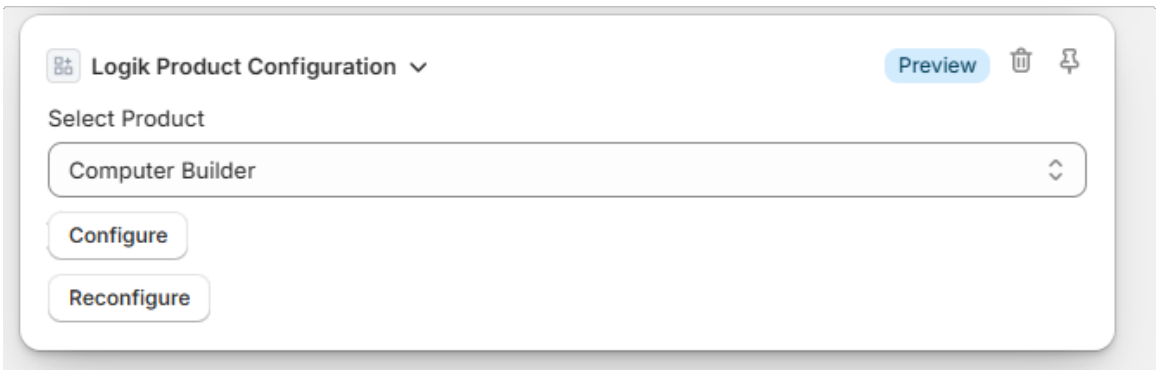
Once the configurator has been loaded, the Shopify user can complete a configuration just like a customer. Once complete, all items in the configuration are added to a new draft order and the user is redirect to that order's page.



From the order page, the user can complete the order like any other Shopify order.

Editing a Configurable Product in a draft order

On the draft order page, a Shopify user can edit a Logik configurable product that is included in the order. The user will select the product from the dropdown then click the 'Reconfigure' button, which will redirect to the create draft order page.



The existing configuration will automatically load on the page and the user will then have the ability to make any changes before saving. Once saved, the user will be redirected to the order.

Using the app with headless implementations

The CPQ Shopify app is not required for users who wish to integrate CPQ with their Shopify storefront. However, the app is designed with headless implementations in mind.

Here are some considerations when using the app for your headless implementation:

The app will streamline the setup with CPQ and reduce the overall need for custom middleware by providing a product sync between platforms, a custom CPQ Configurable product attribute and Draft Order functionality.

A Custom UI can be used in place of the CPQ app block which is completely optional.

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Saving a configuration, even heedlessly, will trigger the CPQ add to cart function which facilitates dynamic pricing and attributes Automated add to cart on save can be disabled through a DevOps request.

Clearing app settings

In any case where you need to clear the app settings, they can be manually deleted in your Shopify store settings: Go to the Metafields and metaobjects page and select **logikconfig**.

Click the 'More Actions' drop down menu and click 'Delete metaobject'.

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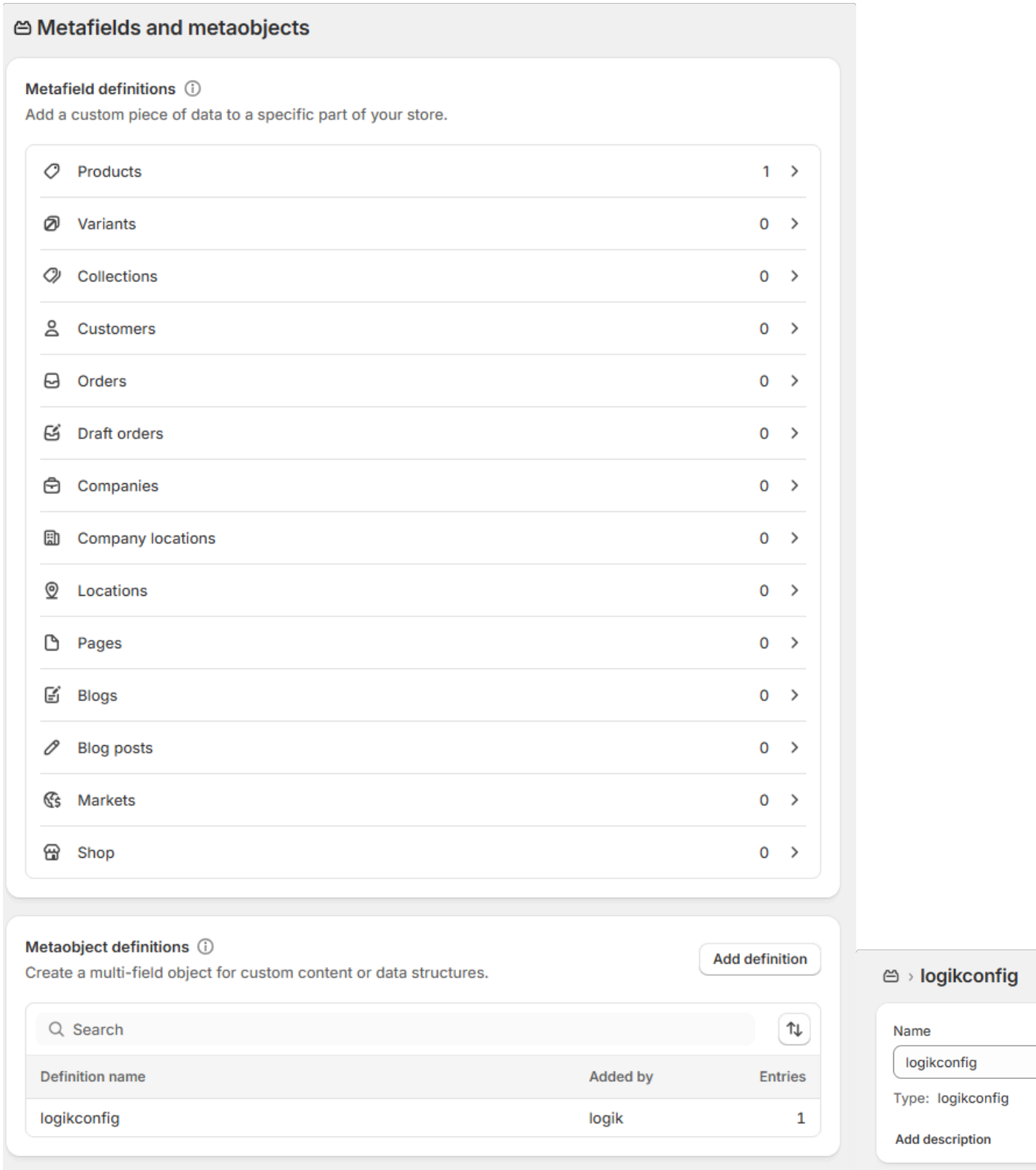

Configuring CPQ for SalesForce RLM

Install and configure the Salesforce Revenue Lifecycle Management package for CPQ (v0.3 or later).

Prerequisites

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Salesforce (SF) environment:

- Your Salesforce environment has Revenue Lifecycle Management (RLM) license(s) provisioned.
- The setup steps described in Salesforce RLM documentation are complete:
  - Enable RLM features in your SF org
  - Enable Product Configurator
  - Set up your user permissions set licenses and permission set groups for Admin user

Note that Salesforce Development states that its RLM and CPQ apps are incompatible. Therefore, follow these steps:

- Uninstall the CPQ app, if it is installed.
- Uninstall any Salesforce CPQ for CPQ package that may be installed on the Salesforce environment.
- If the CPQ environment previously had a Salesforce Subscription Management for CPQ package installed on it, this must be uninstalled. Some Subscription Management package elements conflict with the elements installed by the Salesforce Revenue Lifecycle Management for CPQ package.

CPQ base package: Salesforce for Logik Base package v2.2, or greater installed.

Set up CPQ Configuration for SalesForce RLM

This guide walks you through the installation and setup of the Salesforce Revenue Lifecycle Management package for CPQ v0.3 or later. (This guide does not discuss NGP setup. It will be added in a later version.)

As the current package is unmanaged, you will be required to uninstall v0.3 to install future releases of this package.

Salesforce Product Catalog Management (PCM) → Setup Configurable Product Bundle

1. App Launcher → Price Books: Activate "Standard Price Book"
2. App Launcher → Product Selling Models: Create a new Product Selling Model (PSM)
   - PSM Name: "One Time"
   - Selling Model Type: "One Time"

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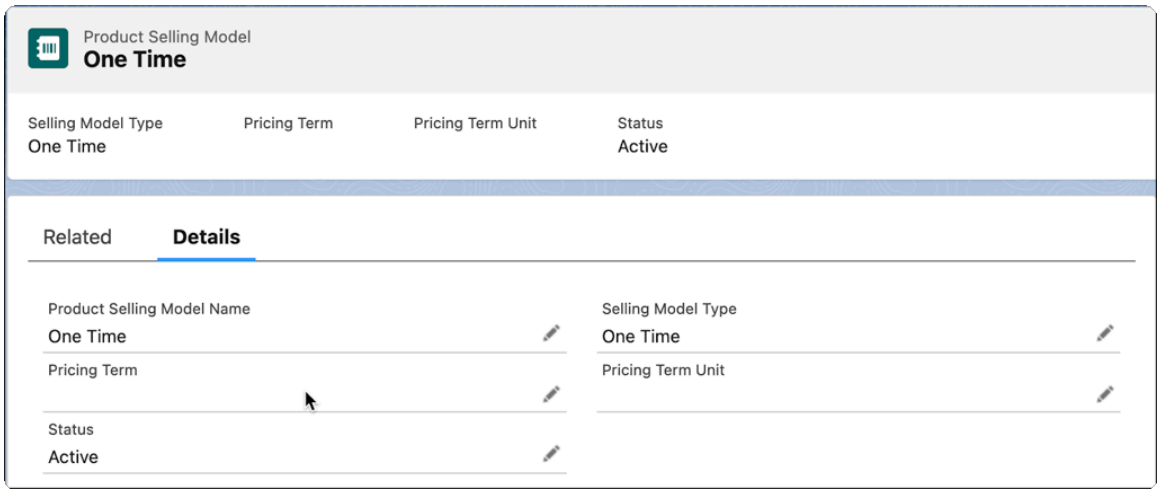
- Status: "Active"



3. Setup → Object Manager → Price Book Entry → Page Layouts → "Price Book Entry Layout": Add "Product Selling Model" field to the layout
4. Setup → Object Manager → Product → Page Layouts → "Product Layout": Add the following fields to the layout
   - Configure During Sale - makes the product configurable or not
   - Based On - associates a product to a class
   - Display URL - used for product images
   - Product Type
   - Tax Policy
5. Add the following related lists to the Product Layout
   - Product Selling Model Options
   - Overridden Inherited Attributes
   - Child Components
   - Inherited Attributes
   - Product Component Group
6. App Launcher → Product Catalog Management → Product Classification: Create a new Product Classification
   - Name: “Server Racks”
   - Code: “RACK”
   - Status: Active
7. App Launcher → Product Catalog Management → Products: Create a new Product
   - Product Name: “Product Warranty - 1 Year”
   - Active: true
   - Product Code: “WARRANTY”
   - Configure During Sale: “Not Allowed”
   - Product Type: “— None —"
   - Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

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On the related list of the product, add a new Product Selling Model Option named "One Time."

Click "Add Price Book Entry" in the Price Books related list, and use the following options:

- Product Selling Model: "One time"
- List Price: 2000
- Active: True
- Price Book: Standard Price Book

8. App Launcher → Product Catalog Management → Products: Create another new Product
   - Name: “Server Rack”
   - Active: True
   - Product Code: “RACK“
   - Configure During Sale: “Allowed”
   - Based On: “Server Racks”
   - Product Type: “Bundle”
   - Display URL: https://someimage.jpg
   - Product Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

   On the related list of the product, add a new Product Selling Model Option named "One Time."

   Click "Add Price Book Entry" in the Price Books related list, and use the following options:

   - Product Selling Model: "One time"
   - List Price: 150000
   - Active: True
   - Price Book: Standard Price Book

   On the related list of the product, create a new Product Componnent Group with the following options:

   - Product Component Group Name: “Warranties”
   - Code: “WARRANTY”
   - Sequence: 0
   - Min Bundle Components: 0
   - Max Bundle Components: 2
   - Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

   On the related list of the "Server Rack" product, click "Add" on the Child Components related list, and add "Product Warranty - 1 Year" as a child component with the following options:

   - Sequence: 0
   - Quantity: 1
   - Group: “Warranties”
   - Allow quantity changes: true
   - Price includes component: false

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- Include component by default: true
- Min Quantity: 1
- Max Quantity: 3
- Product Relationship Type: "Bundle to Bundle Component Relationship"

Notes:

- You need to search this and type it - the dropdown is not automatic.
- After manually opening the Bundle-to-Bundle Component Relationship record from App Launcher → Product Relationship Types, the record appears in this menu:

  App Launcher → Product Relationship Types → Bundle to Bundle Component Relationship.

  If you don't see it, you must manually create it by navigating to App Launcher → Product Relationship Types → New, and setting the following options:

  - Product Relationship Type Name: "Bundle to Bundle Component Relationship"
  - Associated Product Role Category: "Bundle Component"
  - Main Product Role Category: "Bundle Parent"

9. Create a new Attribute Category (App Launcher → Product Catalog Management → Attribute Categories) with the following options:
   - Name: "Server Rack Specifications"
   - Code: "SPEC"
   - Description: "Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."
10. Create a new Attribute Definition (App Launcher → Product Catalog Management → Attributes) with the following options:
    - Name: "Load Capacity"
    - Label: "Load Capacity"
    - API Name: "LoadCapacity"
    - Data Type: "Number"
    - Default Value: 1500
    - Active: true
    - Code: "CAP"
    - Description: "Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam."
11. Return to the related list of the new "Server Rack Specifications" attribute category you created, and in its related list, under "Attributes", click "Assign" and add the "Load Capacity" attribute to it.
12. App Launcher → Product Catalog Management → Product Classifications → "Server Racks" → "Attributes" tab: Click "Assign" → "Assign individual attributes" → add the "Load Capacity" attribute.

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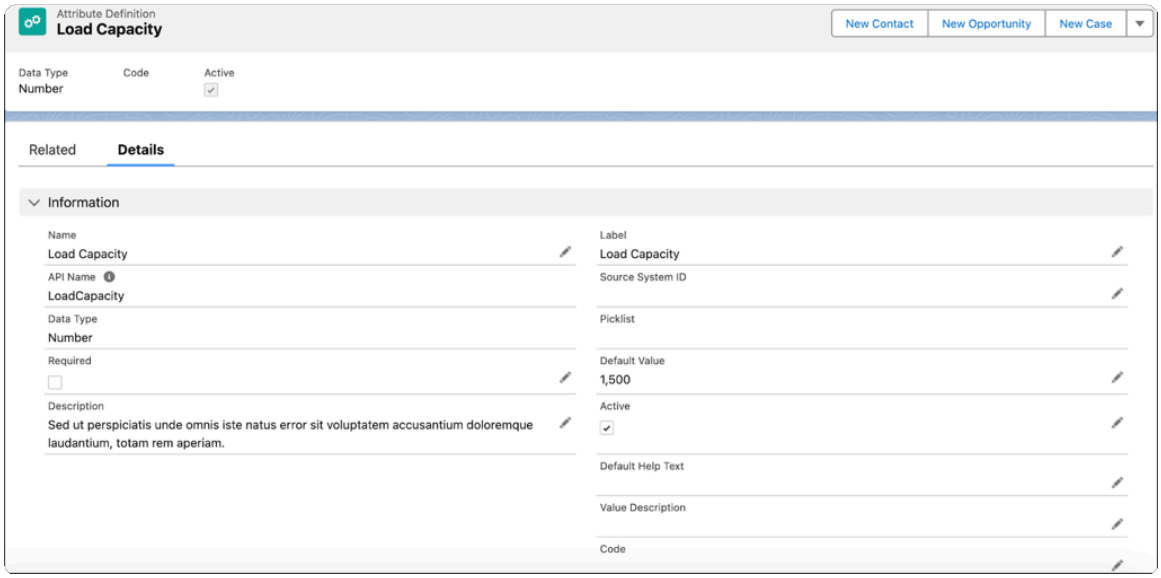

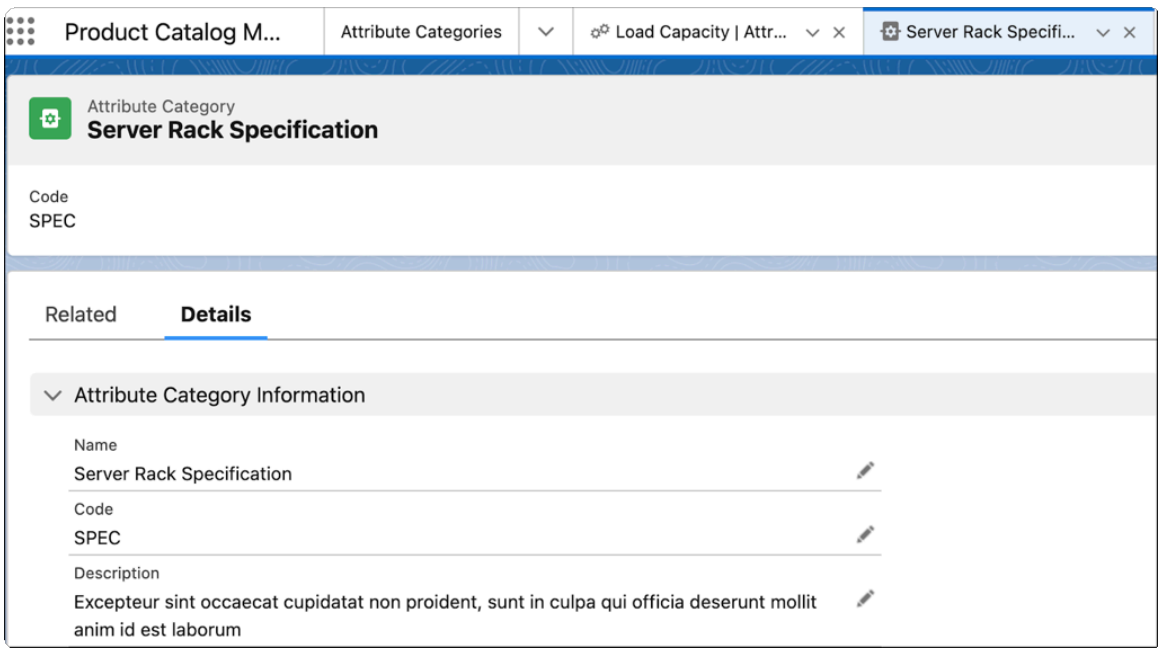

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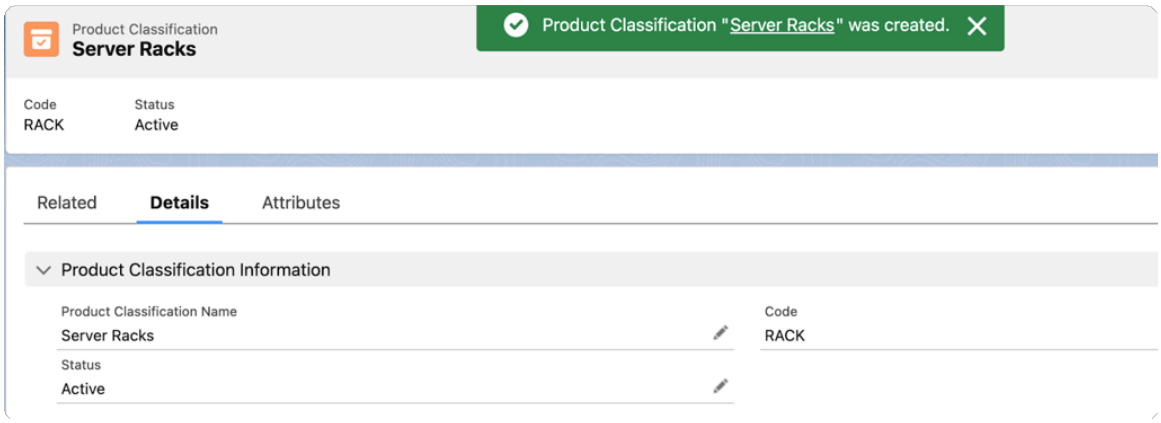
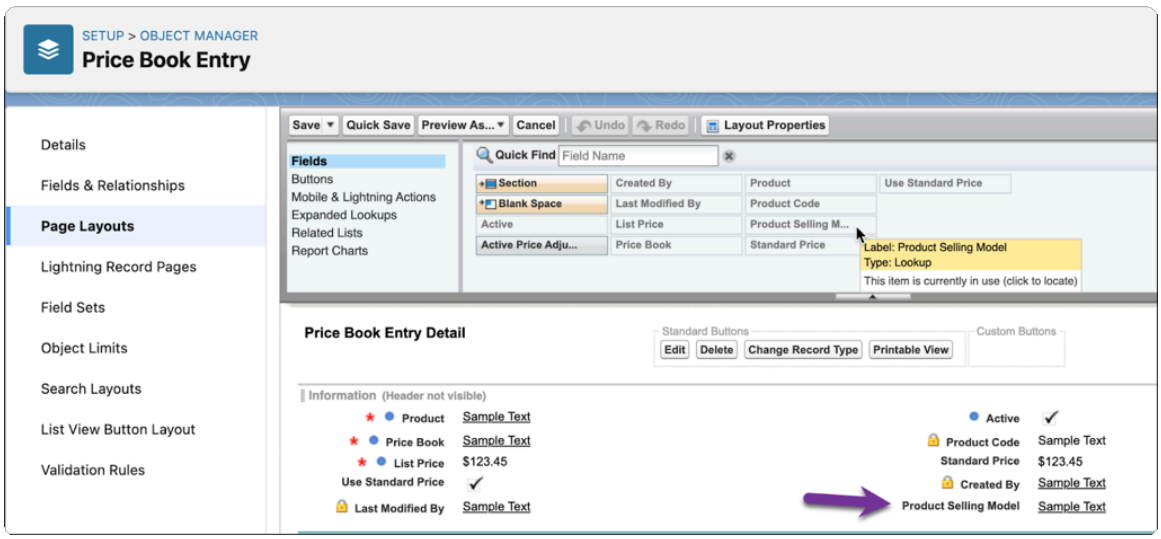
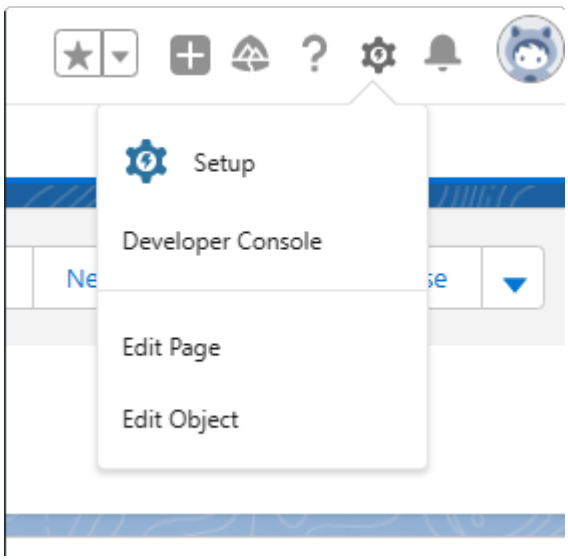




Salesforce Transaction Line Editor Setup

A Lightning Web Component is available to perform configure/reconfigure and view the Quote Line Items in their bundled/hierarchical view. To add this component to the layout:

1. App Launcher → Sales → Quotes → open a quote.
2. Press the gear icon on the top-right corner of the page and select "Edit Page".



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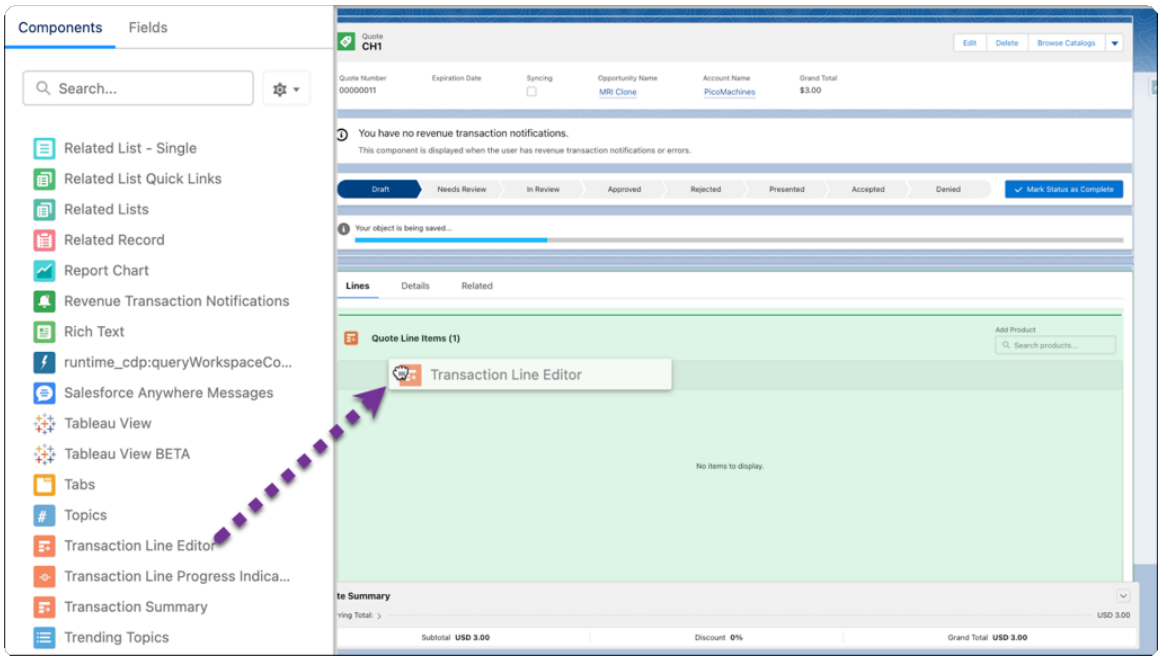
3. From left menu, drag Transaction Line Editor component onto the layout.



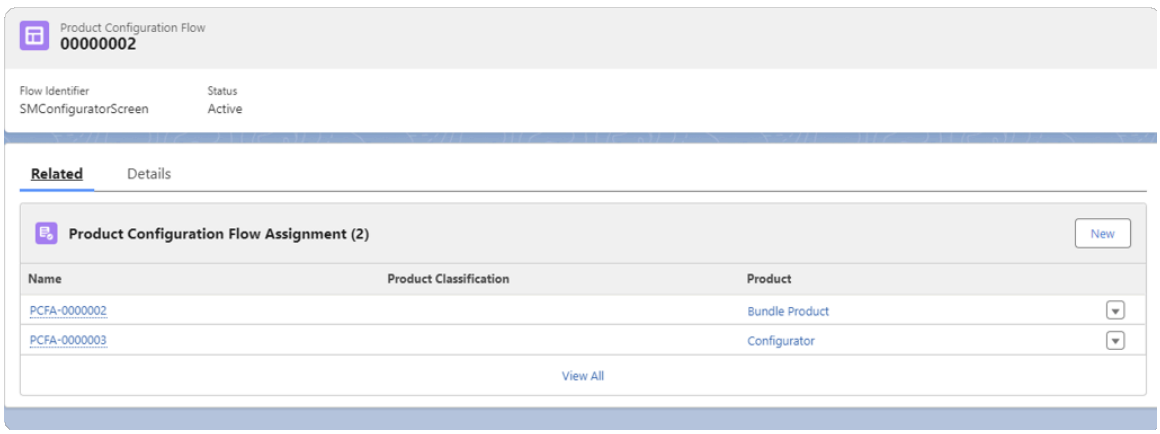
4. Save and Activate.

Salesforce Product Configuration Flows Setup

Instead of assigning a Configurator at the org level, a new object determines which configurator to launch per product.

1. Search for and open the sObject, "Product Configuration Flow"
2. Create a new Config Flow record and set the Flow Identifier as "RLMConfiguratorScreen". If you're only using one configurator, make this the Default as well.

If there are multiple config flows being used, the flow can be assigned to individual products or product classifications through the Related records.



Salesforce Product Discovery Setup

Configure from Quote: With Product Discovery, products can be configured before being added as a quote line.

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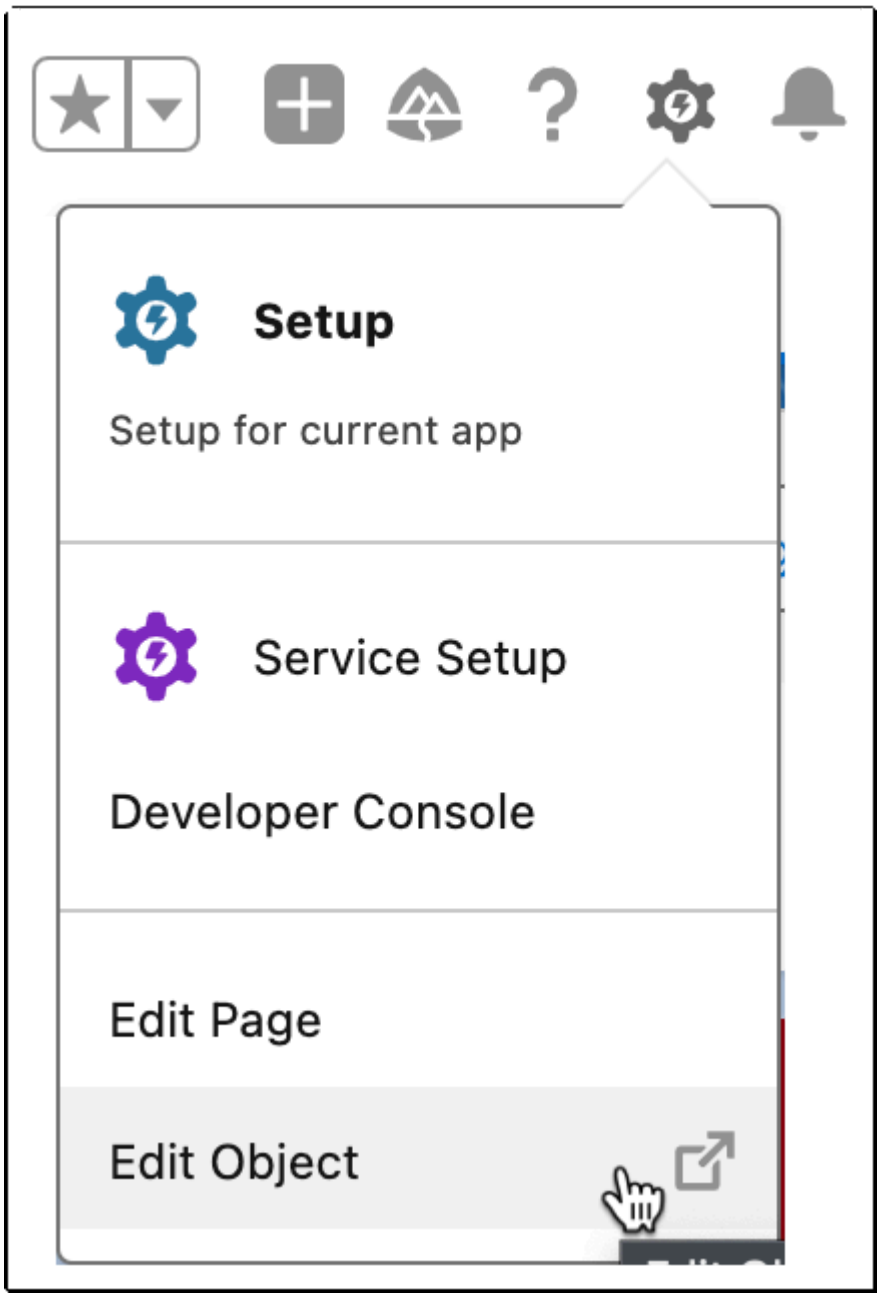
1. App Launcher → Sales → Quotes → open a quote.
2. Press the gear icon on the top-right corner of the page and select "Edit Object".
3. Go to Page Layouts; for the layouts being used, add the “Browse Catalog” action to the layout and save.



Configure from account is not currently supported. In the future, the user will be able to configure without reference to a quote. For instance, this could be used to launch product discovery from the account page.

1. From a Catalog page, open the Admin gears and click “Edit Page”.
2. Under Components, search for and add the "Product List Page Component" onto the page.

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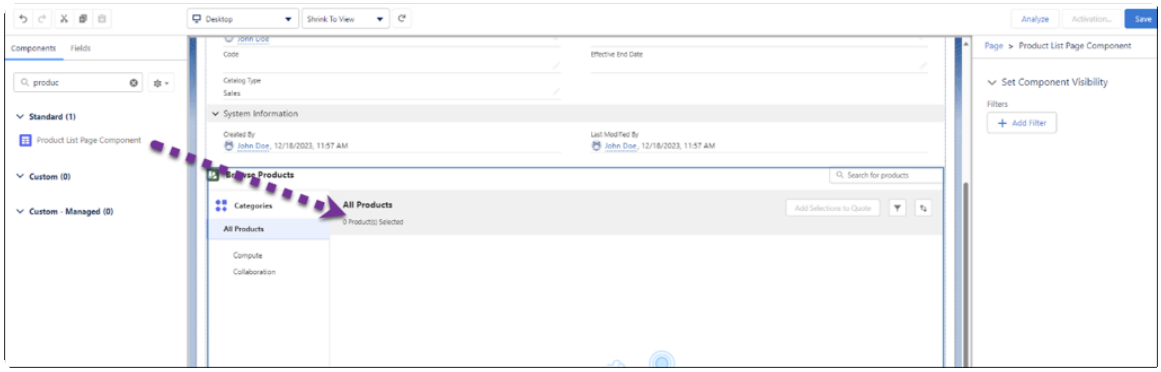
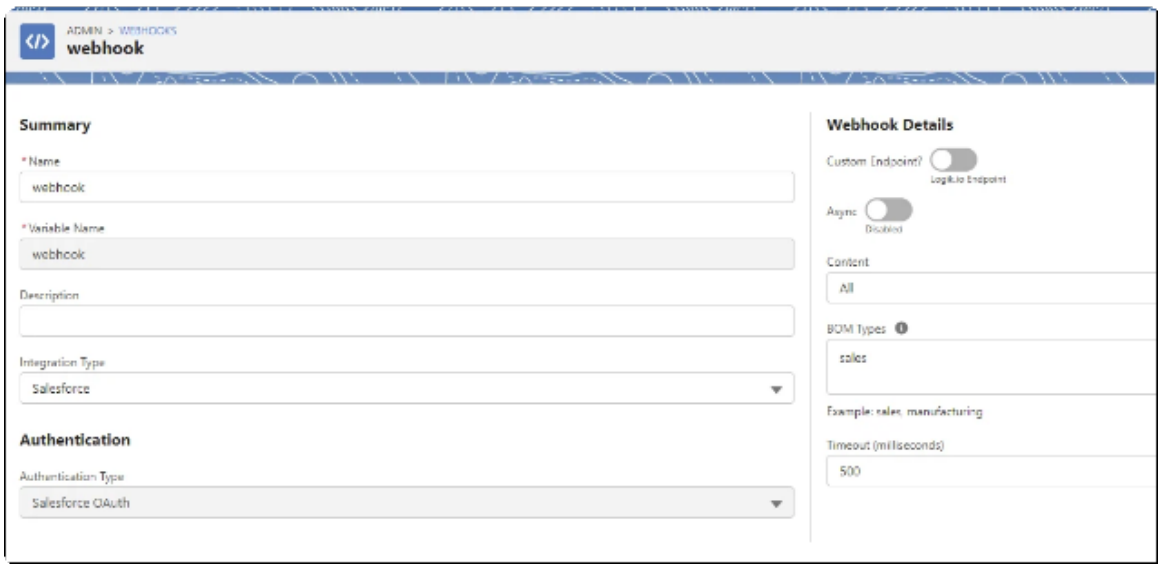


3. Save, and if needed, Activate and assign as default.

CPQ Webhook Setup

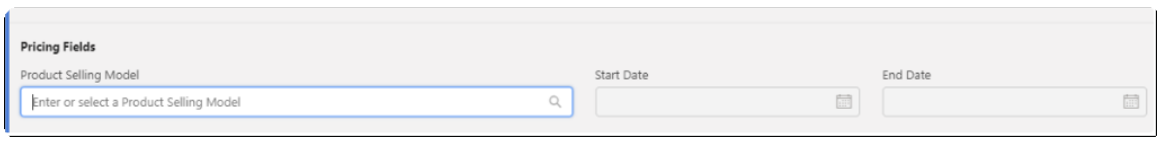
1. If Webhooks are not enabled on your CPQ environment, create a Support case and request Webhooks be turned on in the environment.
2. When Webhooks are enabled, navigate to CPQ Admin Home → Utilities → Webhooks, and create a new Webhook with the following settings:
   - Integration Type: Salesforce
   - Async: false
   - Content: Either "All" or "BOM and System Fields"
   - BOM Types: "sales" (others can optionally be added, but "sales" is required)



CPQ Product Selling Models Setup

In a product action, pricing fields for Revenue Lifecycle Management can be set, similar to extended info. These are available in both simple and advanced product actions.

Example of simple product action setup:



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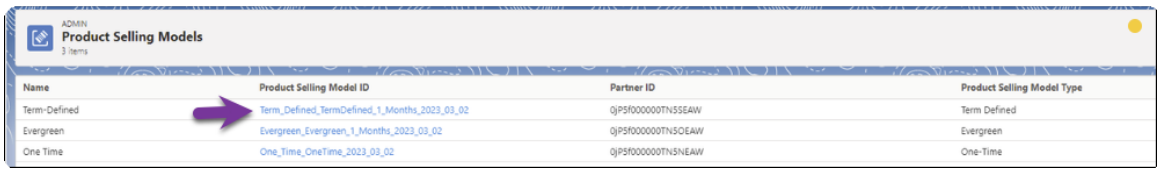
Available pricing map (ProductList.pricing) fields are:

- productSellingModelId
- startDate
- endDate

Assuming Product Selling Models have been created in Salesforce, the productSellingModelId can be found in a subpage of Utilities and will automatically be suggested in the simple product action UI.

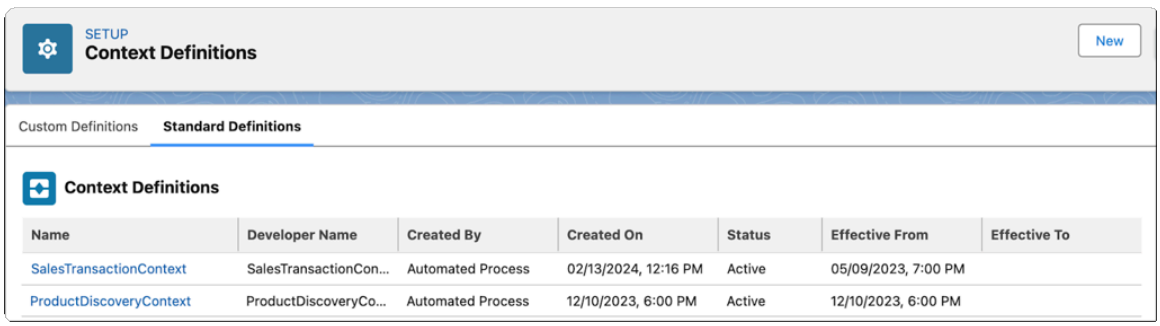
Example productSellingModelId based on this image would be "Term_Defined_TermDefined_1_Months_2023_03_02"



Salesforce: Enable Context Service

1. Setup → Feature Settings → Context Service → Context Service Settings: Set “Context Definitions” to "On"
2. Refresh the page. If you don’t see the next step, wait 10 seconds and try again.

   If you still don’t see the next step, wait 20 seconds and try again. This is an asynchronous process.
3. Setup → Feature Settings → Context Service → Context Definitions: Confirm that under “Standard Definitions”, the “Sales Transaction Context” is present and is “Active”.
   a. Open dropdown menu for "SalesTransactionContext__stdctx" and press 'Extend'.
   b. Populate the new Context Definition and Save.
   c. Go to the Custom Definitions tab. Open the dropdown menu for the newly created Context Definition and press 'Activate'.



Salesforce: Enable Business Rules Engine (BRE) for Qualification

1. Setup → Feature Settings → Business Rules Engine → Business Rules Engine Settings: Toggle on the switch to enable “Industries Cloud Common Decision Tables Access”
2. Setup → Context Service → Context Definition: Create a new custom context definition named “BrowseContextdefinition” (this name must match exactly). Don't set any other fields.
3. Click “Next”
4. Add the following context nodes:

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- Name: “PriceBook”
- Name: “Account”
- Name: “Catalog”

5. Under “Catalog”, add a child node of ”Category“
6. Under “Category”, add child nodes of “CategoryProduct” and “PricingProduct”
7. Under “CategoryProduct” add a child node of “Message”, and click Next.
8. Under “PriceBook”, click “Add Attributes” and add the PricebookID attribute:
   - AttributeName: “PricebookId”
   - Type: “INPUT”
   - Data Type: “STRING”
9. Under “Account”, click “Add Attributes” and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING:
   - Id
   - contactId
   - AccountCity__c
   - SLA__c
   - CurrencyIsoCode
   - Region__c
10. Under “Catalog”, click “Add Attributes” and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING:
    - Id
    - CurrentDate
11. Under “Category”, click “Add Attributes” and add the following attributes with a data type of STRING and the type as specified:
    - CategoryId (Type: INPUT)
    - IsCategoryQualified (Type: OUTPUT)
    - CategoryDisqualifiedReason (Type: OUTPUT)
12. Under "CategoryProduct", click "Add Attributes" and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING, unless otherwise specified:
    - Id
    - ProductId
    - RootProductId
    - ParentProductId
    - CategoryId
    - CatalogId
    - Name
    - Code
    - MaxQuantity (Data Type: NUMBER)
    - MinQuantity (Data Type: NUMBER)
    - Quantity (Data Type: NUMBER)

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- IsQualified (Type: OUTPUT; Data Type: NUMBER)
- Reason (Type: Output: Data Type: STRING)

13. Under "Message", click "Add Attributes" and add the following attributes with a type of OUTPUT and a data type of STRING:
    - Name
    - Value
14. Under "PricingProduct", click "Add Attributes" and add the following attributes:
    - PricingId
        - Type: INPUT
        - Data Type: STRING
    - PricingProductId
        - Type: INPUT
        - Data Type: STRING
    - ProductSellingModelId
        - Type: INPUT
        - Data Type: STRING
    - ProductQuantity
        - Type: INPUT
        - Data Type: NUMBER
    - UnitPrice
        - Type: OUTPUT
        - Data Type: CURRENCY
    - NetUnitPrice
        - Type: OUTPUT
        - Data Type: CURRENCY
    - PriceWaterFall
        - Type: OUTPUT
        - Data Type: STRING
    - PricingErrorMessage
        - Type: OUTPUT
        - Data Type: STRING
15. Click Next.
16. For each of the following nodes, add node tags that exactly match the name of the node:
    - PriceBook
    - Account
    - Catalog
    - Category
    - CategoryProduct
    - PricingProduct

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17. For each of the following attributes, add the specified attribute tags:
    - (For PriceBook:) PriceBookId: PriceBookId
    - For Account:
        - AccountCity_c: AccountCity
        - SLA_c: SLA
        - CurrencyIsoCode: CurrencyCode
    - (For Catalog:) CurrentDate: CurrentDate
    - For Category, give each attribute a tag that exactly matches the name:
        - CategoryId
        - IsCategoryQualified
        - CategoryDisqualifiedReason
    - For CategoryProduct, give each attribute a tag that exactly matches the name:
        - ProductId
        - RootProductId
        - ParentProductId
        - IsQualified
        - Reason
    - For PricingProduct, give each attribute a tag that exactly matches the name:
        - PricingProductId
        - ProductSellingModelId
        - ProductQuantity
        - PricingId
        - UnitPrice
        - NetUnitPrice
        - PricingErrorMessage

      For PriceWaterFall, assign a tag of price_water_fall. Click Save.
18. Open your newly created "BrowseContextDefinition" → click "Map Data" tab → click "Add Mapping":
    - Mapping Name: "BrowseOperation"
    - Description: "Browse Operation"
    - Mapping Type (select both):
        - "Automatic Input Schema Mapping"
        - "Automatic sObject Mapping"
    - Mark as Default: TRUE
19. Setup → Context Service → Context Definitions: in "BrowseContextDefinition" menu, click "Activate"
20. App Launcher → Business Rules Engine → Lookup Tables: Click “New” and select “Decision Table”
    - Name: “ProductQualificationDT”
    - Description: “Qualification Rules decision table”

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- API Name: “ProductQualificationDT”
- Source Object: “Product Qualification”
- Filter Result By: “Any Value”
- Usage Type: “Product Qualification”

On the next screen, because we’re going for the simplest qualification rule, we have only a single input and output (i.e. “Given a Product ID, tell me if its qualified or not”)

21. Next to “ProductId” set “Don’t Use” to “Optional input”
22. Next to “IsQualified” set “Don’t Use” to “Output”
23. Click “Next” and “Save"
24. Click the “Activate” button in the upper right corner to activate the decision table
25. App Launcher → Business Rules Engine → Expression Sets: Click "New" to create a new Expression Set
    - Name: “QualificationProcedure”
    - Usage Type: “Product Qualification"
    - Context Definition: “BrowseContextdefinition”
26. In the newly created expression set record home, see the “Expression Set Versions” table and click the first row to launch the Expression Set Builder.
27. In the expression set builder, click the “+” button in the middle of the screen and select “Evaluate Qualification”
    - Lookup Table Details: “ProductQualificationDT”
    - ProductId: “ProductId”
    - IsQualified: “IsQualified”
    - Reason: “Reason”
28. In the sidebar in the expression set builder, click the cog icon and set the “Rank” equal to 1
29. Click the Element Details tab and select “Include in Output”
30. Click “Save As”, wait for the full-page refresh, and then click “Activate”

    At this point, your BRE Qualification Rules should be setup correctly. To end, we will simulate the configuration to verify that it is working correctly.

31. In the Expression Set Editor, click the “Simulate button”
32. Select “Advanced” for the input and populate the ProductId field with your Cisco Server Rack NX44 product ID

    Leave the IsQualified and Reason fields as empty strings.

33. Click “Simulate”

Inspect the Output JSON to see if your product returns. "IsQualified" will be "null" and "Reason" will be an empty string.

Salesforce: Pricing Procedure

1. App Launcher → search for and open "Pricing Procedures" → open the "Revenue Management Default Pricing Procedure" → open the active Pricing Procedure and deactivate it.
2. Return to the Revenue Management Default Pricing Procedure. Edit it.

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Change the Context Definition to the custom definition that was extended from "SalesTransactionContext__stdctx". Save.

3. Reactivate the Pricing Procedure Version.

Troubleshooting

Issue: The CPQ blueprint was loaded into the RLM org, but no products show in the product catalog during quoting.

Diagnosis: This could mean that there's an issue with the Product Discovery settings (see the Salesforce: Enable Context Service section and beyond).

- Setup → Feature Settings → Decision Tables. Open both the ProductQualification and Price Book Entries tables and perform the 'Refresh' action on each.
- If the refresh doesn't solved the problem, view the following Salesforce documentation:
  - RLM Product
  - Discovery Setup

Issue: At runtime, the user receives the following error in RLM:
`System.IllegalArgumentException: Looks like you don't have access to the place quote service. Salesforce Customer Support can help with that`

Diagnosis: This is a permission set issue. Make sure that the following three RLM permission sets are assigned to the integration user that facilitates the CPQ integration.

- Product Catalog Management Designer
- ProductAndPriceConfiguration API
- Product Catalog Management Viewer

CPQ integration with Salesforce B2B Commerce

Learn how to configure CPQ to work with Salesforce B2B Commerce.

Prerequisites

This guide assumes the following:

- Commerce is enabled in Salesforce
- The CPQ Base Managed Package is installed
- System Administrator or similar access is available in order to perform the steps listed

Install files to Salesforce

1. If it isn't already installed, download and install the Salesforce Command Line Interface (CLI) using the instructions here:

   Install Salesforce CLI

2. Download and extract the logik-b2b.zip file, which contains the components used for the B2B integration, from github.com.

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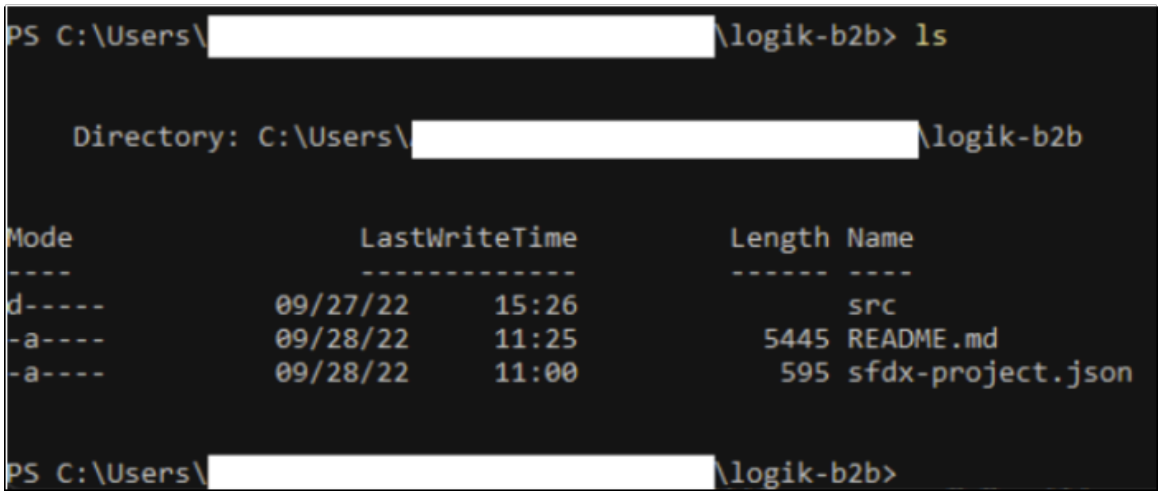
- On Mac, double-click the file. Its contents will be extracted automatically in the same location.
- On Windows, right-click and select Extract All". Follow the prompts that appear on screen.

a. refer the following:

3. Start Terminal (Mac or Linux) or Powershell (Windows).
4. Navigate to the directory containing the extracted files. For example, if the files were extracted in the Downloads folder, type and enter the command `cd Downloads/logik-b2b`.
5. Run the `ls` command to see a list of files and folders in that directory.

   You should see `src` and `sfdx-project.json`, as well as a plain text copy of this guide.



6. Run the following command, making the changes indicated just below:

```
sfdx auth:web:login --setalias myOrg -r
 https://example-dev-ed.my .salesforce.com
```

   - Replace the URL following `-r` with the one that the Logik-B2B integration will be set up on.
   - The text following `--setalias` is a nickname that is used to identify and reference the correct Salesforce org. The example `myOrg` will be used for the purposes of this guide. Be sure to use your own alias in the following steps.

   The URL specified in the previous login command will be opened in the default browser.

7. Log in and authorize the "Salesforce CLI" connected app.
8. In the command line, run the command `sfdx force:source:deploy -p src -u myOrg`.

   After a few moments, the command line will return a confirmation message, "Deploy Succeeded."

