

PartEase

Contracts renewal in parts made easy!

User Manual to install PartEase app for Salesforce CRM users to renew selected contract lines as per user need .

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About PartEase

PartEase app allows users to do partial renewal of Service Contract by manually selecting the specific contract lines they want to renew. With PartEase, customers can now renew Contract Lines from different Service Contracts, which are associated with the same Account as per their need.

The native Salesforce CPQ allows users to renew Service Contracts but with the limitation that they cannot renew selected contract lines as per their need, whatever lines user needs to renew can be renewed in one go and remaining lines cannot be renewed again in multiple steps.

Pre-requisites

You should have **Salesforce CPQ & Service Cloud** for Salesforce CPQ Packages pre-installed in your salesforce org.

How to Download the App

Installation of PartEase App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

- 1.1. In a new browser tab, open **AppExchange**.
- 1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
- 1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.
- 1.4. If you see the Choose a Username page, click **Log In with a Different Username**. If you see a login page, skip to the next step.
- 1.5. Enter your Salesforce username and password, then click **Log In**.
- 1.6. Click on **Link Account**.

Steps to Install Application to Salesforce Org-

- 2.1. In a new browser tab, open **AppExchange**.
- 2.2. Search for **PartEase**.
- 2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
- 2.4. Click on the **PartEase** App Name.
- 2.5. Now click on **Get it Now** button.
- 2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.
- 2.7. In Install in Production you will see all the connected salesforce accounts.
- 2.8. If you cannot find the username for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section **Error! Reference source not found.**

- 2.9. Choose the username and click Install in Production.
- 2.10. You will see a page where you can confirm your details.
- 2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.
- 2.12. Click on **Confirm and Install**, it will take you to the login screen.
- 2.13. If you want to Install in Sandbox then click on **install in Sandbox** button.
- 2.14. You will see a page where you can confirm your details.
- 2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.
- 2.16. Click on **Confirm and Install** it will take you to the login screen.
- 2.17. Provide your login credentials and select for which users you want to install the application.
- 2.18. After that application installation will start.

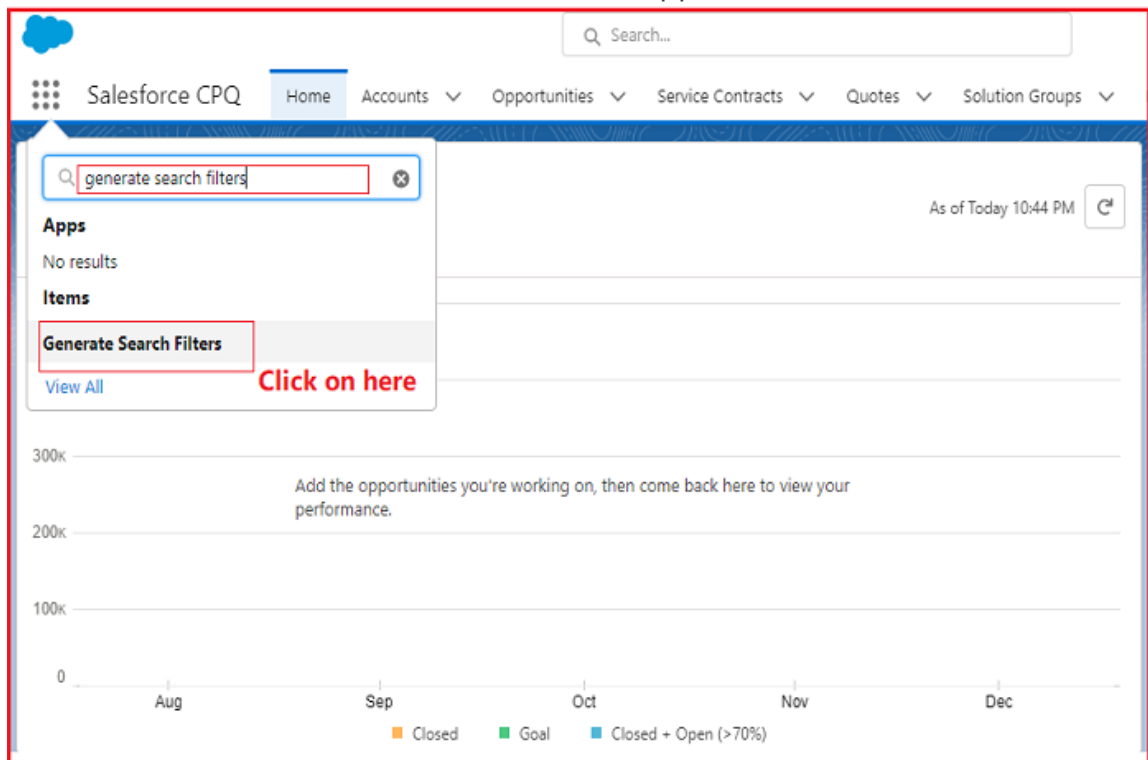
***We strongly recommend not to use any file that you receive from any unauthorized source or any source not mentioned above.**

How to Generate Search Filters