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```
PS C:\Users\[redacted]\logik-b2b> sfdx force:source:deploy -p src -u [redacted]
*** Deploying with SOAP API v55.0 ***
Deploy ID: 0Af0r00000dbH2uCAE
DEPLOY PROGRESS | [redacted] | 8/8 Components

=== Deployed Source

 FULL NAME                              TYPE                    PROJECT PATH
 ___________________________________ ___________________ ___________________________________________________________
 CommerceConfigurationPunchinController ApexClass               src\main\classes\CommerceConfigurationPunchinController.cls
 CommerceConfigurationPunchinController ApexClass               src\main\classes\CommerceConfigurationPunchinController.cls-meta.xml
 CommerceConfigurationPunchinTest       ApexClass               src\test\CommerceConfigurationPunchinTest.cls
 CommerceConfigurationPunchinTest       ApexClass               src\test\CommerceConfigurationPunchinTest.cls-meta.xml
 commerceConfigurationWindow            ApexPage                src\main\pages\commerceConfigurationWindow.page
 commerceConfigurationWindow            ApexPage                src\main\pages\commerceConfigurationWindow.page-meta.xml
 CartItem.ConfigurationId__c            CustomField             src\main\objects\CartItem\fields\ConfigurationId__c.field-meta.xml
 Product2.CommerceLayoutName__c         CustomField             src\main\objects\Product2\fields\CommerceLayoutName__c.field-meta.xml
 ConfigurableProductDetail              FlexiPage               src\main\flexipages\ConfigurableProductDetail.flexipage-meta.xml
 commerceConfigureButton                LightningComponentBundle src\main\lwc\commerceConfigureButton\commerceConfigureButton.css
 commerceConfigureButton                LightningComponentBundle src\main\lwc\commerceConfigureButton\commerceConfigureButton.html
 commerceConfigureButton                LightningComponentBundle src\main\lwc\commerceConfigureButton\commerceConfigureButton.js
 commerceConfigureButton                LightningComponentBundle src\main\lwc\commerceConfigureButton\commerceConfigureButton.js-meta.xml
 Admin                                  Profile                 src\main\profiles\Admin.profile-meta.xml
Deploy Succeeded.
PS C:\Users\[redacted]\logik-b2b>
```

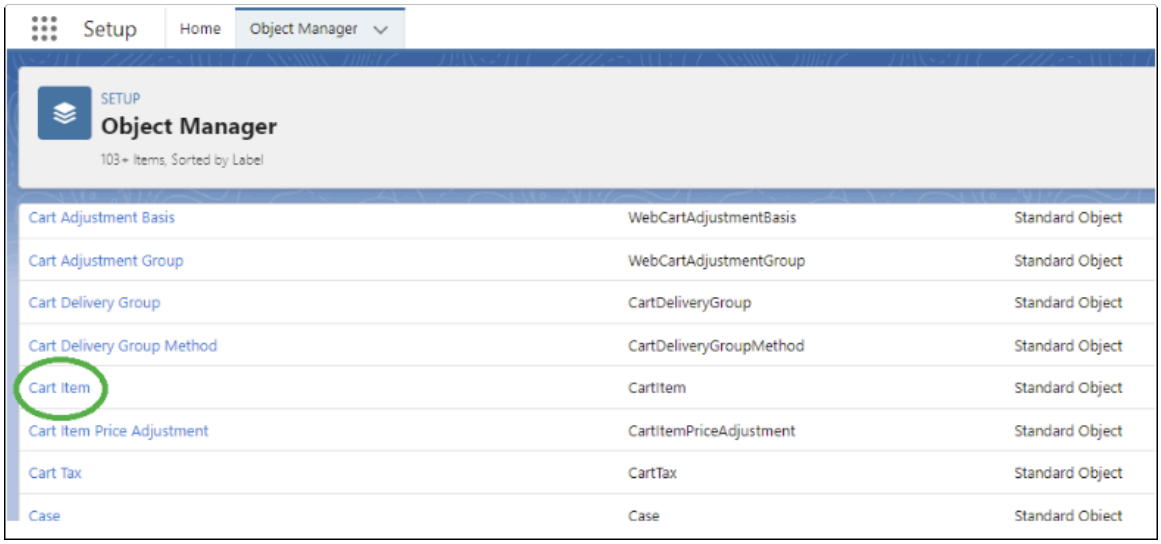
If the Salesforce org isn't already open in a browser, it can be opened by running the command `sfdx force:org:open -u myOrg`.

Post-installation setup in Salesforce

You must complete the following steps after installing the components to Salesforce.

Setting Field Level Security:

1. From Setup Home, go to the Object Manager tab, or navigate to Objects and Fields > Object Manager.
2. From Object Manager, search for and open Cart Item (CartItem).



3. Go to Fields & Relationships. Search for and open the field Configuration Id (ConfigurationId__c).
4. Click **Set Field-Level Security**.

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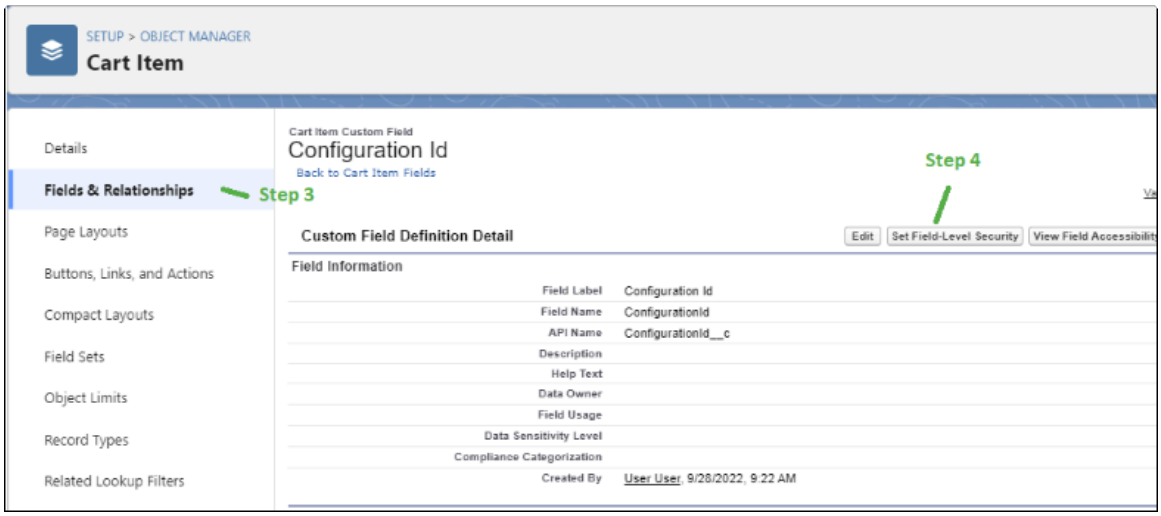
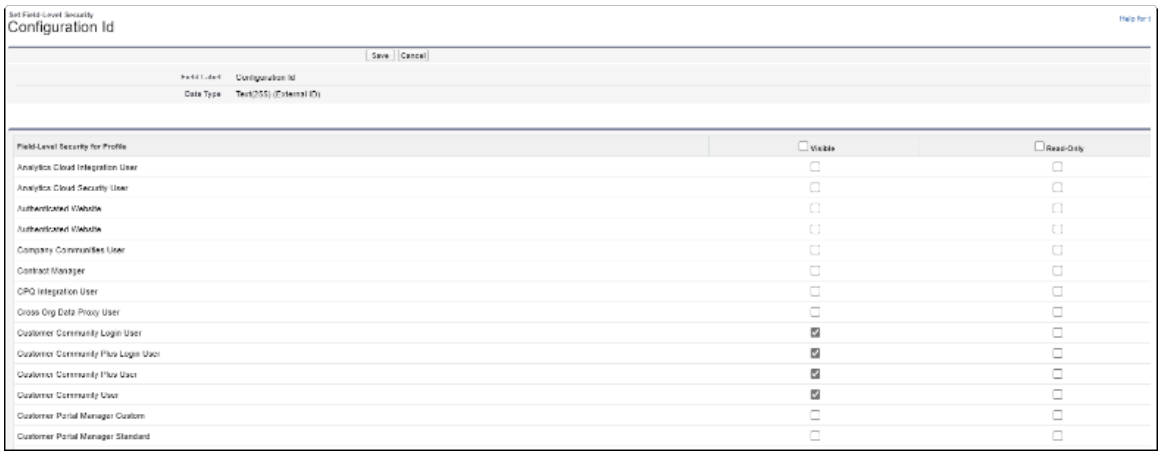


5. Make sure the Visible option is selected and Read-Only is not selected for profiles that will be configuring products in Commerce, and then click **Save**.



A similar set of steps need to be followed for a Product2 field.

1. From Object Manager, search for and open Product (Product2).
2. Go to Fields & Relationships. Open the field CPQ Enabled (LGK__IsConfigurable__c).
3. Click “Set Field-Level Security”. Make sure the Visible option is selected for any shopper profiles. Read-Only can either be enabled or disabled.
4. Save.

More field level security permissions are required if using the Add to Cart API. First, from Object Managed, search for and open Configuration Line Item (LGK ConfigurationLineItem c). Then, make sure shopper profiles have Field-Level Security to Visible for the following fields:

- Quantity
- ProductId
- Price
- ConfigurationId
- Type

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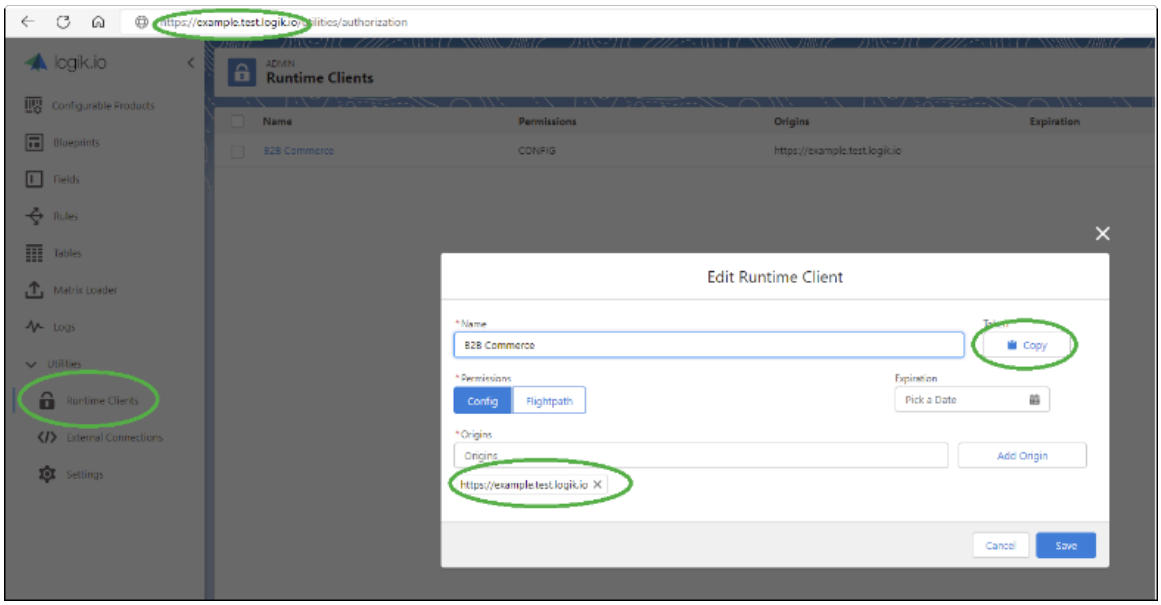
In addition, the following CartItem fields will need to be set to Visible (Read-Only must not be checked):

- ConfigurationId (this should already be done for the UI integration)
- Quantity
- ProductId
- Price
- Type

Obtaining and applying the runtime token

1. In Logik, create a Runtime Client, with an Origin matching the Logik base URL. Click **Copy** to get the client token.



2. In Salesforce, from Setup home, go to Custom Code > Custom Settings.

3. For Logik Tenant, click `Manage`.

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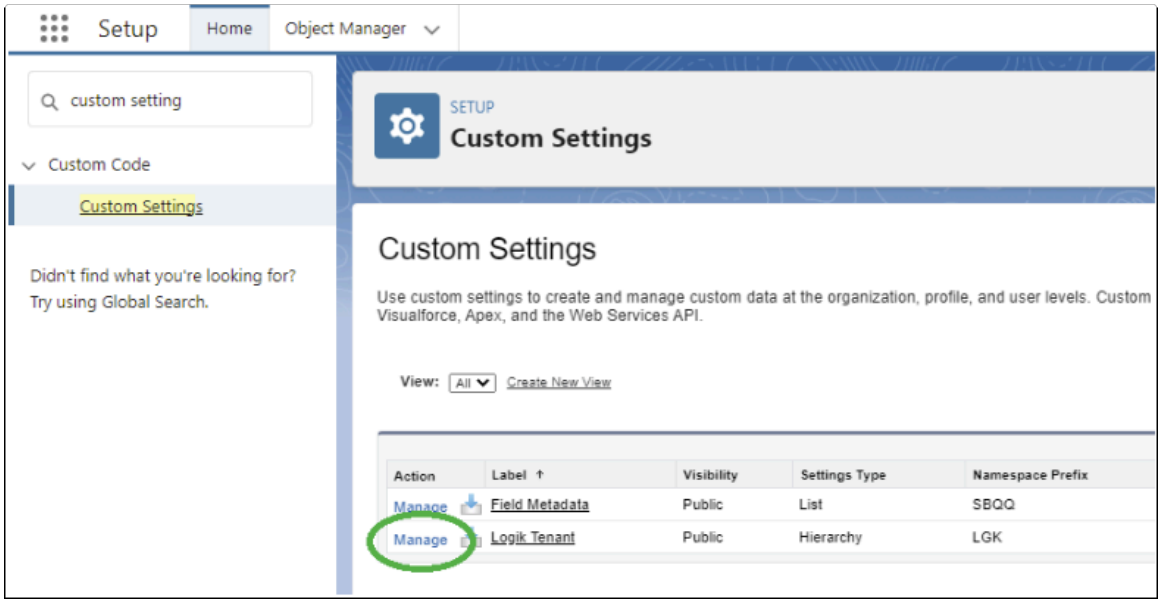
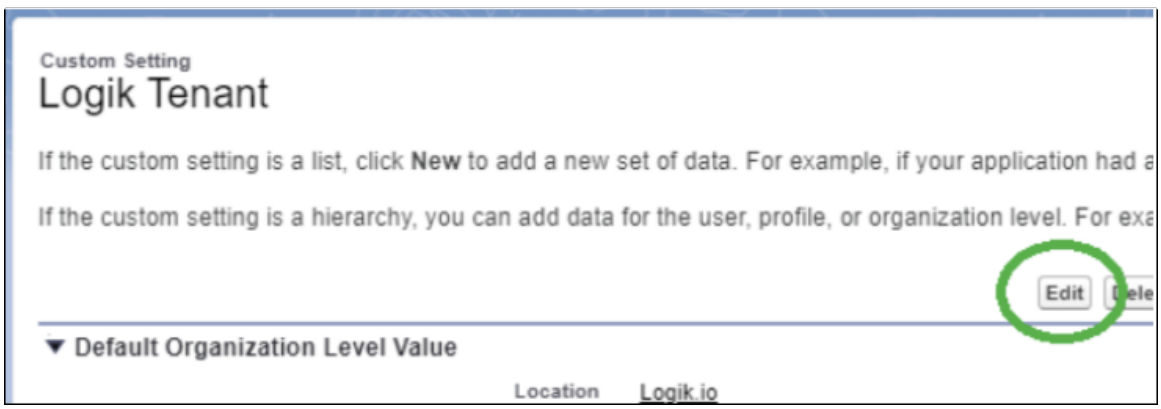


4. If settings already exist, click “Edit”. Otherwise, click “New” above the “Default Organization Level Value” header.



5. For the Runtime Client Token field, paste the copied token for the runtime client. Make sure the URL field(s) are set to the same URL as one of the runtime client’s Origins in CPQ Admin.

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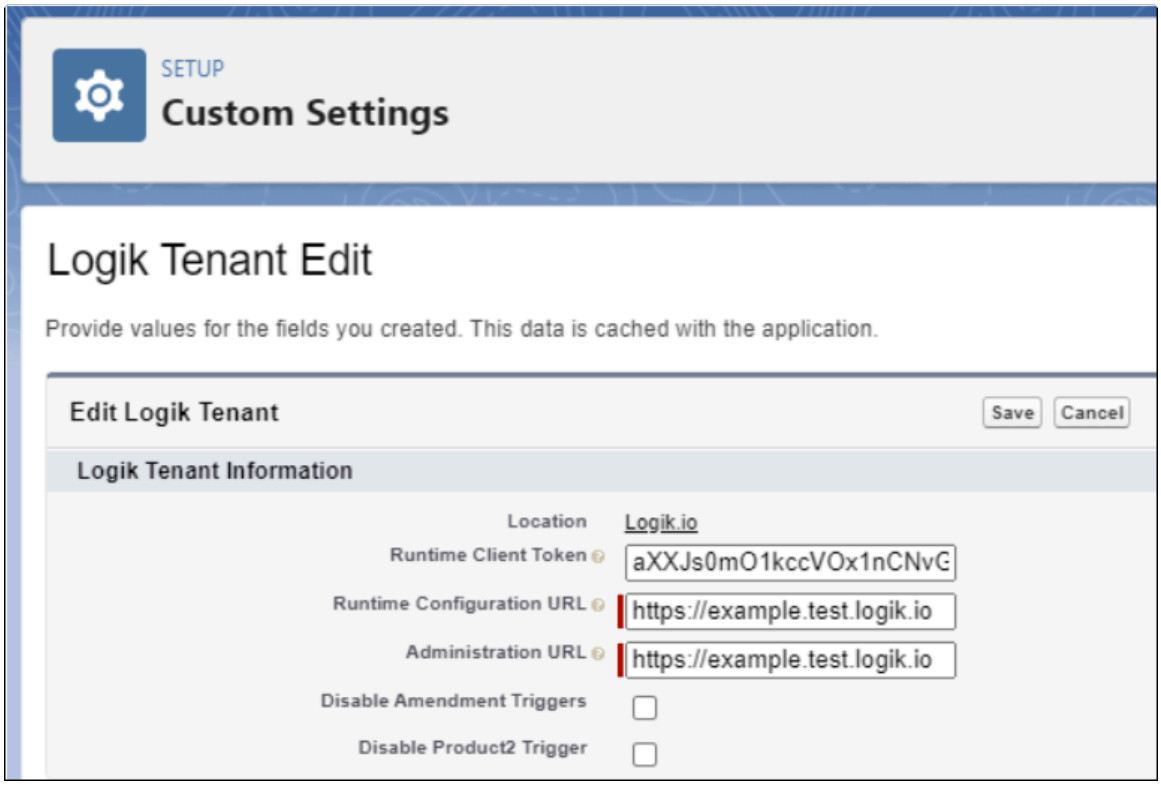

6. Save.

Setting Visualforce page access

1. From Setup home, go to Feature Settings > Digital Experiences > All Sites.

2. For your store, click `Workspaces`.

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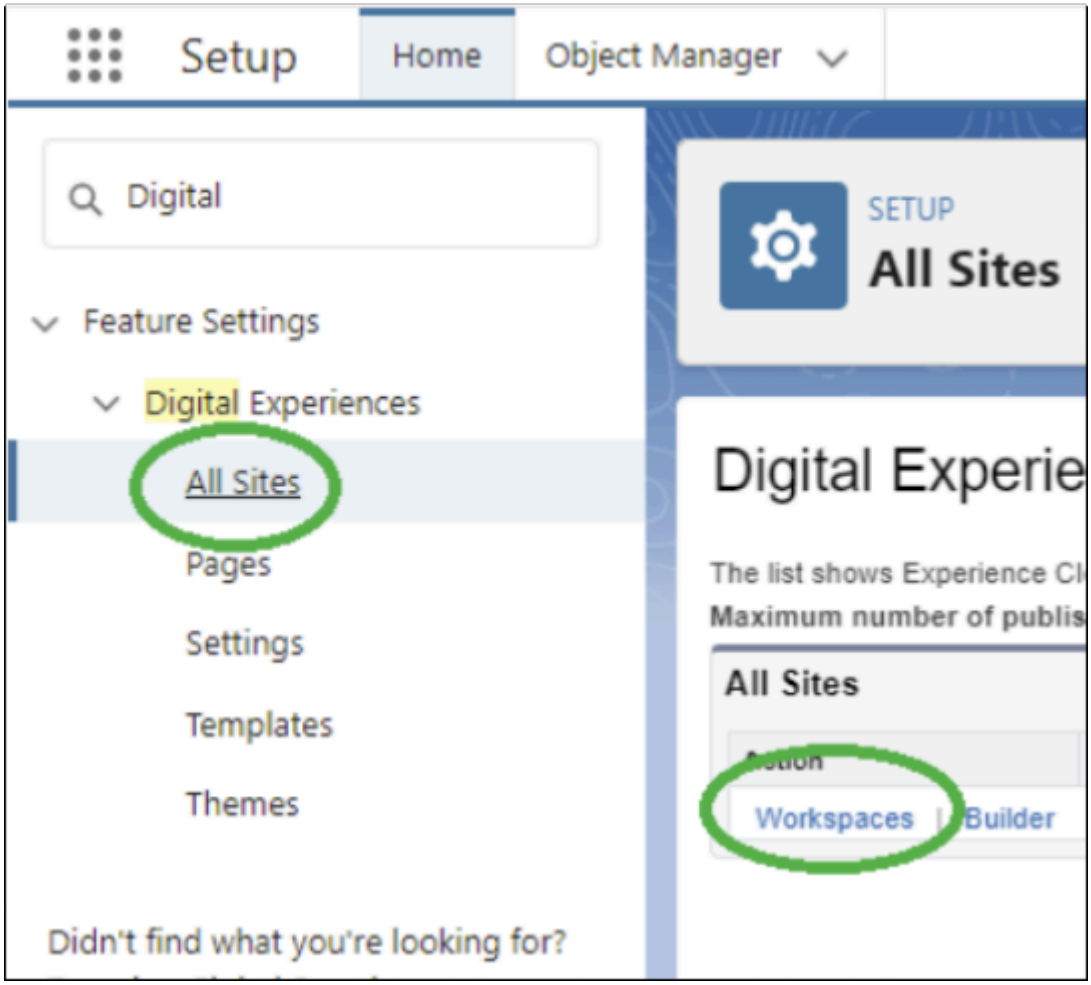

3. Go to Administration > Pages > Go to Salesforce Platform for Application Development.

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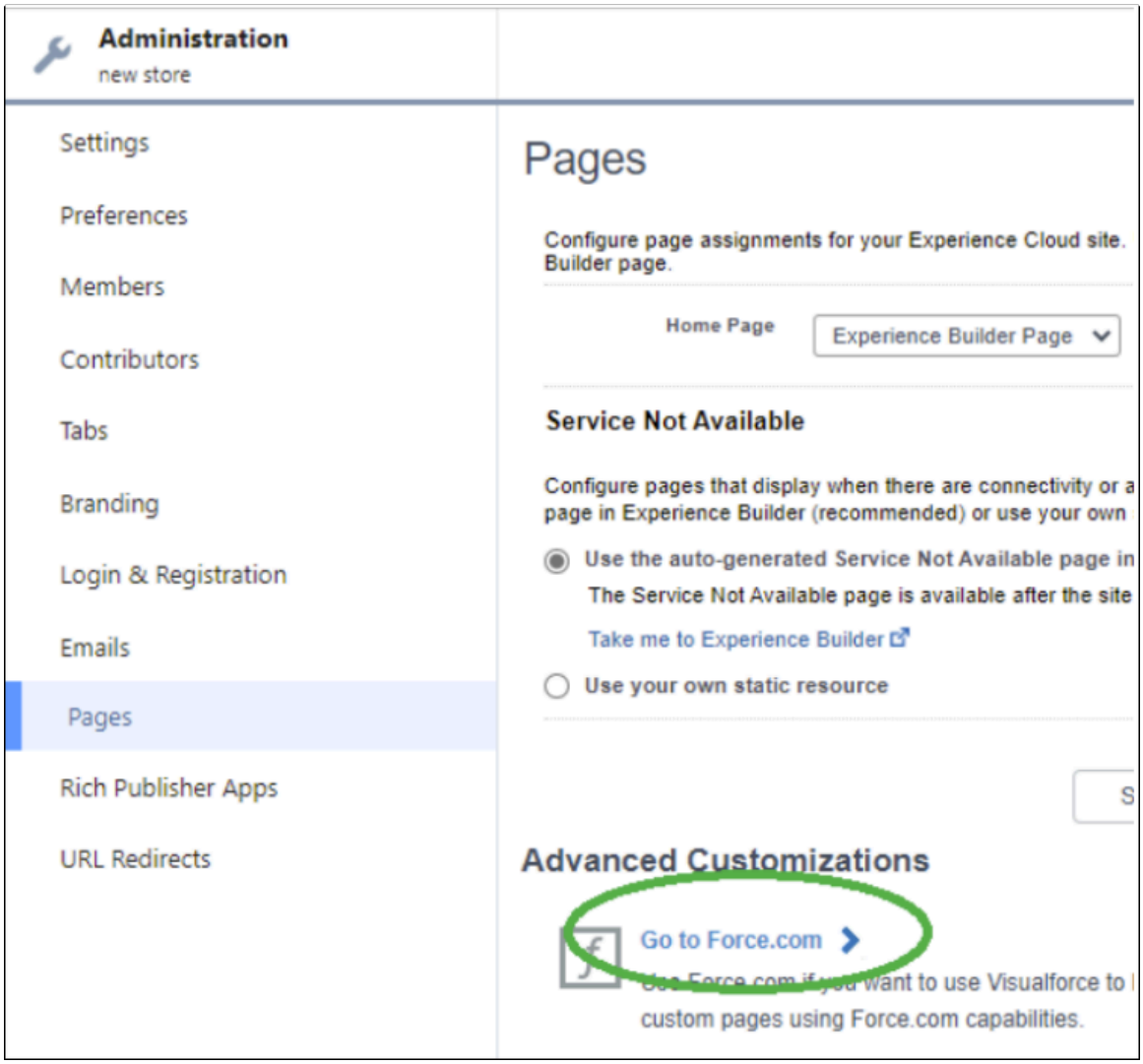
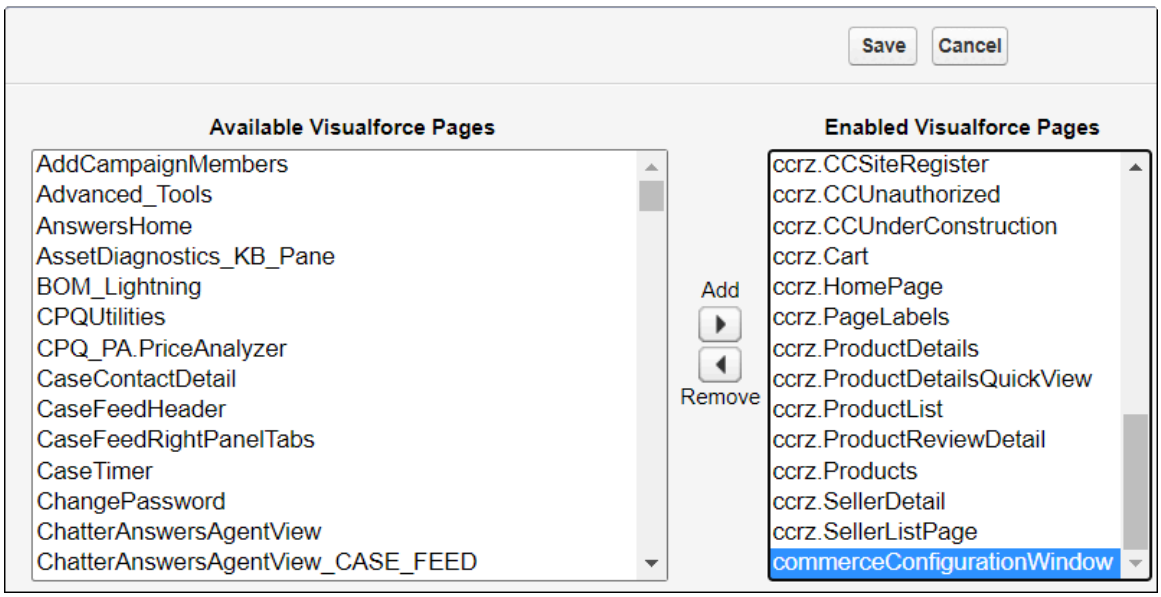


4. Under "Site Visualforce Pages", click `Edit`.

5. Move `commerceConfigurationWindow` from Available to Enabled and save.



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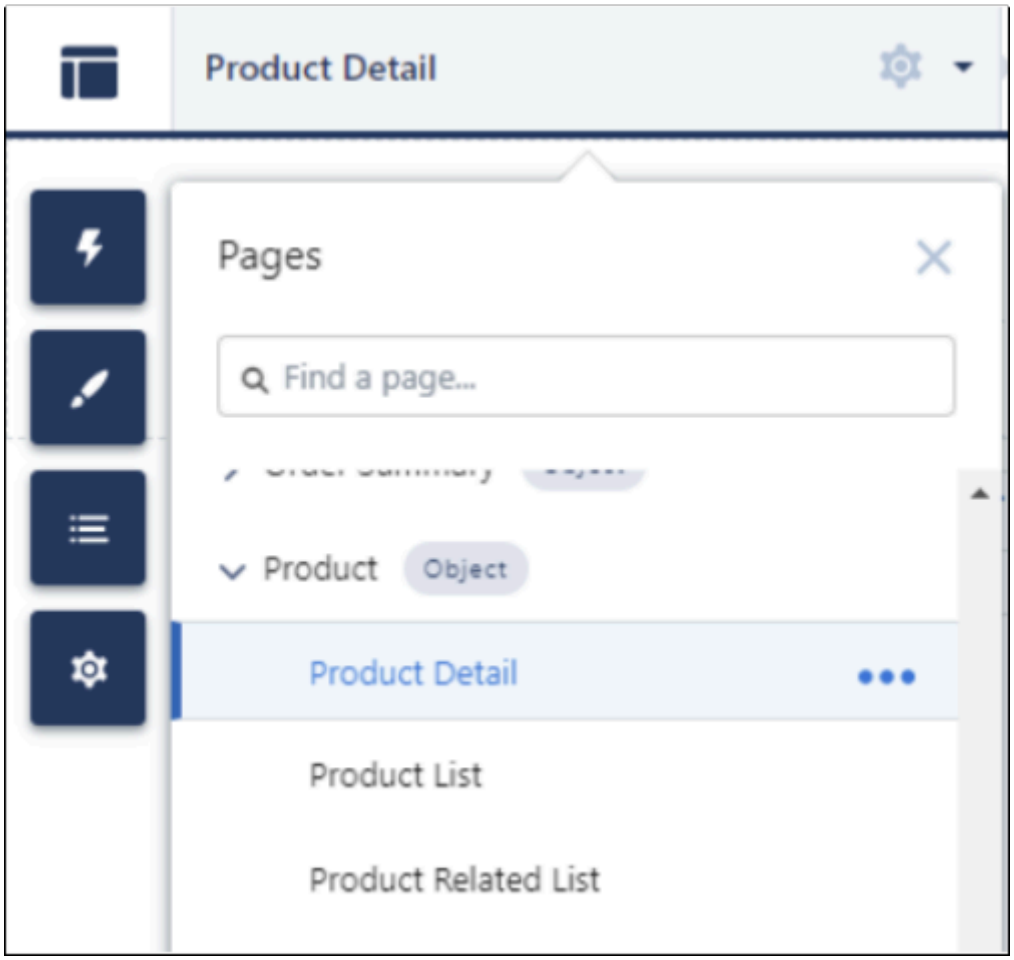
Configuring the Experience Builder

1. From the Commerce home page, open Experience Builder.

2. Click **Home** on the top left to open the list of pages. Search or navigate to Product and click **Product Detail**. Either add the custom Logik button to the existing Product Detail page, or use the packaged page as a variation.



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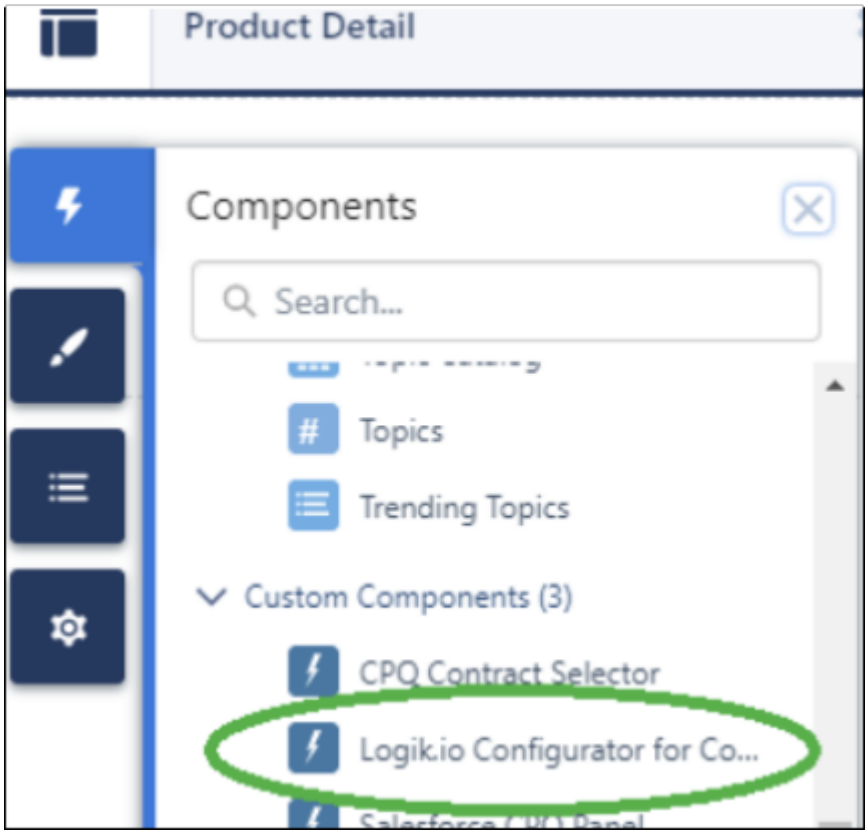
- To add the button to an existing page:
  - **a.** Click the lightning bolt on the left and go to Custom Components (the last section in the list).
  - **b.** Drag the Configurator from the list and move it to where you want it in the layout.



- To use the packaged page as a variation:
  - **a.** Reopen the page navigation menu on the top left.
  - **b.** On the Product Detail option, click the three dots and go to the Page Variations tab.
  - **c.** Click New Page Variation and choose “Configurable Product Detail” as the layout.

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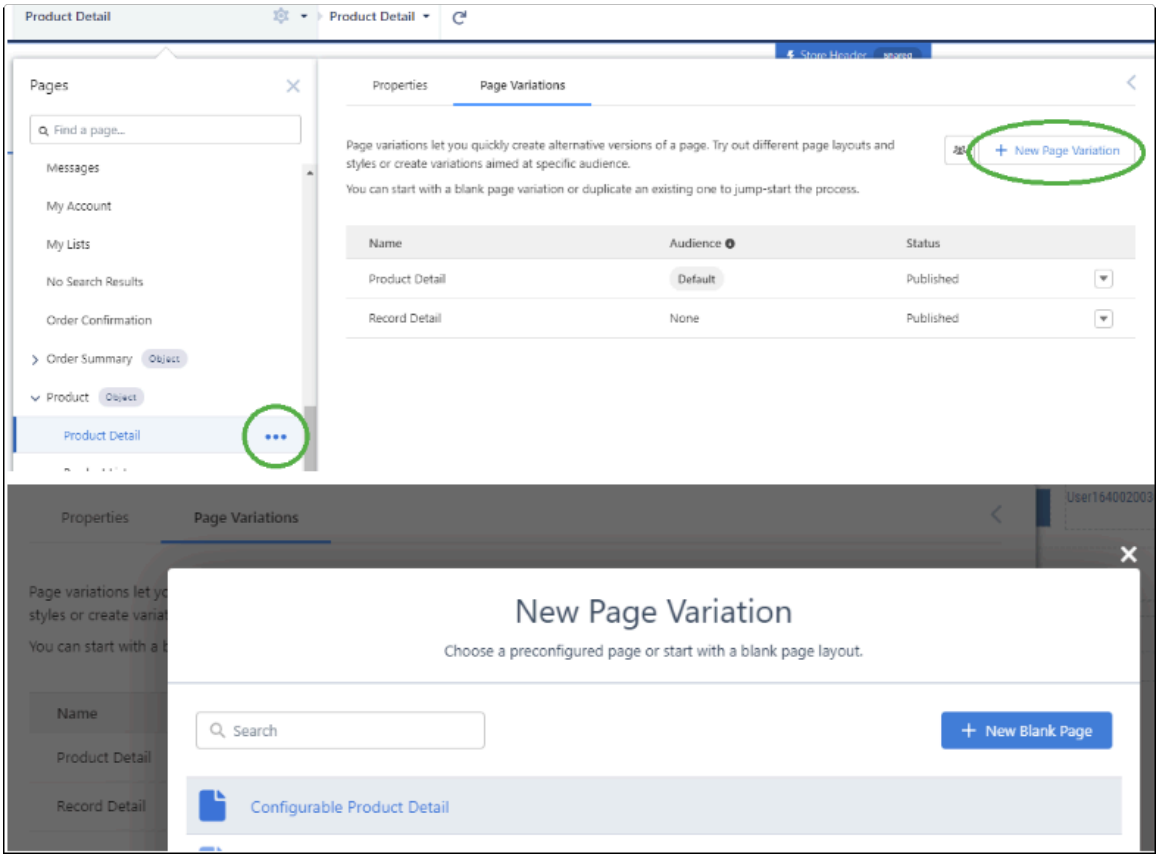

d. Give the variation a name and click **Create**.

Add to Cart API

Endpoint: `/services/apexrest/add-to-cart`

Methods: Receives and returns `application/json`

POST: Use to add items to the currently active cart. (If a cart is not active, a cart is created.) Requires the following:

- `configurableProductId`
- `configurationId`
- `webstoreId`
- `effectiveAccountId`

Note: `webstoreId` and `effectiveAccountId` are part of Salesforce Commerce#s standard APIs, so that information should be readily available to users.

`configurableProductId` and `configurationId` must correspond to the same configurable product.

PATCH: Use to add items to a specified cart. Requires the following:

- `configurableProductId`
- `configurationId`
- `cartId`

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Response: an array of cart item (CartItem) records.

Example request (create new quote):

```
{
 "configurableProductId": "01t8a0000061GQPAA2",
 "configurationId": "7e45beb9-790c-46ef-a05f-9195718bcda7",
 "effectiveAccountId": "0018a00001nsFoNAAU",
 "webstoreId": "0ZE8a000000XwckGAC"
}
```

Example request (add to existing quote):

```
{
 "configurableProductId": "01t8a0000061GQPAA2",
 "configurationId": "7e45beb9-790c-46ef-a05f-9195718bcda7",
 "cartId": "0a68a000000kXQeAAM"
}
```

Example response:

```
[
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtlAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQPAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "SalesPrice": 10000.00,
  "UnitAdjustedPrice": 10000.00,
  "TotalLineAmount": 10000.00,
  "TotalPrice": 10000.00,
  "TotalPriceAfterAllAdjustments": 10000.00,
  "LGK__ConfigurationId__c":
"7e45beb9-790c-46ef-a05f-9195718bcda7",
  "Name": "LGK Machine",
  "Id": "0a98a000000kWtlAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtkAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQOAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 1.00,
  "SalesPrice": 0.00,
  "UnitAdjustedPrice": 0.00,
  "TotalLineAmount": 0.00,
  "TotalPrice": 0.00,
  "TotalPriceAfterAllAdjustments": 0.00,
```

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```
 "Name": "Warranty",
 "Id": "0a98a000000kWtkAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtjAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQKAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 0.00,
 "UnitAdjustedPrice": 0.00,
 "TotalLineAmount": 0.00,
 "TotalPrice": 0.00,
 "TotalPriceAfterAllAdjustments": 0.00,
 "Name": "1.5T Magnet",
 "Id": "0a98a000000kWtjAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtiAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQGAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 1.50,
 "UnitAdjustedPrice": 1.50,
 "TotalLineAmount": 1.50,
 "TotalPrice": 1.50,
 "TotalPriceAfterAllAdjustments": 1.50,
 "Name": "MRI Platform Table",
 "Id": "0a98a000000kWtiAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWthAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQLAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 2.50,
 "UnitAdjustedPrice": 2.50,
 "TotalLineAmount": 2.50,
 "TotalPrice": 2.50,
 "TotalPriceAfterAllAdjustments": 2.50,
```


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```
  "Name": "MRI Scanner",
  "Id": "0a98a000000kWthAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtgAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQRAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 25.00,
  "SalesPrice": 1.00,
  "UnitAdjustedPrice": 1.00,
  "TotalLineAmount": 1.00,
  "TotalPrice": 1.00,
  "TotalPriceAfterAllAdjustments": 1.00,
  "Name": "MRI Gradient Coils",
  "Id": "0a98a000000kWtgAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtfAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQHAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 25.00,
  "SalesPrice": 3.00,
  "UnitAdjustedPrice": 3.00,
  "TotalLineAmount": 3.00,
  "TotalPrice": 3.00,
  "TotalPriceAfterAllAdjustments": 3.00,
  "Name": "MRI Radio Frequency Coils",
  "Id": "0a98a000000kWtfAAE"
 }
]
```


Related topics

- CPQ and Salesforce base package overview
- Salesforce amendments and CPQ
- CPQ and Salesforce managed packages

Salesforce amendments and CPQ

A brief look at the Logik amendments feature, which adds and updates fields in existing objects.

The CPQ amendments feature follows the standard CPQ amendment model by adding additional fields to existing objects as well as triggers to update these fields appropriately.

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Prerequisites

The Logik Extension for Salesforce CPQ must be installed in the org.

How the amendments feature works

When an amendment is created from a contract, generating a CPQ quote and CPQ quote lines, a CPQ trigger on the CPQ quote line automatically populates the Committed Configuration ID from the related subscription record and sets the Action Context to Amend.

When a reconfiguration of the quote line is saved, the configuration line item includes the prior quantity and price.

When the standard Salesforce CPQ amendment process is completed, the contract is updated with subscriptions using the new quantities and terms as expected.

The following fields are added to facilitate this functionality.

Object	Field
ConfigurationLineItem c	LGK CommittedConfigurationId c
ConfigurationLineItem c	LGK PriorQuantity c
ConfigurationLineItem c	LGK PriorPrice c
ConfigurationLineItem c	LGK ActionContext c
SBQQ QuoteLine c	LGK CommittedConfigurationId c
SBQQ QuoteLine c	LGK ActionContext c
SBQQ Subscription c	LGK ConfigurationId c
SBQQ Subscription c	LGK BomData c

You can disable this functionality in Setup > Custom Settings > Manage Logik Tenant > Edit > Disable Amendment Triggers.

Common Salesforce integration issues

Learn how to solve problems you may have integrating CPQ with Salesforce.

When Salesforce CPQ is a host for CPQ configurations, integrating the two sites my lead to some common errors. Here is a list of known issues with their solutions and what to check.

In general, when you see an error generated by Salesforce, you can use the Salesforce debug logs to find where that error is being triggered.

Another worthwhile step when investigating any integration issue is to confirm that the steps in the Installation and setup guide for environments linked to Salesforce orgs were correctly completed.

Note: If partner users are experiencing any of these issues, or you utilize RFQ APIs, first see the Partner users/RFQ API sharing settings section at the end of this topic.

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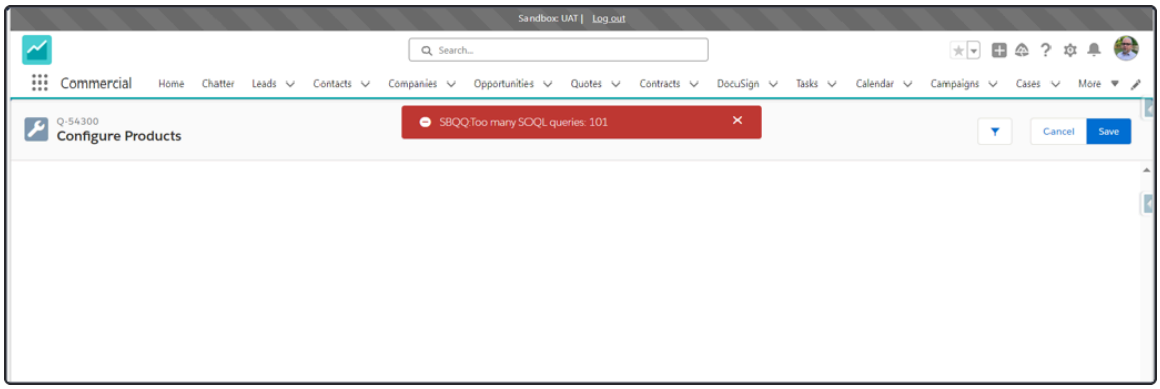
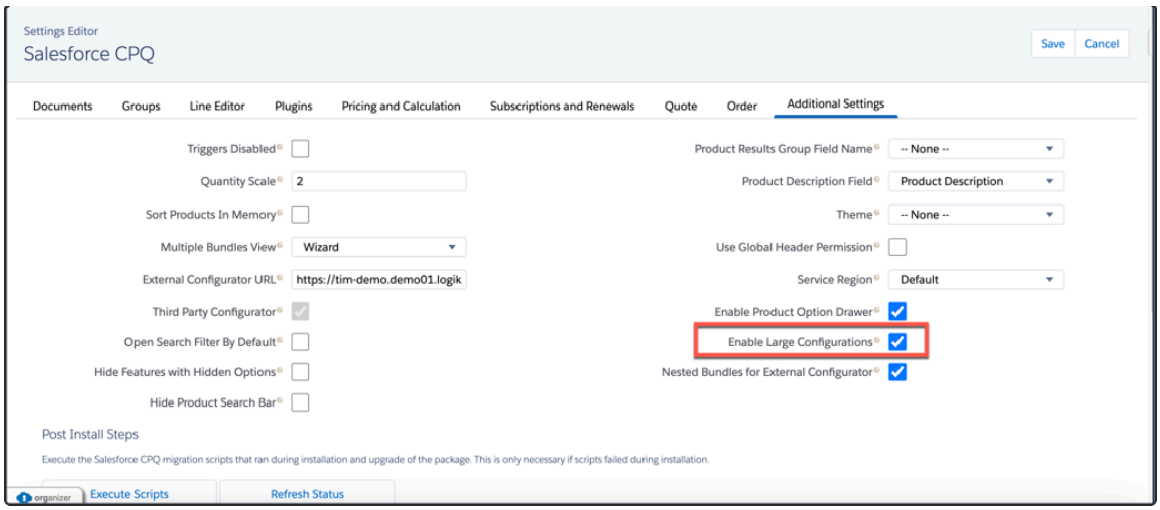
Salesforce: “SBQQ: Too many SOQL queries: 101”



This error happens usually when a user creates a BOM that has more than 100 items, clicks **Quote** in CPQ, and there are too many quote lines being created for the default Salesforce CPQ behavior to handle.

Solution: confirm that Enable Large Configurations is set in the Salesforce CPQ Package Settings.



This setting decreases the likelihood of hitting governor limits when your sales reps configure a large bundle, but performs slower overall. To read more about this setting, see Enable Large Configurations.

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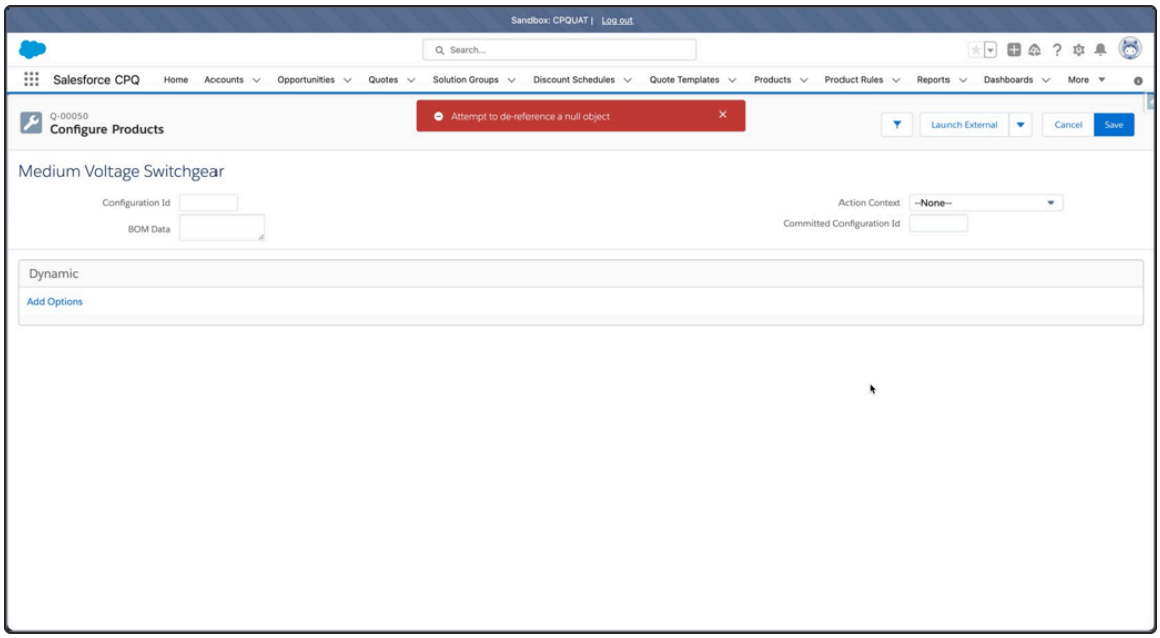
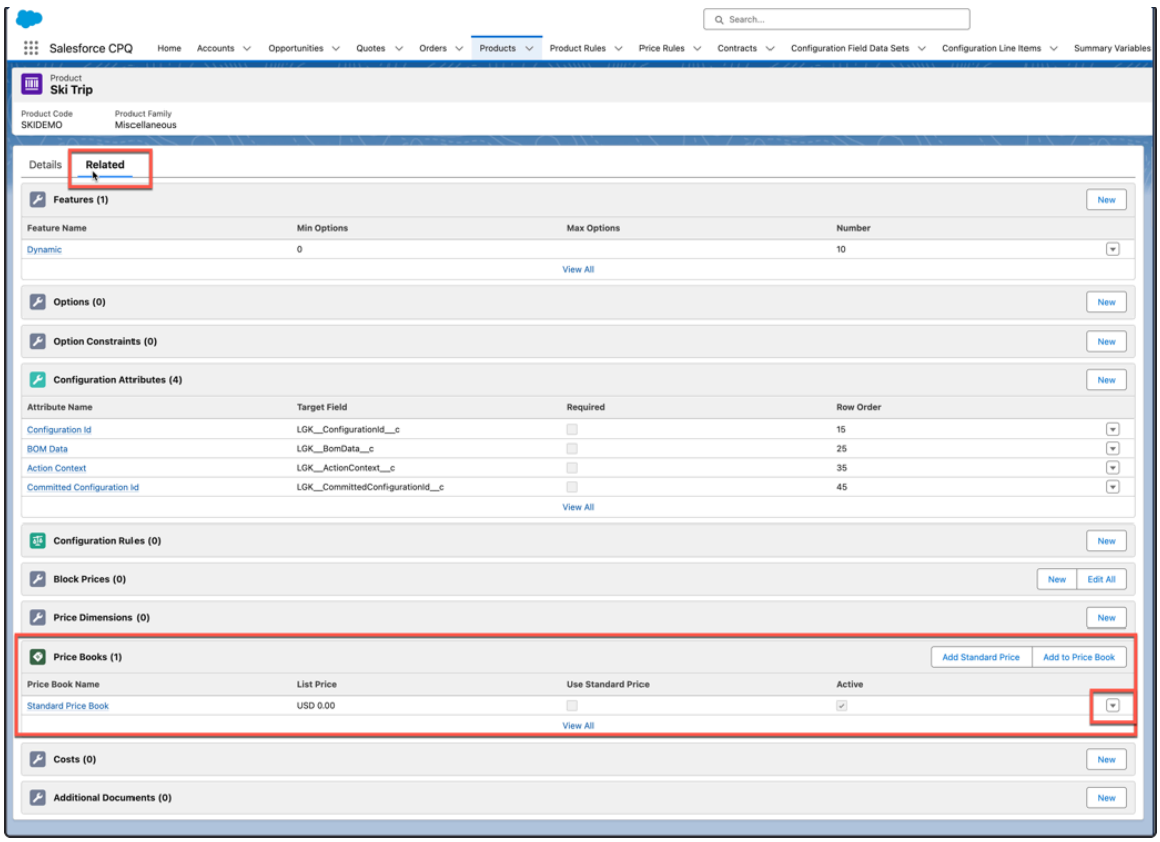
Salesforce: “Attempt to de-reference a null object”



This error usually happens when an end user saves the quote in CPQ and before they return to the QLE. It speaks to either a missing or inactive Pricebook entry for affected items, or an issue with nested bundling.

Solution (no nested bundling): The Pricebook entry for the product is missing or inactive.



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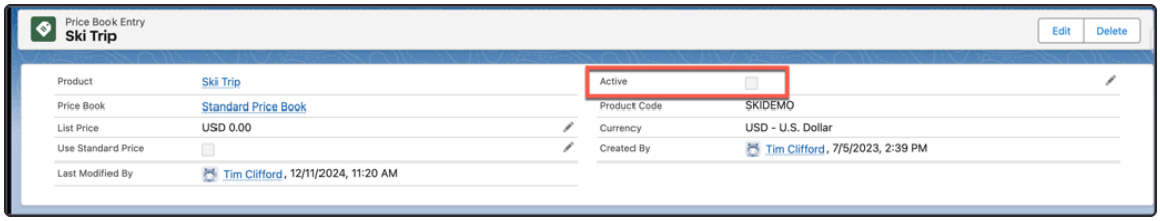


Check all of the product's Pricebook entries. This error occurs if any of the following are true:

- A returned product is missing a Pricebook entry
- A returned product has an inactive Pricebook entry
- A returned product's related Pricebook is inactive
- The standard Pricebook is used by default but is inactive

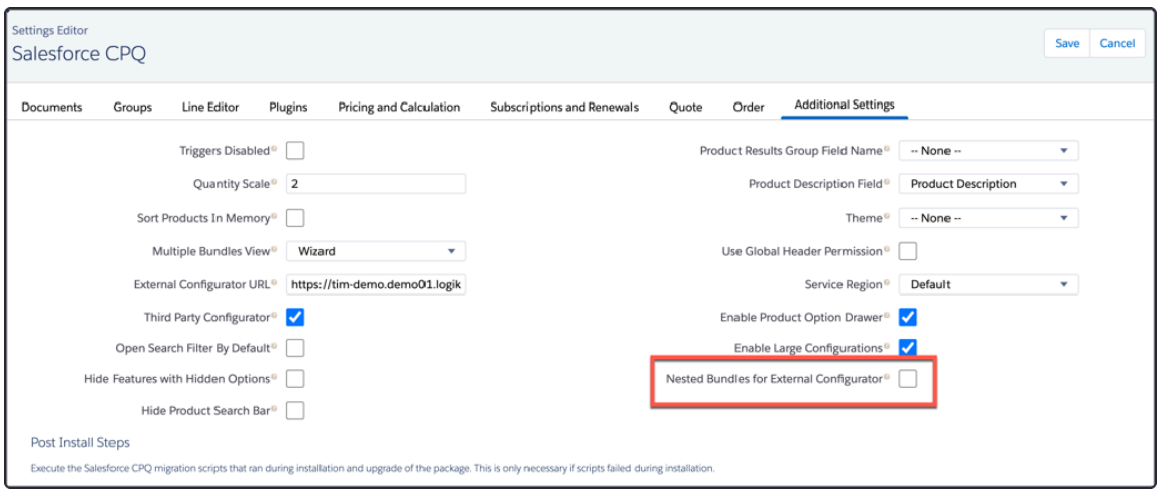
Solution (nested bundling): If you have nested bundling enabled and your configuration has products configurations that match the following structure, there is no direct solution. You can either design your configurations to not encounter this Salesforce issue, or turn off nested bundling.

```
Parent product
 Nested child 1
  Product X
 Nested child 2
  Product X
```

To learn more about this issue, see the following Salesforce.com topic:

Adding the Same product to Two Different Dynamic Nested Bundles via External Configurator Throws an "Attempt to de-reference a null object" Error

If you decide to disable nested bundling, you can do so in SFDC through Setup > Installed Packages > Salesforce CPQ > Additional Settings > Nested Bundles for External Configurator.



Please also submit a support ticket so that we can send this request to our DevOps team to turn off this feature from the CPQ side. You will continue to encounter the issue until we turn off this feature.

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Not generating configuration line items or configuration field data sets

This functionality is not used by many implementations, but when it is, it is paramount that the expected Salesforce Objects are created. Configuration line items (CLIs) and configuration field data sets (CFDSs) are Salesforce objects that are managed by our base managed package, and their creation is asynchronous with the data that is pushed to the quote line.

The moment that a user saves the configuration from CPQ, the process to create these objects begins, regardless of whether you save the final quote lines created in the QLE. When this occurs, there is usually only one place to check.

Solution: The creation of these objects depends on the following settings being enabled.

- (For CLIs) The Push BOM Data to CPQ Salesforce Object CPQ Admin setting
- (For CFDSs) The Push Config Data to CPQ Salesforce Object CPQ Admin setting
- The SFDC permissions of Refresh Token username

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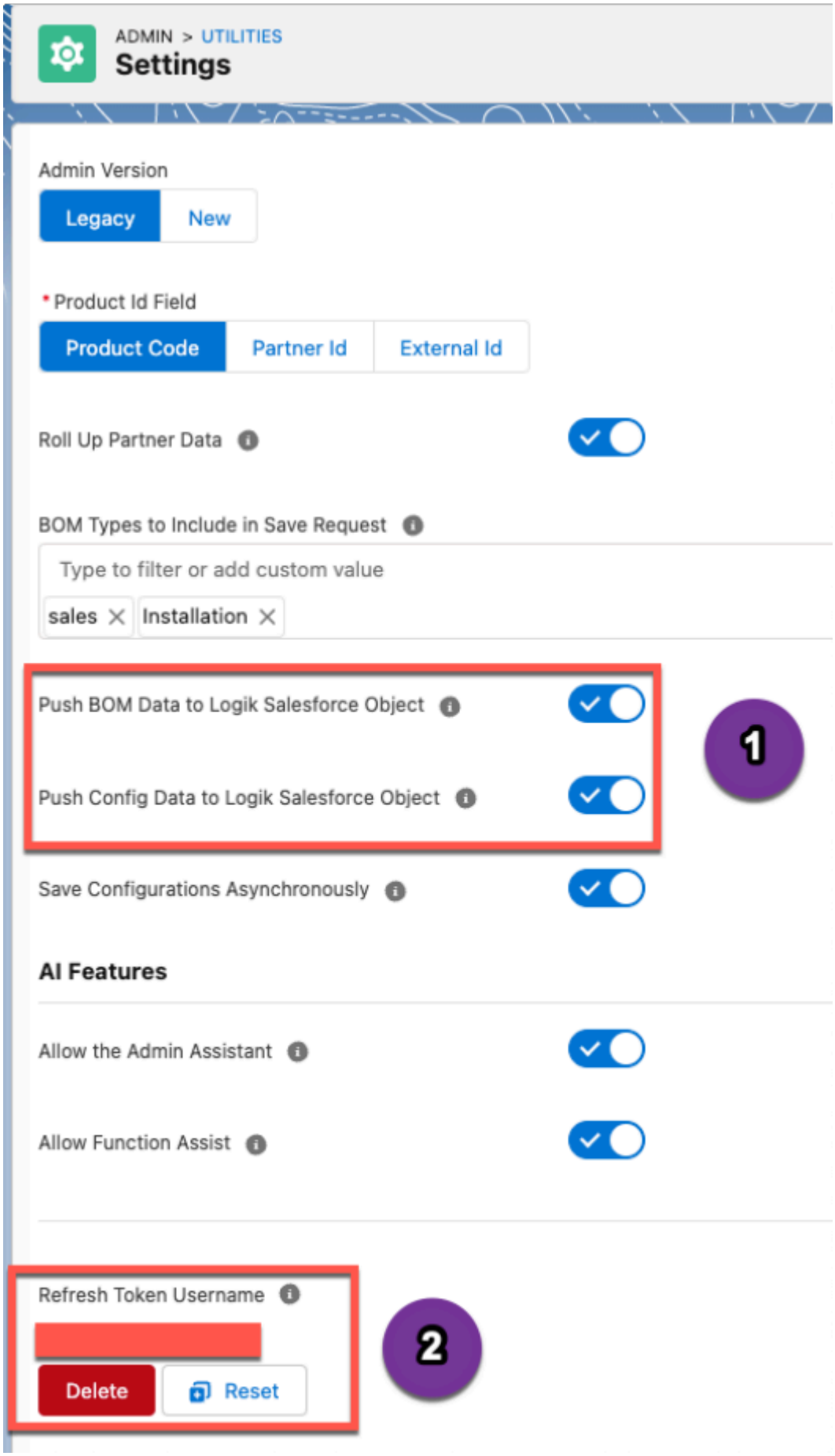

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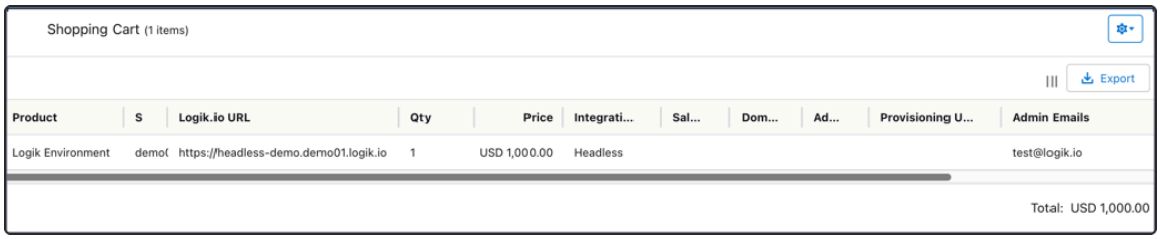
If these settings are not enabled, these objects will not be created when the user clicks Save.

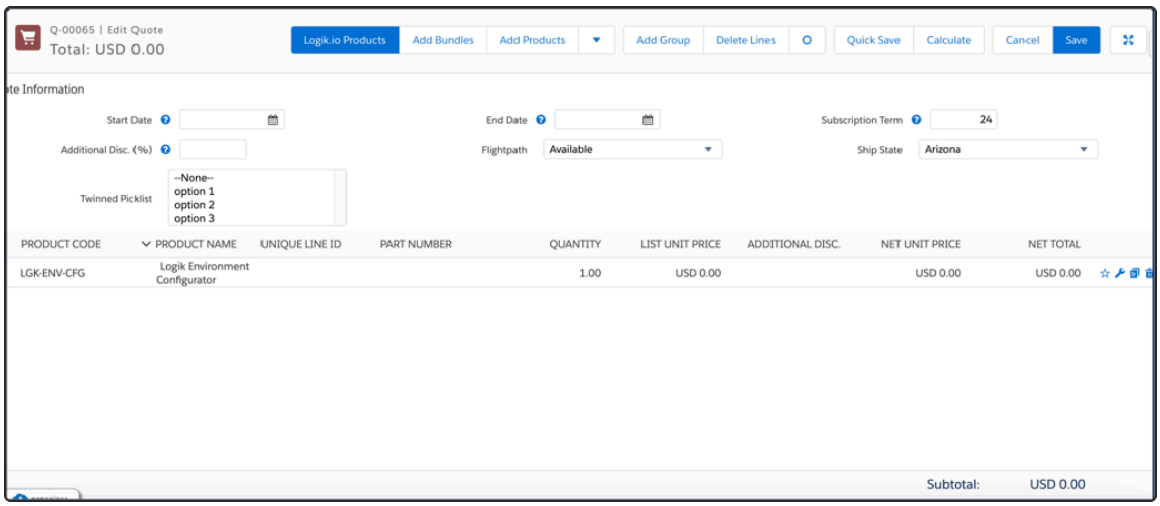
If these settings are enabled, and you still do not see CLIs or CFDSs (or Extended Information Field Mapping is not working), try the following:

- Check the logs to see whether the error “Salesforce syncing of LGK__ConfigurationLineItem__c object for configuration [******] did not complete successfully” appears. There may be more information in the “Paused And Failed Flow Interviews” page in your Salesforce Setup.
- Check the permissions of the integration user against the list in Required permissions for the integration user.

Saving does not create child quote lines



CPQ BOM has the product CPQ environment.



Saving to Salesforce has only the parent Configurable product, not the CPQ environment.

We only create quote line items when a BOM item fits these conditions:

- The BOM type of the item is specified in the “BOM Types to Include in Save Request” setting
- The product exists in our database from our product sync with Salesforce

This issue occurs when the user clicks Save from CPQ and they are met with only the parent Configurable product that they launched the configuration from, and no child quote lines that were created in the CPQ configurator. This usually means that there is a disconnect between the product Object in Salesforce and the BOM item created in CPQ.

Solutions:

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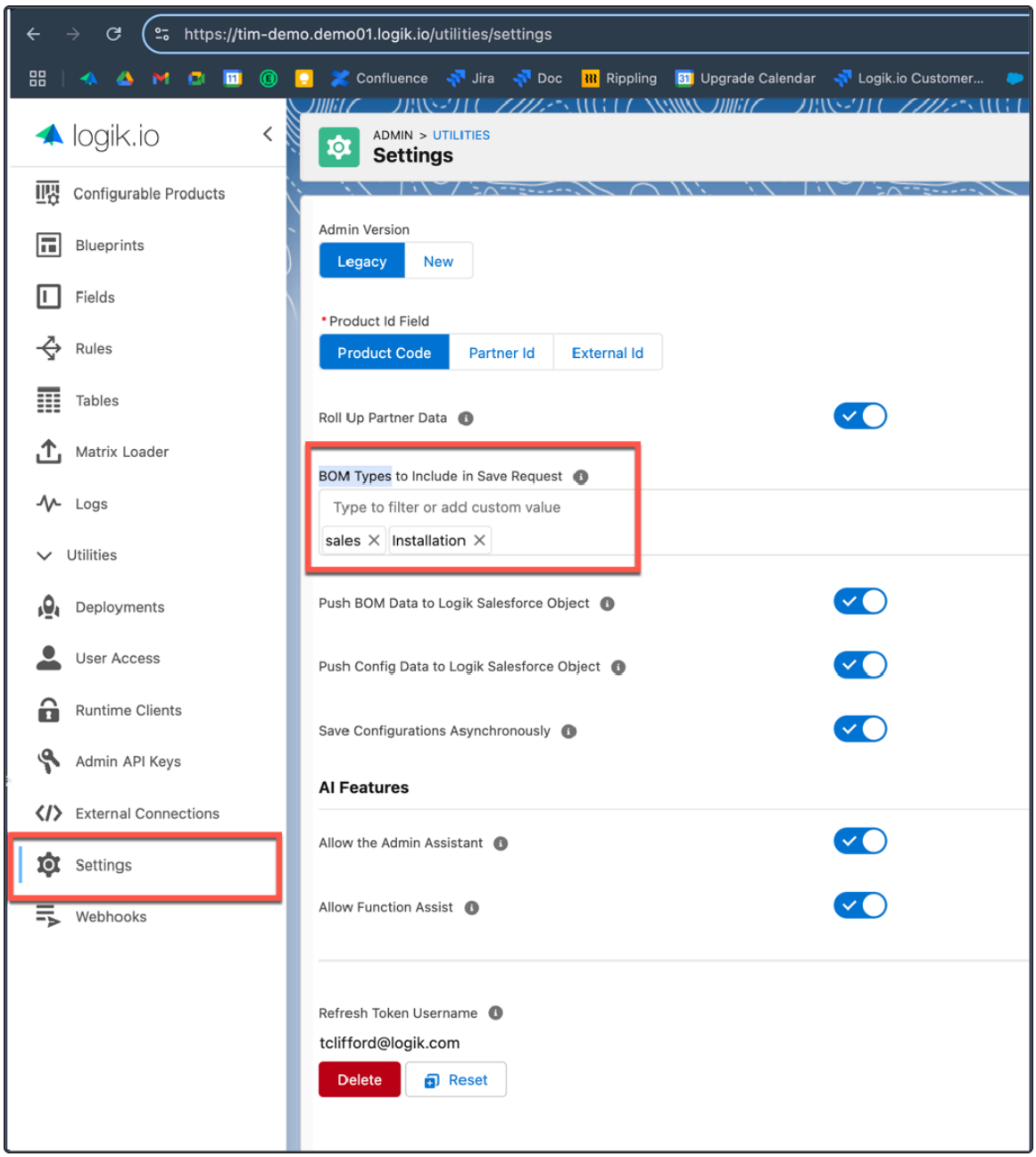
- Check whether the products exist in your Salesforce Site with the same product IDs that are determined by your product rules. If the products exist, try updating a field in the product record (such as “Active”), saving, reverting it, waiting 30 minutes, and then trying again.

  Our product record sync relies on the Last Modified Date of the product2 records to speed up performance. If your environment was repointed from another one, products that did not exist in your last environment may now exist here and have a date that is older than the reconnect. Wait for the product sync to complete every 30 minutes, and try to save the configuration again.

- Confirm that the BOM items have the correct BOM types as defined in CPQ Admin:



If your BOM item was of type Manufacturing and your CPQ Admin had only Sales and Installation defined in the Settings tab, that item would not be returned to the QLE.

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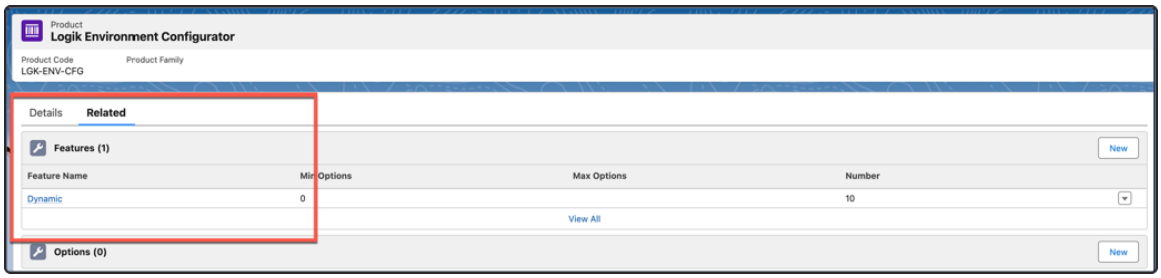
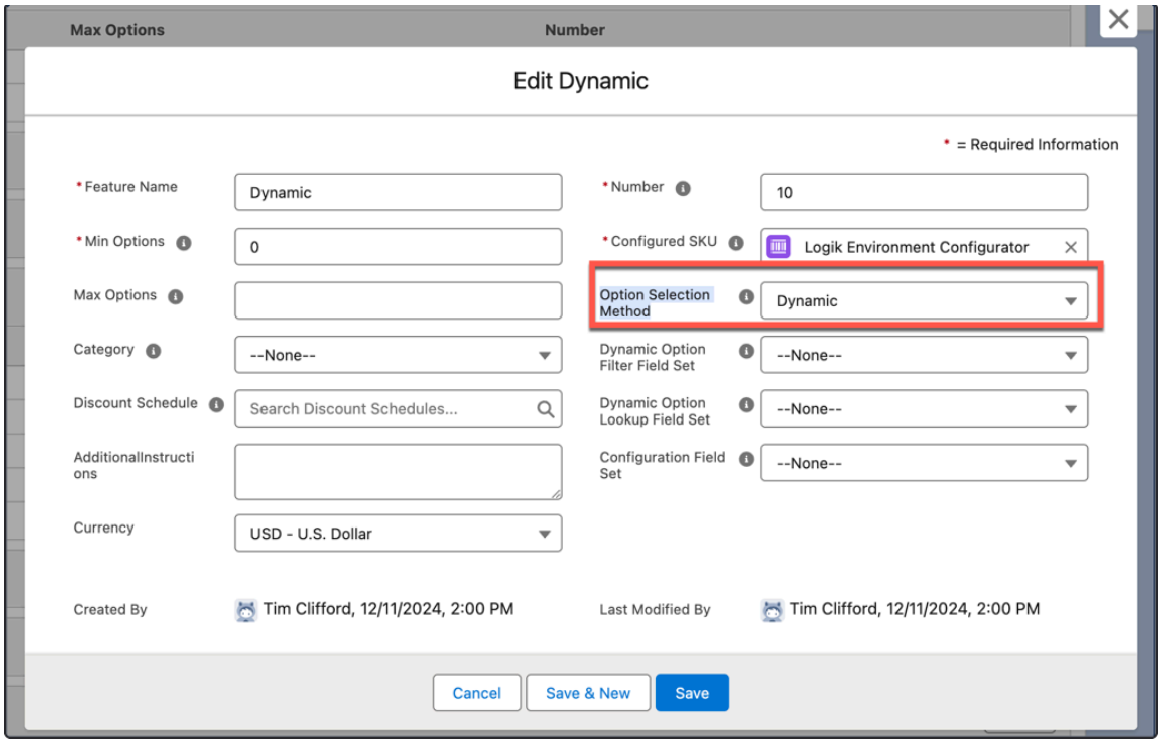
- Check whether the parent configurable product has the related Dynamic feature defined:



If so, also confirm that the option selection method is also dynamic:



This related feature should be automatically created when you click **Logik Enabled** on the Configurable product, but some custom product triggers in your Salesforce org can disrupt this automation. To trigger the feature creation again, try disabling **Logik Enabled**, saving, and then re-enabling it. Then, try to configure with that product.

(If using nested bundling, every product that has children quote line items associated with it must have this dynamic feature related to its product, not just the top-level parent Configurable Product.)

Saving does not create quote lines as expected

This usually happens when one of the fields on the child quote lines are being populated in a way that is not reflected in the CPQ configuration. This is a tricky issue to track since there isn't a clear error.

Solution: Check to see whether the SFDC environment has any quote calculator plugin (QCP) scripts, flows, or Apex triggers acting on the quote lines.

For QCP specifically, search custom scripts. Also check whether there is a script in the Quote Calculator Plugin field (Setup > Installed packages > Salesforce CPQ > Plugin).

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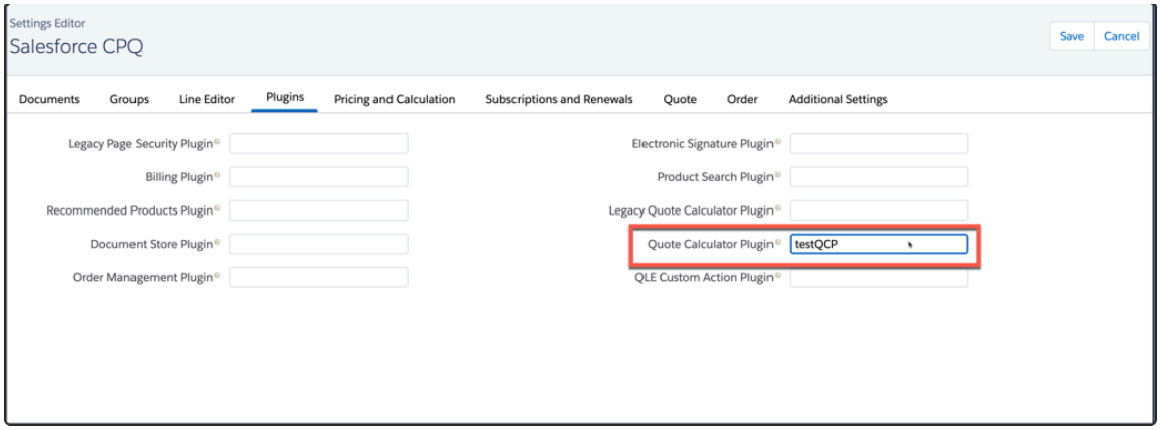
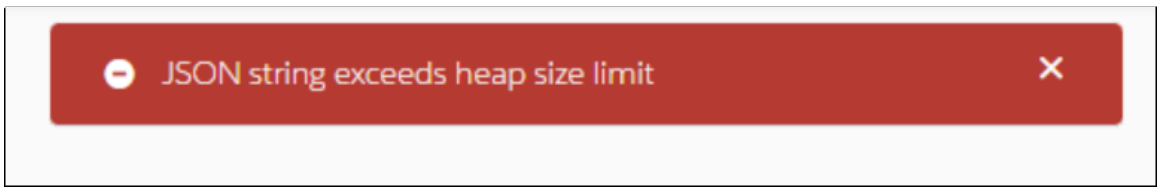


Review this custom script to see whether it is behaving as expected.

CPQ: "JSON string exceeds heap size limit"



This will happen if the LGK__BomData__c field contains too much data (such as a lot of quote lines or extended information) and the user tries to reconfigure the quote.

Solution: Control how many items get written with the BOM Item Limit feature. To solve, count the items in the BOM of the configuration that is causing the error. (The number of items is the number of lines in the BOM. Items are separated by "{}" in the BomData field.) Then, create a support case to set the tenant setting to half that number. If you are not using this Salesforce field, have it set to zero.

Reconfigure doesn't save selections in CPQ

An end user can save a configuration correctly and it writes to the QLE without issues. However, when the user tries to reconfigure, not all the selections are retained.

Solutions:

- Check whether this issue occurs only with a specific user or profile. Their permissions may be set incorrectly.
- Check whether the product has the related Feature Name, Configuration Attributes, and Price Books defined.

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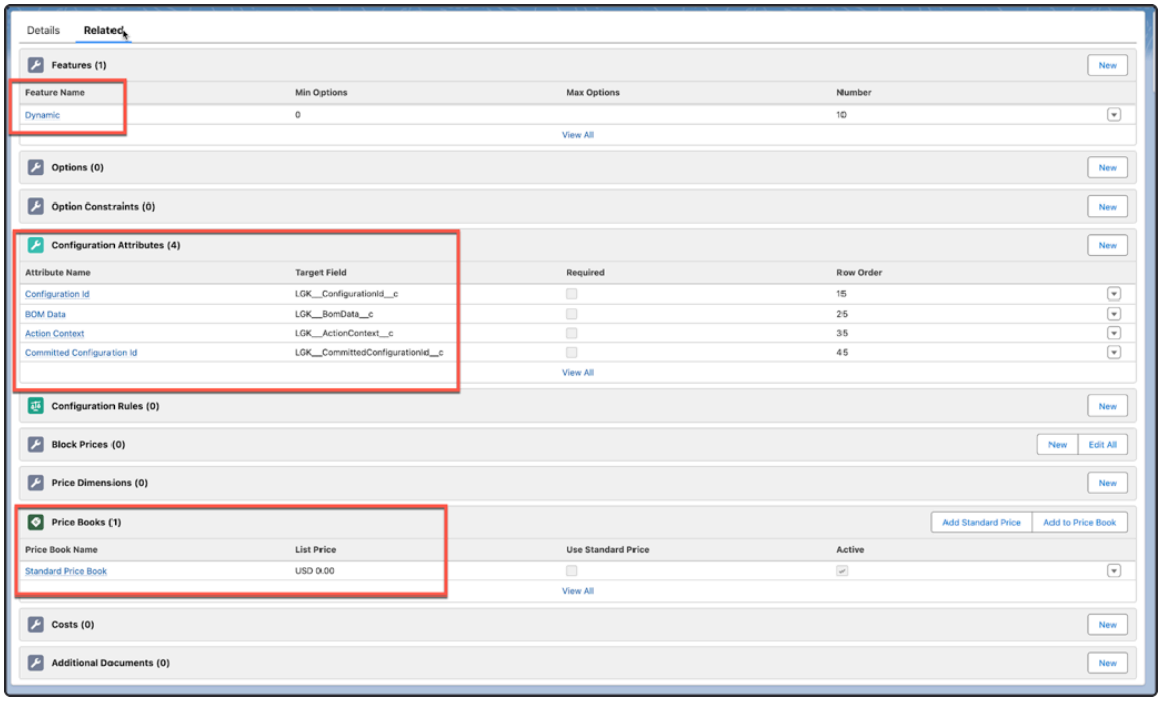


- Check whether the Blueprint uses twinning, which could be triggering a rule to clear certain selections, or has the On Configure/Reconfigure Enrichment set up incorrectly. To learn more about this issue, see Scripting: Checking for first and subsequent configurations.

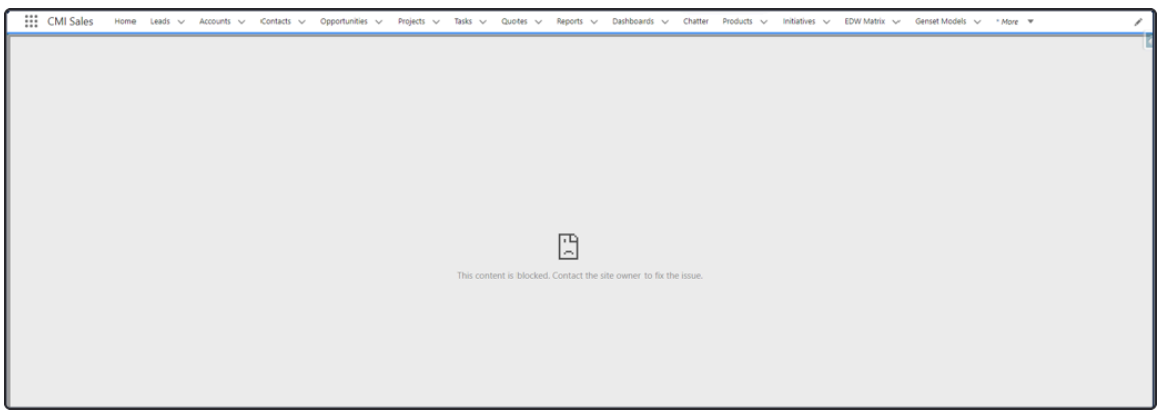
Saving doesn't create child quote lines

The configurable product you are attempting to configure with may have had an issue with the CPQ enabled automation and did not create the necessary configuration attributes for reconfiguring. To reconfigure, the Configuration ID attribute must be present, as this is where the quote line references the previous configuration's UUID.

On the Configurable Product's details page, uncheck **Logik.io Enabled**, save, then recheck and see whether the configuration attribute has been created.

Cannot access CPQ Admin from SFDC

This issue may prevent admins from working on the design and implementation of CPQ. There are many causes for this issue.



Solution:

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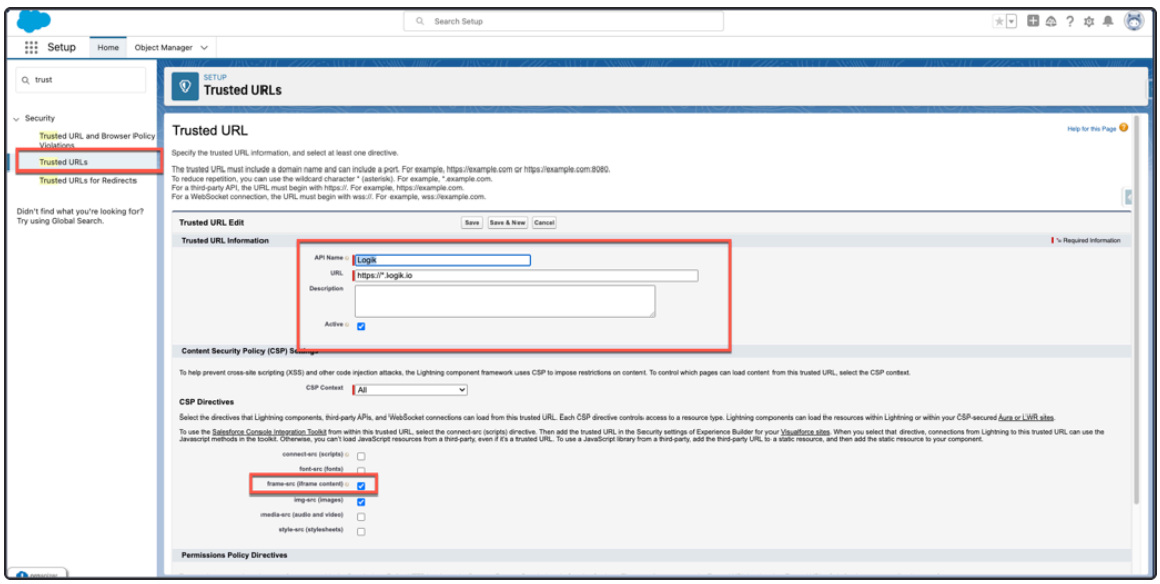
- If this is happening for only one user:
  - Confirm that they have Admin access. See User access.
  - Check whether they are running into browser issues. See Common browser issues while using CPQ.
- If this is happening for a group of users:
  - Confirm that their profile and permission group have the proper SFDC permissions. See What to do if receiving an Insufficient Privileges or blank screen when launching a Logik configuration.
  - Confirm that CPQ has been added to Trusted URLs in the Setup section, with iFrame enabled. While this isn't necessary in all cases, we've seen this addition help organizations with CPQ users from multiple different countries, or if they are using Subscription Manager/ RLM.



  - If this is happening for every user, check whether the URL is correctly entered in Custom Settings.

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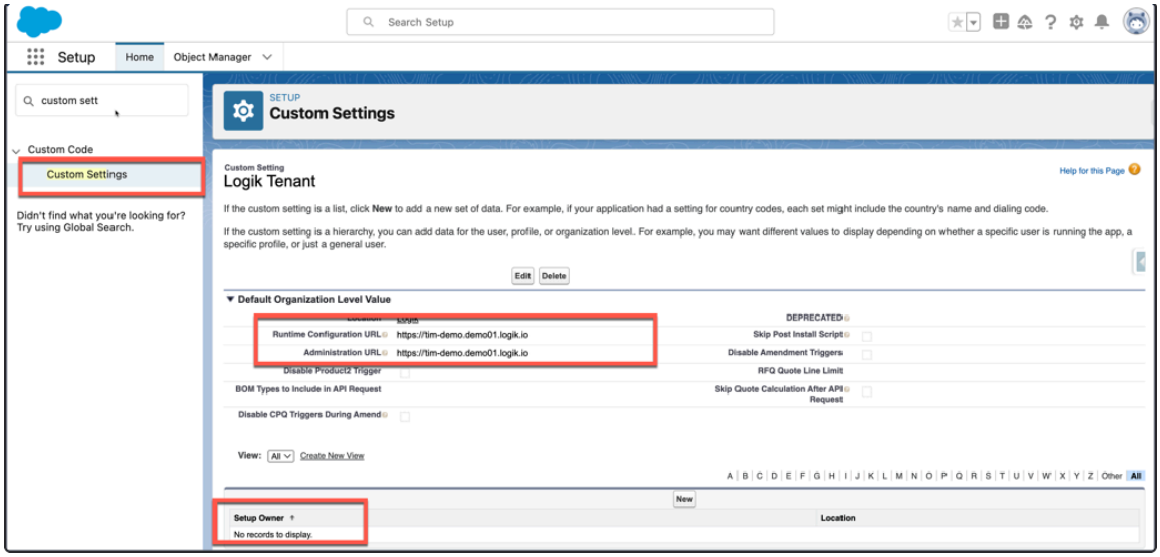
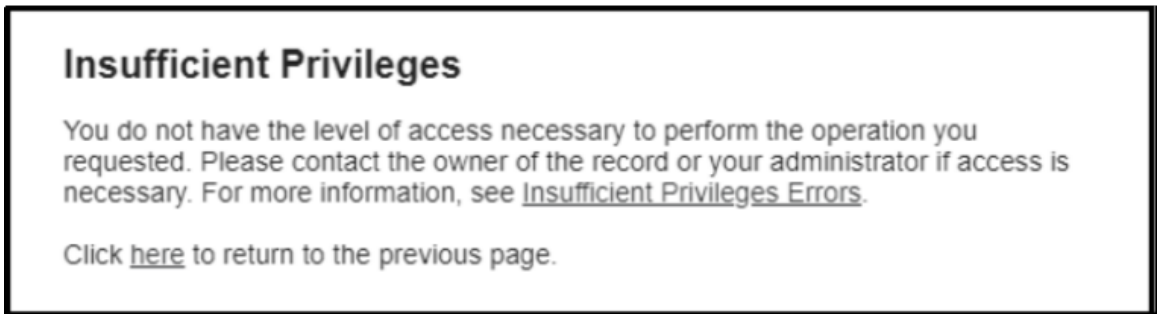


This is usually one of the first steps done when integrating a CPQ environment with an SFDC org. Sometimes, the user that sets it up will unintentionally set the URL as an override for a profile (the bottom box) instead of accessible for all users (the middle box).

Cannot launch a configuration

The "Insufficient Privileges" error message from Salesforce is only one of many screens a user can encounter when clicking the wrench icon in the QLE or when selecting a product after clicking **Edit lines** in the quote.



When this issue occurs, other issues may include seeing the Content Blocked screen (as seen in the Cannot Access CPQ Admin from SFDC issue), seeing a blank screen, or seeing an error message display.

This can happen for a variety of reasons, including problems with the same permissions that are necessary for accessing the CPQ Admin. However, this issue affects only end users of the configurator (that is, sales/partner users).

Solutions:

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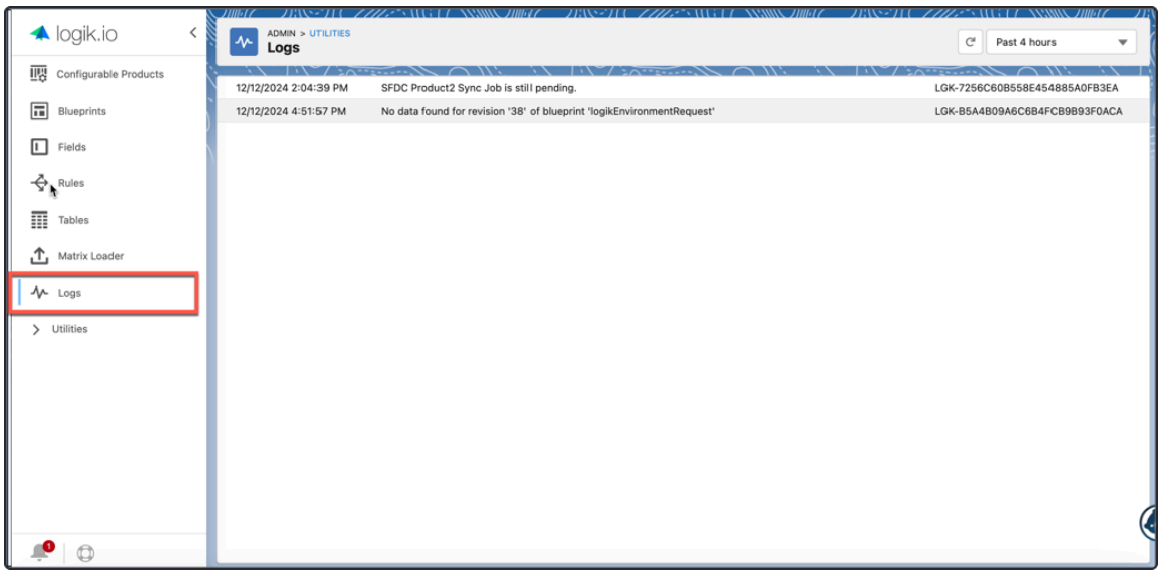
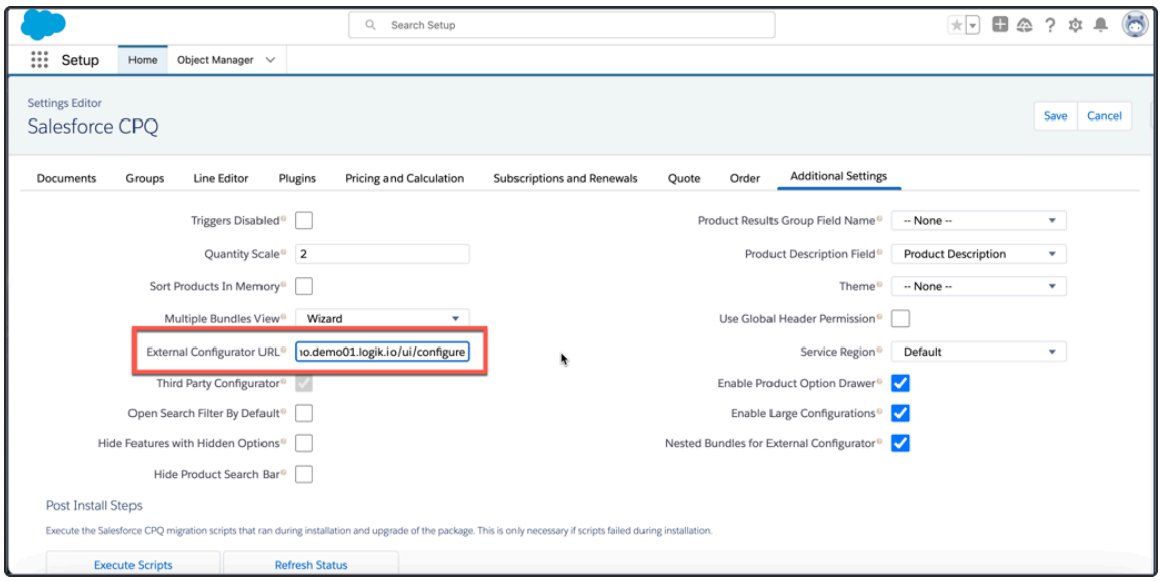
- If this is happening only for one Blueprint or when launching from one quote, check whether there are any errors in the Logs tab of the CPQ Admin.



If you find no errors in the logs, review Common error messages and causes. This may be due to an issue with the On Configure/Reconfigure script of the Blueprint, or with a twinned field that is expected from the quote.

- If this is happening for only one user, check whether they are experiencing browser issues. See Common browser issues while using CPQ.
- If this is happening for a group of users, check to see whether their profile and permission group have the proper SFDC permissions. See What to do if receiving an Insufficient Privileges or blank screen when launching a Logik configuration .
- If this is happening for every user, confirm that the URL is correct in Salesforce CPQ. Navigate to Setup > Installed packages > Salesforce CPQ > Configure > Additional Settings > External Configurator URL & Third Party Configurator.



This is usually one of the first steps done when integrating a CPQ environment with an SFDC org. The URL will usually take the form of `https://<domain-`

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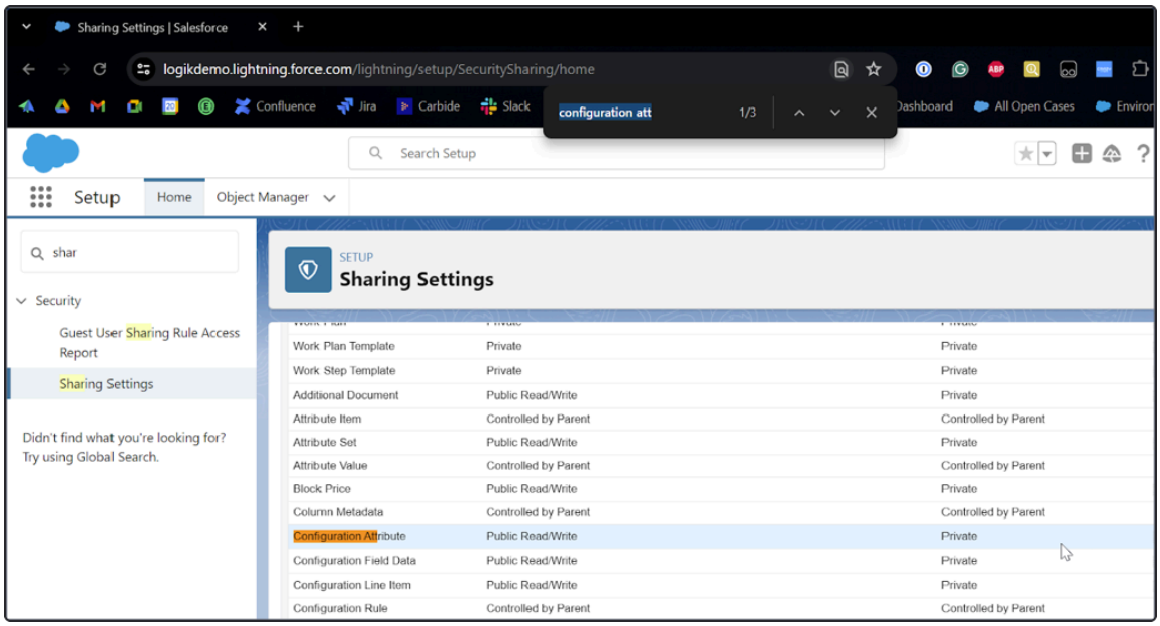
`name>.<sector>.logik.io/ui/configure`, but it can vary based on whether you use VisualForce pages to launch the configurator.

If your URL is not in the above form, your organization should have documentation for the custom setup done for launching into the CPQ configurator.

Partner users/RFQ API sharing settings

Under Setup > Sharing Settings, check to see whether the following objects have Default External Access set to Private:

- Pricebook
- Product Feature
- Quote
- Quote line
- Configuration Attribute
- Configuration line item



Salesforce CPQ needs access to these objects for part of our reconfigure integration to work.

Usually, you wouldn't need to edit the Sharing Settings for this object since it's created by the Integration user, but in many cases, partner users could try to reference these records during RFQ, so they will need it set to either Public Read-Only or Public Read/Write.

Salesforce platform issues

You may receive an "Error saving record" message:

```
Error saving record: We couldn't convert the configurable
 product to a static product. Ensure that the child components
 meet the requirements and try again.
```

This error can occur when you try to uncheck the *LGK__IsConfigurable__c* field on a Product2 record. To resolve the issue, from the Salesforce app launcher, visit the Logik.io Admin Custom Settings page and enable the **Skip Configurable Product Setup Trigger** setting.

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Refreshing a CPQ connected Salesforce org

Refreshing a Salesforce org severs the database sync between CPQ and Salesforce. To get things working again, take these steps after the refresh.

When a CPQ connected Salesforce org is refreshed, the database sync between CPQ and Salesforce will be temporarily broken. This is because a refresh automatically changes many pieces of the Salesforce org, including the Salesforce org ID, product IDs, and user names.

These ID changes are used for many integration points between the two systems, such as the Refresh Token User Runtime APIs that depend on a User ID, the product, the Pricebook, Pricebook entry sync, and the user access set up for the CPQ Admin.

To complete the CPQ side of the refresh, create a Support case. Provide the following information:

- The current CPQ Environment URL
- The date the refresh will be performed
- What you'd like to do with the connected CPQ environment's existing data:
  - Retain its data (a repoint)
  - Start from scratch (decommission and create a new environment)
- The new SFDC org ID (if unknown at the time, simply give TBD)
- The SFDC My Domain URL (if changed)
- The SFDC Usernames for users that will need CPQ Admin access
- Whether you want to change the CPQ environment host name, and if so, what it should be
- The provisioning username with the email address of provisioning@logik.io and system administrator privileges.

Once the environment is refreshed, you will need to:

- Send the new SFDC org ID
- Navigate to Salesforce Setup > Custom Settings > Manage Logik tenant and modify the CPQ URLs.

  Navigate to SFDC > Setup > Custom Settings > Manage CPQ Tenant > Edit, and change the Runtime Configuration URL and Administration URL.

- If using Salesforce CPQ, change the external configurator URL.

  Navigate to SFDC > Setup > Installed Packages > Configure Salesforce CPQ > Additional Settings, and change the external configurator URL to the new site with `/ui/configure` appended to the end.

- Submit a new refresh token user name with system administrator permissions.

  Navigate to CPQ Admin > Settings, and delete or reset Refresh Token Username.

- If using any Runtime APIs in SFDC, create new Runtime Clients.

  Navigate to CPQ Admin > Runtime Clients, and create the new clients.

CPQ and Salesforce managed packages

Learn about the Logik Extension Package and the Logik Extension for Salesforce CPQ.

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CPQ offers two managed packages for Salesforce(SFDC) orgs: the Logik Extension Package and the Logik Extension for Salesforce CPQ. This article discusses what each package does and how they are different. Details on how to set up or upgrade an environment's managed packages are provided at the end of the article.

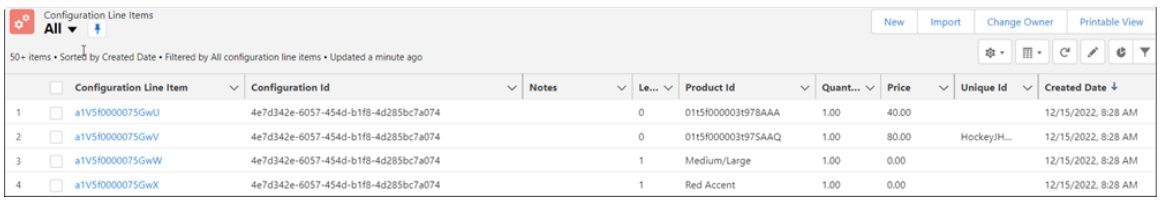
Logik Extension Package

This is the base package for CPQ interacting with Salesforce. This package allows the user to:

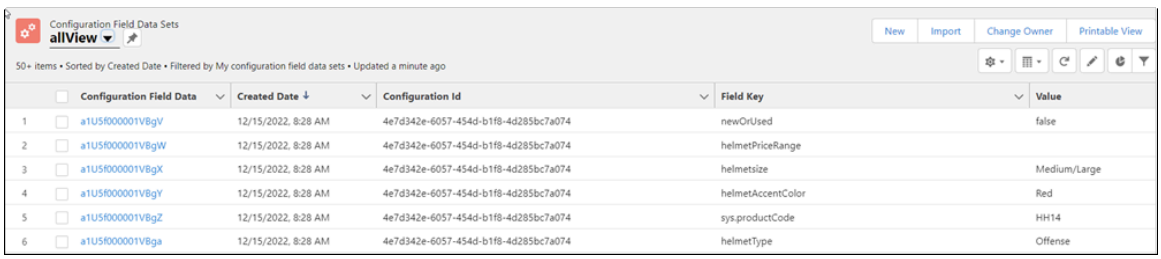
- Enable any SFDC Product2 record to be a CPQ configurable product through custom fields added to the Product2 record. For detailed steps, see Configurable products.
- Launch the CPQ Admin from in Salesforce by navigating to the Salesforce Products tab, select the list view of 'CPQ View', find a CPQ enabled product, and click the corresponding Click Here link located in the View Logik Setup column or through the Product2 record itself by clicking the link in the **View Logik.io Setup** section on the product's page.
- Support embedding the CPQ UI in Salesforce applications outside of CPQ using Visualforce. See Use case: Embed CPQ UI in a Salesforce VisualForce page.
- Call CPQ admin APIs using Salesforce Tokens. For detailed steps, see Admin APIs: Authentication using a Salesforce-connected app.

Notable components of this package include:

- Configuration line item object: This object stores the product data that comes out of a configuration including product id or code, price, BOM type, quantity, and extended information. It also includes the unique configuration ID that ties the data back to a specific configuration session and can be referenced in other flows or triggers in SFDC. Finally, it allows users to populate quote line custom fields with information from CPQ. For additional information, review the following video: Populate quote line Custom Fields from Logik.mp4



- Configuration field data object: This object stores the values set to fields in the configuration and contains the unique configuration ID of that session in order to reference that information upon reconfiguration.



- Custom settings to control the end points by setting the Administration URL and Runtime Configuration URL. Navigate to the CPQ Admin custom settings Item:

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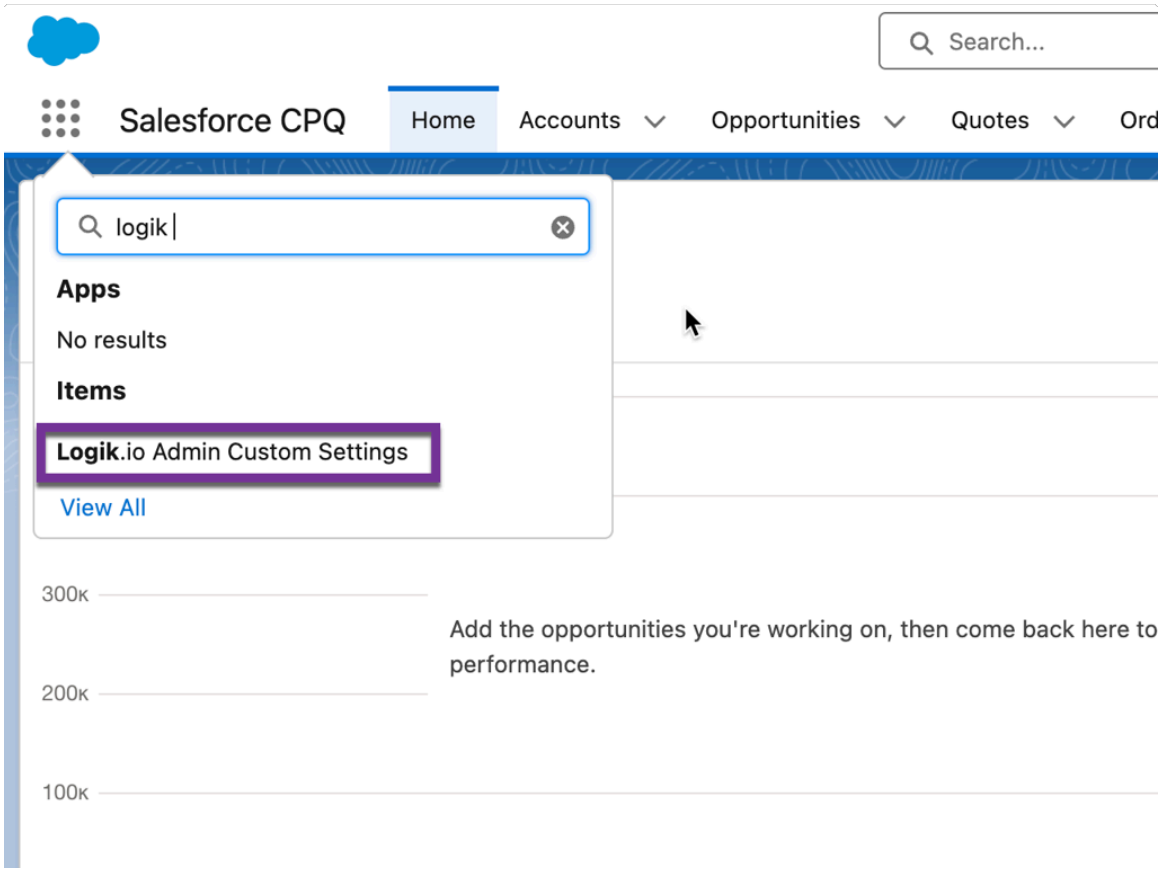
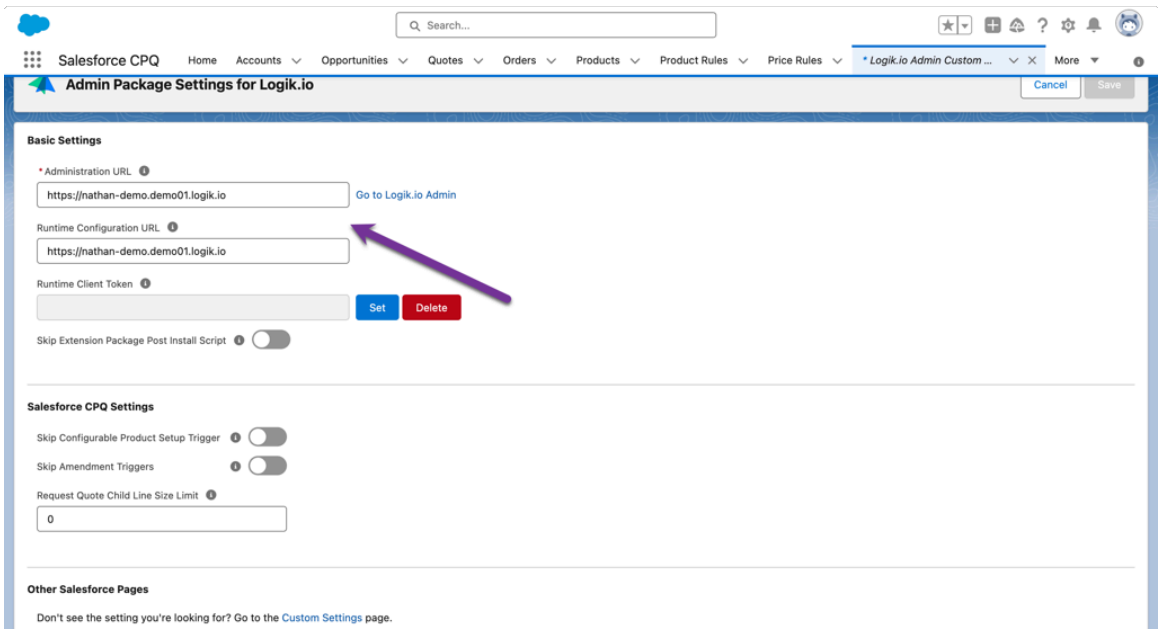


And update these settings here:



Logik Extension for Salesforce CPQ

In order to install the Logik Extension for Salesforce CPQ. You must have the base package and Salesforce CPQ installed on your org, and at least version 244 or later for your Salesforce CPQ package. This package contains CPQ object specific enhancements over the base package and leverage the CPQ configuration in Salesforce CPQ. This package gives the user the ability to:

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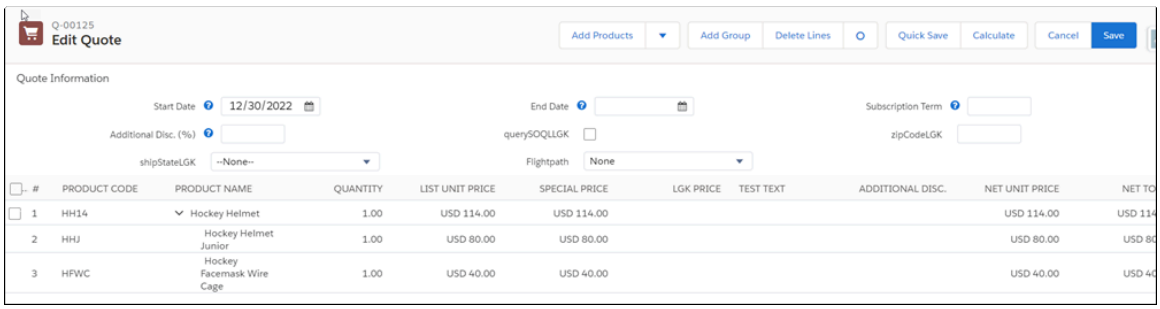
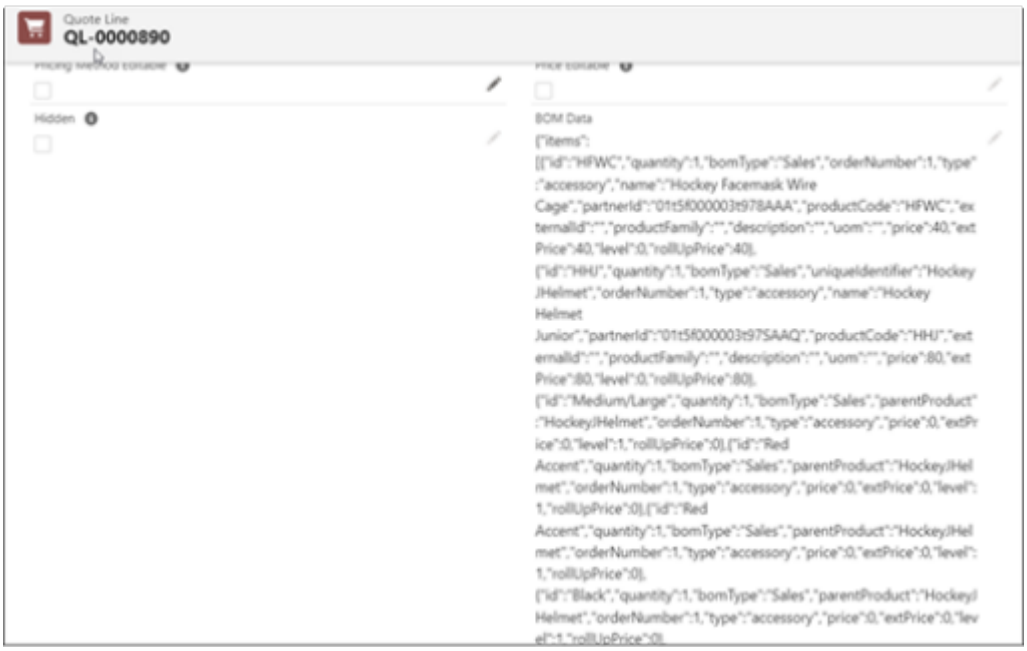
- Launch a CPQ configuration in a CPQ new or amendment quote flow.
- Populate prior quantity and price in the BOM object for amendment flows.
- Create child quote lines for the top quote line. Automatically populate the quantity and list price values for each line item based on the information coming from CPQ. This also sets the parent item to be the top line so that the line item appears as a bundle view in the quote.



Notable components of this package include:

- Custom fields added to top level quote line object:
  - Configuration UD: The universally unique identifier (UUID) of the configuration session. Used upon reconfigure to restore configuration to previously determined state.
  - Committed Configuration UD: When an amendment quote is created. This field is populated with the Configuration ID. During an amendment, when Reconfigure is finished, the Committed Configuration UD is used to populate Prior Quantity and Prior Price columns on the Configuration Line Item object.
  - BOM Data: Sales line item data serialized in JSON format. Allows for use of data with the quote line calculator or other actions in Salesforce to perform some calculations or custom logic on top of the BOM data coming from a CPQ configuration.



For more information on these objects and the user capabilities they add review the following video: Delta BOM Feature.mp4

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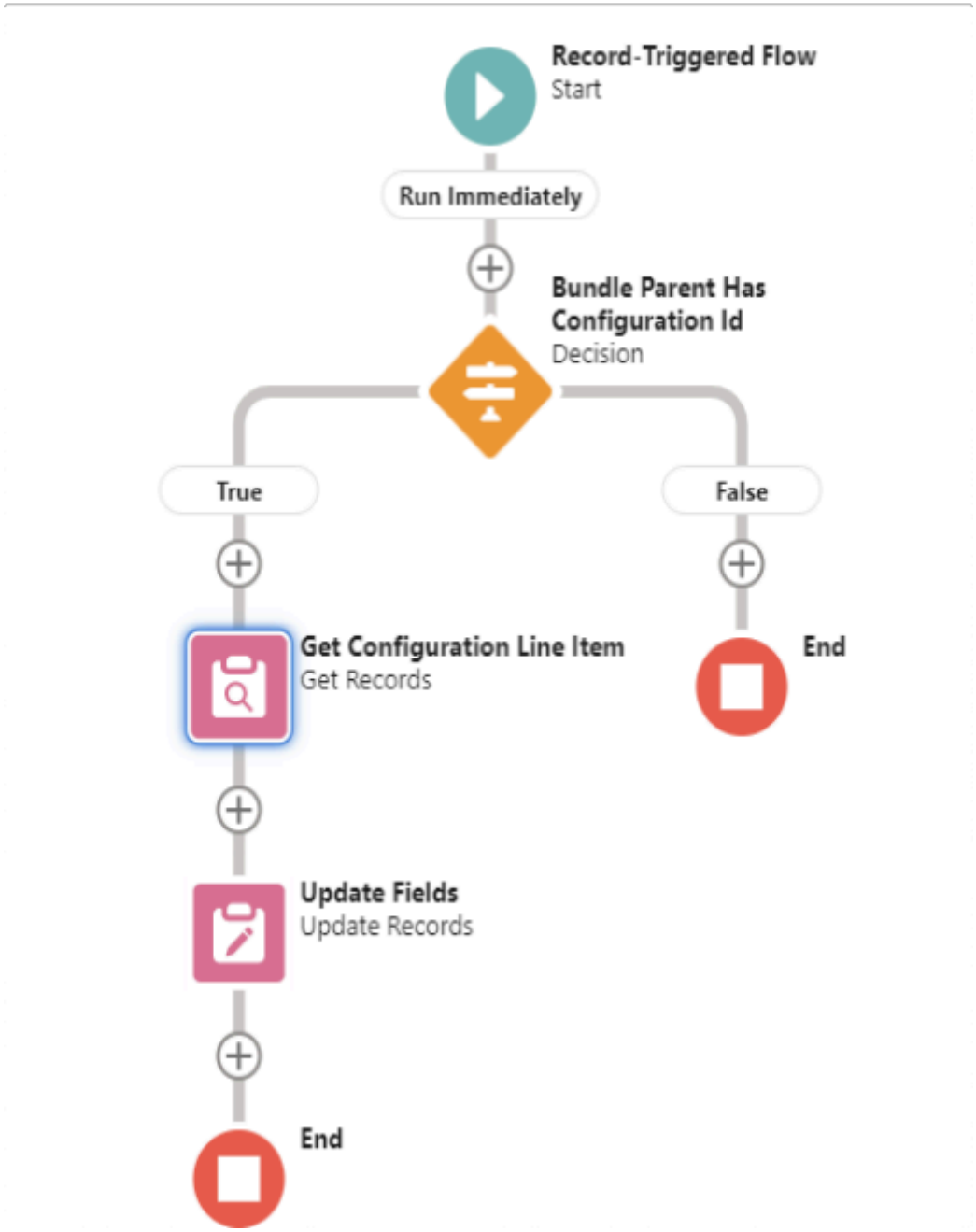
- Custom Salesforce REST endpoint that creates a quote and quote lines based on a previously saved configuration, without going through Salesforce CPQ's UI. For more information, review this video: Request for quote for Omnichannel using Logik APIs.mp4
- Flightpath: allows the administrator to understand how the rules engine responds to end-user inputs by presenting a visual interaction between inputs and triggered rule actions.
- Configuration Line Item to quote line flow: flow template to populate quote line fields from Configuration Line Item object.



The flow starts inactive and must be enabled.

Writes Configuration Line Item field to quote line as an example for reference, write the extended info data to the BOM data field. This is where the user would define what fields should be mapped, as well as an optional filter:

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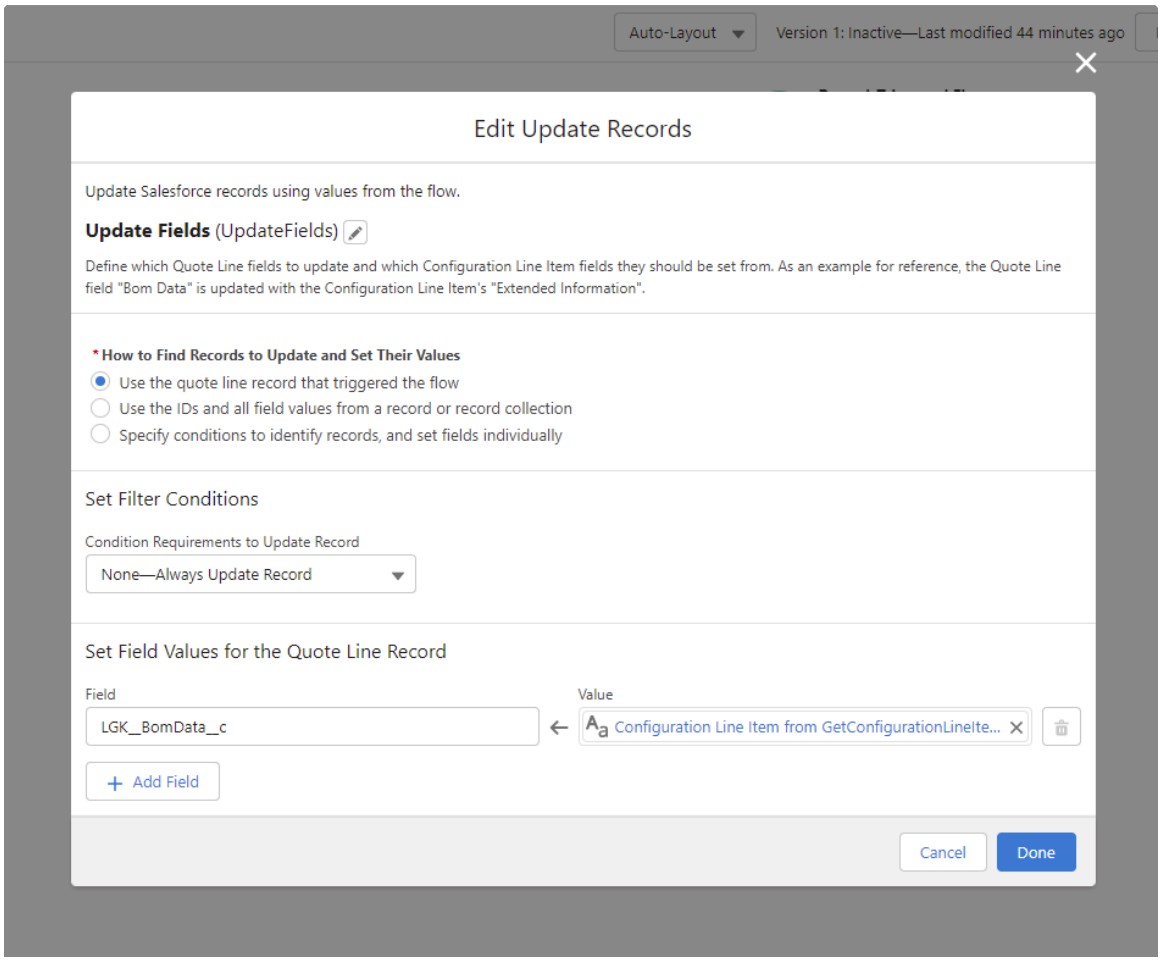

- Triggers: Two triggers are included with this package.
  - Product configurable trigger: This trigger is responsible for setting up configurable products to be configurable. That includes providing the link to CPQ and making the configurable product show up in the CPQ Admin (on the Configurable Products page), as well as setting up some product-related data for basic functionality in CPQ quoting.
  - Amendment quote line trigger: This trigger acts on the custom field Committed Configuration ID. This field gets populated when an amendment quote is created. If the subscription lines originated from a CPQ configuration, this trigger will automatically populate the current Configuration UD to the Committed Configuration UD field. During an amendment, when Reconfigure is finished, the Committed Configuration UD is used to populate Prior Quantity and Prior Price columns on the Configuration Line Item object. The Configuration UD custom field of the amended quote line is updated with new Configuration UD generated during the reconfigure flow. The Configuration UD field on the original subscription is also updated with the new value, so that amendments can be repeated with the latest changes made during the amendment.

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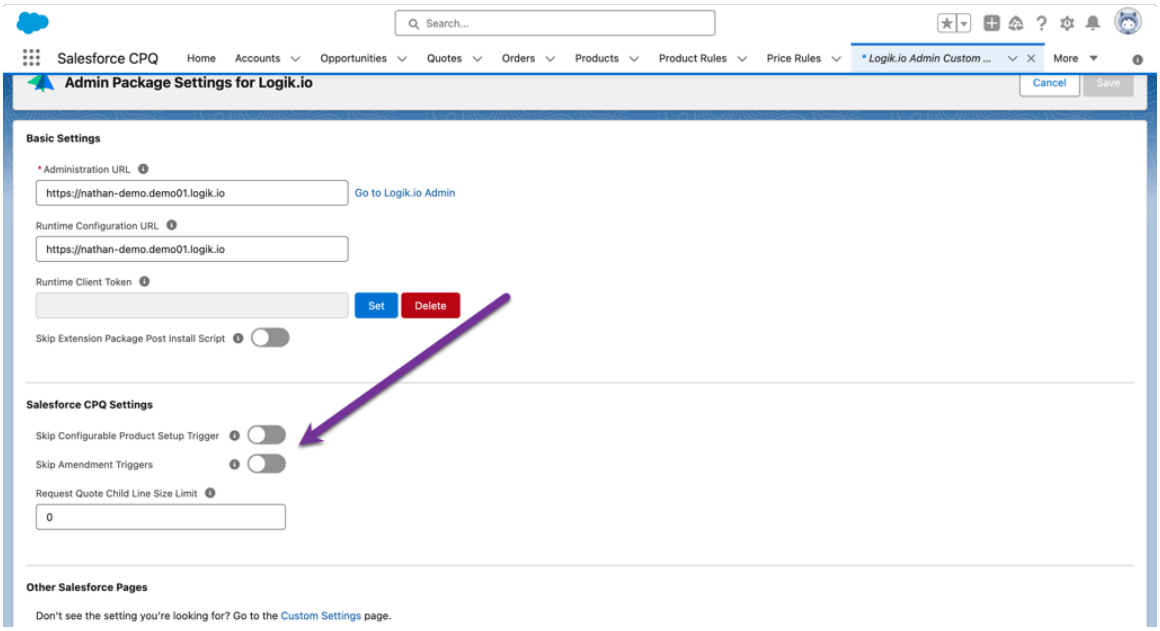
You can disable these triggers through managing the CPQ Admin custom settings referenced above:



All package components

To view all the components contained in each package, go to Setup, search for "Installed Packages" in the Quick Find box, drill into either package, and click **View Components**. To request an environment setup or upgrade, ensure that a user has been created with the email address of provisioning@Logik.io, and request the setup or upgrade through our support site or by emailing support@Logik.io.

Reconnect Logik after refreshing the Salesforce org

Reconnect the Logik environment to a new or refreshed SFDC org.

Before you begin

Role required: Admin

Procedure

1. Submit a support case through the support site or by emailing
   Provide the new org ID, the My Domain URL, and the custom URL of the Logik environment. The custom URL will have the form `https://<tenant>.<sector>.CPQ`.
2. If a Logik user exists on the org, send a password reset request for the user.
3. If no Logik user exists on the org, create a user.

Result

You will be notified when the migration of the Logik environment to the new org is complete.

Trouble?

If Logik has confirmed the migration is complete but you are unable to give a Logik user access to the org, follow these steps:

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1. Navigate to the Logik Tenant: Setup > Custom Settings > Click Manage next to the Logik Tenant.
2. Edit or confirm that the Administration URL is set to the custom URL of your Logik environment: `https://<tenant>.<sector>.CPQ`.
3. Navigate to Installed Packages > Find Salesforce CPQ > Configure > Additional Settings, and update the Salesforce CPQ External Configurator URL to your Logik URL followed by `/ui/configure`: `https://<tenant>.<sector>.CPQ/ui/configure`.

Twinning: pulling Salesforce CPQ quote information into CPQ

You can set up Salesforce.com and CPQ to bring quote data into a CPQ configuration at runtime.

Note: This article is relevant only to use cases that are integrated with Salesforce CPQ.

On occasion, the CPQ Admin will need to bring Salesforce.com (SFDC) quote data into CPQ, to drive configuration, rules, calculations, and so on. This article describes the setup in both SFDC and CPQ that will bring relevant quote data into a CPQ configuration experience at runtime. This method of data transfer is nicknamed Twin Field or "field twinning."

CPQ rules run differently depending on whether the account is a new prospect or an existing customer. CPQ allows new prospects to select from a subset of offers such as starter packages, whereas existing customers are limited to renewing their existing products or upgrading to higher value products.

Prerequisites

The CPQ managed package installed in your SFDC environment should be version 0.8 (released February 4, 2022) or later. If the managed package has not been upgraded, log an Upgrade SFDC Managed Package Request ticket in the Help Center.

Navigation in SFDC: Setup -> Object Manager -> quote (SBQQ Quote_c) -> Field Sets.

In the SFDC CPQ quote object (SBQQ_Quote_c), confirm that there is a field set named ReferencedFields. If no field set named ReferencedFields exists, create it. Navigation in SFDC: Setup -> Object Manager -> quote (SBQQ Quote_c) -> Field Sets.

Implementation

1. In SFDC, add a custom field to the SFDC CPQ quote object with the format <someName>LGK. This will create a field with the API name <someName>LGK_c.

   In Logik, variable names begin with a lowercase character by default. Take care to make sure your twinned quote object in SFDC begins with a lowercase character as well.

2. Add this custom field to the ReferencedFields field set on the quote object. In SFDC, navigate to Setup -> Object Manager -> quote (SBQQ_Quote_c) -> Field Sets -> ReferencedFields. From the list of quote fields, drag and drop your new custom field into the In the Field Set box.

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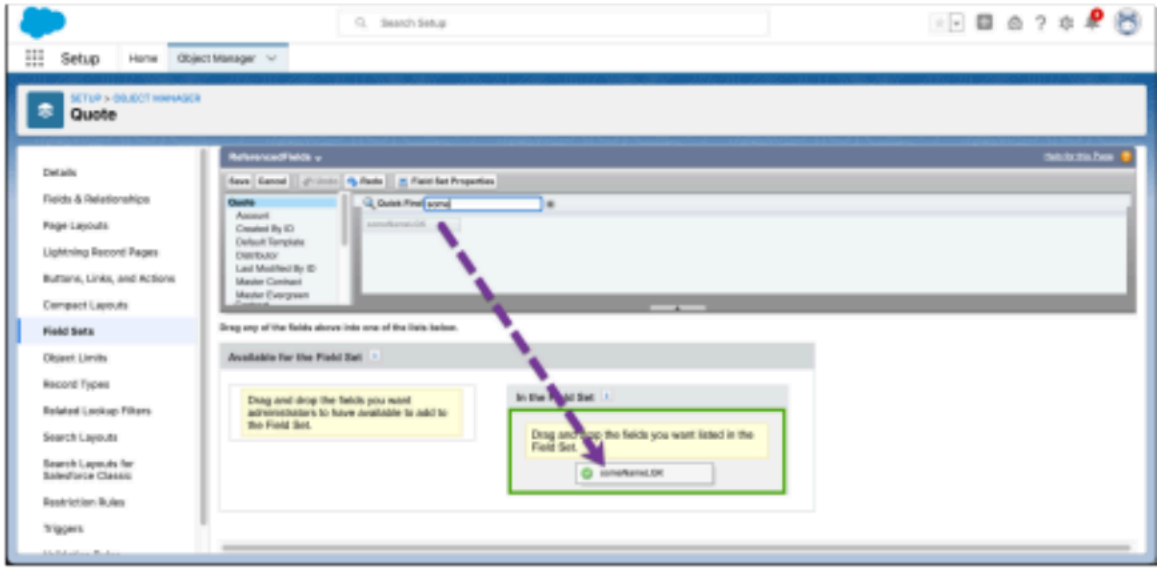

3. In CPQ, add a field with variable name <someName>.

   Note: <someName> should be the same case-sensitive string as the one defined in the SFDC API name of the corresponding field to import, <someName>LGK_c. This CPQ field should not have LGK suffix. Twinned fields can have different field types.

4. Associate this field to the Blueprint that will utilize it.

When a user transitions from a SFDC quote into CPQ, the new field in CPQ, <someName>, will be populated with the data that SBQQ Quote_c. <someName>LGK_c stored in SFDC.

In Salesforce, the ReferencedFields field set is a custom field set that can be created on the Quote, Quote Line, and Quote Line Group objects. For more information, see SFDC: ReferencedFields Field Set in Salesforce CPQ.

Capturing data from a configuration when amending a subscription contract

How to capture data from a prior configuration of a subscription contract.

When amending a pre-existing subscription contract, you may want to capture data relating to the prior configuration. Through additional fields added to the Configuration Quote Line and the CPQ Quote Line objects, you can access prior quantity and prior price for configuration items. For additional information, view the following 19-minute video.

https://drive.google.com/file/d/10Uffs0C7aFWPqkLYRILqZcwgIq2-uxsp/view?usp=sharing

Related topics

CPQ integration with Salesforce B2B Commerce

CPQ and Salesforce base package overview

The CPQ and Salesforce base package lets the user use Salesforce Product2 records as configurable products in CPQ, launch the CPQ Admin from Salesforce, and integrate the two applications in other useful ways.

The base package provides the minimum components and configuration for CPQ interacting with Salesforce. This package allows the user to:

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- Enable Salesforce Product2 records to be a CPQ configurable product through custom fields added to the Product2 record. For detailed steps, see Configurable products.
- Launch the CPQ Admin from Salesforce, from enabled Product2 records
- Embed the CPQ configuration UI in other Salesforce pages or applications outside CPQ using Visualforce. See Use case: Embed CPQ UI in a Salesforce VisualForce page.
- Access CPQ admin APIs using Salesforce tokens. For detailed steps, see Admin APIs: Authentication using a Salesforce-connected app.

Product2 integration

The base package includes the Logik Enabled checkbox and a link View CPQ Setup that will be populated with a link to the CPQ Admin page when the Logik Enabled checkbox is checked.

Configuration line item field mapper

A flow is available that checks for user-created custom fields on the configuration line item (LGK_ConfigurationLineItem_c), and compares it to data in the Extended Information and Pricing Information fields on the record. If there are name matches, write the data from the Extended Information or Pricing Information to the custom fields.

Name comparisons ignore case sensitivity, and the "_c" suffix on field names is optional. For example, both "StartDate" and "startDate_c" in Extended Information or Pricing Information will be considered a match for a Salesforce field named "StartDate_c". If the map contains the same name both with and without the "_c" suffix, the Salesforce will save the value of the field with the suffix.

If the same field names exist in both Extended Information and Pricing Information, the value in Extended Information is written to the custom field.

Configuration line items

LGK__ConfigurationLineItem__c stores the product data (bill of materials) that comes out of a configuration. (See below for a complete list of fields.)

The record stores the unique CPQ configuration ID that ties the data back to a specific CPQ configuration session and can be referenced in other flows or triggers in Salesforce.

Quote line fields can be populated with information from a CPQ configuration using records of this object. For additional information, see the following video: Populate Quote Line Custom Fields from Logik

CPQ writes the configuration line item objects when a CPQ configuration is saved. The setting in CPQ Admin must be enabled.

Note: CPQ writes these records into Salesforce, but does not read them. Any changes made to these records will not affect a CPQ configuration.

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Fields & Relationships
17 Items, Sorted by Field Label

Quick Find | New

FIELD LABEL ▲	FIELD NAME	DATA TYPE
Configuration Id	LGK__ConfigurationId__c	Text(255) (External ID)
Configuration Line Item	Name	Text(80)
Created By	CreatedById	Lookup(User)
Extended Information	LGK__ExtendedInformation__c	Long Text Area(131000)
Last Modified By	LastModifiedById	Lookup(User)
Level	LGK__Level__c	Text(255)
Notes	LGK__Notes__c	Text(255)
Owner	OwnerId	Lookup(User,Group)
Parent Product Id	LGK__ParentProductId__c	Text(255)
Price	LGK__Price__c	Number(10, 2)
Pricing Information	LGK__PricingInformation__c	Long Text Area(131000)
Product Id	LGK__ProductId__c	Text(255)
Quantity	LGK__Quantity__c	Number(10, 2)
Rollup Price	LGK__RollupPrice__c	Currency(15, 3)
Type	LGK__Type__c	Text(255)
Unique Id	LGK__UniqueId__c	Text(255)
UOM	LGK__UOM__c	Text(255)

Configuration field data

LGK__ConfigurationFieldData__c stores the field values set in a configuration and contains the unique CPQ configuration ID. (See below for a complete list of fields.)

Creates records for every field from a configuration, even if it has a blank or null value.

Writes the configuration Field Data objects when a CPQ configuration is saved. The setting in CPQ Admin also needs to be enabled.

Note: CPQ writes these records into Salesforce, but does not read them. Any changes made to these records will not affect a CPQ configuration.

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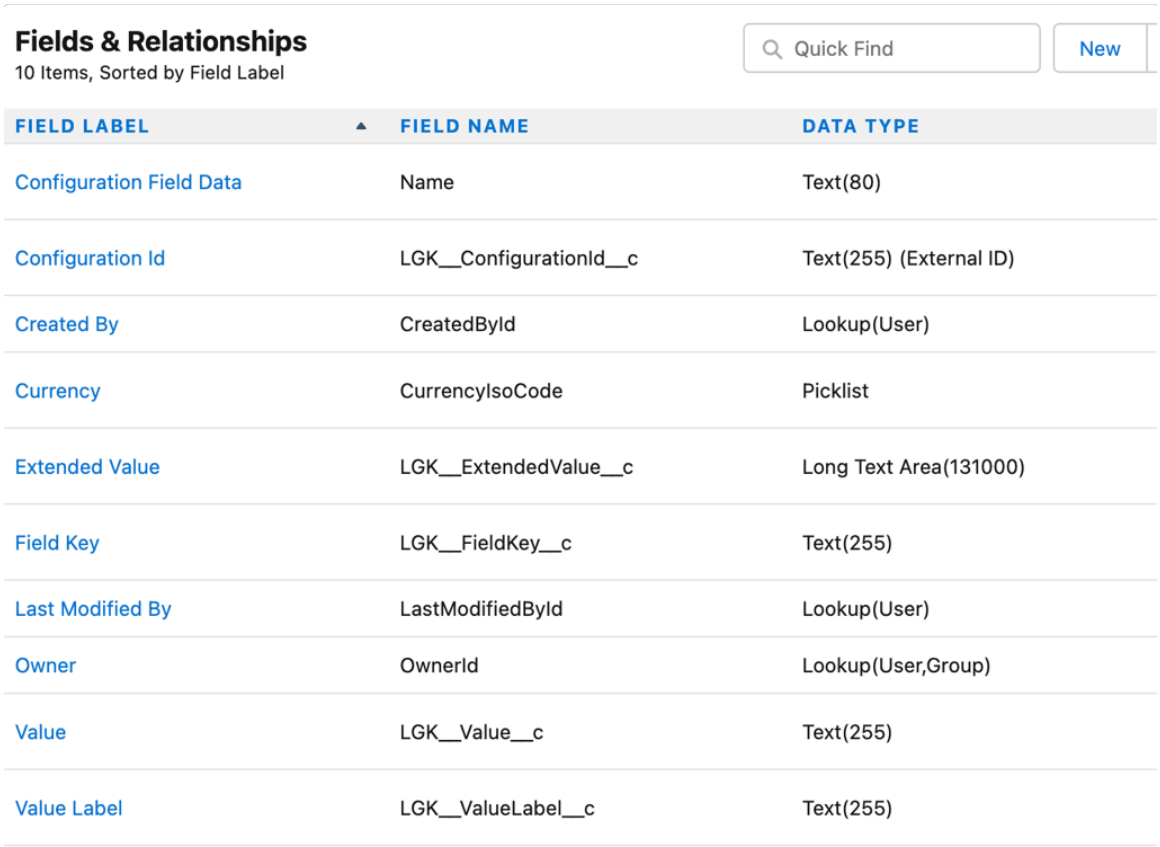


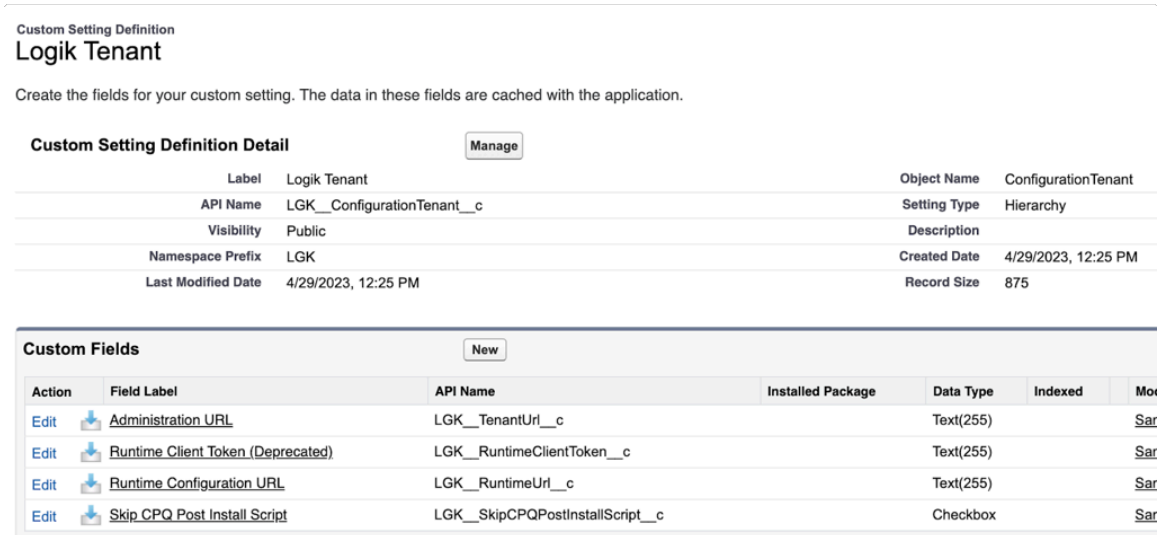
Fields & Relationships
10 Items, Sorted by Field Label

Quick Find | New

FIELD LABEL	FIELD NAME	DATA TYPE
Configuration Field Data	Name	Text(80)
Configuration Id	LGK__ConfigurationId__c	Text(255) (External ID)
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Extended Value	LGK__ExtendedValue__c	Long Text Area(131000)
Field Key	LGK__FieldKey__c	Text(255)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Value	LGK__Value__c	Text(255)
Value Label	LGK__ValueLabel__c	Text(255)

Configuration tenant

LGK__ConfigurationTenant__c controls aspects of the CPQ integration with Salesforce.



Custom Setting Definition
Logik Tenant

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail Manage

Label	Logik Tenant	Object Name	ConfigurationTenant
API Name	LGK__ConfigurationTenant__c	Setting Type	Hierarchy
Visibility	Public	Description	
Namespace Prefix	LGK	Created Date	4/29/2023, 12:25 PM
Last Modified Date	4/29/2023, 12:25 PM	Record Size	875

Custom Fields New

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Mo
Edit	Administration URL	LGK__TenantUrl__c		Text(255)		Sar
Edit	Runtime Client Token (Deprecated)	LGK__RuntimeClientToken__c		Text(255)		Sar
Edit	Runtime Configuration URL	LGK__RuntimeUrl__c		Text(255)		Sar
Edit	Skip CPQ Post Install Script	LGK__SkipCPQPostInstallScript__c		Checkbox		Sar

A single record for org-wide defaults should be created and populated with the Administration URL and Runtime Configuration URL values of your CPQ instance.

For security reasons, the Runtime Client Token field is deprecated. The Skip CPQ Post Install Script checkbox disables product updates that run while installing CPQ's CPQ extension package.

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Sales Customer Relationship Management reference

Reference topics provide additional information about the Sales Customer Relationship Management applications.

Sales Customer Relationship Management REST APIs

Sales Customer Relationship Management (Sales CRM) APIs provide endpoints to create and manage Sales CRM entities such as leads, quotes, and orders from external systems.

Sales CRM APIs

REST API	Description
Entitlement API	The *Entitlement* API provides endpoints to create and retrieve entitlement records from an instance.
lead API	The *lead* API provides endpoints that enable you to create, update, and query/retrieve marketing leads and their associated lead line items from an instance.
Order API	The *Order* API provides endpoints for retrieving and creating orders with order line items for the Customer Service Management application.
Product Inventory Open API	The *Product Inventory Open* API provides endpoints to create and retrieve product inventories.
Sales Agreement API	The *Sales Agreement* API provides methods for creating a new sales agreement and retrieving an existing sales agreement of a given sys_id.
Work Order Management API	The *Work Order Management* API provides endpoints to create, update, and retrieve work orders.

Related topics

- TMF APIs for TMT
- Browse APIs by product
- API implementation and reference

Lead and opportunity management reference

Reference for lead and opportunity management applications.

Customer Engagement Sequences reference

Reference topics provide additional information about the Customer Engagement Sequences application.

Components installed with Customer Engagement Sequences

Several types of components are installed with activation of the Customer Engagement Sequences plugin, including tables and user roles.

Roles installed

The following roles are installed if you're using Customer Engagement Sequences version 1.0.0.

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Role title [name]	Description	Contains roles
Sequence viewer [sn_crm_sequence.viewer]	Views sequence-related records.	sn_crm_sequence.sn_crm_sequence_
Sequence task read granular [sn_crm_sequence.sn_crm_sequence_task_read_granular]	Granular role to grant read access to the sequence task records.	None

The following roles are installed if you're using Customer Engagement Sequences version 2.0.0:

Role title [name]	Description	Contains roles
Sequence admin [sn_crm_sequence.admin]	Granular admin role grants full administrative access to all sequence records and their related data.	• pd_cancel • pd_content_author • sn_crm_sequence.writer
Sequence writer [sn_crm_sequence.writer]	Creates sequence records, and views related records such as sequence tasks and sequence steps.	• playbook.write • sn_crm_sequence.executor
Sequence executor [sn_crm_sequence.executor]	Views sequence and sequence task records, and completes activities related to the sequence steps.	• sn_crm_sequence.reader • sn_crm_sequence.sn_crm_seque

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Role title [name]	Description	Contains roles
Sequence reader [sn_crm_sequence.reader]	Views sequence records.	playbook.designer_access
Sequence task read granular [sn_crm_sequence.sn_crm_sequence_task_read_granular]	Granular role to grant read access to the sequence task records.	None

Tables installed

Table	Description
Customer Engagement Sequence Task [sn_crm_sequence_task]	Stores the sequence task records that are generated when a sequence is triggered.

The Customer Engagement Sequence Task [sn_crm_sequence_task] table extends the Task [task] table.

Related topics

Install Customer Engagement Sequences

Using Customer Engagement Sequences

My sequence task list view

Description of the details displayed on the My sequence task list view.

My Sequence Task list view

Column	Description
Number	ID of the sequence task record.
Sequence entity record	Sales entity record that triggered the sequence. For example, lead.
Sequence	Sequence that created the sequence task record.
Description	Description of the sequence.
State	Current state of the sequence task. The available options are: • Work in progress • Completed
Priority	Priority of the sequence task.
Due date	Date by which the sequence task must be completed.
Added at	Timestamp when the sequence task was created.

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Automation form fields

The Automation form enables you to configure properties and pull data from referenced tables for an automated call attempt.

Dot-walking enables you to access columns from referenced tables so you can pull data beyond the current record into your configuration. For more information, see Dot-walking examples.

Field	Description
Short description	The parent table field containing a value that you want to use as a short description on the call task.
Description	Optional description about the schedule call activity.
Phone number	The parent table field containing the phone number.
Sequence task	Sequence task associated with the call task. This value should be **1.1 - Start sequence** > **Sequence task record**.
Assigned to	Agent assigned to the sequence task.
Priority	Priority of the call task.
Reason for call	Purpose of calling the prospective customer.
State	The state of the call task. The available options include: • Open • Work in Progress • Closed Complete • Closed Abandoned • Cancelled

Lead Management reference

Reference topics provide additional information about the Lead Management application.

Components installed with Lead Management

Several types of components are installed with activation of the Lead Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Lead writer [sn_lead_mgmt_core.lead_writer]	A granular role created to give write access to Lead and Lead Line Item.	sn_lead_mgmt_core.lead_viewer
Lead integrator [sn_lead_mgmt_core.lead_integrator]	Lead integrator have access to call the REST APIs of lead.	sn_lead_mgmt_core.lead_writer
Lead responsibility write granular [sn_lead_mgmt_core.lead_responsibility_write_granular]	Provides granular access to lead and related entities	sn_lead_mgmt_core.lead_responsibility_read_

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Role title [name]	Description	Contains roles
	through the responsibility framework.	
Lead responsibility read granular [sn_lead_mgmt_core.lead_responsibility_read_granular]	Provides granular read-only access to lead and its related entities through the responsibility framework.	None
Lead agent [sn_lead_mgmt_core.lead_agent]	Lead agent can perform CRUD operations on Lead and related tables.	• sn_customerservice.csm_workspace_user • sn_lead_mgmt_core.lead_writer
Lead admin [sn_lead_mgmt_core.lead_admin]	An admin role created to give create, update, read, and delete access on lead tables.	• sn_lead_mgmt_core.lead_agent • sn_lead_mgmt_core.lead_integrator
Lead viewer [sn_lead_mgmt_core.lead_viewer]	A granular role created to give read access to Lead and Lead Line Item.	• sn_csm_ctxrul_mgt.context_variable_viewer • sn_prd_pm.product_catalog_viewer • canvas_user • sn_csm_ctxrul_mgt.rule_matrix_viewer

Tables installed

Table	Description
Lead Needs sn_lead_mgmt_lead_needs	Specific requirements or expectations of a customer.
Lead Line Item sn_lead_mgmt_core_lead_line_item	Individual product entry within a lead.
Lead Task sn_lead_mgmt_core_lead_task	A specific action or activity assigned to manage or progress a lead, such as follow-up calls, sending proposals, or scheduling meetings.
Lead sn_lead_mgmt_core_lead	Prospective customers who have expressed their interest through various channels, such as website forms, social media, or events.

Lead details form

Field descriptions for editing or reviewing details on the Lead form for Lead Management.

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Details fields

Field	Description
Number	Unique, auto-generated identifier for the lead record. This field is automatically set to the next available LEAD number.
Lead Group	Group or campaign segment associated with the lead.
First Name	First name of the lead contact.
Middle Name	Middle name of the lead contact.
Last Name	Last name of the lead contact.
Title	Job title of the lead contact.
Email	Email address of the lead contact.
Business Phone	Primary business phone number of the lead contact.
Mobile Phone	Mobile phone number of the lead contact.
Owner	Name of the user responsible for managing the lead.
Company	Name of the company or organization the lead represents.
Industry	Industry vertical of the lead's organization. Options include: • Manufacturing • Healthcare • Technology Services • Banking • Bio-Technology • Telecommunications
Website	Website URL of the lead's organization.
Short Description	Brief summary of the lead's inquiry or intent.
Stage	Current stage of the lead in the sales lifecycle. Options include: • New • Contacted • Nurturing • Qualified • Disqualified
Lead Type	Category of the lead. Options include:

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Details fields (continued)

Field	Description
	• New Business • Existing Business

Additional Information fields

Field	Description
Lead Source	Channel or origin through which the lead was acquired. Options include: • Inbound Phone • Inbound Web • Partner Referral • 3rd Party Referral • Employee Referral • List • Trade Show • Pr • Display Ad • Billboard • AI-Suggested • Other
Lead Score	Numerical score indicating the lead's likelihood to convert.
Lead Rating	Rating that indicates the quality or priority of the lead. Options include: • Cold • Warm • Hot • Super Hot
Closed Date	Date on which the lead was closed.
Account	Account record associated with the lead.
Contact	Contact record associated with the lead.
Consumer	Consumer record associated with the lead.

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Address fields

Field	Description
Street	Street address of the lead contact.
City	City of the lead contact's address.
State	State or province of the lead contact's address.
Zip/Postal Code	ZIP or postal code of the lead contact's address.
Country	Country of the lead contact's address.

Customer Preferences fields

Field	Description
Do Not Call	Option to exclude the lead contact from phone outreach.
Do Not Email	Option to exclude the lead contact from email outreach.
Do Not Share	Option to prevent the lead contact's information from being shared.

System Information fields

Field	Description
Created By	Name of the user who created the lead record.
Updated By	Name of the user who last updated the lead record.
Created	Date and time when the lead record was created.
Updated	Date and time when the lead record was last updated.
Notes	General notes related to the lead.
Work Notes	Internal notes related to the lead, visible only to agents and administrators.

Create new lead task form

Field descriptions for editing or reviewing details on the Create New Lead Task form in the Lead Management and CRM Touchpoints modules.

Field	Description
Number	System#generated unique identifier assigned to each lead task record with the prefix LDTASK.
Short description	Brief description of the work to be completed for the lead.
Due date	Date and time by which the lead task has to complete.
Assigned to	Name of the sales agent to whom this lead task is assigned.

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Field	Description
State	Current status of the lead task. The available options are: • Draft • In Progress • Completed • Cancelled • Closed
Touchpoint	CRM touchpoint associated with the lead record. This field is automatically populated when the task is created from a touchpoint record.
Work notes	Internal notes visible only to team members with appropriate access.

Related topics

Add lead tasks

Create new appointment form

Field descriptions for editing or reviewing details on the Create New Appointment form in the Lead Management and CRM Touchpoints modules.

Field	Description
From	Email id of the sender.
To	Email id of the receiver.
Activity state	State of the appointment.
Start time	Start time of your appointment.
End time	End time of your appointment.
Reminder	Time interval for a reminder.
Subject	Subject information of your appointment.
Location	Location of your appointment.
Message	Additional information for your appointment.

Related topics

Create appointments for lead tasks

Opportunity Management reference

Reference topics provide additional information about the Opportunity Management application.

Components installed with Opportunity Management

Several types of components are installed with activation of the Opportunity Management plugin, including user roles and tables.

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Roles installed

Role name	Description	Contains roles
sn_opty_mgmt_core.opportunity_viewer	A granular role created to give read access to Opportunity and Opportunity Line Item.	• sn_csm_pricing.pricelist_viewer • sn_prd_pm.product_catalog_viewer • sn_customerservice.customer_data_viewer • sn_opty_mgmt_core.opportunity_setup_viewe
sn_opty_mgmt_core.opportunity_responsibility_read	Provides granular read access to opportunity and its related entities through the responsibility framework.	None
sn_opty_mgmt_core.opportunity_admin	A granular role created to give CRUD access to Opportunity tables.	• sn_opty_mgmt_core.opportunity_setup_write • sn_opty_mgmt_core.opportunity_writer • sn_opty_mgmt_core.opportunity_allocation_w
sn_opty_mgmt_core.opportunity_responsibility_write	Provides granular write access to opportunity and related entities through the responsibility framework.	sn_opty_mgmt_core.opportunity_responsibility
sn_opty_mgmt_core.opportunity_setup_viewer	Provides view-only access to the Sales cycle and Opportunity stage tables.	None
sn_opty_mgmt_core.opportunity_writer	A granular role created to give write access to Opportunity and Opportunity Line Item.	• sn_opty_mgmt_core.opportunity_viewer • sn_quote_mgmt_core.quote_writer
sn_opty_mgmt_core.opportunity_contributor	Provides limited permissions to FSM/CSM agents to generate opportunities and view their progress across the sales life cycle.	• sn_prd_pm.product_catalog_viewer • sn_opty_mgmt_core.opportunity_setup_viewe • sn_csm_pricing.pricelist_viewer • sn_customerservice.customer_data_viewer
sn_opty_mgmt_core.opportunity_setup_writer	Provides write access to read, create, and write the Sales cycle and Opportunity stage tables.	sn_opty_mgmt_core.opportunity_setup_viewer
sn_opty_mgmt_core.opportunity_allocation_viewer	Provides granular view access to view opportunity allocations.	None
sn_opty_mgmt_core.opportunity_allocation_writer	Provides granular write access to manage opportunity allocations.	sn_opty_mgmt_core.opportunity_allocation_vie
sn_opty_mgmt_core.opportunity_allocation_responsibility_read	Provides granular responsibility access to opportunity allocations	None

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Role name	Description	Contains roles
	through the responsibility framework.	
sn_opty_mgmt_core.opportunity_allocation_responsible_group	Provides group responsibility access to opportunity allocations through the responsibility framework.	sn_opty_mgmt_core.opportunity_allocation_res

Tables installed

Table	Description
Opportunity sn_opty_mgmt_core_opportunity	Potential sales deal with a customer account.
Opportunity Task sn_opty_mgmt_core_opportunity_task	Tasks associated with an opportunity, such as follow#ups, reviews, or sales actions required to progress the opportunity through its stages.
Opportunity Line Item sn_opty_mgmt_core_opportunity_line_item	Individual products or services included in an opportunity.
Opportunity Line Characteristic sn_opty_mgmt_core_opportunity_line_characteristic	Additional attributes or characteristics associated with an opportunity line item, such as product#specific options, classifications, or dimensions required for pricing, reporting, or allocation logic.
Opportunity Needs sn_opty_mgmt_opportunity_needs	Customer#expressed business needs or requirements linked to an opportunity.
Opportunity Competitor sn_opty_mgmt_core_opportunity_competitor	Competitors associated with an opportunity, enabling sales teams to record competitive presence, assess deal risk, and analyze win/loss patterns across opportunities.
Opportunity Team Member sn_opty_mgmt_core_opportunity_team_member	Users involved in working on an opportunity, along with their roles and responsibilities.
Opportunity Associated Contact sn_opty_mgmt_core_opportunity_associated_contact	Contacts related to an opportunity, such as decision#makers, influencers, or stakeholders at the customer account.
Opportunity Stage sn_opty_mgmt_core_opportunity_stage	The current phase of an opportunity within a sales cycle, such as Qualify, Develop, Propose, or Close.
Sales Cycle Type sn_opty_mgmt_core_sales_cycle_type	A category of sales motion for opportunities, such as New Customer, Renewal, or Upsell.
Sales Cycle Stage	A stage configuration within a specific sales cycle type.

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Table	Description
sn_opty_mgmt_core_sales_cycle_stage	
Opportunity Related Party sn_opty_mgmt_core_opportunity_related_party	Non#user entities related to an opportunity, such as partners, resellers, or external organizations.
Opportunity Related Channel Partner sn_bus_org_opptym_related_business_organization	Channel partners associated with an opportunity, such as distributors or resellers.
Opportunity Allocation sn_opty_mgmt_core_opportunity_allocation	Transactional allocation records that represent how opportunity value is distributed across participants, such as team members, territories, or product groupings.
Opportunity Allocation Type sn_opty_mgmt_core_opportunity_allocation_type	Allocation configuration metadata, such as what entity is allocated (opportunity or line item), which numeric field is used, and whether allocations must total 100%.
Opportunity Allocation Dimension sn_opty_mgmt_core_opportunity_allocation_dimension	Allocation values that are grouped or categorized, such as by territory or product family.

Related topics

Install Opportunity Management

Opportunity details form

Field descriptions for editing or reviewing details on the Opportunity form for Opportunity Management.

Details

Field	Description
Number	The system-generated number of the opportunity starting with the prefix OPTY.
Primary Quote	A Primary Quote within an opportunity.
Account	Company name of the customer account.
Industry	Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking.
Contact	Name of the individual in the company that you interact with.
Estimated Deal Size	Amount of potential opportunity.
Deal type	Indicates the type of deal associated with the opportunity:

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Details (continued)

Field	Description
	• Direct: The seller engages directly with the customer, with no intermediary partner involved. • Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor.
Probability %	Estimated percentage of the sales opportunity's success.
Route to market	Identifies the exact sales channel used to execute the deal: • Direct • Reseller • Service Provider • Distributor
Amount	Total opportunity amount. **Note:** If an opportunity doesn't have any line items, then the amount picks up the same value as the **Estimated Deal Size**. When opportunity line items are added, the amount value changes as the value is picked up from **Total TCV**.
Sales Cycle Type	Type of sales, for example NEWCUST, RENEW, or UPSELL.
Weighted Amount	Total revenue adjusted by the probability percentage. The **Weighted Amount** for an opportunity is calculated by multiplying the **Probability %** with the **Amount**. For example, if the probability percentage for an opportunity is 10 (0.1%) and the amount is 100$, the weighted amount is 0.1 X 100 = 10.00.
Stage	Phases of the opportunity. For example, Qualify, Develop Propose, Negotiate, Closed-Won, or Closed-Lost.
Opportunity Group	Logical grouping of related opportunities.
Forecast Category	Forecast classification of the opportunity.
Territory	Sales territory associated with the opportunity. Used to assign responsibility, control access, and support reporting and forecasting.

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Details (continued)

Field	Description
Owner	Sales agent or sales representative assigned to this opportunity.
Channel partner	An external organization involved in selling, influencing, or supporting an opportunity as part of an indirect sales.
Short Description	Brief description of the opportunity.
Description	Description of the opportunity.

Pricing

Field	Description
Currency	Currency of the price list, for example USD for US dollars.
Price List	Default price list for the opportunity.
Term (months)	Subscription period of the opportunity line item. The default term is 12 months.
Total one-Time Price	Total price of all one-time products or services in the opportunity.
Total MRR	Total monthly recurring revenue (MRR) amount for all recurring products and services.
Total ARR	Total annual recurring revenue (ARR) amount for all recurring products and services each year.
Total ACV	Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract.

Totals

Field	Description
Total Renewal Amount	The sum of all renewal amounts associated with the opportunity. Represents revenue from renewing existing contracts.
Total Upsell/Downsell Amount	The net sum of all upsell and downsell amounts on the opportunity. Represents incremental increase or decrease in contract value compared to the existing contract.
Total TCV	Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract.

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Totals (continued)

Field	Description
Total Net New Amount	The cumulative net new price associated with the opportunity, excluding renewal portions of existing contracts
Total One#Time Price	The total price of all one#time (non#recurring) products or services included in the opportunity.

Win/Loss Outcome

Field	Description
Win reason	A predefined choice that captures the primary reason an opportunity was won. Used to record why the customer selected the solution and to support win/loss analysis and reporting. The choices are: • Brand and reputation • GenAI capabilities • Ease of implementation • Security, Risk and compliance • Ability to customize • Product features and functionality • Upsell/cross sell merged opportunity • Partner support • Executive relationships • Others - please specify • I don't know • Consolidation
Loss reason	A predefined choice that captures the primary reason an opportunity was lost or resulted in no decision. Used to analyze deal losses and identify patterns across competitors, products, or pricing. The choices are: • Customer not ready • Lack of GenAI capabilities • Security, Risk and compliance did not fit customer's needs • Inability to customize • Product features and functionality did not fit customer's needs • No longer funded

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Win/Loss Outcome (continued)

Field	Description
	• Price too high for value gained • Product has too many issues • Lack of partner support • Account went silent • Contract consolidated • Others - please specifyI don't know
Lost to	Identifies the competitor to whom the opportunity was lost. The list is populated from competitors already associated with the opportunity. Used for competitive analysis and reporting.
Outcome notes	Free#text notes used to capture additional context or supporting details for the win or loss outcome, beyond the selected reason. Remains visible for both won and lost opportunities.

Additional Information

Field	Description
Source	Identifies the source from where the opportunity originated. The options are: • Lead: Indicates that the opportunity originated from a lead record. • Direct: Indicates that the opportunity was created directly by a sales user without an originating lead, for example through direct customer engagement or outbound sales activity. • Partner: Indicates that the opportunity originated from a partner, such as a reseller, distributor, or alliance partner who identified or referred the deal. • Other: Indicates that the opportunity originated from a source that does not fall into the standard Lead, Direct, or Partner categories. Used when the source cannot be clearly classified.
Lead	The lead record associated with the opportunity, indicating the originating lead from which the opportunity was created.

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Additional Information (continued)

Field	Description
Score	A system#derived or user#assigned value used to indicate the relative quality or priority of the opportunity.
Rating	A qualitative assessment of the opportunity, typically used to classify opportunity attractiveness or health. The classifications are: • Cold: Indicates low engagement or low likelihood of progression. The opportunity shows limited momentum, minimal customer activity, or weak buying signals. • Warm: Indicates moderate engagement and emerging buying interest. The opportunity is progressing, but key signals or commitments are still developing. • Hot: Indicates strong engagement and a high level of buying intent. The opportunity shows clear momentum with positive signals toward closure. • Super Hot: Indicates very strong engagement and an imminent likelihood of closure. The opportunity demonstrates sustained momentum, high confidence, and near-term action.
Contract start date	The date on which the customer contract associated with the opportunity begins.
Estimated Closed Date	The expected date on which the opportunity is projected to close. Used for pipeline planning and forecasting.
Actual Closed Date	The date on which the opportunity was actually closed, either as won or lost.
Consolidated opportunity	Indicates that the opportunity is part of an account or contract consolidation, where multiple source opportunities are merged into a single target opportunity for execution and reporting.
Contract end date	The date on which the customer contract associated with the opportunity ends.
Customer Preferences	The customer's preferred mode of communication: • Do Not Call • Do Not Email • Do not Share

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System Information

Field	Description
Opened By	Identifies the user who initially opened or created the opportunity record in the system.
Created	Displays the date and time when the opportunity record was created in the system. This value is system#generated and cannot be edited.
Work Notes	Internal notes used to capture additional information, updates, or context related to the opportunity. Work notes are intended for internal use and are not visible to customers.

Create new appointment form

Field descriptions for editing or reviewing details on the Create New Appointment form in the CRM Touchpoints and Opportunity Management modules.

Create New Appointment form fields

Field	Description
From	Email ID of the user sending or organizing the appointment. This field is automatically set to the logged-in user.
To	Email ID of the recipient or attendee of the appointment.
Activity state	Read-only field displaying the current state of the appointment activity. Available options are: • Ready (default) • Sent • New • Completed • Cancelled • Pending
Start time	The date and time the appointment begins.
End time	The date and time the appointment ends.
Reminder (minutes)	How many minutes before the appointment start time a reminder notification is sent. The available options are: • None • 15 (default) • 30 • 60 • 120
Subject	A brief description of the purpose of the appointment.

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Create New Appointment form fields (continued)

Field	Description
Location	Optional physical locations or conference rooms where the appointment takes place.
Message	Additional details or notes about the appointment. This field supports rich text formatting.

Related topics

- Create an appointment from Opportunity Management
- Schedule an appointment from a touchpoint

Create new opportunity task form

Field descriptions for editing or reviewing details on the Create New Opportunity Task form in CRM Touchpoints and Opportunity Management modules.

Field	Description
Number	System-generated unique identifier for the opportunity task record starting with the prefix OPTASK.
Opportunity	Opportunity record associated with the task.
Due date	Date and time by which the task should be completed.
State	Current state of the opportunity task. The available options are: • Draft (default) • In Progress • Completed • Cancelled • Closed
Assigned to	User responsible for completing the task.
Touchpoint	CRM touchpoint associated with the opportunity record. This field is automatically populated when the task is created from a touchpoint record.
Short description	Brief summary of the task.
Work notes (Private)	Internal notes visible only to team members with appropriate access.

Related topics

- Create a related task from a touchpoint

Components installed with Sales Territory Management

Several types of components are installed with activation of the Sales Territory Management plugin, including user roles.

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Roles installed

Role title [name]	Description	Contains roles
Sales Territory Override [sn_sales_territory.sales_territory_override_user]	Role for overriding territory associated on Lead, Opportunity, Account, or Consumer.	None
Sales Territory Viewer [sn_sales_territory.sales_territory_viewer]	Role for viewing sales territory levels, territory models, territories, and sales data.	• sn_tp.territory_read • sn_sales_territory.sales_territory_basic
Sales Territory admin [sn_sales_territory.sales_territory_admin]	Role for creating and managing sales territory levels, territory models, and territories.	• sn_lead_mgmt_core.lead_viewer • sn_quote_mgmt_core.quote_viewer • sn_tp.territory_admin • sn_opty_mgmt_core.opportunity_viewer • sn_tmt_core.inbound_queue_read • sn_customerservice.customer_data_viewer • sn_sales_territory.sales_territory_basic • sn_sales_territory.sales_territory_override_user
Sales Territory Manager [sn_sales_territory.sales_territory_manager]	Role for managing resources of the assigned territory and its child territories.	• sn_sales_territory.sales_territory_basic • sn_tp.territory_resource_manager
Sales Territory Basic [sn_sales_territory.sales_territory_basic]	Granular role to access sales territory data.	None
Sales Territory Member [sn_sales_territory.sales_territory_member]	Role for viewing the sales territory associated on the CRM entities like Lead, Opportunity, Account, or Consumer.	• sn_tp.territory_member • sn_crm_customer_access_management_user • sn_sales_territory.sales_territory_basic

Activity Management reference

Reference topics provide additional information about the Activity Management application.

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Components installed with CRM Touchpoints

Several types of components are installed with activation of the CRM Touchpoints plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
CRM touchpoint admin [sn_crm_touchpoint.admin]	Allows users with write permission on the associated entity to create, read, update, and delete CRM touchpoint records.	sn_crm_touchpoint.touchpoint_writer
CRM touchpoint writer [sn_crm_touchpoint.touchpoint_writer]	Allows users with write permission on the associated entity to create and update CRM touchpoint records.	sn_crm_touchpoint.touchpoint_reader
CRM touchpoint reader [sn_crm_touchpoint.touchpoint_reader]	Allows users with read permission on the associated entity to view CRM touchpoint records.	None

Tables installed

Table	Description
CRM Touchpoint [sn_crm_touchpoint_touchpoint]	Stores touchpoint records that track customer engagement activities across the sales and service life cycle.

The CRM Touchpoint [sn_crm_touchpoint_touchpoint] table extends the Case [case] table.

Create new CRM touchpoint form

Field descriptions for the Create New CRM Touchpoint form.

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Field	Description
Number	System-generated unique identifier for the touchpoint record starting with the prefix CRMTPT.
Title	Descriptive name for the touchpoint. For example, Product demo session.
Type	Type of interaction the touchpoint represents. The available options are: • None (default) • Discovery • Demo • Customer business review • Qualification • Solution review • Proposal review • Commercials • Technical win • Account check-in • Buying group check-in • Executive alignment • Renewal discussion • Adoption review • Business value assessment • Partner enablement • Sequence outreach • Other
Category	Category that classifies the type of touchpoint. The available options are: • None (default) • Pre-Sales • Sales • Post-Sales • Partner
Associated entity	The table name of the CRM entity linked to the touchpoint, such as Opportunity [sn_opty_mgmt_core_opportunity].
Associated record	Record from the selected associated entity that is linked to the touchpoint, such as an opportunity record. The available options are based on the value set in the Associated entity field.
Primary channel	Primary communication channel used for the touchpoint. The available options are: • None (default) • Email

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Field	Description
	• Call • Meeting • In-Person • Social
State	Current state of the touchpoint. The available options are: • Open (default) • In Progress • Complete • Canceled
Priority	Priority level of the touchpoint. The available options are: • Low • Medium (default) • High
Account	This field is automatically set to the account of the Associated entity.
Contact	This field is automatically set to the contact associated with the Account. You can select a contact from the drop-down list if the Associated entity is set to Account.
Due date	Date and time by which the touchpoint activity should be completed.
Owner	User responsible for the touchpoint. This field is automatically set to the logged-in user.
Description	Optional additional details about the touchpoint.
Notes (Private)	Internal notes visible only to the touchpoint owner and team members with appropriate access.

Note: The Account and Contact fields become read-only after you save the CRM Touchpoints.

Related topics

Create a CRM touchpoint

Create new meeting form

Field descriptions for editing or reviewing details on the Create New Meeting form for CRM Touchpoints.

Field availability depends on the selected State and whether the Virtual meeting option is selected.

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- When State is set to Scheduled, the following fields become available: Invitees, Video software, Cadence, Location, Virtual meeting, and Meeting link.
- When State is set to Completed or Canceled, the following fields become read-only: Meeting type, Video software, Cadence, Location, Virtual meeting, and Meeting link.
- When State is set to Scheduled and Virtual meeting is unselected, Video software and Meeting link are unavailable.

Field	Description
Number	System-generated unique identifier for the meeting record, starting with the prefix CCMTG.
Source	This field is automatically set to the CRM touchpoint from which the meeting was created.
State	Current state of the meeting record. The available options are: • Draft • Scheduled • Completed • Canceled
Meeting type	Type of meeting. The available options are: • Ad-hoc • Weekly Status • QBR • Renewal
Video software	Video conferencing application used for the meeting.
Cadence	Frequency of the meeting. The available options are: • Daily • Weekly • Biweekly • Monthly • Quarterly
Locations	Optional physical locations or conference rooms where the meeting takes place.
Virtual meeting	Option to indicate that the meeting is virtual rather than occurring in a physical location.
Meeting subject	Title or topic of the meeting.
Start date & time	Date and time the meeting is scheduled to begin.

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Field	Description
End date & time	Date and time the meeting is scheduled to end.
Duration	Length of the meeting expressed in days, hours, minutes, and seconds. Automatically calculated based on the start and end date and time values when you save the meeting.
Invitees	People invited to the meeting.
Repeat until	End date for the recurring meeting series. This field is available only when a value is set in the **Cadence** field.
Meeting link	URL that enables participants to join a virtual video or audio meeting.
Agenda	Meeting agenda shared with the participants when the invite is sent. This field supports rich text formatting.
Customer notes	Notes or updates to share with the participants in an email. This field supports rich text formatting.
Internal notes	Post-meeting observations and follow-up actions for internal teams. This field supports rich text formatting.

Related topics

Schedule a meeting from a touchpoint

Create new callback form

Field descriptions for the Create New Callback form for CRM Touchpoints.

Field	Description
Number	System-generated unique identifier for the callback record starting with prefix CAL.
Short description	Brief summary of the purpose of the call.
Reason for the call	Reason or context for the callback. The available options are: • None (default) • Product Issue • Order Issue • Billing Issue • Customer Survey • Other issue • Sales Discovery • Product Feedback • Customer Relationship Building
Callback context	This field is automatically set to the CRM touchpoint from which the callback was created.
Priority	Priority level of the callback. The available options are:

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Field	Description
	• None (default) • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assigned to	Agent responsible for making the call.
Due date	Date and time by which the call should be completed.
Callback number	Phone number to call.
Outcome	Result of the call, recorded after the callback is completed. The available options are: • None (default) • Resolved • Timeout • Max attempts exceeded • No show • Cancelled by agent • Technical issue • Picked up • Interested • Left Voicemail • Rescheduled • Other
State	Current state of the callback record. The available options are: • Open • Work in Progress • Closed Complete • Closed Abandoned • Cancelled
Description	Optional additional details about the callback.
Work notes	Internal notes about the callback, visible only to team members.

Related topics

Schedule a call from a touchpoint

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Components installed with the CRM Outlook Add-in

User roles are installed with activation of the CRM Outlook Add-in plugin.

Roles installed

Role title [name]	Description	Contains roles
CRM Outlook Add-in admin [sn_crm_outlook.crm_outlook_admin]	Granular administrative permission for configuring and managing data related to the CRM Outlook Add-in.	• ais_admin • sn_crm_outlook.crm_outlook_user • sn_nb_action.next_best_action_author • sn_outlook_addin.outlook_addin_setup
CRM Outlook Add-in user [sn_crm_outlook.crm_outlook_user]	Associates emails to existing or new CRM entities using the ServiceNow CRM for Outlook add-in.	• workspace_user • sn_nb_action.next_best_action_user

Lead form in the ServiceNow CRM for Outlook add-in

Field descriptions for creating or viewing a lead record from the ServiceNow CRM for Outlook add-in.

Field	Description
Number	System-generated unique identifier for the lead record starting with the prefix LEAD.
First Name	First name of the lead.
Last Name	Last name of the lead.
Email	Email address of the lead pre-populated from the From field of the email header.
Mobile Phone	Mobile phone number of the lead.
Business Phone	Business phone number of the lead.
Account	Account associated with the lead.
Title	Job title of the lead.
Company	Company name of the lead.
Lead Score	Numeric score indicating the lead's potential value or likelihood of being converted into an opportunity.

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Field	Description
Stage	Current stage of the lead in the sales process. The available options are: • New (default) • Contacted • Nurturing • Qualified • Disqualified

Related topics

Associate an email with an existing CRM record

Account form in the ServiceNow CRM for Outlook add-in

Field descriptions for viewing or editing an account record from the ServiceNow CRM for Outlook add-in.

Field	Description
Name	Name of the account or company.
Website	Company website URL.
Number	System-generated unique identifier for the account record starting with the prefix ACCT.
Phone	Primary phone number for the account.
Primary Contact	Main contact person for the account.
Street	Street address of the account.
Parent Account	Parent account if this account is a subsidiary.
City	City where the account is located.
State / Province	State or province where the account is located.
Zip / Postal code	Postal or ZIP code for the account address.
Country	Country where the account is located.

Related topics

Associate an email with an existing CRM record

Contact form in the ServiceNow CRM for Outlook add-in

Field descriptions for creating a contact record from the ServiceNow CRM for Outlook add-in.

Field	Description
First name	First name of the contact.
Last name	Last name of the contact.

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Field	Description
Email	Email address of the contact pre-populated from the From field of the email header.
Business phone	Business phone number of the contact.
Mobile phone	Mobile phone number of the contact.
Account	Account associated with the contact.
Title	Job title of the contact.
Time zone	Time zone of the contact. This field is set to the system setting by default.
Language	Preferred language of the contact. This field is set to the system setting by default.
Notification	Option to enable notifications for this contact.

Related topics

Associate an email with an existing CRM record

Opportunity form in the ServiceNow CRM for Outlook add-in

Field descriptions for viewing or editing an opportunity record from the ServiceNow CRM for Outlook add-in.

Field	Description
Number	System-generated unique identifier for the opportunity record starting with the prefix OPTY.
Short Description	Brief summary of the opportunity.
Sales Cycle Type	Type of sales cycle for this opportunity. The available options are: • NEWCUST • RENEW • UPSELL
Industry	Industry associated with the opportunity. The available options are: • Manufacturing • Healthcare • Technology Services • Banking • Bio-Technology • Telecommunications
Account	Account associated with the opportunity. You can use the search icon to find an existing account.
Stage	Current stage of the opportunity in the sales pipeline. The available options are:

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Field	Description
	• Qualify • Develop • Propose • Negotiate • Closed - Won • Closed - Lost
Estimated Deal Size	Estimated monetary value of the opportunity. Includes currency selection.
Owner	Sales representative responsible for the opportunity.
Opportunity Group	Group or team associated with managing the opportunity.
Probability %	Likelihood of closing the opportunity, expressed as a percentage.
Description	Optional description of the opportunity.

Related topics

Associate an email with an existing CRM record

Staged Email table

Field descriptions for viewing email records linked to CRM entities in the Staged Email [sys_email_staging] table.

Field	Description
Receive type	Processing status of the email, such as New.
Target	CRM record the email is linked to, displayed as record type and number. For example, Lead: LEAD0000001.
User	Email address of the user who sent the email.
User ID	User ID of the user associated with the email, if one exists.
UID	Unique identifier for the email message.
Importance	Priority level of the email if specified by the sender.
Deleted	Indicates whether the email has been marked as deleted.
Target table	Database table of the linked CRM record, such as Lead [sn_lead_mgmt_core_lead].
Reply to	Email address specified for replies if different from the sender.
Recipients	Email addresses of all recipients, including the **To** and **CC** fields.
Subject	Subject line of the email.
Headers	Any headers embedded in the email, such as routing details, authentication results, and server timestamps.
Content type	The MIME (Multipurpose Internet Mail Extension) media type of the email content stored in this record. This value indicates how the email body should

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Field	Description
	be interpreted and rendered by email clients, including the content format and character encoding. For example, `text/html; charset=utf-8`.
Body	HTML-formatted content of the email.
Body text	Plain text version of the email content.

Related topics

Track emails linked from Microsoft Outlook

Configure, price, quote reference

Reference for configure, price, and quote applications.

Advanced Approval Management reference

Reference topics provide additional information about Advanced Approval Management.

Components installed with Advanced Approval Management

Several types of components are installed with activation of the Advanced Approval Management plugin, including tables, scheduled jobs, and user roles.

Roles installed

Role title [name]	Description	Contains roles
Approval rule admin [sn_adv_appr_mgmt.approval_rule_admin]	Manages all aspects of approval workflows. Creates, updates, and deletes approval configurations, chains, approval trigger conditions, approval rules, and approval users and groups.	sn_adv_appr_mgmt.approval_rule_writer
Approval rule writer [sn_adv_appr_mgmt.approval_rule_writer]	Creates, updates, and views approval configurations, approval chains, approval trigger conditions, approval	sn_adv_appr_mgmt.approval_rule_viewer

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Role title [name]	Description	Contains roles
	rules, and approval users and groups. An approval rule writer can't delete approval-related items.	
Approval rule viewer [sn_adv_appr_mgmt.approval_rule_viewer]	Views approval configurations, approval chains, approval trigger conditions, approval rules, and approval users and groups.	None
Approval request approver [sn_adv_appr_mgmt.approval_request_approver]	Views approval steps and approves approval requests for which they are an approver.	• sn_adv_appr_mgmt.approval_request_vie • approver_user (if using My Approvals)
Approval request writer [sn_adv_appr_mgmt.approval_request_writer]	Creates and views approval requests.	[sn_adv_appr_mgmt.approval_request_view
Approval request viewer [sn_adv_appr_mgmt.approval_request_viewer]	Views approval requests.	sn_adv_appr_mgmt.approval_rule_viewer

Scheduled jobs installed

Scheduled job	Description
Approval Reminder Daily Processor	Sends reminders to approvers to accept or reject an approval request.

Tables installed

Table	Description
Approval Configurations [sn_adv_appr_mgmt_approval_configuration]	Details of an approval workflow entity, for example quotes that need approvals.

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Table	Description
Approval Trigger Conditions [sn_adv_appr_mgmt_approval_trigger_condition]	Conditions that trigger one or more approval requests. Conditions map to one or more approval rules.
Approval Rules [sn_adv_appr_mgmt_approval_rule]	One or more approval rules associated to an approval trigger condition. Rules define steps in an approval process. A rule can have multiple users or groups as approvers, as well as dynamic approvers.
Approval Chains [sn_adv_appr_mgmt_approval_chain]	A group of approval rules that run in a specified order sequentially. A chain can run one or more rules in sequence. Chains can run in parallel or sequentially.
Approval Users [sn_adv_appr_mgmt_approval_user]	A list of users who can approve requests.
Approval Groups [sn_adv_appr_mgmt_approval_group]	A list of groups that can approve requests.
Approval Reminders [sn_adv_appr_mgmt_approval_reminder]	A list of reminder durations for an approval workflow entity.
Approval Rule Reminders [sn_adv_appr_mgmt_approval_rule_reminder]	A list of reminder durations for approval rules.
Approval Requests [sn_adv_appr_mgmt_approval_request]	The approval request records created when an approval request is submitted.
Approval Steps [sn_adv_appr_mgmt_approval_step]	The approval step records created for an approval request. The records contain the relevant approval rules, conditions, and chain details defined for an approval configuration. The Approval Steps table is extended from the Task [task] table.

Approval Configuration form

Field descriptions for the Approval Configuration form in Advanced Approval Management.

Approval Configuration form

Field	Description
Name	Name of the configuration for a Sales Customer Relationship Management entity, for example Quote.
Entity table	Sales Customer Relationship Management Entity for the approval configuration.

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Approval Configuration form (continued)

Field	Description
	For example, if you're creating an approval configuration for Quote Management, select the Quote [sn_quote_mgmt_core_quote] table.
Allow escalations	Option that turns on escalations for approvals. If you select this option, you must also define escalation details in the appropriate approval rules, including the escalation assignee, length of time allowed for approval completion, and associated Service Level Agreement (SLA)). For information on the escalation details defined in an approval rule, see Create Approval Rule form.
Allow email consolidation	Option that turns on the consolidation of multiple approval email requests for an approver or approval group into a single email.
Send auto reminders	Option that enables notification approval reminders to be sent automatically to approvers.
Reminder schedule	Option displayed when **Send auto reminders** is enabled. Enter the time (days, hours, minutes, seconds) at which approval reminder notifications are sent.

Related topics

Create an approval configuration

Create Approval Rule form

Field descriptions for the Create Approval Rule form in Advanced Approval Management.

Create Approval Rule form

Field	Description
Name	Functional name of the approver associated with this approval rule, for example, Contract Manager or VP Finance.
Approval trigger condition	Approval condition that triggers this approval rule.
Approval chain	Sequence of approval steps that an approval request must meet before the request is fully approved.
Order	Sequence in which the approval rule is triggered within a set of steps.

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Create Approval Rule form (continued)

Field	Description
Advanced rule	Option, when selected, for entering a script that identifies the functional approver. Only admins can enter an approver using a script.
Description	Brief explanation of the rule. For example the description of the Contract Manager approval rule could be `Reviews contracts and terms`.
Active	Option indicating that the approval rule is in use. To deactivate the approval rule, deselect this option.
Approver type	Type of approver: • User: Specific approval user who can approve a request, such as Contract Manager. • Group: A group that can approve a request, such as the Contracts group. • Dynamic: An approver determined by the advanced approval engine when an approval request is submitted, based on relationships, roles, or rules provided in the **Dynamic approver** field.
Dynamic approver	Rule logic that determines the approver dynamically when an approval request is submitted.
Approval criteria	Option that determines how approval requests are handled: • All: Indicates all designated approvers must approve the request. • Anyone: Indicates that only one approver from multiple approvers must approve the request.
Auto escalate	Option that turns on escalations for the approval rule. Escalation is a mechanism for reassigning an approval request to another approver when the original approver hasn't acted on the request within the defined time set in the **Expected days to complete** field.
Expected days to complete	The number of days, hours, minutes, and seconds that defines the total time allotted to approve or reject the request.
Escalation schedule	The escalation schedule to be applied. The default schedule is the Approval Escalation SLA.

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Create Approval Rule form (continued)

Field	Description
Escalation type	Type of approver for the escalation: • User: Specific approval user who can approve a request, such as Contract Manager. • Group: A group that can approve a request, such as the Contracts group. • Dynamic: An approver determined by the advanced approval engine when an approval request is submitted, based on relationships, roles, or rules provided in the **Dynamic escalated assignee** field.
Escalated assignee	The approver designated to act on the approval request instead of the original approver.
Dynamic escalated assignee	Rule logic that determines the escalated assignee dynamically when an approval request is submitted.

Related topics

Create approval rules

Components installed with Pricing Management

Several types of components are installed with activation of the Pricing Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Price list administrator [sn_csm_pricing_pricelist_administrator]	Create and update pricing entities, set up or edit pricing-related system properties, and view transaction logs.	• sn_csm_pricing.pricelist_manager • sn_export_entities.export_user • import_admin
Price list manager [sn_csm_pricing_pricelist_manager]	Create and update pricing entities such as	sn_csm_pricing.pricelist_writer

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Role title [name]	Description	Contains roles
	price lists and price list lines, set up or edit pricing-related system properties, and view transaction logs.	
Price list writer [sn_csm_pricing.pricelist_writer]	Granular role that has read, write, and delete access to pricing entities. To delete a pricing entity such as a price list or cost book, the pricing entity must be in Draft state.	• decision_table_crud_api • decision_rule_author • n_csm_ctxrul_mgt.rule_matrix_writer • sn_csm_pricing.pricelist_viewer • personalize_decision_table_input
sn_csm_pricing.pricing_integrator	Role required to access pricing features through the Pricing REST API when using the advanced configurator.	None
sn_csm_pricing.pricing_integrator_internal	Role required to access pricing features through the Pricing REST API when using the advanced configurator. Exempt	None

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Role title [name]	Description	Contains roles
	from API rate limits.	
Sales Agreement price list writer [sales_agreement_pricelist_writer]	Granular role that has read, write, and delete access to pricing entities. Write access only for Sales Agreement price lists.	None
Price list viewer [sn_csm_pricing.pricelist_viewer]	Granular role that has read access to pricing entities such as price lists, price list lines, cost books, and cost book lines.	None

Tables installed

Table	Description
Pricing Plan [sn_csm_pricing_pricing_plan]	Stores the pricing steps used by the pricing engine to retrieve and calculate product pricing.

Components Installed with Quote Management

Several types of components are installed with activation of the Quote Management plugin, including user roles.

Roles installed

Role title [name]	Description	Contains roles
Quote responsibility read granular [sn_quote_mgmt_core.quote_responsibility_read_granular]	Provides granular read access to quote and related entities through the responsibility framework.	None

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Role title [name]	Description	Contains roles
Quote responsibility write granular [sn_quote_mgmt_core.quote_responsibility_write_granular]	Provides granular write access to quote and related entities through the responsibility framework.	sn_quote_mgmt_core.quote_responsibility_read
Quote integrator [sn_quote_mgmt_core.quote_integrator]	Role required to access quote features when using the advanced configurator.	sn_quote_mgmt_core.quote_writer
Quote admin [sn_quote_mgmt_core.quote_admin]	A granular role created to give create, update, read, or delete access on quote tables.	sn_quote_mgmt_core.quote_writer
Quote writer [sn_quote_mgmt_core.quote_writer]	A granular role created to give write access to quote tables.	• sn_quote_mgmt_core.quote_viewer • sn_nb_action.next_best_action_user • sn_doc.reader
Quote viewer [sn_quote_mgmt_core.quote_viewer]	A granular role created to give read access to quote tables.	• sn_bus_loc.ibl_viewer • sn_service_org.customer_criteria_read • sn_bus_loc.ebl_viewer • sn_csm_pricing.pricelist_viewer • sn_tmt_core.inbound_queue_read • sn_prd_invt.product_inventory_viewer • sn_customerservice.customer_data_viewer

Customer Contracts and Entitlements reference

Reference topics provide additional information on service contract life cycle and forms available within the Customer Contracts and Entitlements application.

What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

Customer contract life cycle

A customer contract goes through the various states in each phase of its life cycle.

In each state, a customer contract is enabled to perform certain actions as mentioned in the following table.

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customer contract life cycle, related states, and actions that it can perform

Life-cycle	State	Action
A customer contract is generated.	Draft	• The start and end dates of the customer contract can be modified such that the child records' dates are within the date range. • The related contract lines and entitlements can be added, removed, or modified. • The sold product/install base item covered can be added or removed.
Customer contract gets activated on the date of activation.	Active	• Modifications to the customer contract can be done manually, via integration and via Sales Customer Relationship Management workflow. • The start date can't be modified. • The end date can be extended and should be greater than the current date. • customer contract line items can be added. • The sold product/install base item covered can be modified.
Customer contract is deactivated on the date of expiration.	Expired	No action.
Customer contract is canceled.	Canceled	No action.

The customer contract line items and entitlements also perform similar actions in the respective states.

When a parent entity moves to the Expired state, the child entities inherit the same state. For example, when a customer contract expires, the related contract lines and entitlements also expire.

However, the state change of a child entity doesn't affect it parent entity.

The sold product or install base item referenced either in the contract line or an entitlement must be in the same state as the entity where it's referenced.

Suspended state

When a sold product is suspended, the related customer contract lines and entitlements, in the Draft or Active states, move to the Suspended state as well.

A suspended customer contract line or entitlement is paused for any activity, except the following:

- Editing the field values.
- Creating records in the corresponding related lists.

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On resuming the sold product, the related customer contract line item or entitlement acquires the state depending on its start and end dates. For example, a resumed entitlement that has its start date in the past and its end date in the future, acquires the Active state.

Exceptionally, when a contract line or entitlement in the Suspended state has reached its end date, it moves to the Expired state automatically.

Date validations

A customer contract line associated with a customer contract must be created within the customer contract's start and end dates. Any modification to the dates of customer contract lines must comply with the date range of the parent service contract.

Customer contract form

The Customer Contracts and Entitlements application uses the Customer contract form to create customer contracts.

customer Contract form

Field	Description
Name	The name of the customer contract.
Number	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.
Contract Reference	The externally assigned identification number assigned to the customer contract.
Account	The name of the account associated with the customer contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Account form. For more information on the fields in the Account form, see Account form.
Consumer	The name of the consumer associated with the contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
State	The current state of the customer contract: • Draft • Active • Expired • Canceled • Suspended
Start date	The activation date of the customer contract.

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customer Contract form (continued)

Field	Description
End date	The date when the customer contract ends.
Renewal root	A customer contract can be renewed multiple times. Renewal root refers the customer contract reference of the first or base customer contract.
Renewed from	A customer contract can be renewed multiple times. Renewed from field refers to the previous customer contract that was renewed.

Customer contract line form

You can create customer contract lines in the Customer Contracts and Entitlements application by using the Customer Contract Line form.

Customer Contract Line form

Field	Description
Name	The name of the customer contract line.
Contract	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.
Parent contract line	The internal unique identification number of the parent customer contract line that is associated with the child customer contract line.
Account	The name of the account associated with this customer contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The customer or installation location.
Product specification	The product specification that is mapped to the sold product.
Number	The internal unique identification number of the customer contract line that is generated when it is created. This number isn't editable.
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
State	The current state of the contract line: • Draft • Active • Expired

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Customer Contract Line form (continued)

Field	Description
	• Canceled • Suspended **Note:** • The state of the customer contract line is inherited from its parent customer contract. • Suspended state is only applicable when the contract line item is created via the Sales Customer Relationship Management workflow.
Start date	The date of activation of the customer contract line.
End date	The date when the customer contract line expires.
Product	The product model that is mapped to the product offering for the sold product.
Product offer	The product offering that is mapped to the sold product.
Sold product	The name of the sold product that is added to the contract line. **Note:** • When the customer contract line item is created via the Sales Customer Relationship Management workflow, this field displays the sold product name from which the contract line is generated. • When customer contract lines are created via integration, the field becomes invalid.
Renewal root	A customer contract line can be renewed multiple times. Renewal root refers the customer contract line reference of the first or base customer contract line.
Renewed from	A customer contract line can be renewed multiple times. Renewed from field refers to the previous customer contract line that was renewed.

You can see the pricing information on a contract line for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.
Subscription End Date	End date of the contract subscription.
Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.

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Subscription & Pricing (continued)

Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.
Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.
Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Note: When a customer contract line item is created manually, the **Pricing method**, **Unit net price**, and **Periodicity** fields are invalid. They're only applicable when the contract line is created by the Sales Customer Relationship Management workflow or by integration. In that case, these fields are auto-populated with the details from the related sold product. The start and end dates of a child customer contract line must be in between the start and end date of the associated parent customer contract line.

Entitlement form

The Entitlement form can be used to create entitlements in Customer Contracts and Entitlements.

Entitlement form

Field	Description
Name	The name of the entitlement.
Product	The product associated with the entitlement.
Contract	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.

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Entitlement form (continued)

Field	Description
Account	The name of the account associated with this contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The service or installation location.
Product specification	The product specification that is mapped to the sold product. **Note:** Configure this field manually on the entitlement form using form layout.
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
Customer contract line	The name of the related customer contract line.
State	The current state of the entitlement: • Draft • Active • Expired • Canceled • Suspended **Note:** The state of the entitlement is inherited from its parent contract line.
Start date	The entitlement activation date.
End date	The date when the entitlement ends.
Sold entitlement	The name of the sold product that is added to the entitlement. **Note:** • If the entitlement is created manually, this field remains read-only. • The field must have the same state as its related entitlement. • The field becomes invalid when entitlements are created via integration.
Product offer	The product offering that is mapped to the order line item.

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Entitlement form (continued)

Field	Description
Renewal root	An entitlement can be renewed multiple times. Renewal root refers the entitlement reference of the first or base service entitlement.
Renewed from	An entitlement can be renewed multiple times. Renewed from field refers to the previous entitlement that was renewed.

You can see the pricing information on an entitlement for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.
Subscription End Date	End date of the contract subscription.
Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.
Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.
Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.

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Subscription & Pricing (continued)

Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Sold Product Covered form

The Customer Contracts and Entitlements application uses the Sold Product Covered form to add sold products or install base items that are covered to the Customer Contracts and Entitlements entities.

For information about adding sold products or install base items that are covered, see Add a sold product or install base item to a customer contract.

Sold Product Covered form

Field	Description
Contract	The reference number of the associated customer contract.
Sold Product	The products that are sold to a customer. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If a product is added, the **Install Base Items** field is automatically removed. • If a product isn't listed, you can add it. Select **New** in the Sold Products window. For more information, see Create a sold product.
Install Base Item	The related install base item. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If an install base item is added, the **Sold Product** field is automatically removed. • If an install base item isn't listed, you can add it. Select **New** in the Install Base Item window. For more information, see Create an install base item.
Customer contract line	The associated customer contract line reference.
Entitlement	The associated entitlement reference.
Date added	The date that the product is added to the entity.
Date removed	The date until which the product is active on the entity.

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Note: The activation time period for the sold product or install base item covered must comply with the related entity's activation period.

Components installed with Sales Agreement Management

Several types of components are installed with activation of the Sales Agreement Management plugins, including tables and user roles.

Roles installed

Sales Agreement roles details

Role	Description	Contains roles
sn_sales_agmt_core.sales_agreement_viewer	This role enables users to perform read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables.	• sn_prd_pm.product_catalog_viewer (contains sn_prd_pm.characteristics_viewer) • sn_quote_mgmt_core.quote_viewer (contains sn_csm_pricing.pricelist_viewer)
sn_sales_agmt_core.sales_agreement_writer	This role enables users to perform, create, read, and update operations on sales agreements and sales agreement lines.	sn_sales_agmt_core.sales_agreement_viewer

Tables installed

Sales Agreement Management tables

Table	Description
sn_sales_agmt_core_sales_agreement	Stores all the sales agreements.
sn_sales_agmt_core_sales_agreement_line	Stores the lines of a sales agreement indicating the products and services agreed for sale.
sn_sales_agmt_core_line_characteristic	Stores the attributes of products and services to be sold.

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Sales Agreement Management tables (continued)

Table	Description
sn_sales_agmt_core_line_adjustment	Stores the adjustments applied during negotiation.

Quote details forms

Use Quote details forms to capture, view, and manage all key information about a quote.

Quote

Field	Description
Number	System#generated unique identifier for the quote.
Active	Option indicating that the current quote is the active quote. When there are multiple versions of a quote, selecting this option indicates this is the active quote.
State	Options that reflect the quote status. • Draft - The default state of a quote that indicates the quote is still in development. • In review - Use this state to indicate that the quote is in a review state. • Pending customer acceptance - Set to this state when the quote is created and in review with a customer. • Accepted - Use this state to indicate that the quote was accepted by the customer. • Revised - Revised indicates that changes have been made to the quote that other working on the quote can take note. • Expired - Shows that the quote is beyond its expiration date. Reset the expiration date to make the quote active again. • Canceled - Use this state to show that the quote is canceled. • Closed - Shows that the quote is closed. • Completed - Shows that the quote is completed. When a quote is set to **Completed**, the quote can be used to create an order. For more info, see Convert quotes into orders.
Synced	Indicates whether the quote is synchronized with a downstream or external process.
Created by	Identifies the user who created the quote.
Source Opportunity	References the opportunity from which the quote was created, if applicable.
Account	The customer account for which the quote is created.
Enable sales agreement quote	Option to enable a quote to be governed by a sales agreement.
Contact	Primary customer contact associated with the quote.

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Quote (continued)

Field	Description
Sales agreement	A sales agreement that defines the scope, pricing, and conditions under which the quote is created.
Partner account	Specifies the partner organization associated with the quote, such as a reseller or distributor, if applicable.
Existing contract	References an existing contract associated with the quote.
Partner contract	Specifies the contact person from the partner organization.
Assignment group	The group responsible for owning and processing the quote.
Channel partner	Specifies the channel partner involved in the quote.
Assigned to	The individual user responsible for the quote.
Deal type	Indicates the type of deal associated with the quote: • Direct: The seller engages directly with the customer, with no intermediary partner involved. • Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor.
Route to market	Identifies the exact sales channel used to execute the deal: • Direct • Reseller • Distributor
Short description	A brief description that summarizes the quote.
Consolidated quote	Indicates the quote is generated after consolidating multiple contracts, contract lines, or source opportunities into a single unified commercial offer.

Pricing

Currency	The currency for the price matches the currency stated in the account information.
Renewal adjustment basis	Specifies the price reference used to calculate renewal pricing adjustments, such as contracted price or price list.
Price list	The Standard Price List field is the default price list for the product catalogs referenced in the quote.
Renewal adjustment type	Specifies the method used to adjust the renewal price, such as applying a markup percentage to the selected renewal adjustment basis. The adjustment type is applied after the renewal adjustment basis is determined.

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Pricing (continued)

Cost book	The Standard Cost Book is the default cost book for the product catalogs referenced in the quote.
Renewal adjustment value	Specifies the numeric value used to adjust the renewal price, such as a percentage increase or decrease applied during renewal pricing.

Totals

Total annual price	Sum of the cumulative annual recurring price of all root parent quote lines. This value represents the total recurring revenue for the quote over one year.
Total cost	Roll#up of the cumulative net cost of all root parent quote lines. This includes one#time costs and recurring costs calculated over the quote term.
Total amount	Roll#up of the cumulative net price of all root parent quote lines. This represents the total quoted amount, including recurring and one#time charges.
Total margin%	Percentage representing the overall profitability of the quote. Calculated as: (Total amount – Total cost) ÷ Total amount × 100
Total net new amount	Sum of the cumulative net price for all root quote lines with Line Type = Net New. This value represents incremental revenue generated from new products or services only.

Dates

Quote date	Date from which the quote is considered valid. This date is used as the reference point for quote lifecycle and pricing calculations.
Contract start date	Date on which the contract associated with the quote becomes effective. This date is used to calculate subscription pricing, term, and contract end date.
Expiration date	Date after which the quote is no longer valid. This date defines the offer validity period and is used on generated quote and order documents.
Contract end date	Date on which the contract term ends. This date is derived from the contract start date

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Dates (continued)

	and term, and is used to determine renewal eligibility and renewal quote generation.
Payment Terms	Specifies the payment conditions agreed for the quote, such as when payment is due after invoicing. Payment terms are applied to the quote document and downstream orders.
Term (months)	Duration of the contract or subscription in months. When a start and end date are provided, the system automatically calculates the term value.
Quote Document Details	Contains information used when generating the quote document, such as dates, pricing, and validity details displayed on the document sent to the customer.
Auto-renew contract	Indicates whether the contract is enabled for automatic renewal. When selected, the system automatically generates renewal opportunities and renewal quotes based on configurable rules before the contract end date.

Addresses

Billing address same as shipping	Indicates whether the billing address is the same as the shipping address. When enabled, billing address fields are automatically populated from the shipping address.
Shipping location	Reference to the shipping location associated with the quote. This location identifies where products or services are delivered.
Shipping street	Street address of the shipping location.
Shipping city	City of the shipping address.
Shipping state/Province	State or province of the shipping address.
Shipping country	Country of the shipping address.
Shipping Zip/Postal code	ZIP or postal code of the shipping address.
Billing location	Reference to the billing location associated with the quote. This location is used for invoicing and billing purposes.
Billing street	Street address of the billing location.
Billing city	City of the billing address.
Billing state/Province	State or province of the billing address.
Billing country	Country of the billing address.
Billing Zip/Postal code	ZIP or postal code of the billing address.

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Notes

Work notes	Internal notes used to record behind#the#scenes information related to the quote, such as negotiation details, pricing decisions, or internal follow#ups. Work notes are intended for internal users only and are included in the quote activity history.
Additional comments	Free#form comments used to capture customer#facing or general information related to the quote. Additional comments can be used to communicate updates or clarifications and are visible to a broader audience, depending on access permissions.

CPQ reference

Reference topics provide additional information about CPQ.

Boundaries and limits

View a list of boundaries and limits in CPQ.

Blueprints

No limits are imposed on the number of fields, rules, or layouts associated with a Blueprint.

Fields

Text fields: 2000 characters.

Picklist extensions: ProductOrderNumber accepts an integer up to 88 characters.

Fields

Simple message actions: 256 characters.

Picklist fields will only display 100 options in a drop-down list. Options not included in the list are still searchable by typing into the field.

Subfields that product picker can contain: 50.

Sets

Each set can contain up to 2000 records. An error will be thrown if the set.size field is greater than 2000.

No hard limit exists on the number of fields that can be associated with a set. However, a practical threshold exists, beyond which runtime performance will suffer. This threshold has several dependencies, including the number and complexity of rules running between fields on set index, the number of set records defined during configuration, the total number of fields shown in the UI, and so on. Unfortunately, no simple rule of thumb exists to determine this threshold for your implementation.

Set repeater indices that display on a layout: 50.

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Rules

Custom grouping: 2000 characters.

Tables

Rows in a table: no practical limit.

Columns in a table: no practical limit.

Length of value stored in text-type column cell: 2000 characters.

Length of value stored in number-type column cell: For practical purposes, no limit.

ProductList object

ProductList.orderNumber: 28 digits.

Scripting and enrichments

Lookup: returns a maximum of 10,000 rows from a managed table.

Advanced rules and enrichments are limited to 50,000 characters.

Matrix Loader

ZIP files over 75 MB cannot be imported.

Layout Wizard

500 fields can be automatically loaded when the Layout Wizard is initialized. Additional fields must be added manually via the Add Field menu.

Session and configuration timeouts

Learn how timeouts for inactive or abandoned configurations improve system efficiency and prevent resource waste.

Because CPQ is a web-based application, we regulate our software usage by implementing certain timeouts on sessions, so as to not waste processing power on abandoned configurations.

Timeouts for the CPQ platform have two key mechanisms:

- Session timeout: Set at 30 minutes of user inactivity.

  This applies to any end user or Admin interaction. When configuring a product or editing a rule, if nothing has been updated on any tab in this time, the session times out.

- Configuration cache timeout: 15 minutes if abandoned (browser closed or navigated away)

  This cache can stay active for up to 2 hours. As long as the configuration UI remains open and is being updated, or the user has multiple browser tabs that they are configuring in, the cache will be maintained.

Here are a few example scenarios.

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- Scenario 1: If an end user is configuring, or if an Admin is creating a rule and stays on that tab, but does not update the site, the session will time out after 30 minutes.
- Scenario 2: If a user calls a runtime API to configure a product, the 15-minute configuration cache timeout applies to make PATCH updates to the configuration, as there is no automatic heartbeat for this method.
- Scenario 3: If an end user is actively configuring a product, that configuration session can remain active for up to 2 hours.
- Scenario 4: If a user navigates to a different tab while in the middle of configuring, that configuration can still remain active for up to 2 hours as long as the user is still actively working with another configuration in CPQ.

  Note: While this behavior works well in CPQ, we cannot guarantee the same functionality in Salesforce iframe tabs. SFDC may not allow JavaScript to run on inactive tabs, potentially affecting the 2-hour timeout in that environment.

- Scenario 5: If the CPQ configurator is in an SFDC iframe and the user navigates to a different tab, the 15-minute cache expiry for inactive sessions may occur.

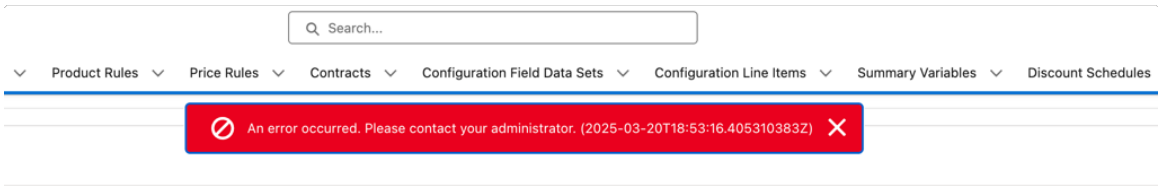
The most effective approach to avoid a timeout is to manually save your configurations, especially when working across multiple tabs. This way, progress is not lost when completing other work.

Troubleshooting

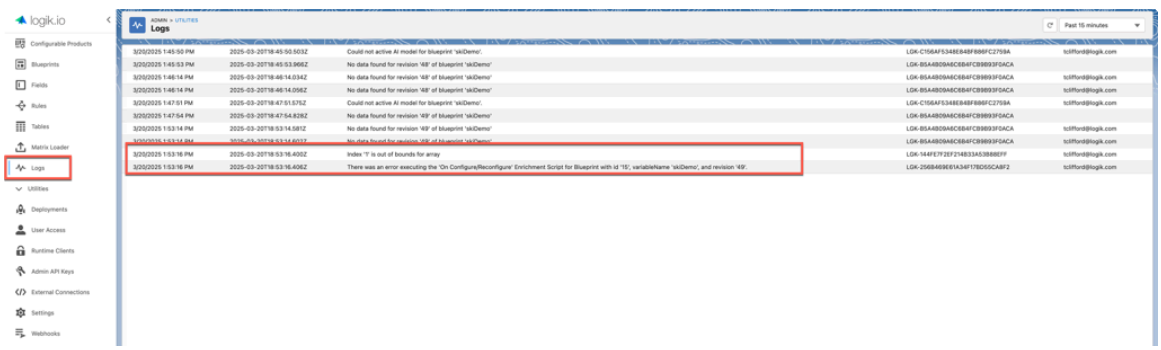
Steps to take if you encounter problems using CPQ.

Error messages

- An error occurred. Please contact your administrator.



This generic error message appears for every error logged when configuring. This usually points to an edge case that was not previously considered when building the Blueprint and can be rectified by looking into the results of the Logs tab in CPQ Admin when this error occurs. A more detailed response will usually be present that should point your administrator to the location of the error, such as a rule, enrichment, or an external connection.



If there is no further detail located in the Admin log, or if you are still confused by the messaging of the error, please log a support ticket.

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- Cannot get Configurable Product. Product <Salesforce Product2 Id> is not available in cache.

  The CPQ user that was added when your environment was being set up in your Salesforce org may have been deactivated, causing an issue with the Refresh Token Username and Refresh Token.

Admin

The Products tab is not visible in Admin view.

The Products Admin page is only shown when CPQ is set up to support a headless use case. In this scenario, CPQ provides its own product master.

In a Salesforce-integrated use case, the CPQ environment is integrated with a Salesforce [SFDC] environment. In a headless or eCommerce use case, CPQ is accessed from a resource other than SFDC, such as an eCommerce platform, partner portal, or a non-SFDC CPQ application. In this scenario, the CPQ environment is frequently accessed via APIs only, with the calling resource digesting the results and displaying them in its own user interface.

When a CPQ environment is not integrated with Salesforce, this is commonly called a 'headless' or 'ecommerce' use case. The Products Admin page only displays to CPQ administrators when the environment is set up for this headless mode.

As a point of contrast, when the CPQ environment is integrated with SFDC, the SFDC product2 object is the part master. CPQ administration intentionally does not show a Products administration page when integrated with SFDC.

APIs

- The Salesforce Authentication call is returning a Status: 400 Bad Request

  Inspect the permissions of this OAuth App, as defined in Salesforce, by navigating to App Manager in Salesforce Setup. For your connected app, select "Manage" from the drop-down menu on the right, and then click **Review OAuth Policies**. The **IP Relaxation** setting may be set to **Enforce IP restrictions**. Set this to **Relax IP restrictions**.

- When using the JWT to authenticate the administration API call, you get a 302 Found error with no body.

  Make sure that you insert the string, "Bearer" before the JWT access_token text in the Authorization value.

Configuration

For some user profiles, configuring results in a white screen or reconfiguring does not load any of the previously chosen options. In order to properly configure or reconfigure, users need access to certain objects and fields in Salesforce. These can be assigned

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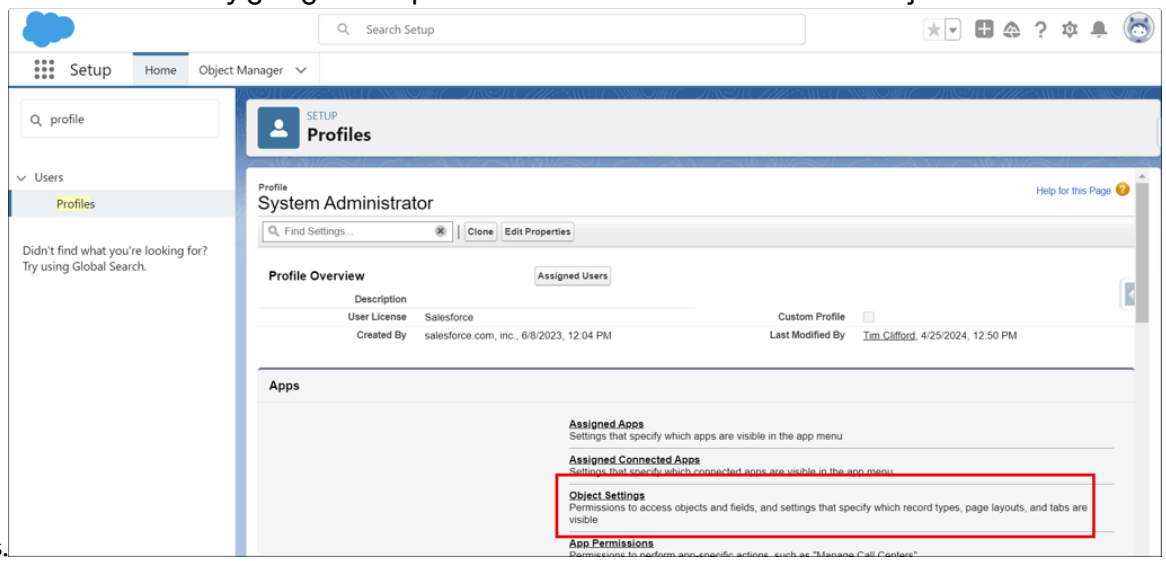
using permission sets or by going to Setup > Profiles > Select Desired Profile > Object Settings.



Users will need read/edit access in the Field Permissions section to the following objects:

Configuration Attributes:

- Id
- Name
- Target Field
- Product
- Raw Order
- Column Order
- Position

Product features:

- Id
- Name
- Option Selection Method
- Configured SKU
- Number
- Min Options

For products (Product2):

- Configuration Type
- Has Configuration Attributes
- Externally Configurable

For quote lines:

- Configuration Id
- BOM Data
- Product

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- Incomplete
- Dynamic Option ID
- Quantity
- List Unit Price
- Option Level

For product options:

- Read/Edit access in Object Permissions
- Configuration Id
- BOM Data

And if using Amendments, users also need the following:

Quote lines:

- Committed Configuration Id
- Action context
- Upgraded subscription
- Source

Subscriptions (SBQQ__Subscription__c):

- Configuration Id
- BOM Data

See Granting user access in CPQ.

Salesforce integration

- Products in CPQ do not create quote lines in Salesforce CPQ

  When using CPQ with Salesforce CPQ, certain configuration requirements must be met in order for your products to get added to CPQ as quote lines. Here are the most common causes for products not creating quote lines in CPQ.

  - The Product Id in CPQ is not equal to the Product Code field on the product record in Salesforce.

    This is contingent upon the “Product Id Field” tenant setting in the Admin. You can use either Product Code (Product2.ProductCode), Partner Id (Product2.Id), or External Id (Product2.ExternalId).

  - The product record is not active in Salesforce.
  - No pricebook entry has been assigned to the product record.
  - The pricebook entry for the pricebook is different from the pricebook on the quote. The pricebook entry for the product is inactive.

  If you have confirmed none of these are true and a quote line is still not being created, then it is probable that the product sync that takes place between CPQ and Salesforce via the refresh token user has not occurred yet. This sync occurs via API every 30 minutes for test and demo

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environments and every 15 minutes for production. To determine when this sync last occurred, enter Salesforce and navigate to Setup → Bulk Data Load Jobs.

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Common browser issues while using CPQ

When cookies are blocked by the browser or by browser extensions, it can interfere with the use of CPQ.

If attempting to configure in CPQ results in an error (configurator not loading, a 403 error is returned, or similar) and using another browser resolves the issue, then the issue must be with the settings of the original browser.

CPQ uses authentication cookies to track active sessions across browser tabs. These cookies do not track the user and are deleted when the user closes their web browser. Their only purpose is to validate the user and their organization for the use of the software.

If cookies are not enabled in the browser, CPQ cannot configure products. The browser itself or the extensions used by the end user in this browser could be inhibiting this active cookie.

Here are some reasons this issue might occur.

Cookie blocking by the browser

By default, Safari and Firefox block all cross-site cookies. This behavior interferes with the authentication cookie that jumps across CPQ and Salesforce. If either of these browsers is your (or your end user's) default browser, cookies must be allowed to use the configurator.

If you have no control over what browsers end users use to access the CPQ Configurator, and you use easyXDM, submit a support case requesting a "runtimeAPI" parameter. Once the runtime clients are updated to include this parameter, the browsers should work with their default settings.

Consult your browser's documentation to find the settings that affect whether cookies are blocked. These settings are often found in the privacy options sections of the browser settings.

Cookie-blocking extensions

Cookies can also be blocked by browser extensions that are installed by the user. Some third-party cookie-blocking browser extensions include:

- uBlock Origin
- Privacy Badger
- Ghostery
- Disconnect
- Cookie AutoDelete

Other extensions such as email templates or crypto wallets can also cause issues with cross-site third-party cookies. These extensions include:

- Briskine
- BNB Chain Wallet MetaMask
- WalkMe

Review your browser's plugins to check whether any other extensions could be interfering while using CPQ. If the end user can configure after all browser extensions are disabled, one of the

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extensions must be causing the issue. If you identify an extension that causes the issue and is not in the list above, please let us know.

CPQ Support Team access to customer Salesforce sites

Learn how CPQ support team members can securely access customer Salesforce and CPQ Admin environments for troubleshooting. This article outlines recommended access methods, user-management practices, and considerations for customers with stricter security policies.

This document outlines the standard processes for CPQ support team members to gain access to customer environments. These procedures ensure secure, efficient support while maintaining appropriate access controls.

Note: Some enterprise customers have stricter security policies that prohibit direct access to their environments, requiring support methods other than those described here.

Salesforce user access

When support requires access to a customer's Salesforce environment, customers can create a Salesforce user with an email address of provisioning@logik.io and system administrator permissions. This ensures that every member of our support team has access, not just the one currently working on your case.

For assistance with this process, see Salesforce's official documentation: Adding New Users in Salesforce

CPQ Admin access

Support team members may need access to CPQ Admin in customer environments. To learn how to grant access, see User Access.

User management

There is no standard timeline for access removal. Customers can modify access levels by changing CPQ support users to End User or by deactivating the SFDC user.

In test environments, many customers let our provisioning user stay active indefinitely. Some utilize our user as the integration user for product/pricebook synchronization, which lets us troubleshoot more quickly because we can directly investigate the issue.

During a support case, disabled user accounts can be reactivated upon request.

Common error messages and causes

Look here for information and troubleshooting steps when you receive an error message.

Unable to roll back to previous state

This error is often related to a table lookup. Check to ensure that any tables in a lookup exist in your CPQ environment. Check the syntax of your lookup to ensure that the table column headers exactly match your query script. Capitalization or spelling could be off, causing a table lookup to fail, resulting in this error.

This could also involve circular logic being triggered by a field change, such as the condition and action of a rule both including the same field. If this error is seen right after selecting a field option, check the rules related to the field (by last modified date) to help isolate the cause.

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Error: Your rules are running beyond the stipulated time. Please contact your system administrator

Typically, this means that some rules are running in an infinite loop.

A rule may have the same field as part of conditions and actions. For example, a determination rule sets a field value based on a value already in that field.

Diagnose this by getting the click path to fire error and then inactivating recently modified rules one at a time to see if the error continues to be encountered.

"...Index '0' is out of bounds..."

This almost always means that something is trying to reference an empty list or an empty array. In a literal sense, the error message is trying to reference the first index (0) of the list or array and is finding that 0 is beyond the bounds of the list or array.

Some possible causes:

- Something is misspelled in a table query.
- The query references a cfg value that hasn't yet been set, due to the rule conditions.
- The lookup query returned no results.

Null checks on arrays are always a good idea.

Cannot read properties of undefined (reading 'map')

This error occurs on the buyside when the user opens CPQ config.

Review the layout file. Make sure that references to set the variable names are accurate.

CPQ Upgrade Schedule

CPQ updates customer environments on a predictable bi-weekly schedule to deliver new features, enhancements, and fixes. Test environments are upgraded first, with production updates following after at least 14 days to ensure stability. You can identify your environment's sector from its URL and refer to the Upgrade Calendar to see which version your instance is currently running.

CPQ Development iterates the application quickly, releasing new software to customers about every two weeks. Each release delivers new features, enhances existing features, and fixes bugs. The benefits of each release are outlined in the corresponding Build Notes publication. Build Notes are sent to account holders of the CPQ Support Center; they are also posted in the Support Center.

Customer environments are upgraded according to the following table:

Upgrade windows

Sector	Upgrade Window	Notes
test	Biweekly, Thursday 8:00p CT	
prod	Biweekly, Friday 8:00p CT	A build is pushed to production no less than 14 days after it was introduced to test environments. To reduce the risk of upgrading

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Upgrade windows (continued)

Sector	Upgrade Window	Notes
		prod environments as fiscal periods are ending, the schedule avoids upgrading prod environments at the ends of calendar months.

To determine which version of CPQ your environment is on, first determine the sector of your environment by inspecting its URL. The sector precedes "logik.io" in the URL. For example, in the URL https://customName.prod.logik.io, the sector is prod. Then, find the current day in the Upgrade Calendar. Review the corresponding test or prod entry for this day.

Glossary

A list of terms used in CPQ

Associated Picklist (AP)

CPQ functionality that allows a set to be generated with predetermined rows based on the selection of a picklist field.

API (Application Programming Interface)

A way for two or more computer programs to communicate with each other. In the context of CPQ, APIs are categorized into runtime APIs (create, update and save configurations) and admin APIs (works with blueprints, fields, rules, configurable products, managed tables, and various automation tasks).

Bill of materials (BOM)

A list of parts and components needed to manufacture a product.

Blueprint

A collection of associated CPQ rules and fields utilizing a layout that defines a configuration experience. Identifying a product as a configurable product for a blueprint means it will launch the related configuration experience when selected.

BOM type

A category in which products in the BOM will be organized under (such as sales or manufacturing).

Buyside

Refers to the CPQ experience that the end user sees.

Configurable product

A product that is associated with a blueprint that kicks off the CPQ configuration experience. The relationship to the blueprint differs whether CPQ is being used as a headless application or in Salesforce.

Configuration Line Item (CLI)

Records that are generated from a configuration and associated with the Configuration Line Item object. A configuration ID lets related configuration line items be grouped together.

CPQ (Configure, Price, Quote)

A category of sales software that lets users configure products and services, apply pricing, and generate price quotes.

CRM (Customer Relationship Management)

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Software that manages all your company#s relationships and interactions with customers and prospects. Some examples are Salesforce and Microsoft Dynamics, but there are many more.

Enrichments

Scripts that run outside of the rules engine that affects configurations in CPQ. Enrichments can run on configure, on reconfigure, on BOM response, or via picklist extension pricing.

Expert Services (ES)

Consulting hours purchased from the CPQ Expert Services team to receive design or implementation guidance, request build work to be done, etc.

External Connections

Allows for data for a CPQ configuration to be retrieved from outside of CPQ. Called from in an enrichment.

Field

Allows input to be gathered from the end user and stores data. There are several types of Fields that can be used to meet various needs, including: text, date, Boolean, number, and picklist.

Field grid

A series of fields displayed as a matrixed layout.

Flightpath

CPQ feature that allows administrators to record a configuration session tracks end-user inputs and how the CPQ rules engine responds.

Go-Live

When your CPQ implementation is moved to a production environment and begins to be used by end users in some capacity.

Headless application

An application where the backend (data, logic, and functionality) is decoupled from the frontend (user interface). CPQ is headless in the sense that customers can leverage its powerful functionality via APIs in their desired techstack.

Layout

The visual experience that an end user sees when configuring a product in CPQ. Every blueprint in CPQ has a layout that can be customized by the Admin. Beginning at the lowest level, layouts contain fields, which are housed in columnsets. Finally, columnsets are situated in containers called tiers, which can be nested if desired.

Matrix Loader

A feature in CPQ that enables the bulk upload of multiple types of data into CPQ, such as data in CSV files or entire CPQ blueprints.

Migration

The act of moving your CPQ work from one environment to another. This could be from one test environment to another, or from a test environment to a production environment.

Picklist extension (PLE)

CPQ feature for picklist field options that allows product info or additional info to be displayed, as well as filtering options.

Price Book Entry (PBE)

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Price books associate products with their prices in Salesforce.

Product

A product can refer to many things, such as the company#s product itself, a configurable product (e.g “Computer”) or product part (e.g. “Motherboard”) in CPQ, and even an entry of the company product in a CRM like Salesforce.

Product action

CPQ functionality used in tandem with a rule. The rule would specify the conditions that need to be met, and a product action can be defined to add a product to the BOM accordingly.

Product ID

A unique identifier for a product, commonly used to refer to the unique IDs for products in Salesforce. An example of a Product ID is `01tHn00000VB38mIAD`.

Product picker (PP)

This functionality allows you to display a number of options that represent products. When options are selected, the product will be added to the BOM. Additional columns of new or existing fields can also be appended to surface more metadata along with the ability to aggregate.

Production environment

A CPQ Production environment represents your live and active environment currently being utilized, and is the most sensitive. Best practices are to do any implementation work in your test/sandbox CPQ environment, test it, and then migrate the work to your production environment along with some final testing.

Quote Calculator Plugin (QCP)

A plugin for Salesforce CPQ that provides extra functionality in the quote line editor by means of custom JavaScript code.

Quote Line Editor (QLE)

When using Salesforce CPQ, this interface allows you to add/remove products, apply discounts and markups, and calculate prices for the quote.

Rule

Comprising conditions and actions, and associated with a blueprint, rules are the powerhouse that provides the ability to hide/show content, deliver recommendations and messages, add products to a BOM, and more.

Rule action

Defined in a rule, rule actions are what will fire when a rule#s conditions are met. Action types consist of hiding/showing, excluding/including, Messages, adding products, Determination (populating fields with metadata), and more.

Sandbox environment

A type of environment that should be used to build-out new implementations or features of CPQ according to best practices. Once built and tested, the work can be moved into a Production environment and tested again before use in an active workflow. Also known as a test environment.

Service level agreement (SLA)

The level of service expected from a vendor. An example of a CPQ SLA could be how quickly customers can expect a support case to be acknowledged after being created.

Set

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A feature that groups fields so they can be multiply replicated in the end-user#s UI in a matrix format. Sets reduce the number of fields and rules that need to be defined in scenarios where the same fields are being repeated. Analogous to Configuration Arrays in Oracle.

Set repeater

Functionality that allows you to easily create new indices in a set.

System Integration Testing (SIT)

A QA process to ensure the compatibility of two or more systems.

Table

CPQ has tables (relational databases) that allow data to be stored, which can then be retrieved using able lookups.

Table lookup

Utilizing a programming language called SQL (Structured Query Language), tables in CPQ can be queried using scripts to retrieve specific information.

Test environment

See Sandbox environment.

Twinning

The ability to automatically pull data from a Salesforce quote field into a CPQ field by creating a CPQ quote custom field using the format "<fieldName>LGK" in Salesforce, and a matching "<fieldName>" in CPQ.

User acceptance testing (UAT)

Also known as end-user testing, this is a phase near the end of implementation and before going live. A small group of the end-users will run through various scenarios to validate the desired end-user experience and address any issues or bugs before the full launch.

The CPQ Technology and Product Training Portal

The CPQ Training Portal includes self-paced video training content.

CPQ is excited to introduce the CPQ Product & Technology Training Portal. This new training portal is your one-stop shop for all things training for CPQ. On the site you will find a library of self-paced video training content that covers all current products and features available at CPQ. This is training the way you want it, on your schedule, at your pace.

You can go to the homepage of the Training Portal at ServiceNow University.

The portal is a subscription-based site where you can purchase 12 months of access to all current and future CPQ training content for one price.

On the portal you will find the following Learning Tracks:

Introduction to CPQ:

These modules are free to view by any individual without the need to create an account on the portal. These modules provide the student with a high level overview of the CPQ Commerce Logic Engine, its purpose, its main features and advantages, as well as a review of its major components. There is also a video demonstration of the end-user interface that a sales rep or customer would use to configure products for purchase, as well as a video demonstration of the CPQ Administration user interface that system administrators use to create and maintain CPQ configurations.

Using CPQ with Salesforce:

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CPQ Essentials: The student is presented with learning modules that cover the core, central features of the Commerce Logic Engine as they are used in a Salesforce application environment. These 18 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform on a daily basis. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ Advanced Administration: The student is presented with learning modules that cover the more, advanced features of the Commerce Logic Engine as they are used in a Salesforce application environment. These 12 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform when implementing various advanced features. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

Using CPQ in an eCommerce Implementation:

CPQ Essentials: The student is presented with learning modules that cover the core, central features of the Commerce Logic Engine as they are used in an eCommerce application environment. These 18 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform on a daily basis. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ Advanced Administration: The student is presented with learning modules that cover the more, advanced features of the Commerce Logic Engine as they are used in an eCommerce application environment. These 12 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform when implementing various advanced features. The student is provided video- based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ APIs:

CPQ admin APIs: These 25 learning modules provide the student with an overview of all of the available admin APIs for CPQ. Each module reviews a specific subset of the admin APIs, and gives the student the syntax of each API call, the required parameters for each call, a description of each parameter, and real world examples of what an actual call might look like in use. Also, a demonstration of the use of every API call is performed so that the student can see what the complete API request would look like, including the request payload, if needed. The response to each API call is then reviewed to allow the students to see what they should expect to get back once the call is executed.

CPQ Run Time APIs: This set of 3 learning modules provides content that cover the various Run Time APIs for CPQ. Each module reviews a specific subset of the Run Time APIs, and gives the student the syntax of each API call, the required parameters for each call, a description of each parameter, and real world examples of what an actual call might look like in use. Also, a demonstration of the use of every API call is performed so that the student can see what the complete API request would look like, including the request payload, if needed. The response to each API call is then reviewed to allow the students to see what they should expect to get back once the call is executed.

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Use Cases:

These modules cover specific use cases for CPQ and provide the student with an explanation of the use case and why you might need it, as well as a demonstration of how the use case can be implemented in CPQ, including the components that need to be set up in order to implement the use case.

New Feature Training:

These free modules are produced monthly and provide the student with an overview of the latest new features that have been added to the Commerce Logic Engine.

In the top right corner of the home page you will find the Course Catalog link. The Course Catalog provides you with course descriptions of all training modules contained on the portal. You can use the Categories checkboxes to sort the course descriptions to help you find the information that is most important to you.

In the Student Home page you can view the Course Catalog and select courses, monitor your progress, join a Group, participate in Discussions, and view Calendar events such as live, virtual Office Hours events where you can talk with a CPQ training professional to help you better understand the learning content, or help you with any issues you might with the content or the lab exercises.

ServiceNow University Training Portal Demo

For more information about the Training Portal and how to purchase a subscription to the Portal, contact CPQ Training at training@logik.io or your CPQ Sales Representative.

UI display components

View examples of picklist, text, and number fields as they appear to end users in the CPQ UI.

Picklist fields

Picklist fields

Name	Options	Appearance	Notes
RadioButtons		Option One Option Two Option Three	Single-select
VerticalRadio		Option A Option B Option C Option D Option E	Single-select
Radio		Option A Option B	Single-select

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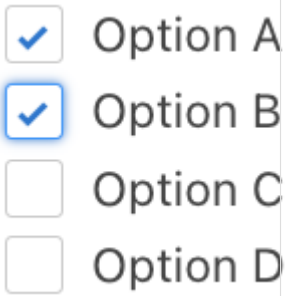
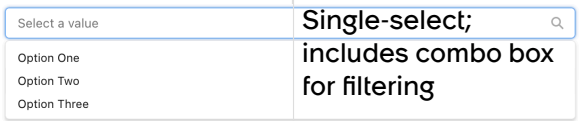
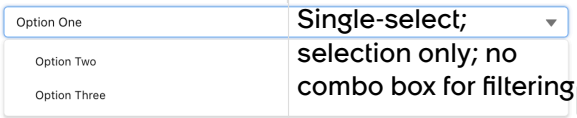
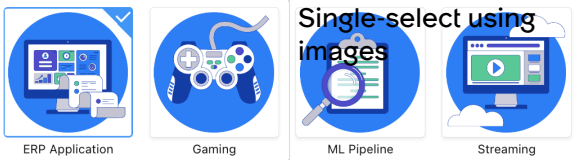
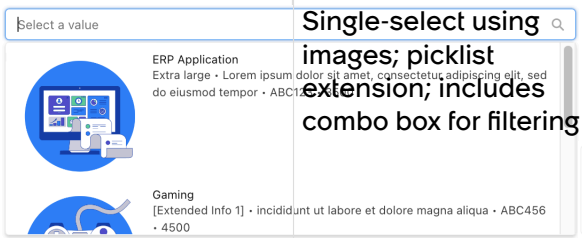
Picklist fields (continued)

Name	Options	Appearance	Notes
Checkbox			Multi-select
VerticalCheckbox			Multi-select
Picklist			Single-select; includes combo box for filtering
BasicPicklist			Single-select; selection only; no combo box for filtering
MultiSelectPicklist			Multi-select; includes combo box for filtering
VisualPicker			Single-select using images
MultiSelectVisualPicker			Multi-select using images
ExtendedPicklist			Single-select using images; picklist extension; includes combo box for filtering

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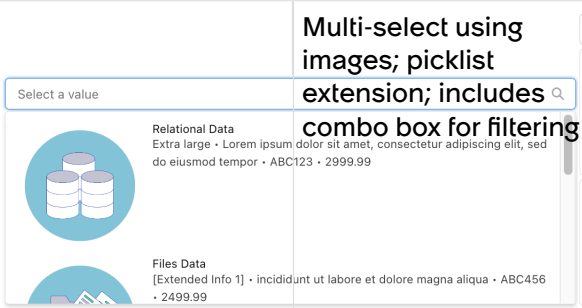
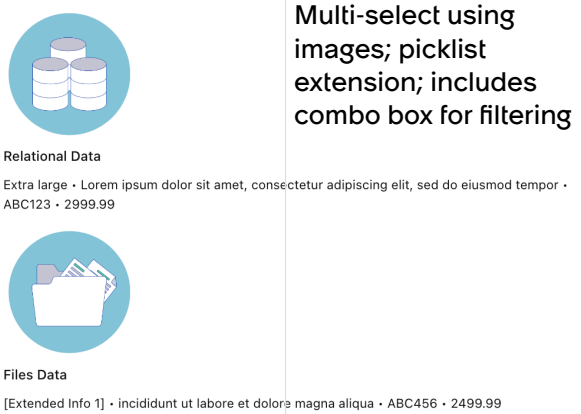
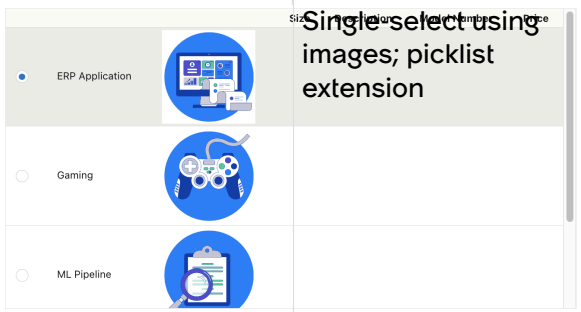
Picklist fields (continued)

Name	Options	Appearance	Notes
MultiSelectExtendedPicklist			Multi-select using images; picklist extension; includes combo box for filtering
ExtendedPicklistDisplayOnly	• Hide field label • Hide option label • Center content • Arrange horizontally or vertically • Control image size		Single-select using images; picklist extension; includes combo box for filtering
MultiSelectExtendedPicklistDispla	• Hide field label • Hide option label • Center content • Arrange horizontally or vertically • Control image size		Multi-select using images; picklist extension; includes combo box for filtering
SingleSelectPicklistGrid	• Set column headers • Set column alignment • Control image size Price display (currency code or symbol) follows layout settings		Single-select using images; picklist extension

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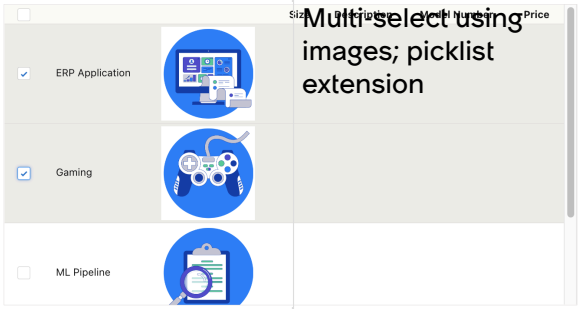
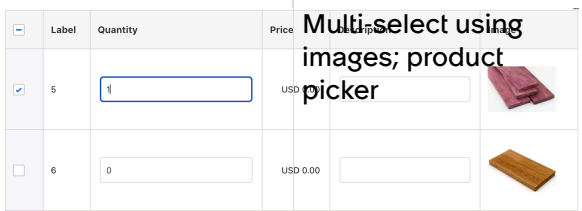
Picklist fields (continued)

Name	Options	Appearance	Notes
MultiSelectPicklistGrid	• Set column headers • Set column alignment • Control image size Price display (currency code or symbol) follows layout settings		Multi-select using images; picklist extension
SingleSelectProductPickerGrid	• Set column headers • Set column alignment • Control image size Automatically creates product rules Price display (currency code or symbol) follows layout settings User can edit custom subfields - includes quantity by default Bulk actions: • Set values • Include or exclude options • Specify minimum and maximum quantity		Single-select using images; product picker
MultiSelectProductPickerGrid	• Set column headers • Set column alignment • Control image size Automatically creates product rules Price display (currency code or symbol) follows layout settings		Multi-select using images; product picker

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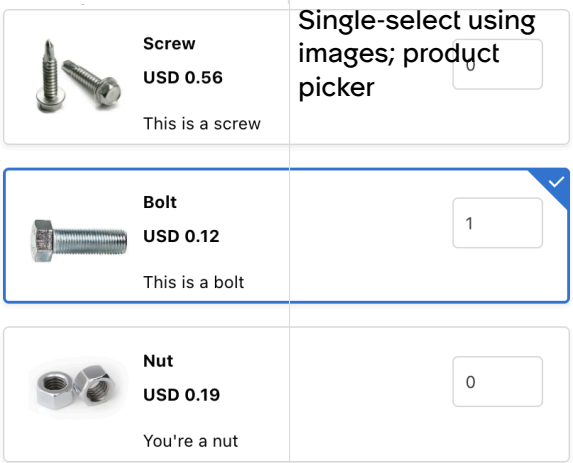
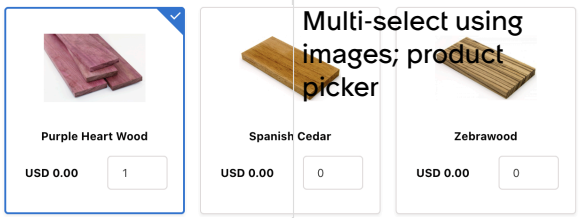
Picklist fields (continued)

Name	Options	Appearance	Notes
	User can edit custom subfields - includes quantity by default Bulk actions: • Set values • Include or exclude options • Specify minimum and maximum quantity		
VisualProductPicker	• Wide or tall rectangle • Image, label, price, description, and quantity fields		Single-select using images; product picker
MultiSelectVisualProductPicker	• Wide or tall rectangle • Image, label, price, description, and quantity fields		Multi-select using images; product picker

Text fields

Text fields

Name	Options	Appearance	Notes
Text			
TextArea		Text area sample content	
ReadOnlyText		Read Only Text Value	Supports markdown formatting, including links and inserting

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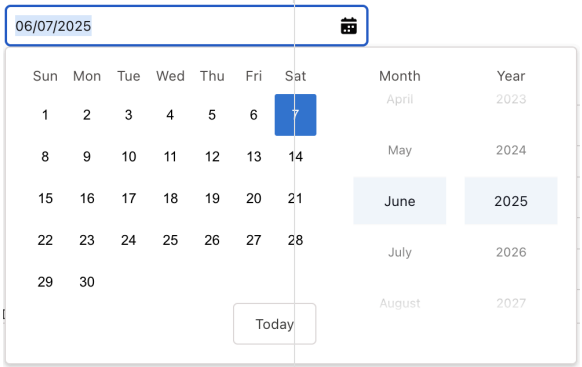
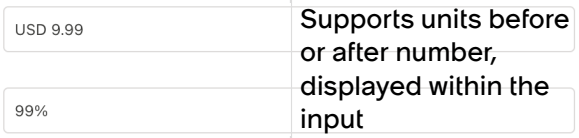
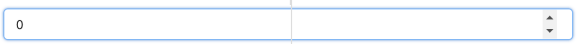
Text fields (continued)

Name	Options	Appearance	Notes
			content from other fields
Date			
FormattedNumber			Supports units before or after number, displayed within the input
LocationLookup			Accesses Google API and returns location data, which can be inserted into specified fields

Number fields

Number fields

Name	Options	Appearance	Notes
Number	Minimum and maximum values; step size Layout value example: `{"step":1,"min":0,"max":100}`		
Slider	Minimum and maximum values; step size Layout value example: `{"step":1,"min":0,"max":100}`		
NumberWithSubmit	Button label		

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Boolean fields

Boolean field

Name	Options	Appearance	Notes
Boolean	Labels for true and false states	 true	

Order Management reference

Reference topics provide additional information about Order Management.

Components installed with Order Management

Several types of components are installed with activation of the Order Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Order Fulfillment Agent [sn_ind_tmt_orm.order_fulfilment_agent]	Views product order, product order task, service order, and resource order. Can edit some fields from the tasks.	• sn_customerservice.case_viewer • sn_tmt_core.outbound_request_read • sn_ind_tmt_orm.fulfillment_writer • sn_customerservice.csm_workspace_use • sn_prd_invt.product_inventory_relationsh • sn_sla_definition_read • awa_agent • sn_ind_tmt_orm.order_creator • sn_fallout_mgmt.fallout_creator • sn_prd_invt.product_inventory_relationsh • sn_prd_invt.product_inventory_relationsh • wm_basic
Order Fulfilment Manager [sn_ind_tmt_orm.order_fulfilment_manager]	Views and edits product order, product order task, service order, and resource order.	• sn_ind_tmt_orm.order_fulfilment_agent • sn_ind_tmt_orm.order_approver • sn_prd_invt.product_inventory_relationsh
Service Order Agent [sn_ind_tmt_orm.service_order_agent]	Views service order and resource order.	• wm_basic • sn_prd_invt.product_inventory_relationsh • awa_agent

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Role title [name]	Description	Contains roles
	Can edit some fields from the tasks.	• sn_sla_definition_read • sn_ind_tmt_orm.order_creator • sn_tmt_core.outbound_request_read • sn_ind_tmt_orm.fulfillment_writer • sn_prd_invt.product_inventory_relationsh • sn_prd_invt.product_inventory_relationsh • sn_customerservice.case_viewer • sn_customerservice.csm_workspace_use • sn_fallout_mgmt.fallout_creator
Service Order Manager [sn_ind_tmt_orm.service_order_manager]	Views and edits service order and resource order.	• sn_ind_tmt_orm.service_order_agent • sn_ind_tmt_orm.order_approver • sn_prd_invt.product_inventory_relationsh
Order Approver [sn_ind_tmt_orm.order_approver]	Approves customer orders in Order Management for Telecommunications. This role is included in the Order Management Business Stakeholder role.	sn_ind_tmt_orm.order_viewer
Order Viewer [sn_ind_tmt_orm.order_viewer]	Views customer, product, service, and resource orders and any related order tasks in Order Management for Telecommunications. This role is included in the Order Management Business Stakeholder role.	• sn_prd_invt.product_inventory_viewer • sn_sales_agmt_core.sales_agreement_vi • sn_customerservice.customer_data_view • sn_prd_pm.product_catalog_viewer • sn_bus_loc.ibl_viewer • agent_workspace_user • sn_bus_loc.ebl_viewer • sn_csm_pricing.pricelist_viewer • canvas_user • sn_ord_qual_mgmt.alternate_proposal_re • sn_ind_tmt_orm.fulfillment_viewer • sn_tmt_core.inbound_queue_read • sn_prd_invt.product_inventory_operation • sn_service_org.customer_criteria_read • sn_change_read

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Role title [name]	Description	Contains roles
Fulfillment Writer [sn_ind_tmt_orm.fulfillment_writer]	Granular role to grant write access to fulfillment tasks.	• sn_ind_tmt_orm.fulfillment_viewer • sn_tmt_core.outbound_request_write
Order Agent [sn_ind_tmt_orm.order_agent]	Reads, creates, and updates access to orders, order line items, order characteristic values, and price adjustments. Also, reads order tasks, product order, service order, and resource orders.	• sn_ind_tmt_orm.order_creator • sn_customerservice.csm_workspace_use • sn_customerservice.sn_customer_menu_
Order admin [sn_ind_tmt_orm.order_admin]	Reads, writes, and updates access for Order tables.	• sn_ind_tmt_orm.order_agent • sn_ind_tmt_orm.order_approver
Order Creator [sn_ind_tmt_orm.order_creator]	Creates orders. Use this role to send order via REST Web Services.	• sn_ord_qual_mgmt.alternate_proposal_w • sn_ind_tmt_orm.order_viewer • sn_ord_qual_mgmt.alternate_proposal_cr
Order Integrator [sn_ind_tmt_orm.order_integrator]	Creates orders. Use this role to send order via REST Web Services.	• sn_prd_invt.product_inventory_operation • sn_tmt_core.inbound_queue_create • sn_tmt_core.inbound_queue_create • sn_tmt_core.outbound_request_write • sn_ind_tmt_orm.order_creator

Tables installed

Table	Description
Order Line Related Items [sn_ind_tmt_orm_order_line_related_items]	Indicates associations between an order line item and its related items or product inventory.
Inflight Order Line Item Change [sn_ind_tmt_orm_inflight_order_line_item_change]	Tracks changes made to order lines items whole the order is in progress.

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Table	Description
External product inventory [sn_ind_tmt_orm_external_product_inventory]	Tracks product inventory records managed in external systems and linked to order line items.
Decomposition Rule [sn_ind_tmt_orm_order_decomposition_rule]	Defines the rules used to break down an order into smaller fulfillment tasks based on characteristics and specification.
External Sim Numbers [sn_ind_tmt_orm_st_external_sim_numbers]	Stores Sim numbers managed in external systems for use in order processing.
Order Line Item Contact [sn_ind_tmt_orm_order_line_item_contact]	Stores contact details linked to a specific order line item.
Resource Order [sn_ind_tmt_orm_resource_order]	Represents resource level orders and their associated tasks in the fulfillment process.
Order Characteristic [sn_ind_tmt_orm_order_characteristic_value]	Represents the characteristics and configurable attributes defined for an order.
Pricing Adjustments [sn_ind_tmt_orm_pricing_adjustment]	Tracks adjustments such as discounts or surcharges applied to an order or order line item.
Mobile Order Task [sn_ind_tmt_orm_mobile_order_task]	Represents order tasks created for mobile services or mobile related fulfillment.
Customer Order Related Party [sn_ind_tmt_orm_order_related_party]	Represents parties linked to a customer order, such as organizations or responsible entities.
Req Def Glide [sn_ind_tmt_orm_req_def_glide]	Stores request definition data linked to variables and dictionary entries in Glide.
Domain Order Related Items [sn_ind_tmt_orm_domain_order_related_item]	Represents items linked to a domain order, including related orders and inventory.
Product Order	Represents customer product orders and their associated fulfillment tasks.

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Table	Description
[sn_ind_tmt_orm_product_order]	
Covered Product [sn_ind_tmt_orm_covered_product]	Represents products covered under an order line, sold product, or install base.
Service Order [sn_ind_tmt_orm_service_order]	Represents customer service orders and their associated fulfillment tasks.
Decomposition Trigger [sn_ind_tmt_orm_decomposition_trigger]	Defines the conditions that initiate decomposition of an order or order line.
Inflight Change Type [sn_ind_tmt_orm_inflight_change_type]	Defines the types of changes that can be applied to inflight orders or order lines.
Order Stage [sn_ind_tmt_orm_order_stage]	Defines the stages an order goes through in its life cycle.
Order To Project Relationship [sn_ind_tmt_orm_order_line_rel_task]	Indicates the relationship between an order and its associated project tasks or records.
Request Definition Characteristic [sn_ind_tmt_orm_req_def_char]	Defines the characteristics and attributes associated with a request definition.
Domain Order [sn_ind_tmt_orm_domain_order]	Represents a domain level order that consolidates product, service, or resource orders into fulfillment tasks.
Upgrade Inventory Job [sn_ind_tmt_orm_upgrade_inventory_job]	Stores details of inventory upgrade jobs, including specifications, payload, and status.
Contract Product Offering [sn_ind_tmt_orm_contract_m2m_product_offering]	Indicates the relationship between a contract and its associated product offerings.
Customer Order [sn_ind_tmt_orm_order]	Represents a customer's order, including account, billing, shipping, pricing, and charge details.

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Table	Description
Order Line Item [sn_ind_tmt_orm_order_line_item]	Represents the individual items in a customer order, including product, pricing, quantity, and shipping details.

Account Details form

The Accounts Details form enables you to create or review account details for a customer or for a partner.

Field	Description
Name	Name of the enterprise or customer.
Number	Unique system-assigned account number, starting with a prefix ACCT.
Primary Contact	Name of the primary contact person for the account.
Parent Account	Name of the parent account, if any, for this account. • For example, if you are setting up an account that is a national branch of a multi-national corporation, the parent account is the one for the multi-national corporation. • If there isn't a parent account, leave this field empty.
Registration Code	Registration code, if any, assigned to the account.
Customer	Option that designates if this account is for a customer.
Partner	Option that designates if this account is for a business partner.
Website	URL of the website for this account, if any.
Phone	Primary phone number for the account.
Street	Street address for the account.
City	Name of the city for the account.
State / Province	Name of the US state or Canadian province for the account.
Zip / Postal code	Zip or postal code for the account.
Country	Name of the city for the account.
Notes	Free form note text for the customer account.
Industry	Sector or market in which the account operates.
Legal entity name	Registered business name.

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Field	Description
Business structure	Indicates the legal form of the organization such as LLC or Corporation.
Assumed name	The trade name or DBA (Doing Business As) used publicly.
Date of Incorporation	The date the business was legally formed.
Trademark	Registered brand or symbol associated with the account.
Tax ID	Unique tax identification number for regulatory purpose.
Email	Primary email address for account-related communication.
Sales Owner	The internal contact responsible for managing the account relationship.

Customer and Service order details forms

The Order details forms enable you to select, review, and modify captured customer or service orders.

Order details page - Customer Order fields

The Orders details page - customer order section enables you to review and modify the general details for a product or service order.

Field	Description
Number	Unique system-assigned customer order number. **Note:** Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about order types, see Order types in Sales Customer Relationship Management.
Account	Name of the customer account.
Contact	Name of the contact for the order.
Channel partner	The name of the organization selling a product or service.
State	Indicator of the current processing state for the customer order, including all of its associated line items. **Note:** To view a comprehensive listing of customer order states with detailed descriptions, see Customer Order form states and Customer order states.
Priority	The priority of completing the order. Options include: • 1 - Critical • 2- High

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Field	Description
	• 3 - Moderate • 4 - Low
External purchase order	A unique identifier or reference number associated with a purchase order issued to a third-party vendor outside the organization to procure goods or services.
Order date	Date that you received the customer order.
Order type	Category that indicates the type of order. **Product** Product order: Customer is ordering a product. **Service** Service order: Request for the servicing of a product or installation of a service. **Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to easily identify the type of order.
Fulfillment type	Type of fulfillment action for the customer order. **Deliver** Deliver ordered items to the customer when you fulfill the order. **Qualify** Check the feasibility of delivering the products and services requested on the customer order. Without actually activating or delivering the products or services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated product, service, or resource order tasks can start.
Version	Current version of the customer order. Indicates the number of times that you revised the customer order during the fulfillment process. A customer order for a product or service can go through multiple revisions during its fulfillment cycle. A new order without any revisions has a version of one, and automatically increments for each inflight revision.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the customer order: **None**

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Field	Description
	No update or cancellation is taking place for the customer order. This setting is the default for new customer orders. **Update** A Characteristic, Contact, or Price inflight revision has been submitted for the customer order. **Cancel** A customer order is canceled or in the process of being canceled.
Sales agreement	If you're using the Sales Agreement Management application and one or more sales agreement were created by an agent, this field shows the system-generated number for the sales agreement linked to this account. The oldest active agreement is auto-populated. You can manually select any valid agreement from the list.
Existing contract	Reference to a previously established customer contract when creating or modifying an order. Existing contracts helps maintain a connection between the current order and the original contract, enabling accurate tracking of changes, renewals, or upsells. It facilitates scenarios where pricing or quantity changes are made to existing contract lines. The system can split line items based on effective start dates and apply delta pricing logic accordingly.

PONR	Option that indicates if this order is past the Point of No Return.
	• If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress.
	  ○ You can't select **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it.
	  ○ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
	• If cleared, you can still revise the order or request a cancellation for it.
	The value for this option is a system-assigned flag that you can't manually update.

Order details page - Pricing fields

The Orders details page - pricing section enables you to review and modify the pricing details for a customer or service order.

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Field	Description
Order currency	Currency used to place the order. For example, USD for US dollars.
Price list	The price list used for applying prices to the items within your order.
Renewal adjustment basis	Pricing method applied during the renewal of a service contract. It enables agents to specify whether the renewal price should be based on the current market rate or the previously contracted rate. Options include: • List price: Renews the contract at the current market price of the product or service at the time of renewal. • Contracted price: Renews the contract using the original contract price, with optional adjustments
Renewal adjustment type	Method used to adjust the renewal price of a service contract when the value of the Renewal adjustment basis field is set to Contracted price. Options include: • Markup %: Increases the renewal price by a specified percentage above the contracted price. • Markdown %: Decreases the renewal price by a specified percentage below the contracted price. The field is disabled if the value of the Renewal adjustment basis field is set to List price.
Renewal adjustment value	The actual adjustment value. For example, 10%. If the contracted price is $100 and the adjustment type is Markup % with a value of 10, the renewal price will be $110. The field is disabled if the value of the Renewal adjustment basis field is set to List price.

Order details page - Totals fields

The Orders details page - totals section enables you to review the final total pricing details for a customer or service order.

Field	Description
Total one time price	Aggregate cost of all non-recurring charges associated with an order line item. These are

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Field	Description
	typically setup fees, installation charges, or product costs that are billed once rather than on a recurring basis.
Total monthly price	The sum of all monthly recurring charges associated with the order.
Total annual price	The sum of all annual recurring charges associated with the order.
Total amount	Aggregate cost of all charges, both, one-time and recurring, associated with the entire order. It is a calculated field that reflects the final payable amount after applying quantity, pricing, and adjustments.
Total net new amount	The total value of newly added products or services in a customer order that are not part of a renewal or amendment. It helps quantify the net new revenue generated from fresh purchases.

Order details page - Dates fields

The Orders details page - totals section enables you to review the final total pricing details for a customer or service order.

Field	Description
Expected start date	Planned start date for the order or contract. It reflects when the service or product delivery is intended to begin, based on initial scheduling or customer expectations.
Expected end date	Planned completion date for the order or contract. It helps in forecasting delivery timelines and aligning internal resources accordingly.
Actual start date	Real date when the order fulfillment or contract execution began. This field is updated once the first fulfillment activity or service activation occurs.
Actual end date	Actual date when the order or contract was completed or terminated. It is used for performance tracking and SLA compliance analysis.
Payment terms	Calendar days by which the buyer must pay the full invoice amount from the invoice date. The available options are: • None: No payment terms apply. • Net 30 • Net 45 • Net 60

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Field	Description
	• Net 90 • Due Upon Receipt: Payment is expected immediately once the invoice is received by the buyer.
Auto-renew contract	Option to set the automatic renewal of the contract upon expiration.
Contract start date	Commencement date of the contract for applying subscription pricing to an order.
Contract end date	Date when the contract for a subscription is set to expire.
Term (months)	Shows the number of months the subscription is valid based on the contract start and end dates.

Related topics

Add subscription pricing to an order

Order details page - Address fields

The Orders details page - address section enables you to review and modify the billing and shipping details for a customer or service order.

Field	Description
Shipping location	Designated site or facility where the order should be delivered.
Shipping street	Street address of the shipping destination.
Shipping city	City where the order is to be delivered.
Shipping state / Province	State or province of the shipping address.
Shipping country	Country where the order is being shipped.
Shipping zip / Postal code	Postal or zip code for the shipping location.
Billing address same as shipping	Option to auto-populate the billing address fields with shipping details.
Billing location	Site or office responsible for receiving and processing the invoice.
Billing street	Street address for billing purposes.
Billing city	City associated with the billing address.
Billing state / Province	State or province of the billing address.
Billing country	Country where the invoice is sent.
Billing zip / Postal code	Postal or zip code for the billing location.

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Order details page - Notes fields

The Orders details page - notes section enables you to review and modify the additional details for a customer or service order.

Notes fields

Field	Description
Special instructions	Optional, custom notes or directions related to the order. These instructions are typically added during the ordering or checkout process and are intended to provide additional context or handling preferences for fulfillment agents.
Work notes	Free-form comment text for internal users.
Additional comments	Extra free-form internal comment text for the customer order.

Activity and attachment fields

Field	Description
Comments	Free-form comment text for the customer order that everyone, including the customer, can see.
Work notes	Free-form comment text for internal users.
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment.
Attachments	File attachments for the customer or service order. Select **Select file** to add the file as an attachment.

Customer and service order line items forms

The Order Line Items form enables you to select, review, and modify the captured customer or service order line items.

Order Line items form - Details fields

The order line items form line item details section enables you to review and modify general details for a customer or service order line item.

Field	Description
Number	Unique system-assigned number of the order line item with a prefix ORDL.
Order	Unique system-assigned number for the customer order. Both customer orders and

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Field	Description
	service orders have an assigned ID with a prefix of ORD.
Product specification	Product specification that is associated with the order line item. This field is displayed if the Order type is Product.
Service specification	Service specification that is associated with the order line item. This field is displayed if the Order type is Service.
Product model	Product offering purchased by the customer.
Channel partner	The name of the organization selling a product or service.
State	Indicator of the current processing state for this customer order line item. Unless indicated, the service order manager manually assigns the appropriate state to the service order line item, depending on where it resides in your processing and fulfillment cycle. To view a listing of the state selections, select the down arrow icon ▼. **Note:** To view a comprehensive listing of the customer order line item states with detailed descriptions, see Order line item form states. For service order line item states, see Service order states.
Priority	The priority of completing the order. Options include: • 1 - Critical • 2- High • 3 - Moderate • 4 - Low
PONR	Option that indicates if this order line item is past the Point of No Return. • If selected, it indicates that you can't revise the order line item or request a cancellation for it while the fulfillment process is in progress.

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Field	Description
	○ You can't select **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it. ○ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order line item or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Order line action	Type of action that is taking place in the order line item. Options include: • Add • Change • Disconnect • Suspend • Resume • No change For more information, see Action types for customer and service orders.
Action reason	Optional description briefly describing the reason for selecting a specific order line action.
Account	Name of the customer account.
Primary contact	Name of the primary contact person for the account.
Order type	Category that indicates the type of order line item. **Product** Product order: Customer is ordering a product. **Service**

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Field	Description
	Service order: Request for the servicing of a product or installation of a service. **Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to identify the type of order.
Service location	The location or site at which a product needs to be delivered, provisioned, or serviced.
Parent line item	Primary or top-level item in a hierarchical structure of related line items. It represents the main product or service being ordered, while associated child line items represent components, add-ons, or dependent services linked to that parent.
Ordered quantity	Line item order quantity.
Version	Current version of the customer order line item. Indicates the number of times that you revised the customer order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Revision operation	Indicates the type of revision operation, if any, that is taking place in the current version of the customer order line item: **None** No update or cancellation is taking place for the customer order line item. This setting is the default for new customer orders. **Update** A Characteristic, Contact, or Price inflight revision has been submitted for the customer order line item. **Cancel** The customer order line item is canceled or in the process of being canceled.
Sales agreement line	If you're using the Sales Agreement Management application and one or more sales agreement were created by an agent,

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Field	Description
	this field shows the system-generated number for the corresponding sales agreement line.
Existing contract	Reference to a previously established customer contract when creating or modifying an order. Existing contracts helps maintain a connection between the current order and the original contract, enabling accurate tracking of changes, renewals, or upsells. It facilitates scenarios where pricing or quantity changes are made to existing contract lines. The system can split line items based on effective start dates and apply delta pricing logic accordingly.
Contract Line type	Indicates the action taken on the contract line, determined by the action type of order line. For instance, 'New' for add orders and 'Amend' for change orders. The available options are: • No change • New • Upsell • Amend • Cancel • Renew
Short Description	Short description of the purchased product offering.

Order line items form - date fields

The Order Line Items form - dates section enables you to review and modify crucial date details for a customer order line item.

Field	Description
Planned start date	Planned start date and time for the order line item. It reflects when the product delivery is intended to begin, based on initial scheduling or customer expectations.
Planned end date	Planned completion date and time for the order line item. It helps in forecasting delivery timelines and aligning internal resources accordingly.
Estimated start date	Projected date and time by which work on the order line item is expected to begin.
Estimated end date	Projected date and time by which work on the order line item is expected to conclude.

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Field	Description
Auto-renew contract	Option to set the automatic renewal of the contract upon expiration.
Contract start date	Commencement date of the contract for applying subscription pricing to an order.
Contract end date	Date when the contract for a subscription is set to expire.
Term (months)	Shows the number of months the subscription is valid based on the contract start and end dates.
Actual start date	Timestamp when the order line fulfillment or contract execution began. This field is updated once the first fulfillment activity or service activation occurs.
Actual end date	Timestamp when the order or contract was completed or terminated. It is used for performance tracking and SLA compliance analysis.
Committed due date	Confirmed timestamp by which the which the order line item is expected to be fulfilled or delivered.
Effective date	Date on which the order line item becomes active and its terms officially take effect.
Expiration date	Date after which the order line item is no longer valid or active.

Order line items form - shipping address fields

The Order Line Items form - shipping address details section enables you to review and modify the shipping details for a customer order line item.

Field	Description
Shipping location	Designated site or facility where the order line item should be delivered.
Shipping street	Street address of the shipping destination.
Shipping city	City where the order line item is to be delivered.
Shipping state / Province	State or province of the shipping address.
Shipping country	Country where the order line item is being shipped.
Shipping zip / Postal code	Postal or zip code for the shipping location.

Order line items form - notes fields

The Order Line Items form - notes section enables you to review and modify the additional details for a customer order line item.

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Field	Description
Additional comments	Additional free-form internal comment text for the order line item.
Work notes	Free-form internal work order text for the order line item.
Comments / Work notes (Private)	Free-form comment or private work note text: • Select the comments icon to enter the comment text for the order line item so that everyone, including the customer, can see. Enter the comment text, and then select **Post Comments**. • Select the work notes (private) icon to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then select **Post Work notes (Private)**.
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions: • Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the order line item. Select **Select file** to add the file as an attachment. Alternatively, drag a file from your system and drop it into the Attachments pane.

Order line related items fields

The Order Line Related Items form enables you to review, create, and modify the related items for a customer order line item.

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Field	Description
Number	Order line related item number.
Order line item	Order line item number.
Related order line item	Target order line item that the selected order line item is associated with.
Specification	Specification name of the related product inventory.
Related product inventory	Active product inventory that the selected order line related item is associated with and has a 'Requires' relationship.

Price adjustment fields

The Price Adjustments tab on the order line item details enables you to review and modify manual price adjustments applied to an order line item.

Field	Description
Number	ID of the price adjustment record.
Name	Name specified while creating the price adjustment.
Sequence	The number of the pricing plan step used to generate the adjustment. It helps the agent identify the order of operations for the pricing adjustments.
Adjustment source	Origin of the price adjustment. • Auto: Adjustment applied automatically by pricing plan, and can be defined using standard adjustment matrices or via extension points, such as, PricingAdjustmentExtensionPoint. • Manual: Manual adjustment made by agent.
Adjustment type	• Markdown % • Markdown amount • Markup % • Markup amount • Price override
Price point	Setup by the admin in the Pricing Plan for the adjustment step. This could be the List Price or Net Price.
Adjustment value	Percentage or absolute amount of adjustment that is applied to the price.
Quantity	Quantity of items in the order line.
Amount	Price adjustment amount.
Total amount	Quantity multiplied by the amount.

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Field	Description
Unit running price	Price calculated with the adjustment amount from the specific pricing plan step.

Order Tasks form

The Order Task form enables you to review and update the fulfillment tasks that are associated with the selected order.

Field	Description
Number	System-assigned ID for the task, starting with a prefix of TASK.
Account	Name of the customer account.
Primary contact	Primary contact for the customer account.
Order line item	Order line item associated with the order task.
Parent	Parent product, service, or resource order associated with the order task.
Short Description	Short description of the order task.
State	Current state for the order task. To view a listing of selections, select the down arrow icon: **Open** Processing for the order task is open, and no processing is taking place. **In Progress** Processing for the order task is still in progress, or in fulfillment. **On hold** Order tasks that are on hold due to issues or errors. **Scheduled** Order task scheduled for processing. **Awaiting information** Order task that is stalled due to the lack of information. **Resolved** Issues blocking the processing of stalled order tasks have been resolved.

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Field	Description
	Closed Complete Processing for the order task is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to **Closed Complete**. **Canceled** Processing for the order task was canceled. **Draft** Order task that is still being created by the system or manually.
Priority	The priority of the order task. Options include: • None • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assignment group	The group of agents to which you want to assign the order task.
Assigned to	Name of the agent who should be assigned to the order task.
Short description	Optional description for the order task.
Additional comments (Customer visible)	Free-form work order text that your customers can view.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**.
Activity	Activity stream section for viewing all processing activities that have taken place for the selected order task. It includes a message that indicates that the order has been approved for processing and fulfillment.To expand, collapse, or filter by activity stream:

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Field	Description
	• Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the order task. Select **Select file** to add the file as an attachment.

Order Characteristics form

The Order Characteristics form enables you to review and modify order characteristics for a customer or service order.

Field	Description
Specification	Specification that is associated with the order characteristics.
Characteristic	Selected characteristic, for example, Data Pack, for the order line item. To view and update the characteristic details, select the characteristic. These details include the characteristic name, description, and input type.
Characteristic value	Value that you selected for the characteristic option. For example, Unlimited, for the Data Pack Unlimited option.
Characteristic option	Name of the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic option details, select the characteristic option. These values include the name of the characteristic option and the associated characteristics.

Customer order states

Use the State fields on the customer order management forms to determine the current processing state for the customer order and to perform certain types of customer order actions, such as canceling a customer order.

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Customer Order form states

Use the **State** field on the customer order form to determine the current processing state for the order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling an order. To learn more, see Managing post-fulfillment order changes.

Customer order state	Description
Draft	Customer order that is still in the capture stage or the manual entry of the customer order is not complete. The data capture phase is when an agent is capturing an order or your instance is capturing the full customer order details from an API or through Service Bridge.
New	Customer order capture process is complete and the entire order is awaiting approval by the fulfillment manager. After the customer order data capture completes, it automatically moves to the New state.
Submitted	Customer order that the order agent has submitted.
Enrichment in progress	Customer order for which the order enrichment process is in progress.
Enrichment on hold	Customer order for which the order enrichment process in on hold.
Acknowledged	Customer order that the fulfillment manager approved for fulfillment processing.
Rejected	Customer order that the fulfillment manager rejected for fulfillment processing.
In progress	Customer order that has been approved and is being actively worked on.
Revision in progress	Customer order revision that is in process but has not been approved. As part of the Inflight Order Change functions, when you are currently in the process of updating the customer order, it moves to this state.
Awaiting information	Customer order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.
On hold	Customer order that is on hold. No further fulfillment processing can take place until the hold is removed.

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Customer order state	Description
Canceled	Customer order that the fulfillment manager canceled. No further fulfillment processing can take place.
Assessing cancellation	As part of the Inflight Order Change functions, when a cancellation request is submitted for the customer order, it moves to this state. A cancellation request has been submitted for the customer order.
Cancellation in progress	When the cancellation request is approved, the customer order moves to this state.
Canceled	Customer order that the fulfillment manager canceled. No further fulfillment processing can take place.
Completed	All associated customer order line items are complete. **Note:** After your agents complete all fulfillment tasks for the entire customer order, the following actions occur: • The **State** field for the customer order is automatically set to Completed. • The **State** field for each of the individual customer order line items is set to Completed.

Note: To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled customer order states, see the following:

- Managing inflight order changes and cancellation requests
- Key inflight order change and cancellation request fields

Order line item form states

Use the **State** field on the order line item form to determine the current processing state for an individual customer order line item. You can also use it to perform certain types of customer order actions, such as canceling a line item.

Customer order line item state	Description
Draft	Parent customer order that is still in the data capture stage or the manual entry of the customer order is not completed. The data capture phase is when an agent is creating and configuring order line items or your instance is capturing full customer order details from an API or through Service Exchange. In this case, Draft is a system-

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Customer order line item state	Description
	assigned state. This state is assigned by the system.
Submitted	Order line item of the customer order that the order agent has submitted.
Enrichment in progress	Order line item of the customer order for which the order enrichment process is in progress.
Enrichment on hold	Order line item of the customer order for which the order enrichment process in on hold.
New	Data capture process for the parent customer order that is complete and the customer order line item is awaiting fulfillment approval by the fulfillment manager. After the customer order capture is complete, it automatically moves to the New state. **Note:** When you manually enter a customer order and its order line items, you can assign a **Draft** or **New** state, based on your organization's published procedures.
Acknowledged	Customer order line item that the fulfillment manager approved for fulfillment processing.
Scheduled	Order line item that has successfully passed all validations and approvals and is queued for fulfillment. At this stage, orchestration workflows can begin, ensuring that resources are allocated and tasks are sequenced correctly before actual provisioning starts. This state acts as a control point to prevent premature execution and provides visibility that the item is ready for processing.
Rejected	Customer order line item that the fulfillment manager rejected for fulfillment processing. No further fulfillment processing can take place.
In progress	Customer order line item that is still in process but not ready for fulfillment approval.
Revision in progress	Customer order line item revision that is in process but has not been approved. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Awaiting information	Customer order line item that is in process but awaiting receipt of information from

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Customer order line item state	Description
	the customer before any further fulfillment processing takes place.
On hold	Customer order line item that is on hold. No further fulfillment processing can take place until the hold is removed.
Assessing cancellation	As part of the Inflight Order Change functions, when a cancellation request is submitted for the customer order line item, it moves to this state. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Cancellation in progress	When the cancellation request is approved, the customer order line item moves to this state. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Canceled	Customer order line item that the fulfillment manager canceled. No further fulfillment processing can take place.
Completed	Customer order line item and all associated domain orders and order tasks that are complete. **Note:** After your agents complete all fulfillment tasks for the entire customer order, the following actions occur: • The **State** field for the customer order is automatically set to Completed. • The **State** field for each of the individual customer order line items is set to Completed.

Note: To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled customer order line item states, see the following:

- Managing inflight order changes and cancellation requests
- Key inflight order change and cancellation request fields

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Product Order, Service Order, and Resource Order form states

Use the **State** fields on the Product Order, Service Order, and Resource Order forms to determine the current processing state for a product order, service order, or resource order.

State	Description
Draft	New or waiting-to-start tasks that are assigned to the product, service, or resource order.
Qualified	All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start.
In progress	Product, service, or resource order processing that is still in progress.
On hold	Product, service, or resource order processing is on hold due to issues or inadequate information required for processing the order.
Scheduled	Product, service, or resource order that has successfully passed all validations and is queued for fulfillment
Closed complete	Product, service, or resource order processing that is completed. **Note:** after your agents complete all fulfillment tasks for the product, service, or resource order, the state is automatically set to Closed Complete.
Canceled	Product, service, or resource order processing that was canceled.
Cancellation in progress	Product, service, or resource order that is in the process of being cancelled.

Order Task form states

Use the **State** field on the Order Task form to determine the processing state for an order task. To learn more, see Review and close fulfillment tasks.

Order task state	Description
Open	Processing for the order task that is open and no processing is currently taking place.
In progress	Processing for the order task that is still in progress or in fulfillment.
On hold	Order task that is on hold. No further fulfillment processing can take place until the hold is removed. If you created a fallout record for it, the state of the order task changes to On Hold

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Order task state	Description
	until the person or group that is assigned to the fallout record resolves the issue.
Scheduled	
Awaiting information	Order task that is in process but awaiting receipt of required information before any further processing takes place.
Resolved	An order task that was previously on hold due to an issue, which has now been resolved.
Closed Complete	Processing for the order task that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed complete.
Canceled	Processing for the order task that was canceled.
Draft	Order task that is still in the capture stage or the manual entry of the order task is not complete.

Service order states

Use the State fields on the Order Management forms to determine the current processing state for the service order and to perform certain types of order actions, such as canceling an external service order.

The following flowchart illustrates how customer and service order state processing works.

Customer and service order state processing

Service Order form states

Use the **State** field on the Service Order form to determine the current processing state for the service order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling a service order.

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Service order state	Description
Draft	Service order that is still in the capture stage or the manual entry of the service order is not complete. The data capture phase is when your instance is capturing full service order details from the TMF641. **Note:** The Service Order Open API is a ServiceNow implementation of the TMForum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API. In this case, Draft is a system-assigned state. **Note:** The Draft state also applies to domain orders that are created by the decomposition process. These orders are awaiting additional information or for their turn in the initiate order fulfillment process.
New	Service order capture process that is complete and the entire order is awaiting approval by the service order manager. After the service order data capture completes, it automatically moves to the New state.
Submitted	Service order that the order agent has submitted.
Enrichment in progress	Service order for which the order enrichment process is in progress.
Enrichment on hold	Service order for which the order enrichment process in on hold.
Acknowledged	Service order that the service order manager approved for fulfillment processing.
Rejected	Service order that the service order manager rejected for fulfillment processing.
In progress	Service order that has been approved and is being actively worked on. To learn more, see Review and close fulfillment tasks.
Revision in progress	As part of the Inflight Order Change functions, when you are currently in the process of updating the service order, it moves to this state.
Awaiting information	Service order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.

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Service order state	Description
On hold	Service order that is on hold. No further fulfillment processing can take place until the removal of the hold.
Assessing cancellation	Cancellation request that has been submitted for the service order. As part of the Inflight Order Change functions, when a cancellation request is submitted for the service order, it moves to this state.
Cancellation in progress	When the cancellation request is approved, the service order moves to this state.
Canceled	Service order that the service order manager canceled. No further fulfillment processing can take place.
Completed	All associated service order line items are complete. **Note:** After your agents complete all fulfillment tasks for the entire captured service order, the following actions occur: • The **State** field for the captured service order is automatically set to Completed. • The **State** field for each of the individual captured service order line items is set to Completed.

Note: To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled service order states, see

- Managing inflight order changes and cancellation requests
- Key inflight order change and cancellation request fields

Order Line Item form states

Use the **State** field on the Order Line Item form to determine the current processing state for an individual service order line item. You can also use it to perform certain types of order actions, such as canceling a line item.

Service order line item state	Description
Draft	Parent service order that is still in the data capture stage or the manual entry of the order is not complete. The data capture phase is when your instance is capturing full service order details from the TMF641.

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Service order line item state	Description
	In this case, Draft is a system-assigned state.
Submitted	Order line item of the service order that the order agent has submitted.
Enrichment in progress	Order line item of the service order for which the order enrichment process is in progress.
Enrichment on hold	Order line item of the service order for which the order enrichment process in on hold.
New	Data capture process for the parent service order that is complete, and the service order line item is awaiting fulfillment approval by the service order manager. After the service order capture is complete, it automatically moves to the **New** state. **Note:** When you manually enter a service order and its order line items, you can assign a Draft or New state, based on your organization's published procedures.
Acknowledged	Service order line item that the service order manager approved for fulfillment processing.
Scheduled	Order line item that has successfully passed all validations and approvals and is queued for fulfillment. At this stage, orchestration workflows can begin, ensuring that resources are allocated and tasks are sequenced correctly before actual provisioning starts. This state acts as a control point to prevent premature execution and provides visibility that the item is ready for processing.
Rejected	Service order line item that the service order manager rejected for fulfillment processing. No further fulfillment processing can take place.
In progress	Service order line item that is still in process but not ready for fulfillment approval.
Revision in progress	Service order line item revision that is in process but has not been approved. As part of the Inflight Order Change functions, when you are currently in the process of updating the parent service order or this service order line item, it moves to this state.
Awaiting information	Service order line item that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.

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Service order line item state	Description
On hold	Service order line item that is on hold. No further fulfillment processing can take place until the hold is removed.
Assessing cancellation	Cancellation request that has been submitted for the service order line item. As part of the Inflight Order Change functions, when a cancellation request is submitted for the service order line item, it moves to this state.
Cancellation in progress	When the cancellation request is approved, the service order line item moves to this state.
Canceled	Service order line item that the service order manager canceled. No further fulfillment processing can take place.
Completed	Service order line item and all associated and external service order tasks that are complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.

Note: To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled service order line item states, see

- Managing inflight order changes and cancellation requests
- Key inflight order change and cancellation request fields

Order task form states

Use the **State** field on the Order Task form to determine the processing state for an order task.

Order task state	Description
Open	Processing for the order task that is open and no processing is currently taking place.
In progress	Processing for the order task that is still in progress or in fulfillment.
On hold	Order task that is on hold. No further fulfillment processing can take place until the hold is removed. If you created a fallout record for it, the state of the order task changes to On Hold until the person or group that is assigned to the fallout record resolves the issue.
Scheduled	

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Order task state	Description
Awaiting information	Order task that is in process but awaiting receipt of required information before any further processing takes place.
Resolved	An order task that was previously on hold due to an issue, which has now been resolved.
Closed Complete	Processing for the order task that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed complete.
Canceled	Processing for the order task that was canceled.
Draft	Order task that is still in the capture stage or the manual entry of the order task is not complete.

Create records from inbound queue table async form

The Create records from inbound queue table async scheduled job form enables you to configure a scheduled job for asynchronous order processing.

Field	Description
Name	Name of the scheduled job.
Next action	Timestamp of the next job action.
Calendar	Time window during which the scheduled job can run. The calendar restricts job execution to a defined schedule, such as business hours. If an order is submitted outside the active window, the job will not process it until the next scheduled period.
Job ID	This value must be set to RunScriptJob.
State	State of the scheduler job. The available options are: • Error • Paused • Permanent error • Queued • Ready • Running
System ID	Active nodes of the ServiceNow instance.
Job context	Context of the scheduled job.

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Field	Description
Trigger type	Determines when and how often the scheduled job runs. The selected trigger type controls the additional scheduling fields that appear on the form. The available options are: • None • Daily • Day and Month in Year • Day in Month • Day in Week in Month in Year • Days in Week • Disabled • Interval • Repeat • Run at System Startup • Run Once • Week in Month • Business Calendar: Entry Start • Business Calendar: Entry End
Repeat	Details of the time interval.
Time zone	Time zone in which you're operating your business.

Related topics

Configure a scheduled job for asynchronous order creation

Inbound request states

An inbound request transitions through a series of states as ServiceNow AI Platform processes the asynchronous order received via an API.

Field	Description
New	The inbound request has been received via API and is waiting to be picked up by the scheduled job.
In progress	The scheduled job has picked up the inbound request and is processing the order.
Completed	The order was created successfully.
Error	An error occurred while creating the order. The inbound request exits the processing cycle.
Pending	The inbound request is waiting for a condition to be met before processing can continue.

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Related topics

Asynchronous order processing for large customer and consumer orders

Domain order forms

The domain order forms enable you to review and modify the domain product orders, service orders, and resource orders for a selected customer or service order.

Related topics

View domain orders

Order types in Sales Customer Relationship Management

Product Order form fields

The Product Order form enables you to review and modify the domain product orders that are associated with a selected customer order.

Field	Description
Number	Unique system-assigned product order number starting with a prefix PO.
Priority	The priority of the product order. The available options are: • None • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Account	Name of the customer account.
Primary contact	Name of the primary contact person for the account.
Order line Item	Unique system-assigned order line item number associated with the domain product order.
Location	Customer's site or location where the product must be delivered.
State	Current state for the product order. To view a listing of selections, select the down arrow icon ▼: **Draft** Product, service, or resource that has assigned new or waiting-to-start tasks.

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Field	Description
	Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. **On hold** Stalled product, service, or resource orders due to issues or errors. **Scheduled** Product, service, or resource orders that are scheduled for processing. **In Progress** Product, service, or resource order processing that is still in progress. **Closed Complete** Product, service, or resource order processing that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. **Canceled** Product, service, or resource order processing that was canceled. **Cancellation in progress** Indicates that a product, service, or resource order is being cancelled.
Action	Indicator of the order line item action type, such as Add, Disconnect, Suspend.
Product inventory	Associated Product inventory record.
Assignment group	Name of the group that the product order is assigned to for completion of any remaining work.

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Field	Description
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent product order, if any, to this product order.
Record version	Version of the product order record. If the product order is revised, the version number is incremented.
Short description	Optional brief description for the product order.
Description	Optional extended description for the product order.
Additional comments (Customer visible)	Free-form product order text that your customers can view.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**.
Activity	Activity stream section for viewing that all the processing activities and changes in field values have taken place for the product order. To expand, collapse, or filter by activity stream: • Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the product order. Select **Select file** to add the file as an attachment.

Service Order form fields

The Service Order form enables you to review and modify domain service orders that are associated with a selected customer order.

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Field	Description
Number	Unique system-assigned service order number starting with the prefix SO.
Priority	The priority of the service order. The available options are: • None • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Account	Name of the customer account.
Primary contact	Name of the primary contact person for the account.
Order line Item	Unique system-assigned order line item number associated with the domain service order.
Location	Customer's site or location where the product or service must be delivered.
State	Current state for the service order. To view a listing of selections, select the down arrow icon ▼: **Draft** Product, service, or resource that has assigned new or waiting-to-start tasks. **Qualified** All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. **On hold** Stalled product, service, or resource orders due to issues or errors. **Scheduled** Product, service, or resource orders that are scheduled for processing. **In Progress**

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Field	Description
	Product, service, or resource order processing that is still in progress. **Closed Complete** Product, service, or resource order processing that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. **Canceled** Product, service, or resource order processing that was canceled. **Cancellation in progress** Indicates that a product, service, or resource order is being cancelled.
Action	Indicator of the order line item action type, such as Add, Disconnect, Suspend.
Product inventory	Associated Product inventory record.
Assignment group	Name of the group that the service order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent service order, if any, to this service order.
Record version	Version of the product order record. If the product order is revised, the version number is incremented.
Short description	Optional brief description for the service order.
Description	Optional extended description for the service order.
Additional comments (Customer visible)	Free-form product order text that your customers can view.

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Field	Description
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**.
Activity	Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream: • Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the service order. Select **Browse** to add the file as an attachment.

Resource Order form fields

The Resource Order form enables you to review and modify domain resource orders associated with a selected customer order.

Field	Description
Number	Unique system-assigned resource order number starting with the prefix RO.
Priority	The priority of the service order. The available options are: • None • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning

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Field	Description
Account	Name of the customer account.
Contact	Name of the primary contact person for the account.
Order line item	Unique system-assigned order line item number associated with the domain resource order.
Location	Customer's site or location where the product or service must be delivered.
State	Current state for the resource order. To view a listing of selections, select the down arrow icon ▼: **Draft** Product, service, or resource that has assigned new or waiting-to-start tasks. **Qualified** All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. **On hold** Stalled product, service, or resource orders due to issues or errors. **Scheduled** Product, service, or resource orders that are scheduled for processing. **In Progress** Product, service, or resource order processing that is still in progress. **Closed Complete** Product, service, or resource order processing that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.

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Field	Description
	Canceled Product, service, or resource order processing that was canceled. **Cancellation in progress** Indicates that a product, service, or resource order is being cancelled.
Action	Indicator of the order line item action type, such as Add, Disconnect, Suspend.
Product inventory	Associated Product inventory record.
Assignment group	Name of the group to which the resource order is assigned for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent resource order, if any, to this resource order.
Record version	Version of the product order record. If the product order is revised, the version number is incremented.
Short description	Optional brief description for the resource order.
Description	Optional extended description for the resource order.
Additional comments (Customer visible)	Free-form product order text that your customers can view.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**.
Activity	Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream:

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Field	Description
	• Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the resource order. Select **Select file** to add the file as an attachment.

Components installed Fallout Management

Several types of components are installed with activation of the Fallout Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Fallout Manager [sn_fallout_mgmt.fallout_manager]	Creates, views, assigns, and edits fallout records. A user with this role can also view order tasks and domain orders.	sn_fallout_mgmt.fallout_agent
Fallout Agent [sn_fallout_mgmt.fallout_agent]	Views order fallout records. A user with this role can also update the state of fallout records and create work notes on them. The user can also view task and domain orders.	• sn_fallout_mgmt.fallout_creator • sn_customerservice.case_viewer
Fallout viewer	Views order fallout records. A user with this role can also update the state of fallout records and view order tasks and domain orders.	• sn_ind_tmt_orm.order_viewer • agent_workspace_user
Fallout Creator	Creates fallout records.	None.

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Tables installed

Table	Description
Fallout [sn_fallout_mgmt_fallout]	Tracks order processing or fulfillment exceptions that require monitoring and resolution.
Fallout type [sn_fallout_mgmt_fallout_type]	Defines categories of fallout to classify order processing or fulfillment exceptions.

Fallout Management data model

Manage and fix the processing issues that occur during the fulfillment of a customer or service order. With Fallout Management, you can identify the order processing exceptions and create a fallout record to investigate and resolve the underlying processing issue. Fallout Management enables a customer or service order to continue until it's completed.

The Fallout Management data model extends the Task [task] table. The following table lists the attributes that apply to order fallout processing.

Order fallout table attributes

Field	Description
Number	Unique system-assigned fallout number, starting with a prefix of FO, up to seven digits in length.
Assigned to	Identifier for the assigned person responsible for acting on the fallout record.
Created by	Identifier for the fallout administrator who created the fallout record.
Created on	Timestamp that includes the date and time that the fallout record was created.
State	Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle. **Open** Fallout record that is new and not currently assigned to a person to work on. **In progress** Fallout record that is assigned and currently being worked on. **On hold**

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Order fallout table attributes (continued)

Field	Description
	Fallout record that is on hold. No further fallout processing can take place until you release the hold. **Awaiting information** Fallout record that is on hold and waiting for more information before processing can proceed. **Resolved** Fallout issue that has a resolution but you have not formally closed it. **Closed complete** Fallout record that is complete and closed. **Canceled** Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.
Originated from	Identifier of the originating order task record that the fallout record is associated with.
Activity	Listing of the processing activities and changes in the field values that have taken place for the fallout record. To expand, collapse, or filter by activity stream: • Select the activity stream filter icon to filter by post types, field changes, or flagged items. • Select the search icon to search the required information in the activity stream. • Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action.
Attachments	File attachments for the fallout record. Select **Browse** to add the file as an attachment.

Related topics

Managing order fallout

Creating automated fallout records

Flow Designer

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Flows

Create a flow

Fallout form fields

The Fallout form enables you to manually create, review, and modify the order fallout records.

Field	Description
Number	Unique system-assigned fallout number, starting with a prefix of FO.
Fallout Type	Category that indicates the type of fallout activity. **Billing Issue** Billing issues and disputes that exist for the ordered item. **Inventory Allocation Failure** Inadequate inventory. An ordered item can't be fulfilled. **Provisioning Failure** Associated system that is unavailable due to connectivity problems, timeouts, or other issues. **Note:** You can also create additional fallout types, as per the requirements of your enterprise. To learn more, see Create additional fallout types. To view the associated details or search for another fallout type: • Select the detail icon to view the associated details for the fallout type. • Select the search icon to search and select another fallout type.
Related order task	Identifier of the order task that the fallout record originated from.
Order Line Item	Identifier of the customer or service order line item that the fallout record originated from.
State	Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record,

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Field	Description
	depending on where it currently resides in the processing cycle. **Open** Fallout record that is new and not currently assigned to a person to work on. **In progress** Fallout record that is assigned and currently being worked on. **On hold** Fallout record that is on hold. No further fallout processing can take place until you release the hold. **Awaiting information** Fallout record that is on hold and waiting for more information before processing can proceed. **Resolved** Fallout issue that has a resolution but you have not formally closed it. **Closed complete** Fallout record that is complete and closed. **Canceled** Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.
Priority	Relative priority or importance of the fallout record. **1-Critical** Fallout record that has urgent time criticality that requires immediate attention. **2-High** Fallout record that has a high time criticality, though not as urgent as a Critical priority fallout. **3-Moderate** Fallout record that has a medium time criticality and urgency. **4-Low**

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Field	Description
	Fallout record that has a low time criticality and urgency. **5-Planning** Fallout record that was created for planning purposes.
Assignment group	Name of the assigned group that is responsible for acting on the fallout record.
Assigned to	Name of the assigned person who is responsible for acting on the fallout record.
Short description	Short description of the fallout task.
Work notes (Private)	Free-form private work note text for internal purposes only. The customer can't see this detail.
Attachments	File attachments for the fallout record. Select **Select file** to add the file as an attachment.

Jeopardy Management roles and personas

Learn more about how the roles and personas in Order Management may change by adopting Jeopardy Management.

Roles in Jeopardy Management

The following table lists the roles and personas in Order Management when Jeopardy Management is enabled.

Personas and roles in Jeopardy Management

Persona	Responsibilities	Role
System administrator	• Configures fulfillment flows for Jeopardy Management. • Configures all jeopardy-related decision table rule sets that define jeopardy fulfillment policies. • Configures service level agreements (SLA) definitions for tasks. • Reviews and updates existing workflows and adds jeopardy actions when updates are required. • Reviews and updates jeopardy decision tables.	Admin

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Personas and roles in Jeopardy Management (continued)

Persona	Responsibilities	Role
Order fulfillment manager	• Reviews order jeopardy data for order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer order using jeopardy information. • Proactively mitigates jeopardy risks. • Escalates order jeopardy-related issues as needed.	sn_ind_tmt_orm.order_fulfilment_manager
Order fulfillment agent	• Tracks, monitors, and reviews order task progressions for jeopardy data and proactively acts on potential jeopardy-related issues. • Escalates jeopardy issues as appropriate to fulfillment managers.	sn_ind_tmt_orm.order_fulfilment_agent
Service order manager	• Reviews service order jeopardy data for potential service order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer orders by leveraging jeopardy information. • Proactively mitigates jeopardy risks. • Escalates jeopardy-related issues as needed.	sn_ind_tmt_orm.service_order_manager
Service order agent	• Tracks, monitors, and reviews order task progressions for jeopardy data. • Escalates order jeopardy impacts to the fulfillment manager.	sn_ind_tmt_orm.service_order_agent

Domain separation and Order Management

Domain separation is supported for Order Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview of domain separation in Order Management

The order fulfillment module in Order Management supports domain separation at an account level. All customer orders, order line items, and order tasks have account (customer) level separation.

How domain separation works in Order Management

- Ensure that the account is domain separated according to the domain separation guidelines in Customer Service Management. For more information, see Domain separation and Customer Service Management.
- Customer orders, customer order line items, service orders, service order lines, and order tasks are domain separated using the account name.
- If an administrator assigns fulfillment agents and managers to work on customer orders, service orders, and order tasks for a specific domain, they can work on these types of transactions across accounts.

Domain separated tables

- Customer Order
- Customer Order Line Item
- Customer Order Characteristic Value
- Service Order
- Service Order Line Item
- Service Order Characteristic Value
- Order Tasks
- Product Order
- Resource Order
- Contract product offering

Use cases

If customer or service orders have an account name, an administrator can identify and separate customer or service orders for different domains.

If fulfillment agents or managers are assigned to a domain, an administrator can assign them to work on customer orders, service orders, and order tasks for a specific domain (account).

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Related topics

- Using Order Management
- Configuring Order Management
- Managing service orders

Order operations reference

Reference for order operations applications.

Components installed with Order Operations Case Management

Several types of components are installed with the Order Operations Case Management application, including tables, roles, and service definitions.

Lead-to-Cash Process Management reference

Reference topics provide additional information about Lead-to-Cash Process Management.

Components installed with Lead-to-Cash Process Management

Several types of components are installed with activation of the Lead-to-Cash Process Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Sales process record viewer [sn_l2c_cockpit.sales_process_record_viewer]	Views tables related to the sales process record.	• sn_customerservice.csm_workspace_user • sn_bo_core.business_process_record_viewer
Sales process record writer [sn_l2c_cockpit.sales_process_record_writer]	Views and writes tables related to the sales process record.	• sn_l2c_cockpit.sales_process_record_viewer • sn_bo_core.business_process_record_writer
Sales process manager [sn_l2c_cockpit.sales_process_manager]	Views, creates, and edits sales process records.	sn_l2c_cockpit.sales_process_record_writer

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Tables installed

Table	Description
Sales Process Record [sn_l2c_cockpit_sales_process_record]	Stores records used for monitoring sales-specific entities.

Properties installed with Lead-to-Cash Process Management

Properties for Lead-to-Cash Process Management node map visualization.

These properties are available for Lead-to-Cash Process Management.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Lead-to-Cash Process Management

Property	Description
sn_l2c_cockpit.node_default_levels	• Type: integer • Default value: 3 • Location: System Property [sys_properties] table • Learn more: Customize hierarchical node map le
glide.ui.sn_l2c_cockpit_sales_process_record_activity.fields	• Type: string • Value: short_description,state,assigned_to,assignment discussion*,*EmailAutogenerated*,*Sidebar poste • Location: System Property [sys_properties] table

Components installed with Business Object Core

Several types of components are installed with activation of the Business Object Core plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Business object viewer [sn_bo_core.business_object_viewer]	Views tables related to a business object.	• sn_quote_mgmt_core.quote_viewer • sn_ind_tmt_orm.order_viewer • sn_opty_mgmt_core.opportunity_viewer

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Role title [name]	Description	Contains roles
Business process record viewer [sn_bo_core.business_process_record_viewer]	Views tables related to the business process record.	sn_bo_core.business_object_viewer
Business process record writer [sn_bo_core.business_process_record_writer]	Views and writes tables related to the business process record.	sn_bo_core.business_process_record_viewer
Business object writer [sn_bo_core.business_object_writer]	Views and writes tables related to a business object.	sn_bo_core.business_object_viewer

Tables installed

Table	Description
Business Process Resource [sn_bo_core_process_resource]	Tracks the objects and documents associated with a business process.
Business Object Relationship [sn_bo_core_obj_rel]	Indicates how entities are structurally connected in a process and outlines the relationships between different business object types. For example, a lead is linked to an opportunity through the **Lead** column in the Opportunity [sn_sales_opportunity] table.
Business Object Group Members [sn_bo_core_obj_group_members]	Defines the relationship between business object groups and their corresponding object types, specifying which entities belong to each group.
Business Process Task [sn_bo_core_process_task]	Tracks individual tasks in a process.

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Table	Description
Business Object Type [sn_bo_core_obj_type]	Contains the entities involved in a process and its table. For example, for order-to-cash group, the entities can be lead, opportunity, quote, order, and their respective tables.
Business Process Record [sn_bo_core_process_record]	Stores records that are used for monitoring various business entities.
Business Object Group [sn_bo_core_obj_group]	Represents the logical grouping of entities involved in a process and the category for different types of business entities.

Return Merchandise Authorization Case Management

Reference topic provides additional information about lists and forms that you can use to configure Return Merchandise Authorization (RMA) Case Management.

Return Merchandise Authorization case table fields

Information about Return Merchandise Authorization (RMA) case table fields.

RMA case table fields

List of fields on the rma case table. This table extends the case table. It defines and manages RMA Case.

Field	Type	Description
Request reason code	integer	Reason for RMA request. • Other • Defective • Wrong quantity • Damaged • Outdated • Not satisfied • Wrong item • Not as described

Return Merchandise Authorization case line table fields

Information about Return Merchandise Authorization (RMA) case line table fields.

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RMA case line table fields

List of fields on the rma case line table. This table extends the case line table. It defines and manages RMA Case Lines.

Field	Type	Description
Original quantity [original_quantity]	integer	Original quantity of the purchased item.
Defective quantity [defective_quantity]	integer	Quantity of defective items.
Approved quantity [approved_quantity]	integer	Quantity of items approved for RMA.
Customer expected resolution [customer_expected_resolution]	integer	Customer's preferred resolution. Options are: • Repair • Replacement • Refund
Proposed resolution [proposed_resolution]	integer	Proposed resolution by the seller. Options are: • Return • Replacement • Refund • Reject .
Repair type [repair_type]	integer	Location of repair. Options are: • Onsite • Off-site

Return Merchandise Authorization roles

Information about Return Merchandise Authorization (RMA) roles.

Return Merchandise Authorization roles

Roles	Description	Contains roles
sn_csm_rma_case.csm_rma_case_creator	This role provides granular access to create RMA cases and RMA case Lines.	sn_csm_rma_case.writer

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Return Merchandise Authorization roles (continued)

Roles	Description	Contains roles
sn_csm_rma_case.csm_rma_case_viewer	This role provides granular access to read RMA cases and RMA case Lines.	None
sn_csm_rma_case.csm_rma_case_writer	This role provides granular access to edit or update RMA cases and RMA case Lines.	sn_csm_rma_case.viewer

Partner Relationship Management reference

Reference topics provide additional information about Partner Relationship Management.

Member registration form

Use the member registration form on the Partner portal to register members to a partner organization.

Fields and descriptions on the member registration form

Fields on the member registration form on the Partner portal to register members.

Field	Description
Register staff	Whether the staff member is new or existing
Partner organization	Channel partner account to which the member is being registered.
First name	First name of the member.
Last name	Last name of the member.
User ID	Unique ID of the member.
Email	Email of the member.
Role type	Type of role that is assigned to a member, whether Partner Manager or Partner Associate. To learn more about the roles installed with PRM, see Roles and components of Partner Relationship Management.

Related topics

- Using Partner Relationship Management
- Register a member on Partner portal

General Inquiry form

Use the general inquiry form on the Partner portal to raise queries and get in touch with the enterprise.

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Fields on the General Inquiry form

Fields on the general inquiry form on the Partner portal to connect with the enterprise.

Field	Description
Partner Organization	Partner organization to which the partner belongs.
Requested by	User who has raised the request.
Priority	Level of importance of the inquiry.
Subject	Overview of the inquiry.
What can we help you with	Detailed explanation of the inquiry.

Related topics

- Using Partner Relationship Management
- Raise an inquiry on Partner Portal

Channel partner table fields

Use the fields on the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

Fields on the Channel Partner table

Fields on the channel partner table and their descriptions.

Field	Description
Number	Automatically generated number of the channel partner table. **Note:** By default, channel partner numbers start with the prefix CHPRTNR.
Name	Name of the channel partner.
Business function	Business function associated with the channel partner, either sales or service.
Enterprise partner manager	Manager from the enterprise who is associated with the channel partner. When an enterprise manager is added on the channel partner form, they are also added as a member of the enterprise with a role and responsibility.
Partner manager	Manager from the channel partner that supervises partner member activities. When an enterprise manager is added on the channel partner form, they are also added as

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Fields on the Channel Partner table

Fields on the channel partner table and their descriptions.

(continued)

Field	Description
	a member of the enterprise with a role and responsibility.
Status	Status of the channel partner, whether **Suspended** or **Terminated**.
Parent channel partner	Parent entity of the channel partner.
Type	
Company	Company that is associated with the channel partner.
Activity	Updates and information related to the channel partner.

Related topics

Configure Channel Partner table

Partner program table fields

Enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

Fields on the Partner Program table

Fields on the partner program table and their descriptions.

Field	Description
Number	Number of the program.
Name	Name of the program.
Description	Description of the program.
Active	Current state of the program, whether active or not.
Status	Status of the program. A partner program can have one of the following statuses. • Draft • Approved • Rejected • Retired
State date	Start date to associate partners to a program.
End date	Date at which a program is deactivated.

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Fields on the Partner Program table

Fields on the partner program table and their descriptions.

(continued)

Field	Description
Activity	Updates and information related to the program.
Domain	Domain to which the data belongs.

Related topics

Configure Partner Program table

Partner program relationship table fields

Establish a relationship between channel partners and partner programs with the Partner Program Relationship [sn_prm_partner_program_relationship] table.

Fields on the Partner Program Relationship table

Fields on the partner program relationship table and their descriptions.

Field	Description
Number	Unique number of the relationship.
Channel partner	Channel partner associated with this relationship. **Note:** This field is populated from the Channel partner [sn_prm_channel_partner] table.
Program	Program associated with this relationship. **Note:** This field is populated from the Partner program Program [sn_prm_partner_program] table.
Active	State of the program, whether active or not.
Status	Status of the partner program relationship.
Onboarded date	Onboarding date of a partner into the program.
Off-boarded date	Offboarding date of a partner from the program.
Activity	Updates and information related to the partner program relationship.

Related topics

Configure Partner Program Relationship table

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Domain separation for Partner Relationship Management

Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can then control several aspects of this separation, including which users can see and access data.

All partner program records, partner program relationships, and channel partners are present in the domain of the associated program.

Related topics

- Configure Partner Program table
- Partner program table fields

Program segment mapping table fields

Establish a mapping between a program and a segment on the program segment mapping (sn_prm_program_segment_mapping) table to determine whether a segment belongs to the appropriate partner program.

Fields on the program segment table

Fields, types, and their descriptions on the program segment mapping table

Field	Type	Description
Number	String	Number of the program The **Number** field is auto-generated and is read-only.
Program	Reference	Reference to the program configured in the partner program (sn_prn_partner_program) table
Segment	Reference	Reference to the segment configured in the segment (sn_seg_segment) table
Active	True/False	Current state of the program segment mapping, whether active or not
Is Default	True/False	Determines if a segment is marked as default for a program. **Note:** At any given time, there can be only one **is_default** entry for a program and segment relationship record.

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Related topics

- Program segment criteria table fields
- Program criteria table fields

Program segment criteria table fields

You can establish a mapping between the program segment mapping table and the criteria using the program segment criteria (sn_prm_program_segment_criteria) table.

Fields on the program segment criteria table

Fields, types, and their descriptions on the program segment criteria table

Field	Type	Description
Program Segment Mapping	Reference	Reference to the records in the program segment mapping (sn_prm_program_segment_mapping) table
Criteria	Reference	Reference to the entity criteria (sn_req_criteria_customer_condition) table
Active	True/False	Current state of the program segment criteria, whether active or not

Related topics

- Program segment mapping table fields
- Program criteria table fields

Program criteria table fields

Establish a mapping between the partner program (sn_prm_partner_program_relationship) table and the entity criteria (sn_req_criteria_customer_condition) table.

Program Criteria table fields

Fields, types, and their descriptions for the program criteria table fields

Fields	Type	Description
Program	Reference	Reference to partner program (sn_prm_partner_program) table
Criteria	Reference	Reference to the entity criteria (sn_req_criteria_customer_condition) table.

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Program Criteria table fields

Fields, types, and their descriptions for the program criteria table fields

(continued)

Fields	Type	Description
		Note: The mapping is possible only if the criteria of the channel partner is **Condition on**.
Active	True/False	Current state of the program criteria, whether active or not

Related topics

Program segment mapping table fields

Program segment criteria table fields

Deal registration table fields

Store the main details related to a deal submitted by a partner and track the life cycle of the deal through its stages on the deal registration (sn_prm_dr_deal_registration) table.

Deal registration fields

Fields on the deal registration table and their descriptions.

Field	Type	Description
Number	String	Number assigned to the deal registration
Channel partner	Reference	Reference to the channel partner (sn_prm_channel_partner) table
Submitted by	Reference	Reference to the user and the initiator of the channel partner
Partner program	Reference	Reference to partner program (sn_prm_partner_program) table
Deal registration type	Reference	Reference to deal registration type (sn_prm_dr_deal_registration_type) table
Account	Reference	Reference to account (customer_account)
Contact	Reference	Reference to contact (customer_contact)
Short description	String	Summary of the details of the deal

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Deal registration fields

Fields on the deal registration table and their descriptions.

(continued)

Field	Type	Description
Description	String	Detailed information about the deal
State	Choice	Current state of the deal registration • Draft • Pending approval • Approved • Submitted • Closed • Under-review • Canceled
Sales cycle type	Reference	Choice of sales cycle type field in the Opportunity (sn_opty_mgmt_core_opportunity) table
Estimated deal size	Currency	Estimated size of the deal
Estimated close date	Date/Time	Estimated end date of the deal
Assignment group	Reference	Reference to the user group
Assigned to	Reference	Reference to the user (sys_user) that the deal is assigned to. If the deal registration is a B2B deal, only B2B agents are visible in this list. If the deal registration is a B2C deal, only B2C agents are visible in this list.
Consumer	Reference	Reference to consumer (csm_consumer)
Account name	String	Name of the account
First name	String	First name of the contact or consumer
Last name	String	Last name of the contact or consumer
Email	String	Email of the contact or consumer
Opportunity	Reference	Reference to the Opportunity (sn_oppty_mgmt_core_opportunity)

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Deal registration fields

Fields on the deal registration table and their descriptions.

(continued)

Field	Type	Description
Closure code	Choice	State of the closure code. • Rejected • Duplicate • Converted • Incomplete
Active	Boolean	Determines whether the deal registration is active or not
Comments	Journal input	Comments and important information related to the deal, visible to channel partner and enterprise personas
Work notes	Journal input	Comments and important information related to the deal, only visible to enterprise personas
Domain	Domain id	Domain to which the deal registration belongs

Deal registration line table fields

The deal registration line table contains line items linked to a deal registration, each referencing a specific product offering.

Deal registration line table fields

Fields, type, and their description on the deal registration line type table.

Field	Type	Description
Number	String	Auto-generated number of the deal registration line item
Deal registration	Reference	Reference to the deal registration (sn_prm_dr_deal_registration) table
Product offering	Reference	Reference to product offering (sn_prd_prm_product_offering) table

Deal registration type table fields

Configure the deal registration type table to define how a channel partner can be associated with a deal or is contributing to the associated deal.

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Deal registration type fields

Field, field type, and descriptions for the deal registration type table

Field	Type	Description
Name	Translated text	Auto-generated number of the deal registration type
Description	Translated text	Description of the deal registration type
Active	Boolean	Current state of the deal registration type, whether active or not
Details URL	URL	URL to the details page of the deal registration type. The details URL page hosts additional details associated with the deal registration type.
Domain	Domain ID	Domain to which the deal registration type belongs
Applicable to all programs	True/False	Determines whether the deal registration is applicable to all programs or not

Partner program deal type relationship table fields

Configure the Partner Program Deal Type Relationship (sn_prm_dr_pp_deal_type) table to ensure that the correct deal types are associated with the correct partner programs.

Partner program deal type relationship table

Field, field type, and descriptions for the partner program deal type relationship table

Field	Type	Description
Partner program	Reference	Reference to partner program (sn_prm_partner_program) table
Deal registration type	Reference	Reference to deal registration type (sn_prm_dr_deal_registration_type) table
Active	Boolean	Determines whether the partner program and deal type relationship is active or not

Channel Partner components on workspace

View the various components on the channel partner form to get a consolidated overview of all the entities associated with the channel partner.

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Channel partner tabs and components on the workspace

UI component	Description
Partner Overview	Information associated with the channel partner. You can view the following information in the **Overview** tab of the record. • Point of contact - Designated point of contact for the channel partner. • Staff - Staff member associated with the channel partner. • Products installed - List of products that are installed at the channel partner location.
Details	Details associated with the channel partner. To learn more information about the details, see Create Channel Partner record.
Members	Members associated with the channel partner.
Cases	Cases associated with the channel partner.
Partnerships	Partnerships between the channel partner and partner program.
Child Channel Partners	Channel partners that have the current channel partner as their parent.
Install Base Items	Install base items associated with the channel partner.
Deal registrations	Deal registrations associated with the channel partner.
Opportunities	Opportunities associated with the channel partner.
Quotes	Quotes associated with the channel partner.
Register Partner Staff	Register staff to an enterprise. To learn more about registering partner staff, see Register Partner Staff on workspace.

Lead-to-cash foundation reference

Reference for lead-to-cash foundation applications.

Product Catalog Management reference

Reference topics provide additional information about Product Catalog Management.

Components installed with Product Catalog Management

Several types of components are installed with activation of the Product Catalog Management plugin, including tables and user roles.

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Roles installed

Role title [name]	Description	Contains roles
Characteristics viewer [sn_prd_pm.characteristics_viewer]	Reads characteristics and characteristic values.	None
Characteristics writer [sn_prd_pm.characteristics_writer]	Granular role for creating characteristics and characteristic values.	sn_prd_pm.characteristics_viewe
External product viewer [sn_prd_pm.external_product_viewer]	Reads Product Specification Name and Product Offering Name at the field level.	sn_prd_pm.characteristics_viewe
Product catalog admin [sn_prd_pm.product_catalog_admin]	Creates, reads, and updates products, resources, services, product, service, and resource categories, characteristics, and characteristic options. Exports and imports catalog entities and set up any catalog-related system properties.	• sn_prd_pm.characteristics_wri • sn_prd_pm.product_catalog_m • import_admin • sn_gd_core.decision_tree_auth • sn_gd_guidance.guidance_ma • decision_table_admin • cmdb_read • sn_export_entities.export_user • ais_admin • category_manager
Product catalog manager [sn_prd_pm.product_catalog_manager]	Creates, reads, and updates product specifications,	• sn_tmt_core.inbound_queue_r • decision_table_admin • sn_prd_pm.product_catalog_v

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Role title [name]	Description	Contains roles
	resource specifications, and service specifications.	• model_manager • sn_configrule_mgt.rule_writer • sn_customerservice.customer_ • sn_csm_ctxrul_mgt.rule_matrix
Product catalog viewer [sn_prd_pm.product_catalog_viewer]	Views products, resources, services, product, service, and resource categories, characteristics, and characteristic options.	• canvas_user • decision_table_reader • sn_prd_pm.product_model_ch • sn_gd_core.decision_tree_use • sn_prd_pm.characteristics_vie
Product model characteristic granular viewer [sn_prd_pm.product_model_characteristic_granular_viewer]	Views records in the Product Model Characteristics table where the product model's Customer Visible field is true.	None
Product model characteristic viewer [sn_prd_pm.product_model_characteristic_viewer]	Granular role for viewing records in the Product Model Characteristics table.	None

Tables installed

Table	Description
Catalog Category [sn_prd_pm_catalog_category_relationship]	Stores relationships between catalogs and categories.
Category To Category Relationship [sn_prd_pm_category_category_relationship]	Stores relationships between categories.

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Table	Description
Characteristic [sn_prd_pm_characteristic]	Stores characteristic records.
Characteristic Option [sn_prd_pm_characteristic_option]	Stores the options available for a characteristic.
Quantity Mapping [sn_prd_pm_characteristic_option_quantity_mapping]	Stores quantity mapping records for characteristic options.
Characteristic Relationship [sn_prd_pm_characteristic_relationship]	Stores relationships between characteristics.
Characteristic Group [sn_prd_pm_configuration]	Stores characteristic group records.
Distribution Channel [sn_prd_pm_distribution_channel]	Stores distribution channel records.
Needs Template [sn_prd_pm_needs_template]	Stores needs template records.
Needs Template Relationship [sn_prd_pm_needs_template_relationship]	Stores relationship records for needs templates.
Product Price [sn_prd_pm_pricing]	Stores pricing records for products.
Product Characteristics [sn_prd_pm_product_characteristics]	Stores characteristics associated with a product.
Product Model Characteristic [sn_prd_pm_product_model_characteristic]	Stores characteristics associated with a product model.
Product Offering [sn_prd_pm_product_offering]	Stores product offering records.

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Table	Description
Product Offering Catalog [sn_prd_pm_product_offering_catalog]	Stores catalog records for product offerings.
Product Offering Category [sn_prd_pm_product_offering_category]	Stores category records for product offerings.
Product Offering Category Relationship [sn_prd_pm_product_offering_category_relationship]	Stores relationships between product offering categories.
Product Offering Characteristic [sn_prd_pm_product_offering_characteristic]	Stores characteristics associated with a product offering.
Product Offering Family [sn_prd_pm_product_offering_family]	Stores product offering family records.
Needs Based Offering Recommendation [sn_prd_pm_product_offering_recommendation]	Stores recommendation records for product offerings based on customer needs.
Product Offering Relationship [sn_prd_pm_product_offering_relationship]	Stores relationships between product offerings.
Product Offering Relationship Characteristic [sn_prd_pm_product_offering_relationship_characteristic]	Stores characteristics for product offering relationships.
Product Offering Relationship Group [sn_prd_pm_product_offering_relationship_group]	Stores group records for product offering relationships.
Unit of Measure [sn_prd_pm_product_offering_uom]	Stores unit of measure records for product offerings.
Product Specification [sn_prd_pm_product_specification]	Stores product specification records.
Resource Specification [sn_prd_pm_resource_specification]	Stores resource specification records.

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Table	Description
Service Specification [sn_prd_pm_service_specification]	Stores service specification records.
Specification [sn_prd_pm_specification]	Stores specification records.
Specification Category [sn_prd_pm_specification_category]	Stores category records for specifications.
Specification Product Instance Mapping [sn_prd_pm_specification_char_product_instance_mapping]	Stores mapping records between specification characteristics and product instances.
Specification Characteristic [sn_prd_pm_specification_characteristic]	Stores characteristic records for specifications.
Specification Relationship [sn_prd_pm_specification_relationship]	Stores relationship records between specifications.
Template [sn_prd_pm_template]	Stores template records.
Template Characteristic [sn_prd_pm_template_characteristic]	Stores characteristic records for templates.
Template Characteristic Option [sn_prd_pm_template_characteristic_option]	Stores characteristic option records for templates.
Unit of Measure [sn_prd_pm_uom]	Stores unit of measure records.
Unit of Measure Class [sn_prd_pm_uom_class]	Stores unit of measure class records.
Product Visuals	Stores visual asset records for products.

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Table	Description
[sn_prd_pm_visuals]	

Business Portal reference for Sales Customer Relationship Management

Reference topics provide additional information about the components such as roles and tables that are installed with various Business Portal plugins.

Components installed with Sales Cart

Several types of components are installed with activation of Sales Cart including tables, user roles, and scheduled jobs.

Roles installed

Role title [name]	Description	Contains roles
Cart editor [sn_sales_cart.cart_editor]	Creates, deletes, and edits sales cart and sales cart-related entities.	sn_sales_cart.cart_viewer
Cart viewer [sn_sales_cart.cart_viewer]	Views sales cart and sales cart-related entities.	

Scheduled jobs installed

Scheduled job	Description
Migrate proxy orders to sales cart	On-demand job that migrates draft proxy order carts to the new sales cart experience and sets the value of the *sn_sales_cart.show_cart_migration_msg* system property to true. **Note:** If you used the Business Portal and are upgrading to the Zurich release, then you must run the Migrate proxy orders to sales cart job after installing the Sales Cart plugin (sn_sales_cart). Customers then don't lose products added to their carts on the Business Portal.

Tables installed

Table	Description
Sales Cart [sn_sales_cart]	Stores the main sales cart record, including customer, billing, shipping, pricing, and state details.

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Table	Description
Sales Cart Line Characteristic [sn_sales_cart_line_characteristic]	Stores characteristics and options associated with individual sales cart line items.
Sales Cart Line Item [sn_sales_cart_line_item]	Represents individual line items in a sales cart, including products, pricing, quantities, and hierarchical relationships.
Sales Cart Pricing Adjustment [sn_sales_cart_pricing_adjustment]	Stores pricing adjustments applied to a sales cart or its line items, including adjustment type, value, and related references.

Components installed with Customer Request for Quote

Several types of components are installed with activation of the Customer Request for Quote (RFQ) plugin, including tables, user roles, and plugins.

Roles installed

Role title [name]	Description	Contains roles
RFQ writer [sn_cust_rfq_core.rfq_writer]	Provides write and update access to all RFQ tables.	sn_cust_rfq_core.rfq_viewer
RFQ viewer [sn_cust_rfq_core.rfq_viewer]	Provides read-only access to all RFQ tables.	None

Tables installed

Table	Description
Customer Request for Quote [sn_cust_rfq_core_rfq]	Stores RFQ headers with customer information, shipping/billing addresses, pricing totals, and status tracking.
Customer Request for Quote Pricing Adjustment [sn_cust_rfq_core_pricing_adjustment]	Stores discounts, surcharges, and other price modifications applied to the RFQ or individual RFQ line items.
Customer Request for Quote Line Item [sn_cust_rfq_core_line_item]	Stores individual products requested in an RFQ, including quantities, pricing details, and hierarchical relationships between line items.

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Table	Description
Customer Request for Quote Line Characteristic [sn_cust_rfq_core_line_characteristic]	Stores product specifications and configurable attributes for each RFQ line item.

Plugins installed

The following applications are installed as dependencies with the Customer Request for Quote application (sn_cust_rfq):

- Customer Request for Quote Data Model (com.sn_cust_rfq_core)
- Product Catalog Management Core (com.sn_prd_pm)
- Price Management (com.sn_csm_pricing)
- Sales common (com.sn_l2c_sales_common)
- Product Catalog Management Portal (com.prd_pm_portal)
- Agent Workspace (com.agent_workspace)
- Playbooks for CSM (com.sn_csm_playbook)

Request for quote (RFQ) states

An RFQ can move through different states during its life cycle after being submitted by the customer based on agent activity in the CSM Configurable Workspace.

State (Business Portal)	Status (Workspace)	Description
Submitted	New	Customer has submitted an RFQ through the Business Portal.
Submitted	In review	Agent has provided values for the **Assignment group** and **Assigned to** fields for the RFQ in the CSM Configurable Workspace.
Completed	Completed	Agent has converted the RFQ to a quote in the CSM Configurable Workspace and has changed the status of the RFQ record to Pending Customer Acceptance.
Canceled	Canceled	Agent has manually changed the status of the RFQ to Canceled.

Invoice states on Business Portal

Invoices move through different states during its life cycle after an accounts payable specialist processes the invoice.

State	Description
Draft	The invoice has been created but not yet finalized or sent to the customer.
Received	The invoice has been delivered to the customer and is awaiting action.
Accepted	The customer has reviewed and accepted the invoice.
Rejected	The customer has disputed or declined the invoice.

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State	Description
Pending payment	The invoice has been accepted and is awaiting payment from the customer.
Canceled	The invoice has been voided and is no longer valid.
Paid	The customer has submitted payment in full for the invoice.
Partially paid	The customer has submitted partial payment, and a balance remains outstanding.

Invoice case states on Business Portal

An invoice case moves through different states during its life cycle after an accounts payable specialist processes it.

Invoice case states

State	Description
Draft	The invoice case has been created.
New	The invoice case has been submitted for processing.
Work in Progress	The assigned agent is working on the invoice case.
Awaiting Info	The assigned agent is waiting for the named contact to provide requested information for the invoice case.
Resolved	The assigned agent has proposed a resolution for the invoice case to the contact.
Closed	The invoice case has been resolved and the resolution has been accepted by the contact. When all the case lines for an invoice case are in a Final state, the case can be set to Closed. Final states include: • Resolved - Accepted • Resolved - Denied • Canceled
Cancelled	The invoice case has been cancelled. **Note:** Only invoice cases in the Draft state can be cancelled.

Related topics

Invoice case and invoice case line states

Invoice case details on the Business Portal

Field descriptions for invoice case headers and invoice case line list views on the Business Portal.

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Invoice case header fields

Field	Description
Account	Customer account associated with the invoice dispute case.
Contact	Name of the customer contact for the invoice case.
Invoice	Unique, system-generated invoice number being disputed, starting with the prefix ARINV.
Invoice date	Date the invoice was issued.
Priority	Urgency level assigned to the invoice case. The available options are: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low (default)
Request source	Scope selected when creating the invoice case from the Business Portal using the playbook experience. The available options are: • Specific invoice line and single invoice • Invoice header details and multiple invoices

Invoice case line list view

Field	Description
Number	Unique, system-generated invoice case line starting with the prefix INVCSL.
Invoice	The invoice number associated with this case line. This field is displayed for an invoice case created with **Invoice header details, multiple invoices** as the request source.
Invoice line	The invoice line number associated with one of the invoices in this case line. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Description or Short description	A brief summary of the invoice case line item.
State	The current status of the invoice case line. The available options are: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted

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Field	Description
	• Resolved - Denied • Canceled
Invoiced quantity	The quantity that was originally billed on the invoice. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Disputed quantity	The quantity being disputed by the customer. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Approved quantity	The quantity approved for adjustment or credit after dispute resolution. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Invoiced billing location	The billing address that appears on the original invoice.
Invoiced shipping location	The shipping address that appears on the original invoice.
Disputed billing location	The billing address that the customer claims should have been used.
Disputed shipping location	The shipping address that the customer claims should have been used.
Expected start	The planned or expected start date for service or product delivery.
Actual start	The actual date when service or product delivery began.
Product offering	The product or service offering associated with this invoice line. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Sold product	The specific product that was fulfilled and invoiced. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source.
Contact	Customer contact for the invoice case.

Add invoices to case list

Add invoices to case form on the Business Portal enables you to a.

Field	Description
Number	Unique, system-generated invoice number starting with the prefix ARINV.
Short description	A brief summary of the invoice.
Invoice date	Date on which the invoice was created.

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Field	Description
Due date	Date on which the invoice is due for payment.
Status	The current status of the invoice line. For more information, seeInvoice states on Business Portal.
Account	Name of the customer or business entity in the business-to-business (B2B) model.
Customer contact	Any customer contact for your account.
Primary contact	Primary contact for your account.
Billing location	The billing address that appears on the original invoice.
Shipping to location	Reference to the location to which the order on the invoice is shipped.

Invoice line item details on Business Portal

Invoice line list view details on the Business Portal.

Field	Description
Number	Unique, system-generated invoice line starting with the prefix ARINVL.
Invoice number	The invoice number associated with this invoice line starting with the prefix ARINV.
Description	A brief summary of the invoice line item.
Invoice date	Date on which the invoice was created.
Due date	Date on which the invoice is due for payment.
Status	The current status of the invoice line. For more information, seeInvoice states on Business Portal.
Account	Name of the customer or business entity in the business-to-business (B2B) model.
Customer contact	Primary contact for your account.
Product offering	The product or service offering associated with this invoice line.
Invoice line quantity	The quantity that was originally billed on the invoice. line
Line unit price	Unit price of the line item in the invoice.
Sold product	The specific product that was fulfilled and invoiced.
Billing location	The billing address that appears on the original invoice.
Shipping to location	Reference to the location to which the order on the invoice is shipped.

Sales Customer Relationship Management glossary

Learn about terms and concepts that are unique to Sales Customer Relationship Management.

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Glossary terms are listed alphabetically.

A

account

A customer or organization record in ServiceNow Sales CRM.

attract

The phase where sales agents identify and engage potential customers through marketing efforts to generate interest and leads.

automated fallout records

Records created automatically when an order fulfillment workflow includes a "Create fallout action" due to issues like downstream system failures, data problems, or inventory shortages.

B

backorder

An item that can't be delivered immediately due to being out of stock.

business portal

Self-service web portal for B2B customers, providing integrated access to knowledge articles, community forums, service catalogs, and chat bots, enabling customers to browse products, place orders, and manage order cases.

To learn more about using the business portal, see Using the Business Portal.

C

campaign

A coordinated marketing effort to generate leads and promote products or services.

change order

A request to modify an existing order, such as changing quantity, product, or fulfillment details.

channel partners

External organizations like resellers or system integrators that collaborate with an enterprise to sell products and services, and can be managed through Partner Relationship Management.

characteristics and characteristic options

Characteristics define product attributes, while characteristic options are the available values for these attributes, based on customer preferences.

commit

Sales opportunities that representatives are confident will close in the current forecast period.

committed time frame

The deadline for delivering products and services to a customer, often specified in a contract.

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competitor

A record capturing information about companies or products competing for the same customer deal within an opportunity.

contact

A person associated with a customer account or partner organization, serving as the primary communication point.

contract

A legal agreement between a seller and buyer outlining sale terms, including products/services, pricing, quantities, and delivery.

contract management

The process of creating, managing, and executing legal sales contracts from completed quotes.

covered products

Covered products refer to offerings that act as entitlements or contracts linked to a primary product, such as a warranty purchased with a phone.

For more information, see Add Covered Products using Contracts and Entitlement Workflow.

configurable pricing plans

Customizable plans defining the sequence of pricing calculations and adjustments to determine final product prices.

configure, price, quote (CPQ)

A process that intelligently guides every product, pricing, and quoting decision across every channel to deliver fast, accurate, and customer-centric deals. CPQ enables faster sales cycles and a better buyer experience, with less manual work.

cross-sell

A sales strategy for selling related products that differ from the customer's current purchases.

customer engagement sequence (or sequence)

A playbook guiding sales agents in engaging leads across multiple channels.

customer order

Orders for products (tangible or digital) that a customer wants to purchase or change.

D

deal prioritization

Analyzing opportunities based on financial impact to focus on high-value deals.

discount

A price reduction for a product or service offered to customers.

disqualified lead

A lead that is no longer viable for sales engagement.

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DocuSign

An external service for electronic signatures, enabling customers to sign documents digitally.

domain orders

Product, service, and resource orders generated during customer order decomposition, each with a corresponding fulfillment flow and order tasks.

E

enrichment

Enhancing customer orders with additional technical data or attributes necessary for accurate processing and fulfillment.

F

fallout management

A process that identifies, investigates, and resolves order issues, tracking fallout and triggering automated resolution actions.

fallout record

A record created to investigate and resolve processing issues during order fulfillment, generated automatically or manually.

forecast category

Classification of opportunities by closure certainty, with default categories including Won, Commit, Strong Upside, Upside, Pipeline, and Omitted.

For more information, see Sales Forecasting terminology.

forecast model

A framework predicting future sales.

For more information, see Sales Forecasting terminology.

forecast roll-up method (single/cumulative)

Defines opportunity aggregation into forecasts, with "Single" showing each category separately and "Cumulative" aggregating previous categories.

forecast schedule

A process generating the latest forecast data from all system opportunities.

fulfill

Completing customer orders by executing order tasks.

fulfillment flow

The sequence of steps for decomposed orders, including order tasks.

G

gap (Sales Forecasting)

The difference between Quota and Won sales, indicating the amount needed to meet targets.

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H

hierarchical node map

A visual representation of hierarchical structures, showing relationships and levels.

horizontal relationship

A relationship between different product specifications, defined using compatibility rules.

I

inflight change

Modifications made to customer orders during fulfillment.

inventory allocation

Assigning available inventory to customer orders based on configuration, quantity, and eligibility.

J

jeopardy alert

Notifications generated when fulfillment tasks risk missing deadlines.

L

lead

A potential customer created from information captured through various channels.

For more information, see Lead Management.

lead management workflow

A structured process guiding lead progression from creation to opportunity conversion.

lead nurturing

Engaging with leads over time to build relationships and increase conversion likelihood.

lead qualification

Determining if a lead meets criteria to be considered sales-qualified.

lead routing

Automatically assigning leads to sales representatives based on criteria.

lead scoring

Prioritizing leads based on predefined criteria or assigning numerical values based on conversion potential.

lead segmentation

Categorizing leads based on parameters like industry or behavior for targeted marketing.

lead source

The channel through which a lead was acquired.

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lead task

Follow-up actions created to progress a lead.

lead-to-cash cycle

A business process encompassing all activities and tasks involved in selling to customers, fulfilling orders, and delivering ongoing services.

M

MACD (move, add, change, delete/disconnect)

Order action types managing changes to customer orders and service inventories.

For more information, see Action types for customer and service orders.

matrix validations

Rules ensuring data accuracy in pricing and product eligibility matrices.

monthly recurring charge (MRC)

A pricing method with monthly charges for products/services.

multiple configurations

A feature allowing multiple variations of child product offerings.

For more information, see Multiple configurations.

N

needs analysis

A process using needs templates to gather customer requirements and generate product recommendation.

needs templates

Questionnaires associated with needs decision trees for product recommendations.

needs decision tree

A guided decision process presenting questions to agents for product recommendations.

negotiation enhancement (Opportunity Management)

Providing real-time pricing insights to tailor customer offers while maintaining profitability.

non-product attribute pricing adjustment

Pricing adjustments based on non-product characteristics.

O

open state model

A framework controlling product options in the product configurator.

opportunity

A qualified lead with high potential to become a customer.

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opportunity line items

Products/services added to an opportunity.

opportunity management

Analyzing customer needs and generating product recommendations.

For more information, see Opportunity Management

orchestration

Coordinating order fulfillment through fulfillment flows.

orchestration plans for order fulfillment

User interfaces tracking domain orders and tasks, providing hierarchical representations.

order capture

Receiving product or service orders through various methods.

For more information, see Methods of creating orders in Sales Customer Relationship Management.

order case

Cases created for order-related issues or changes.

order decomposition

Breaking down customer orders into product, service, and resource orders.

For more information, see Order decomposition.

order fallout

Failures during order fulfillment due to errors or exceptions.

For more information, see Managing order fallout.

order fulfillment

Completing tasks to fulfill orders, guided by orchestration plans.

For more information, see Order fulfillment.

order hierarchy

The structure of an order, including decomposed orders and tasks.

order life cycle

Stages a customer order progresses through in Order Management including order creation, enrichment, decomposition, and orchestration, and fulfillment.

For more information, see Using Order Management.

order line items (Order Management)

Individual items in customer and service orders.

order management

Process of capturing and fulfilling customer orders.

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order states

The current stage of an order or an order line item in its life cycle, from initial creation through fulfillment and closure. Each state indicates what actions have been completed and what steps remain in the order processing workflow.

For more information, see Order life cycle states.

order tasks

Tasks needed to fulfill domain orders.

For more information, see Order decomposition.

order tracking

Monitoring order locations and statuses.

P

pipeline

Early-stage opportunities with uncertain closure.

pipeline analysis

Analyzing sales pipeline progression.

point of no return (PONR)

The point after which orders can't be changed or canceled.

For more information, see Managing inflight order changes and cancellation requests.

price list

Definitions identifying pricing features and product or service prices.

price list defaulting matrix

Specifying conditions for default price list usage.

price list line

Entries within price lists identifying list prices.

price point (pricing plan)

Prices calculated after specific pricing plan steps.

pricing adjustments

Modifications to standard list prices.

pricing adjustments for bundled products

Price adjustments defined for product offerings when they are sold as part of a product bundle.

pricing engine

A component calculating and applying pricing strategies.

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pricing engine parallel execution

A system property that enables the pricing engine to process transaction lines in parallel to optimize performance, especially for large sets of transaction lines (typically 100 or more).

pricing engine parallelism lines threshold

The minimum lines required for parallel processing with the default value being 100.

pricing entities

Pricing-related elements exportable between ServiceNow instances.

pricing extension points

Integration points for customizing the pricing engine.

pricing matrix

Frameworks for complex pricing adjustments.

pricing plan

A customizable sequence of steps that determine the final price of a product or service. It includes various pricing calculations and adjustments, such as base price determination, discounts, and markups.

pricing plan step

Stages within pricing plans applying specific calculations.

pricing strategies

Methods determining product and service prices.

product

Items or services offered, configured, quoted, and ordered.

product attribute-based pricing adjustment

Adjustments based on certain product characteristics.

product configurator

A user interface embedded within various ServiceNow Sales CRM applications (Opportunity, Quote, and Order Management) that enables agents to dynamically configure complex products or services according to customer requirements, displaying product hierarchy, option selection, and current pricing.

product hierarchy (product configurator)

A section within the product configurator that lists the parent and child product relationships for configurable products, helping agents navigate nested bundles.

product data model

A structured representation of a business's offerings that separates commercial, service, and technical attributes to support the entire lead-to-cash process.

product offer bundling

Allows for the creation of product offer bundles with an offer hierarchy using product offer relationships and relationship groups. These bundles can reference a product specification or specification hierarchy at any level.

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product offer eligibility

Dynamically filters product catalogs, product offering categories, and product offerings to display only eligible items for a specific customer, based on context such as customer accounts, location, and sales contracts.

product offering catalog

The top-level entity in the catalog hierarchy. Catalogs can contain categories, which in turn can have subcategories or product offers.

product offering category

Logical groupings of product offerings within a catalog, making it easier for agents to browse and navigate product offerings.

product offering recommendations

Suggestions for additional products that agents can use to up-sell or cross-sell to customers in quotes, displayed as cards in the contextual side panel.

product offerings

Configurable, order-able products and services with pricing.

product offering version

New iterations of published product offerings.

product specification

Definitions of product options and fulfillment details, containing information such as the product description, pricing, eligibility, and product options.

propose

Presenting offers to potential customers.

Q

qualified lead

A customer whose needs have been analyzed, resulting in the creation of an opportunity.

quotas

Specific sales targets or goals that individual sales representatives are expected to achieve within a defined time frame, helping to measure performance and drive sales efforts.

quote

A formal offer for products or services with specific prices and payment terms.

quote expiration

The date after which a quote becomes invalid, requiring customers to request a new one.

quote line items

Individual quote entries representing specific products or services, where characteristics and pricing can be updated.

quote management

Process of creating and managing quotes for products and services.

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quote PDF documents

PDF documents created from quotes for customer review and electronic signatures.

quote revision

Modifying a previously generated quote to reflect changes in price, products, or terms.

quote versions

Different quote iterations managed through the Revisions tab with sequential version numbers.

R

renew/expand

A classification indicating sales engagement nature: "Renew" for continuing contracts or subscriptions and "Expand" for up-selling or adding products or services.

renewal

Extending an existing customer contract.

resource specification

Technical information for resources, including visuals and activation guides, supporting product and service delivery.

Return Merchandise Authorization (RMA)

Formal authorization for customers to return unwanted or defective items.

revenue forecasting

Projecting future sales volumes or revenue based on opportunities, historical performance, and pipeline analysis.

risk level (jeopardy)

Classification of fulfillment task risk based on delay percentage. Levels include Low, Medium, High, and Critical.

S

sales agreement

A binding agreement between seller and buyer for future transactions.

In the context of quote management, it is a binding agreement changing quote workflow to set products or services according to agreement terms.

salesforce automation

A software that automates a business's sales processes, including lead and opportunity management, sales forecasting, and territory management.

sale cycle

Lead progression through stages until becoming a qualified opportunity and resulting in a sale.

sales cycle type

Classification of opportunity into different sales cycles such as New Customer, Renewal, or Up-sell (to name a few).

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sales forecast dashboard

A visualization tool displaying sales forecast information and targets.

sales forecasting

Projecting future sales or revenue based on opportunities, historical performance, and pipeline analysis.

sales process record

A ServiceNow record tracking potential sales through stages.

sales-qualified lead

A lead meeting specific criteria, ready for sales engagement.

sales quota management

Assigning sales quota targets to representatives or managers based on hierarchy, role, and forecast period.

For more information, see Set up sales quota.

sales targets

Specific goals or objectives for sales teams, territories, or representatives.

self-service

Customer capability to perform tasks and access information independently via Business Portal.

sequence step

Individual activities within sequence tasks, such as customer calls or emails.

sequence task

System-generated tasks including predefined activities for sales agents while engaging with a prospect or customer.

service order

Orders for activating new services or post-sales requests.

For more information, see Order types in Sales Customer Relationship Management.

shipment

Delivering ordered products to specified locations.

signers (quote PDF)

Individuals designated to sign quote PDF documents.

For more information, see Set up PDF document signers.

staggered decomposition

Breaking down customer orders in multiple iterations.

For more information, see Staggered decomposition.

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strong upside

Opportunities with high potential to close but minor uncertainty.

T

telesales

Process of engaging with prospects or customers via phone calls with the goal of generating leads, making direct sales, and building customer relationships.

total annual contract value (ACV)

Total annual contract value representing yearly revenue.

total annual recurring revenue (ARR)

Cumulative annual recurring revenue for recurring products or services.

total monthly recurring revenue (MRR)

Cumulative monthly recurring revenue for recurring products or services.

total contract value (TCV)

Total revenue expected over a contract's lifetime.

transaction header

Top-level line of Sales CRM transactions providing basic information.

transaction line

Detailed records in orders and quotes representing specific products or services.

transient products

Single-use products and services that are identified as transient to differentiate them from persistent products.

U

unit of measure

Standard quantity/increment defining product offering amounts.

up-sell

Sales strategy encouraging customers to upgrade products.

upside

Opportunities with potential to close but lower certainty.

V

versioning

Tracking or managing different versions of entities in Sales Customer Relationship Management.

volume pricing

Pricing adjustments based on item quantity.

For more information, see Configure volume pricing.

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W

weighted amount

Total revenue adjusted by the probability percentage of closing the opportunity.

win rate

Performance metric reflecting successfully closed opportunities as "Won" compared to the total number of opportunities.

won

Forecast category for successfully closed opportunities.

workflow

Defined sequence of steps automating processes in Sales Customer Relationship Management.

X

Y

Z

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Now Assist for Sales Force Automation (SFA)

Now Assist for Sales Force Automation (SFA) application packages ServiceNow® platform AI capabilities to deliver AI-powered insights and automation to drive faster, smarter sales and order processes.

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Get started

Explore	Configure	Use
		
Learn more about Now Assist for SFA	Configure the Now Assist for SFA application to get started	Use the Now Assist for SFA AI agents to complete tasks autonomously

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for

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accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

Exploring Now Assist for SFA

With the Now Assist for Sales Force Automation (SFA) application, sales agents can manage the lifecycle of leads by automating outreach, follow-up communications, demo bookings, and handling lead disinterest or opt-outs. It can operate independently or under human supervision, thereby streamlining engagement and demo scheduling.

Now Assist for Sales Force Automation (SFA) overview

Sales agents use the Now Assist for Sales Force Automation (SFA) AI agent collection to complete these tasks autonomously:

1. Follow-up/Nudge Emails: Automated follow-ups at defined intervals if leads do not respond, with escalation to sales agents for disqualification.
2. Demo Booking/Rebooking/Cancellation: Reviews lead email replies to book, reschedule, or cancel demos, checking sales agent calendars and sending confirmations.
3. Lead Disinterest/Opt-Outs: Identifies disinterest or opt-out requests from emails, updating lead status and ensuring compliance (for example, unsubscribe links).

Now Assist for Sales Force Automation (SFA) users

User	Description
Sales Manager/Admin	Configure the AI agents.
Sales Agent	Access to Now Assist Panel.

Now Assist for Sales Force Automation (SFA) benefits

- Accelerates sales and order processing.
- Improves accuracy and reduces operational risk.
- Enhances user productivity with intuitive AI support.

What to explore next

To learn more about configuring and using Now Assist for Sales Force Automation (SFA), see:

- Configure Now Assist for Sales Force Automation (SFA)
- Use agentic workflows in Now Assist for Sales Force Automation (SFA)

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Configure Now Assist for Sales Force Automation (SFA)

If you have the admin role, you can configure the Now Assist for Sales Force Automation (SFA) application so that agents can use the generative AI capabilities in the CSM Configurable Workspace.

Before you begin

Use the Now Assist Admin console to configure Now Assist for Sales Force Automation (SFA). This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Overview tab in Now Assist Admin.

Role required: admin

Procedure

1. Log in to the ServiceNow instance.
2. Install the Now Assist for Sales Force Automation (SFA) plugin (sn_som_gen_ai). For information about the installation process, see Install Now Assist plugins.

Use agentic workflows in Now Assist for Sales Force Automation (SFA)

Use the Now Assist for Sales Force Automation (SFA) AI agent collection to complete tasks autonomously.

The Help nurture new leads agentic workflow works with a team of AI agents to assist you with managing the life cycle of leads, either independently or under supervision.

Prerequisites to use an agentic workflow

The prerequisites to use an agentic workflow are as follows:

- Make sure that the Now Assist panel is turned on.
- Set up the work schedule for sales agents:
  - Navigate to **All** > **Agent schedule** > **Work schedule**.
  - Create a work schedule for sales agents.
- Duplicate the agentic workflow and activate the triggers.

Available agentic workflow for AI agent collection

Agentic workflow name	Description	Available AI agents
Help nurture new leads	• Outlines the steps required to engage the lead with the sales agent. • Sends initial outreach and follow-up emails. • Retrieves emails, classifies the intent, and routes it to the right sales agent to take action.	• Lead outreach AI agent • Inbound email AI agent • Appointment management AI agent • Lead disinterest AI agent

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Available agentic workflow for AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
	• Schedules, reschedules, or deletes the appointments based on sales agent availability. • Manages the leads who want to opt out or are uninterested.	

Important: By default, all agent workflow and AI agent records are read-only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Help nurture new leads agentic workflow

Use the Help nurture new leads agentic workflow to process the entire lead record process.

Help nurture new leads agentic workflow overview

You can use the Help nurture new leads agentic workflow to do the following:

- Proactively engage with initial leads
- Book an appointment or demo to get the lead closer to qualification
- Identify opt-outs and disinterest for lead disqualification

To modify the Help nurture new leads agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the Now Assist panel.

Important: When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Help nurture new leads use cases

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Use cases**.
2. Select **Help nurture new leads**.

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Help nurture new leads AI agents

The following table lists the Help nurture new leads AI agents.

Important: In the Define availability screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

AI agents and their roles in the Help nurture new leads use case

AI agent	AI agent role
Lead outreach AI agent	Initiates the outreach and follow-up flow. This flow supports sales agents by sending the initial outreach and follow-up emails.
Lead disinterest AI agent	Handles disqualification of the lead and opt-out requests.
Inbound email AI agent	Initiates the inbound response handler flow. This flow supports sales agents by retrieving and analyzing the latest email records. Based on its analysis, it recommends necessary actions required to move forward with the lead.
Appointment management AI agent	Assists in managing appointments for lead records. The agent is capable of creating, updating, or canceling appointments based on the availability of the lead owner.

Roles required to create an agentic workflow

The roles required to activate and access the workflow are as follows.

Roles and responsibilities

Roles	Responsibilities
Sales AI admin	• Configure the agentic workflow. • Change AI settings. • Create and manage new workflows and AI agents.
Sales AI user	Interact with AI using the Now Assist panel.

Activating the agentic workflow

Activating duplicated workflow

1. Navigate to the Help nurture new leads agentic workflow and duplicate it. The workflow also duplicates any triggers associated with that agentic workflow.
2. Navigate to the duplicated workflow and activate the trigger (the lead record is created or updated).

Note: You can activate the triggers associated with the workflow.

Activating external triggers

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1. Navigate to **All** > **System Policy** > **Email** > **Inbound actions**. There are 2 inbound actions that must be activated:
   - Activate the **Trigger agentic workflow for lead** inbound action.
   - Activate the **Trigger agentic workflow for lead task** inbound action.
2. Navigate to the SalesAIAgentsConstants script and change the value of HELP_NURTURE_NEW_LEAD_FLOW_ID property to the sys_id of the duplicated agentic workflow.

Nurturing a lead

To nurture a lead, perform the following steps:

1. Navigate to **All** > **AI Agent Studio**.
2. Review the information in the Describe and connect screen, make the necessary updates to ensure that the use case adapts to your requirements, and then select **Save and Continue**.
3. In the Define trigger screen, activate the triggers that adapt to your requirements, or create your own triggers, and then select **Save and Continue**.
4. In the Select display screen, perform the following steps:
   a. Select where you want the use case output to be displayed.
   b. Use the arrow next to it to add roles that can access the use case.

      Note: The sales_agent is the default role for the use case.

   c. Select **Save and test**.

The agent executes the testing in AI Agent Studio for the use case.

In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

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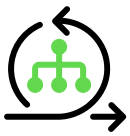
Now Assist for Configure, Price, Quote (CPQ)

Use the ServiceNow® Now Assist for Configure, Price, Quote (CPQ) application to reduce manual effort, improve consistency, and support faster, more accurate quote creation.

Get started

Select a tile to learn how you can use AI capabilities in CPQ workflows.

Explore	Configure	Use Now Assist for Configure, Price, Quote (CPQ) generative AI
 Learn more about Now Assist for Configure, Price, Quote (CPQ)	 Configure the Now Assist for Configure, Price, Quote (CPQ) application to get started	 Use the generative AI capabilities offered by Now Assist for Configure, Price, Quote (CPQ)

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

Exploring Now Assist for Configure, Price, Quote (CPQ)

With the Now Assist for Configure, Price, Quote (CPQ) application, you can use generative AI to summarize quotes and provide immediate, comprehensive visibility into key quote information such as products, pricing, and terms. This functionality reduces errors, accelerates quote creation, and helps teams deliver accurate quotes faster.

Now Assist for CPQ overview

The AI summarization of quotes provides sales teams and stakeholders with fast, reliable insight into complex quote information. AI summaries help:

- Deliver fast, consistent insight into key quote details.
- Reduce manual review and speed up quote turnaround.
- Surface issues early to prevent deal delays.
- Keep teams aligned and helps move deals forward.

Now Assist for CPQ skills

The Now Assist for CPQ application includes the generative AI skill that enables quote summarization. When activated, this skill helps agents gather context faster.

Get started by performing the following tasks:

- Configuring Now Assist for Configure, Price, Quote (CPQ)
- Summarize a quote using quote summarization

Configuring Now Assist for Configure, Price, Quote (CPQ)

Configure the Now Assist for Configure, Price, Quote (CPQ) application so that your agents can use the generative AI skills in CSM Configurable Workspace and Business Portal.

Use the Now Assist Admin console to configure Now Assist for CPQ. Use the Now Assist for CPQ plugin to install and configure the generative AI skills.

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Customize a quote summarization skill in Now Assist for Configure, Price, Quote (CPQ)

Configure the Now Assist for Configure, Price, Quote (CPQ) application so that the agent can use the generative AI skills in the CSM/FSM Configurable Workspace and Business Portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. In the **Customer** workflow group, view the skills for Now Assist for CPQ under Sales CRM.
3. Make a copy of an active quote summarization skill by selecting the More actions icon ••• and then select **Make a copy** to create a version that you can customize.
4. In the General details step, fill in the fields.
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.

   Note: The **More details on the skills** fields are read-only.

5. In the View quote input step, configure the base input table fields and related lists for the Quote template.

   Note: The **Choose base table** field is ready-only.

   Each skill relies on a base input table and input fields with descriptions to provide context for the *Now LLM Service* to generate a response.

   a. Add base input table fields by selecting **New base input field**.

   The following table lists the base input table fields and descriptions.

   ### Base input fields

Field	Description
Base input field	Field in the base input table whose value this skill uses in its response. For example, `Number`.
Field description	Description of the base input field value. For example, `Quote number`.

   b. Configure the rule conditions to filter the data by using the condition builder.

   The rule conditions determine when the input template is used. By default, the record state determines the input template that the *Now LLM Service* uses.

   You can build the condition out further by selecting **New condition set** and configuring additional parameters.

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c. Select the **New data source** field to configure the additional input data sources, as needed.

   Adding input data sources (such as the related tables, activity streams, and relationships) provide more context to the *Now LLM Service* in a related list.

   You can also add the rule conditions to these additional data sources.

   You can build the condition out further by selecting the **New condition set** field and configuring additional parameters.

   The selection of the related table fields has a direct impact on the quality of the corresponding prompt header.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt output.

   Review and test the default prompt provided. The prompt is fixed and can't be customized directly within this step or from the Now Assist Admin screen.

   To customize or create prompts, select **Edit prompt in *Now Assist* Skill Kit**. You are redirected to the *Now Assist* Skill Kit, where you can manage prompt configurations for the skill. For more information, see Now Assist Skill Kit.

   a. Select a record in the Test output section and test the prompt response output format by selecting **Run Test**.

   b. Select **Save and continue** to go to the next step.

7. Use the Define availability section to define how the skill is available to users.

   a. Configure the skill to be available to users, or select the conditions that must be met before the skill is available.
   Selecting the **Customize skill availability** field displays a condition builder to filter the data further.

      Select the **New condition set** field to configure additional conditions, as needed.

   b. Select **Save and continue** to go to the next step.

8. Specify which users can access the skill in the Define access section.

   By selecting specific roles, you're controlling who can use the skill. The roles that you choose will also be available in the Select display step.

   Default and Custom roles:

   - If no changes are made, the default role automatically appears in **User access - Access Control List (ACL)**.
   - Apply role restrictions when the skill is invoked by selecting **Roles** and defining which data and resources (for example, tables) the user can access in **Role restrictions to skill**.

     Note: If you add a role in the Define Access step, you must manually select it in the **Select Display** field to make it active.

9. Configure the **In-product desktop** field to display the quote summarization.

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a. Display Now Assist skills on the forms and workspaces by selecting the **In-product desktop** field.
For the skills that appear in-product, select the arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

10. Review and activate the skill.
    a. Review your choices and select **Activate** to complete the skill customization.
    b. Generate the quote summary by selecting **Summarize** in a quote.

Using Now Assist for Configure, Price, Quote (CPQ)

Use agents in an agentic workflow or as standalone agents to achieve specific automated outcomes.

Use Now Assist for CPQ to generate a summary of a quote to:

- Summarize key quote components during early customer discussions or pre-discovery.
- Provide an updated view of the quote after revisions, without requiring the review of multiple records.
- Provide a single, consolidated snapshot of all actions, tasks, and notes derived from a quote in one place.
- Highlight custom pricing, discounts, and negotiated changes made during the quoting process.
- Review the quote prior to sending it to the customer to confirm accuracy and completeness.
- Support internal handoffs by summarizing the quoted offer for internal teams.

Summarize a quote using quote summarization

Summarize a quote to generate a consolidated report of a quote record to quickly understand the quote without manually reviewing multiple fields, line items, or related records.

Before you begin

Role required: sn_sales_common.sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote to summarize.
3. In the **Quote summary** field, select **Summarize**.

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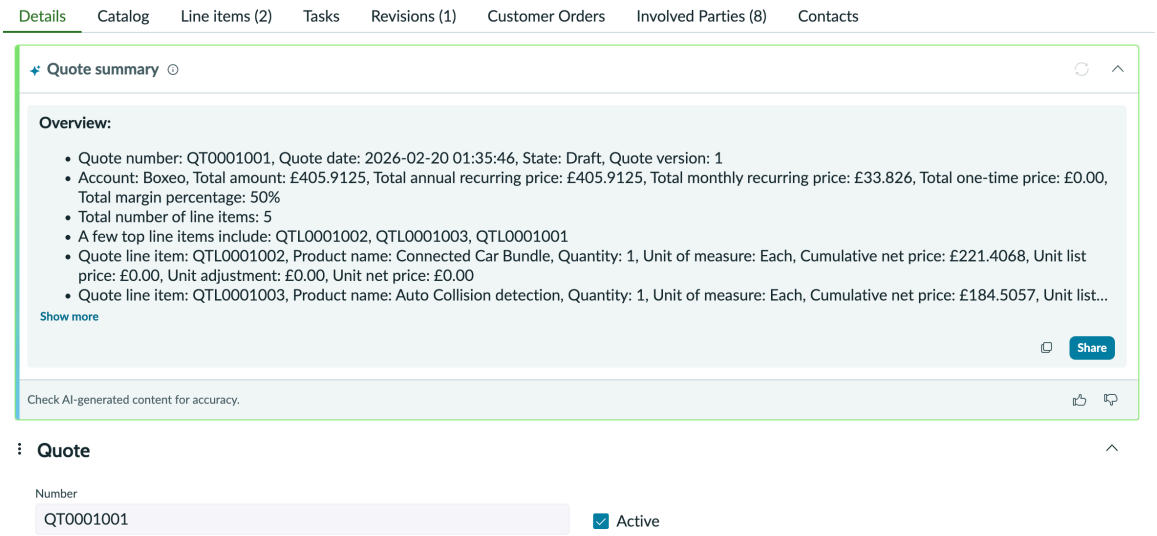

The **Quote summary** field appears above the Quote section inside the **Details** tab. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **Show more** and use the scroll bar to view the rest of the content.

Note: Generating and displaying the summary may take several seconds.

4. **Optional:** When you're finished summarizing a quote, you can save it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the work notes	**a.** Select **Share**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon or the collapse card icon to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon. If you think that the summary wasn't helpful, select the not helpful icon. This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).

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Option	Procedure
Copy the quote summary	Select the copy to clipboard icon to use the quote summary information for another purpose, such as pasting into an email.
View the information about the quote summary	If you want to check details about the summary, select the more info icon.

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Now Assist for Order Management

Use the ServiceNow® Now Assist for Order Management application to improve agent and customer productivity and efficiency in their respective workflows.

Get started

Select a tile to learn how you can use AI capabilities in order management and self-service workflows.

Explore	Configure	Use Now Assist for Order Management generative AI
		
Learn more about Now Assist for Order Management	Configure the Now Assist for Order Management application to get started	Use generative AI capabilities offered by Now Assist for Order Management

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important:

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- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

Exploring Now Assist for Order Management

With the Now Assist for Order Management application, you can use generative AI to summarize complex orders involving multiple products, services, and fulfillment tasks for faster, more accurate decision-making and improved customer responsiveness.

Now Assist for Order Management overview

AI summarization of orders provides a real-time, consolidated view of complex orders spanning multiple products, services, and fulfillment tasks. It empowers agents to:

- Enhance the customer experience with timely updates, clear communication, and seamless handoffs that lead to better satisfaction.
- Track changes and validate details to maintain consistency and transparency.
- Minimize errors and improve communication across suppliers and partners.
- Monitor tasks that are at risk of missing deadlines and take corrective action early.
- Assign tasks to appropriate resources based on priority and skill.
- Make rapid prioritization decisions to avoid delays.

Now Assist for Order Management skills

The Now Assist for Order Management application includes the generative AI skill that enables:

1. Order agent: Quickly check order status, identify issues, and resolve them without navigating to multiple tabs or line items.
2. Fulfillment agent: Gain visibility into the fulfillment progress, spot risks early, and intervene proactively.

Generative and agentic AI applications for enabling customer self-service

The Now Assist for Order Management includes the following applications that enable business-to-business (B2B) customers to submit order and invoice cases autonomously in simple conversational format from the Business Portal.

Manage Order Operations

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The Manage Order Operations application (com.sn_ord_ops_aias) includes the following AI agents:

- Manage order operations AI agent: Enables B2B customers to submit order cases autonomously from the Business Portal using natural language.
- Order exception AI voice agent: Enables B2B customers to submit order cases using voice calls.

Get started by performing the following tasks:

- Enable the manage order operations agent on the Business Portal
- Configure ATP API for the manage order operations agent

Manage Invoice Operations

The Manage Invoice Operations application (com.sn_inv_ops_aias) includes the following AI agents and agentic workflow:

- Invoice dispute intake assistant AI agent: Enables B2B customers to submit invoice dispute cases autonomously from the Business Portal using natural language.
- Invoice dispute AI voice agent: Enables customers to submit invoice dispute cases using voice calls.
- Invoice dispute assist agentic workflow: Enables finance agents to validate and resolve invoice disputes using a guided experience from the Now Assist panel in the CSM/FSM Configurable Workspace. Internally, it uses the invoice dispute support assistant AI agent to validate invoice information, trigger API calls to check quantity discrepancies and provide resolutions.

Get started by performing the following tasks:

- Configure AI-assisted invoice dispute intake on the Business Portal
- Configure the invoice quantity validation extension point
- Configure the invoice dispute resolution extension point
- Make the invoice dispute assist workflow available in the Now Assist panel

Related topics

Configuring Now Assist for Order Management

Using Now Assist for Order Management

Configuring Now Assist for Order Management

If you have the admin role, you can configure the Now Assist for Order Management application so that your agents can use the generative AI skills in the CSM/FSM Configurable Workspace and Business Portal.

Installing the Now Assist for Order Management application installs the following AI applications and skills on your ServiceNow instance:

- Manage Order Operations (com.sn_ord_ops_aias)
- Manage Invoice Operations (com.sn_inv_ops_aias)
- Summarization for Order Management

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Request the Now Assist for Order Management application from the ServiceNow Store and install it using the Application Manager. For more information, see Install a ServiceNow Store application.

Configuring order summarization skill

The Now Assist skills for Sales CRM:

- Order summarization for order capture
- Order summarization for order fulfillment

For information on customizing the order summarization skill, see Customize an order summarization skill in Now Assist for Order Management.

Note: Microsoft Azure, Amazon bedrock, Now LLM, Now LLM LTS, and Google Cloud vertex AI are currently the providers for this Now Assist application's skills.

Configuring the Manage Order Operations application

Business-to-business (B2B) customers can submit order cases using Now Assist Virtual Assistant from the Business Portal. Interaction channels include chat and voice options. Before you can use the AI agents for managing order operations from the Business Portal:

- Enable the manage order operations agent on the Business Portal
- Configure ATP API for the manage order operations agent

Enable AI voice agent support on your phone channels by installing the Now Assist Voice [sn_voice_aia] plugin. For more information, see Deploy AI voice agents.

Configuring the Manage Invoice Operations application

Business-to-business (B2B) customers can submit invoice cases using Now Assist Virtual Assistant from the Business Portal. Interaction channels include chat and voice options. Billing specialists and agents can use the invoice dispute assist agentic workflow from the CSM/FSM Configurable Workspace to resolve invoice cases. Before you can use the AI agents for managing order operations agent in the Business Portal:

- Configure AI-assisted invoice dispute intake on the Business Portal
- Configure the invoice quantity validation extension point
- Configure the invoice dispute resolution extension point
- Make the invoice dispute assist workflow available in the Now Assist panel

Enable AI voice agent support on your phone channels by installing the Now Assist Voice [sn_voice_aia] plugin. For more information, see Deploy AI voice agents.

Configure Chat Summarization to enable the AI summarization and recommendation features in Active Chat. For more information, see Configure chat summarization.

Related topics

Overview tab in Now Assist Admin

Configuring Now Assist Admin features

Using Now Assist for Order Management

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Customize an order summarization skill in Now Assist for Order Management

Configure the Now Assist for Order Management application so that your order agent and fulfillment agent can use the generative AI skills in the CSM/FSM Configurable Workspace and Business Portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. In the **Customer** workflow group, view the skills for the Now Assist for Order Management under SOM.
3. Copy the order summarization skill for customization.

   a. Make a copy of an active skill by selecting either **Order Summarization (Order Capture)** or **Order Summarization (Order Fulfillment)**.

   Note: Only one version of a skill can be active at a time for each skill. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated.

   b. Select the More actions icon ••• for the skill, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the All section.

   c. On the copied skill, select **Activate skill** to open and modify it.
   A guided setup leads you through configuring General details, View order input, Customize prompt output, Define Availability, Define access, select display, and Review and activate of the skill to be customized.

4. In the General details step, fill in the fields.
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.

   Note: The **More details on the skills** fields are read-only.

5. Configure the base input table fields and related lists for the different input templates (Product Order Capture or Service Order Capture) for the skill.

   Note: The **Choose base table** field is ready-only.

   Each skill relies on a base input table and input fields with descriptions to provide context for all the *`Now LLM Service`* to generate a response.

   Select only those related tables that are offered as the base system as part of the input data.

   a. Select **+New base input field** and configure the base input table fields for each input template (Product Order Capture or Service Order Capture).

   Add multiple base input fields, as necessary.

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The following table lists the base input table fields and descriptions.

Base input fields

Field	Description
Base input field	Field in the base input table whose value this skill uses in its response. For example, `Number`.
Field description	Description of the base input field value. For example, `Order number`.

b. For each input template, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that all Now LLM Service use.

You can build the condition out further by selecting **New condition set** and configuring additional parameters.

c. Configure the additional input data sources by selecting **New data source** for each input template, as needed.

Adding input data source, like the related tables, provides more context to all Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

The selection of the related table fields has a direct impact on the quality of the corresponding prompt header.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt output.

Review and test the default prompt provided. The prompt is fixed and can't be customized directly within this step or from the Now Assist Admin screen.

To customize or create prompts, select **Edit prompt in *Now Assist* Skill Kit**. You are redirected to the *Now Assist* Skill Kit, where you can manage prompt configurations for the skill. For more information, see Now Assist Skill Kit.

a. For each input template (Product Order Capture or Service Order Capture), select a record in the Test output section and test the prompt response output format by selecting **Run Test**.

b. Select **Save and continue** to go to the next step.

7. Use the Define availability section to define how the skill is available to users.

a. Configure the skill to be available to users, or select the conditions that must be met before the skill is available.
Selecting **Customize skill availability** displays a condition builder to filter the data further.

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Select **New condition set** to configure additional conditions, as needed.

b. Select **Save and continue** to go to the next step.

8. Specify which users can access the skill in the Define access section.

   By selecting specific roles, you're controlling who can use the skill. The roles that you choose will also be available in the **Select display** step.

   Default and Custom roles:

   - If no changes are made, the default role sn_ind_tmt_orm.order_agent automatically appears in **User access - Access Control List (ACL)**.
   - Apply role restrictions when the skill is invoked by selecting **Roles** and defining which data and resources (for example, tables) the user can access in the **Role restrictions to skill** field.

     Note: If you add a role in the **Define Access** step, you must manually select it in the **Select Display** field to make it active.

9. Configure the **In-product desktop** field to display the order summarization for Order Management.

   a. Display Now Assist skills on the forms and workspaces by selecting the **In-product desktop** field.
   For the skills that appear in-product, select the arrow to identify the roles that can use the skill.

   b. Select **Save and continue** to go to the next step.

10. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    Select **Summarize** in an order to generate the order summary.

Enable the manage order operations agent on the Business Portal

Activate and associate the manage order operations agent on the Business Portal so that your customers can use this agent to submit order cases autonomously using Now Assist.

Before you begin

Activate and enable a chat assistant such as Now Assist in Virtual Agent to use in the Business Portal. For more information, see Configuring assistants overview.

AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **AI agents** tab.

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3. Select the **Manage order operations** agent to start configuring it.
4. On the Define the specialty page, select **Save and continue**.
5. From the navigation pane, select **Select channels and status**.
6. On the Select channels and status page, set the **Engage via Virtual Agent assistants** option to **Allow**.
7. Specify where this AI agent is discoverable by selecting a virtual assistant from the **Choose chat assistants** field.
   For this use case, select **Now Assist in Virtual Agent (Default)**.
8. **Optional:** Promote the agent to add it to the list of promoted topics.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer, select the **AI agents** tab.
   c. Select **Promoted** from the More actions icon ⋮ for the manage order operations agent.

Result
The chat assistant is activated in the Business Portal.

Related topics
- AI Agent Studio
- Promote or demote LLM conversational subflows, actions, and topics in Assistant Designer
- Assistant Designer Asset library

Configure ATP API for the manage order operations agent

Create an Available-to-Promise (ATP) API call that enables the manage order operations agent to check product availability and determine the earliest possible delivery date when customers request expedited shipping.

Before you begin
The application scope must be set to Order Exception AI Agents. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

About this task
The demo data for the manage order operations agent includes a sample implementation called orderExpeditionCheckDemo as part of the sn_ord_ops_aias.orderExpeditionCheckEP extension point. To enable real-world functionality such as checking on-hand quantities and delivery dates from external Enterprise Resource Planning (ERP) systems like SAP or Oracle, you should replace the demo data implementation with your custom ATP API.

Procedure
1. Log in to the ServiceNow instance.
2. Navigate to **All** > **Scripted Extension Points** > **Scripted Extension Points**.
3. In the **API Name** field, search for the `sn_ord_ops_aias.orderExpeditionCheckEP` scripted extension point.
4. View the sample script included in the demo data by selecting **sn_ord_ops_aias.orderExpeditionCheckEP**.

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5. Create your own implementation of the sn_ord_ops_aias.orderExpeditionCheckEP extension point by selecting the **Create implementation** related link.
6. On the Script Include orderExpeditionCheckEP form, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Edit the getAvailability function in the script to implement your own logic for checking product availability and delivery dates.

Function name	Description	Input and output
getAvailability	Placeholder function meant to be overridden. Use this placeholder to implement the logic to: ○ Query external inventory or ERP systems. ○ Determine if the product is available. ○ Calculate the earliest delivery date based on the requested date and stock levels.	Input: The getAvailability function takes the order number of the Customer order record and the revised date requested by the customer as input. Output: `{ "isAvailaible": <true/false - denotes if stock is available>, "earliestDelivery": <earliest delivery date in yyyy-MM-dd format>, "isError": <true/false - denotes if there is any failure in the API call>, "errorMessage": <error message string in case of failure> }`

8. Select **Update**.
9. **Optional:** Validate your implementation by requesting order changes from the Business Portal using the Now Assist Virtual Assistant.
   For more information, see Request order changes using Now Assist Virtual Assistant.

Related topics

Using extension points to extend application functionality

Creating and adding a scripted extension point

Configure AI-assisted invoice dispute intake on the Business Portal

Activate and associate the invoice dispute intake assistant AI agent on the Business Portal so that your customers can submit invoice cases autonomously using Now Assist Virtual Assistant.

Before you begin

Activate and enable a chat assistant such as Now Assist in Virtual Agent to use in the Business Portal. For more information, see Configuring assistants overview.

AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select

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Users with specific roles for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **AI agents** tab.
3. Select the **Invoice Dispute Intake Assistant** agent to start configuring it.
4. On the Define the specialty page, select **Continue**.
5. From the navigation pane, select **Select channels and status**.
6. On the Select channels and status page, set the **Engage via Virtual Agent assistants** option to **Allow**.
7. To specify where this AI agent is discoverable, select a virtual assistant from the **Choose chat assistants** field.
   For this use case, select **Now Assist in Virtual Agent (Default)**.
8. Select **Save and test**.
9. **Optional:** Promote the agent to add it to the list of promoted topics.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer, select the **AI agent** tab.
   c. Locate the Invoice Dispute Intake Assistant AI agent and select **Promoted** from the More actions icon ⋮.

Result
The chat assistant is activated in the Business Portal.

Related topics

AI Agent Studio

Promote or demote LLM conversational subflows, actions, and topics in Assistant Designer

Assistant Designer Asset library

Configure the invoice quantity validation extension point

Implement the invoice quantity check extension point to enable the invoice dispute intake assistant AI agent to validate a customer's quantity dispute claim by reconciling it with delivered quantity data from your Enterprise Resource Planning (ERP) or inventory system.

Before you begin
The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

About this task
The demo data for the Manage Invoice Operations application includes a sample implementation called `invoiceQuantityCheckDemo` as part of the `sn_inv_ops_aias.invoiceQuantityCheckEP` extension point. To enable real-world

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validation of quantity disputes against your external ERP system or inventory delivery records, replace the demo implementation with your own custom logic.

Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
3. Search for the `sn_inv_ops_aias.invoiceQuantityCheckEP` scripted extension point in the **API Name** field.
4. View the sample script included in the demo data by selecting **sn_inv_ops_aias.invoiceQuantityCheckEP**.
5. Create your own implementation of the extension point by selecting the **Create implementation** related link.
6. On the Script Include form, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Override the functions in the script to implement your logic for validating the customer's quantity dispute claim.

Function name	Description	Input and output

`checkInvoiceQuantityWithInvoiceCase`	Placeholder function meant to be overridden. Use this placeholder to implement the logic to validate quantity disputes across multiple invoice lines associated with an invoice case.	Input:
		`{ "invoiceNumber": <Invoice number of the customer invoice record>, "verifiedInvoiceLineDetails": <Array of invoice line details>`
		Output:
		`{ “invoiceLineNumber”: <Invoice line number against which the dispute was raised>,`

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Function name	Description	Input and output
		"disputedQuantity": <Disputed quantity claimed by the customer, as available in the invoice case line> }
checkInvoiceQuantity	Placeholder function meant to be overridden. Use this placeholder to implement the logic to validate a quantity dispute by reconciling the customer's claimed quantity against your ERP or inventory delivery records.	Input: { "invoiceNumber": <Invoice number of the customer invoice record>, "invoiceLineNumber": <Invoice line number of the customer invoice line record against which the dispute was raised>, "userEnteredQty": <Disputed quantity claimed by the customer> } Output:

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Function name	Description	Input and output
		{ "invoiceLineNumber": <Invoice line number against which the dispute was raised>, "invoiceQty": <Actual quantity on the invoice line record>, "deliveredQty": <Integer representing the disputed quantity claimed by the customer>, "qtyMatch": <Boolean; true if the customer's dispute claim is valid, false if the invoiced and claimed quantities match>,

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Function name	Description	Input and output
		"isError": <Boolean; true if the API call failed, false if the API call was successful>, "errorMessage": <Error message string to handle failure scenarios> }

8. Select **Update**.
9. **Optional:** Validate your implementation by submitting an invoice dispute from the Business Portal using the Now Assist Virtual Assistant.
   For more information, see Dispute invoice issues using Now Assist Virtual Assistant.

Related topics

Using extension points to extend application functionality

Creating and adding a scripted extension point

Configure the invoice dispute resolution extension point

Implement the invoice case resolution extension point to enable the invoice dispute intake assistant AI agent to resolve a validated quantity dispute by issuing a credit note or placing an order for the disputed quantity.

Before you begin

The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

About this task

The demo data for the Manage Invoice Operations application includes a sample implementation called `invoiceCaseResolutionEP` as part of the `sn_inv_ops_aias.invoiceCaseResolutionEP` extension point. To enable real-world resolution of validated invoice disputes, such as issuing credit notes or placing orders through your external systems, replace the demo implementation with your own custom logic.

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Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
3. Search for the `sn_inv_ops_aias.invoiceCaseResolutionEP` scripted extension point in the **API Name** field.
4. View the sample script included in the demo data by selecting **sn_inv_ops_aias.invoiceCaseResolutionEP**.
5. Create your own implementation of the extension point by selecting the **Create implementation** related link.
6. On the Script Include form, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Override the `processInvoiceDisputeResolution` function to implement your resolution logic for validated invoice quantity disputes.

Function name	Description	Input and output

`processInvoiceDisputeResolution`	Placeholder function meant to be overridden. Use this placeholder to implement the logic to resolve a validated invoice quantity dispute by processing the customer's preferred resolution option, such as issuing a credit note or placing an order for the disputed quantity.	Input:
		`{`
		`"invoiceCase": <Invoice case number of the invoice case record>,`
		`"resolutionOption": <String value representing the resolution option selected by the customer>,`
		`"conversationSummary": <Optional. String containing the summarized`

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Function name	Description	Input and output

		transcript of the complete conversation.>
		}
		
		Output:
		{
		
		"hasResolved": <Boolean; true if the resolution was processed successfully, false if the resolution failed>,
		
		"creditNote": <String containing the generated credit note number>,
		
		"orderNumber": <String containing the generated order number>
		}

8. Select **Update**.
9. **Optional:** Validate your implementation by submitting an invoice dispute from the Business Portal and selecting a resolution option using the Now Assist Virtual Assistant.
   For more information, see Dispute invoice issues using Now Assist Virtual Assistant.

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Related topics

Using extension points to extend application functionality

Creating and adding a scripted extension point

Make the invoice dispute assist workflow available in the Now Assist panel

Configure the invoice dispute assist agentic workflow in AI Agent Studio to make it available to agents in the Now Assist panel in the CSM/FSM Configurable Workspace.

Before you begin

The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: sn_aia.admin

About this task

Agentic workflows that are installed with Now Assist applications aren't automatically activated. You must activate the invoice dispute assist agentic workflow before it can be used in the Now Assist panel. After you enable the workflow, you can optionally promote it to make it appear as a suggested topic in the Now Assist panel for faster access.

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **Agentic workflows** tab.
3. Select the **Invoice Dispute Assist** agentic workflow.
4. From the navigation pane, select **Select channels and status**.
   You could leave the settings in the remaining tabs at their default values.
5. On the Select channels and status page, enable the **Engage via Now Assist panel** option.
6. Select **Save and test**.
7. **Optional:** Promote the agentic workflow to add it to the list of suggested topics in the Now Assist panel.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer page, select the **Agentic workflows** tab.
   c. Narrow your search by selecting **Now Assist Panel - Platform (default)** from the **Select assistant** drop-down menu.
   d. Locate the Invoice Dispute Assist agentic workflow and select **Promoted** from the More actions icon .

   The invoice dispute assist agentic workflow appears as a promoted topic in the Now Assist panel, making it directly accessible to agents without requiring a search.

Related topics

Activate an agentic workflow template

Using Now Assist for Order Management

Use agents in an agentic workflow or as standalone agents to achieve specific automated outcomes.

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Enhancing agent productivity in Order Management workflows

Order summarization

Use Now Assist for Order Management to summarize complex orders across products, services, and fulfillment tasks, enabling you to quickly understand status, take the right actions, and avoid navigating fragmented views to make next steps easier and improving productivity. For more information, see Summarize an order using Summarization for Order Management.

Bulk order updates

Manage order updates, such as applying bulk changes to order line items, removing order lines, or creating an order case, without navigating between individual records. For more information, see Manage order updates with Now Assist.

Managing order cases using Now Assist

Business-to-business (B2B) customers can request changes to their unfulfilled orders from the Now Assist Virtual Assistant in the Business Portal using chat and voice channels.

- Request order changes using Now Assist Virtual Assistant
- Request order changes via calls

Managing invoice cases using Now Assist

B2B customers can dispute invoice cases from the Now Assist Virtual Assistant in the Business Portal using chat and voice channels.

- Dispute invoice issues using Now Assist Virtual Assistant
- Dispute invoice cases via calls

Now Assist for Order Management includes the invoice dispute assist agentic workflow. Billing specialists can invoke the invoice dispute assist agentic workflow from the Now Assist panel to review the invoice case, validate the dispute, view similar cases, and complete resolution actions using a guided experience. Using an agentic workflow helps reduce manual investigation, improves consistency, and helps agents resolve invoice disputes efficiently while keeping customers informed throughout the process. For more information, see Resolve invoice disputes using agentic workflow.

Email notifications are sent to the customer when an invoice case is created or closed, but only for cases initiated through the Now Assist Virtual Assistant in the Business Portal. Notifications are triggered for the following closure outcomes: Credit note issued or replacement order placed. Case closure can be performed either by the customer using the Now Assist Virtual Assistant in the Business Portal, or by a billing specialist from the Now Assist in the CSM/FSM Configurable Workspace.

Related topics

Find AI agents

Summarize an order using Summarization for Order Management

Generate a summary of a complex order for faster, more accurate decision-making and improved customer responsiveness.

Before you begin

Note: When both the skills are active, the order capture skill takes precedence.

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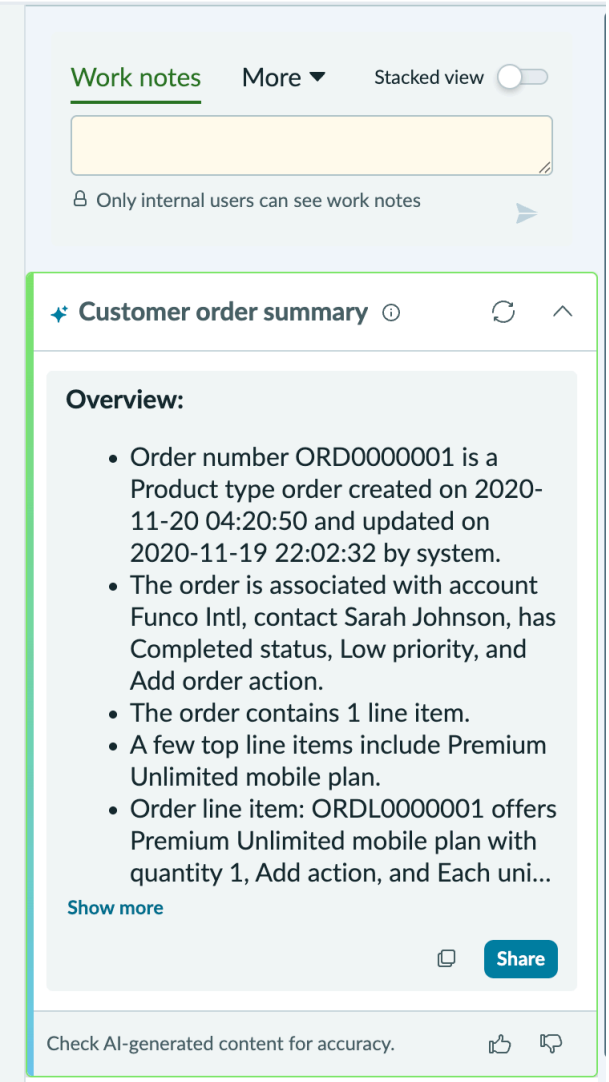
Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.order_fulfilment_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Customer Orders** > **All** and select the order to summarize.
3. In the Customer Order summary by Now Assist, select **Summarize**.



The Customer Order summary by Now Assist appears above the activity stream. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

Note: Generating and displaying the summary may take several seconds.

4. **Optional:** When you're finished summarizing an order, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

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Option	Procedure
Save the summary information by adding it to the work notes	**a.** Select **Share to work notes**. **b.** In the Share summary as Work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon or the collapse card icon to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon. If you think that the summary wasn't helpful, select the not helpful icon. This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the order summary	Select the copy to clipboard icon to use the order summary information for another purpose, such as pasting into an email.
View the information about the order summary	If you want to check details about the summary, select the more info icon.

Request order changes using Now Assist Virtual Assistant

Request expedited delivery for your order in natural language using the Now Assist Virtual Assistant on the Business Portal.

Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Now Assist for Platform (sn_genai_platform)
- Now Assist for Order Management (sn_now_assist_om)
- Order Case Self Service (sn_ord_case_ss)

A working Available-to-Promise (ATP) API call must be configured to query your external inventory systems. For more information, see Configure ATP API for the manage order operations agent.

Role required: sn_customerservice.customer

About this task

When you submit a request through the Virtual Assistant, the AI agent performs the following actions behind the scenes to help you quickly and efficiently:

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- Checks account information and order history.
- Validates the intent of the request. For example, if you enter `expedite` in the Virtual Assistant, the AI agent confirms that you're requesting expedited order delivery for your open orders.
- Confirms the order number and your change request.
- Calls the external ATP API to validate inventory availability and feasibility of the request. For example, the AI agent makes an ATP API call to an external ERP system to check if the ordered item is in stock for early delivery.
- Creates an order case in the ServiceNow system with requested details. If ATP call fails and the customer request is not feasible to fulfill, the AI agent still creates an order case so that the order case agent can review the request in the CSM Configurable Workspace and provide a resolution.
- Posts the summary of the conversation as a work note in the order case, which can only be viewed by the agents from the CSM Configurable Workspace.

Procedure

1. Log in to the Business Portal.
2. Launch the Now Assist chat panel by selecting the Now Assist icon .
3. In natural language, submit a request that you would like for your order.

   Example
   For example, enter `Please expedite my order`.
4. If your request is interpreted correctly by the AI agent, provide your confirmation.

   Example
   You can enter `That's correct` in the response.
5. Verify the order details that are displayed and specify an order that you're requesting changes for.
6. Specify a date that you want your order to be delivered or provisioned by.
   The manage order operations agent validates whether your order can be expedited and fetches the earliest possible delivery date by triggering an ATP API call.
7. When asked about the feasible options, accept or reject the proposal in natural language.
   The AI agent creates an order case with a system-generated number starting with the prefix ORDCS. It also provides the order case link that you can select to view the order case details on the Business Portal.

Related topics

Configure Now Assist for Sales Force Automation (SFA)

Request order changes via calls

Use the AI voice agents to create and manage cases for any order or invoice-related issues such as expediting orders, disputing order quantity with voice calls.

Before you begin

Role required: sn_customerservice.customer

About this task

Using the order exception AI voice agent, you can do the following:

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- Expedite order delivery dates for orders that are not in the Draft state
- Use generic keywords such as Expedite delivery or Faster delivery and get responses from an agent in the context of your questions

Procedure

1. Call the customer support number of the Business-to-business (B2B) seller.
2. When connected to the AI voice agent, state your intent to expedite your order.

   Example
   For example, say "I need to request expedited shipping for my order".
3. Verify your identity when prompted by entering your phone number on the phone keypad, followed by the pound key.
4. Enter your soft PIN on the phone keypad, followed by the pound key.
5. Provide the order number that you want to expedite when prompted.

   Example
   For example, say "I need to expedite order ORD0000523".
6. Specify the date that you need your order delivered by when prompted.

   Example
   For example, say "I need it delivered by the end of this week".
   The AI voice agent attempts to validate availability and retrieve the earliest possible delivery date using an Available-to-Promise (ATP) API call. If the system is unable to retrieve availability, the agent proceeds with your request and offers to create an order case to escalate the matter.
7. Confirm when the agent asks whether you want to create a case for the expedited shipping request.

   Example
   For example, say "Yes, please go ahead and create the case".

Result

The AI voice agent creates an order case based on an agreement of proposed delivery dates with the customer starting with the prefix ORDCS and provides you with the case number over the call.

Dispute invoice issues using Now Assist Virtual Assistant

Dispute invoice issues such as quantity discrepancies in a guided conversational flow using Now Assist Virtual Assistant from the Business Portal, without needing to contact support.

Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Now Assist for Platform (sn_genai_platform)
- Now Assist for Order Management (sn_now_assist_om)
- Invoice Case Self Service (sn_invoice_case_ss)

Role required: sn_customerservice.customer

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About this task

When you describe your issue on the Now Assist panel, the AI agent validates the dispute using an Available-to-Promise (ATP) API call and presents resolution options, such as a credit note or fulfillment of outstanding items.

If you express dissatisfaction or explicitly request human assistance at any point, the AI agent transfers the conversation to a human agent.

Procedure

1. Log in to the Business Portal.
2. Launch the Now Assist chat panel by selecting the Now Assist icon .
   Now Assist uses the context of the current page to tailor its responses and offer support. For example, launching it from an invoice details page offers help in the context of that invoice.
3. In natural language, describe the invoice issue you want to dispute.

   Example
   For example, enter `I want to dispute an invoice for incorrect quantity`.
   A list of invoices related to your account is displayed.
4. If the invoice you want to dispute is listed, confirm by responding affirmatively.

   Example
   For example, select **Proceed with ARINV0001003**.
   Alternatively, you can provide a different invoice number or enter product name or invoice date to help identify your invoice.
   The AI agent validates and fetches the invoice details along with the invoice lines.
5. Select the invoice line you want to dispute.
   The AI agent validates the invoice line details and displays the following information:
   - Invoice line number
   - Product
   - Quantity
6. If the invoice line you want to dispute is correct, select **Yes**.
7. Describe the issue when prompted.

   Example
   For example, to dispute quantity mismatch, you can enter `I ordered 10 items, but received only 9`.
   The AI agent validates the dispute by triggering an ATP API call. Depending on the outcome, one of the following happens:
   - Validated: An invoice case is created with the state set to Work in Progress and the agent presents resolution options for the quantity discrepancy. You also receive an email notification with the case details.
   - Not validated: The agent notifies you that the dispute could not be confirmed and prompts you to try a different invoice. If you disagree with the outcome, you can request to chat with a human agent.
8. If the dispute is validated, select a resolution option for the quantity discrepancy.

Option	Description
Receive a credit note for the missing quanti ty	Request a credit for the disputed quantity

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Option	Description
Receive or order the remaining quantity	Request delivery of the remaining items

If you're not satisfied with the resolution options, you can request to be transferred to a human agent. The AI agent uses sentiment analysis to detect dissatisfaction. You can also explicitly ask to chat with a human agent. For example, you can enter `I'd like to speak with an agent` or select **Connect with a live agent**.
Depending on the resolution option you select, a credit note is issued or an order for the outstanding items is created. The invoice case state is updated to Closed.

Result
When the dispute is resolved, an email notification is sent to you with a summary and a hyperlink to the case.

Related topics
Resolve invoice disputes using agentic workflow

Dispute invoice cases via calls

Use the AI voice agents to create and manage cases for invoice-related issues such as disputing order quantity with voice calls.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Call the customer support number of the B2B seller.
2. When connected to the Voice AI agent, state your intent to dispute an invoice.

   Example
   For example, say I want to dispute an invoice or I have an issue with the quantity in my invoice.
3. Provide the invoice number associated with the issue when the agent asks for it.
4. State the dispute reason when prompted.

   Example
   For example, say The quantity on the invoice is higher than what we received.
5. Confirm the invoice line or lines affected by the dispute.
6. Review the dispute summary read back by the agent and confirm that the details are correct.

   Example
   For example, say Yes, that's correct to confirm.

Result
The AI voice agent then creates an invoice case corresponding to the disputed invoice, and provides the invoice case number to the customer over the phone call.

Resolve invoice disputes using agentic workflow

Resolve invoice dispute cases using Now Assist directly from the CSM/FSM Configurable Workspace.

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Before you begin

The invoice dispute assist agentic workflow must be made available on the Now Assist panel. For more information, see Make the invoice dispute assist workflow available in the Now Assist panel.

Role required: awa_agent, sn_csm_invoice.agent, sn_otc.accounts_receivable_agent, and now_assist_panel_user

About this task

When a customer escalates an invoice dispute to a human agent either through a Virtual Assistant handoff or by contacting support directly, you can launch the Now Assist panel from the CSM/FSM Configurable Workspace to help accelerate resolution. The invoice dispute assist agentic workflow fetches the invoice case details, finds similar resolved cases, validates the dispute using an API call, and guides you through closing the case with the appropriate resolution.

When a customer is transferred from the Virtual Assistant, the interaction record opens automatically with a conversation summary, giving you full context of the dispute discussed on the Virtual Assistant side.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. If you're assisting a customer via the live chat, accept the chat.
   a. Select the Inbox icon .
   b. **Optional:** Change the status to **Available** to be able to accept the live chat.
   c. Join the chat by selecting **Accept**.
   The Active Chat panel opens with an AI-generated summary of the conversation between the AI agent and the customer, including the disputed invoice number and the issue described by the customer. The associated interaction record opens alongside.
   d. Access the invoice case details by selecting the **Related Tasks** tab.
   The case number, priority, state, and short description details are displayed for the associated invoice case.
3. Launch the Now Assist panel by selecting the Now Assist icon .
   The Now Assist panel is context-aware. When you launch it from an open interaction record or invoice case record, it tailors its responses to that record.
4. Launch the invoice dispute assist agentic workflow using either methods.
   - Select the **Invoice Dispute Assist** pill in the Now Assist panel.
   - Type your query in natural language, for example, `Help me resolve this invoice dispute`.

   The invoice dispute assist agentic workflow invokes the invoice dispute support assistant AI agent. The AI agent fetches the invoice case and prompts you to confirm if it's valid.
5. If the invoice case fetched by the AI agent is correct, select **Yes**.
   Otherwise, enter the invoice case you need help with.
   The AI agent validates the invoice case and then provides you the options for resolving the case.
6. Select **Find similar cases** to view previously resolved cases with a similar dispute pattern.

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The AI agent lists similar cases from the same account, matched by common dispute types and resolution patterns, such as credit note or replacement order, to help you determine the appropriate course of action.

7. Select **Validate invoice dispute** to verify the customer's claim.
   The AI agent triggers an ATP API call to cross-check the claimed quantity against delivery records and returns a validation status. If validated, the invoiced and delivered quantities are displayed for your review.
8. **Optional:** Select **View invoice details** to review the invoice number, status, account, and associated invoice lines before closing the case.
9. If everything looks good, select **Close the case** and choose a resolution option.
   - Select **Issue a credit note for the missing quantity** to generate a credit for the disputed quantity.
   - Select **Place an order for the remaining quantity** to fulfill the outstanding items.
   - Select **Close the case as invalid dispute** if the validation confirms that the customer's claim is invalid or not supported.

   The invoice case State is changed to Closed and the Resolution code is auto-populated depending on the resolution. Based on the selection, credit note number or order details are posted to the Resolution notes and Work notes of the invoice case.

Result
When the dispute is resolved, the invoice case is closed with the resolution details documented in the case notes, and an email notification is sent to the customer with a summary and a hyperlink to the case.

Manage order updates with Now Assist

Use Now Assist for Order Management to manage order updates, such as applying bulk changes to order line items, removing order lines, or creating an order case, without navigating between individual records.

Before you begin
Role required: sn_ind_tmt_orm.order_agent.

About this task
The Order Assistant Agent is a context-aware assistant that works inside the order workspace and helps order agents perform order updates while working on a single order. In this task, you can use Now Assist for Order Management to:

- Bulk apply a discount to all order lines.
- Update the shipping address for all order lines.
- Update quantity for order lines.
- Delete order lines.
- Create order case.

Some bulk update actions offer an undo option immediately after the change is applied. Undo is available only within the current Now Assist chat and only for supported actions, such as updating quantity or shipping address.

Bulk quantity updates apply to top-level (parent) order lines. Child order lines reflect the change through the parent relationship and aren’t updated directly.

The actions available in Now Assist depend on the current state of the order.

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Order state	Actions available to the order agent
Draft	• Bulk update quantity • Update shipping address • Apply bulk discount • Delete an order line item
New	• Bulk update quantity • Update shipping address • Apply bulk discount • Delete an order line item • Create case for order • Create a case for order lines
Acknowledged	• Create case for order • Create case for order lines

Note: For best results, start a new Now Assist chat for each bulk action. Long conversations can reduce accuracy overtime.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Orders** > **All**
4. Select an order.
5. Select the Now Assist icon to launch the Now Assist panel.
6. In the Now Assist panel, start Assistance for orders (Order Assistant Agent).
7. If prompted, confirm the order number (or enter a different order number).
8. Choose the order update that you want to perform.

Action	What to do in Now Assist
Bulk update quantity	**a.** Enter the new quantity value when prompted. **b.** Confirm the bulk update.
Bulk update shipping address	**a.** Provide the complete shipping address when prompted. **b.** Confirm the bulk update.

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Action	What to do in Now Assist
Apply bulk discount	**a.** Enter the discount percentage when prompted. **b.** Choose how to handle lines with manual ad justments (if prompted). **c.** Confirm the bulk update.
Delete order line	Specify the top-level order line you want to re move when prompted, then confirm the dele tion.
Create Order case	Describe the issue with the order when prompted, review the generated summary, then confirm to create the order case.

9. Review the order lines to verify the update was applied.

What to do next

After updating quantity or shipping address, you can keep the changes or undo them when prompted.

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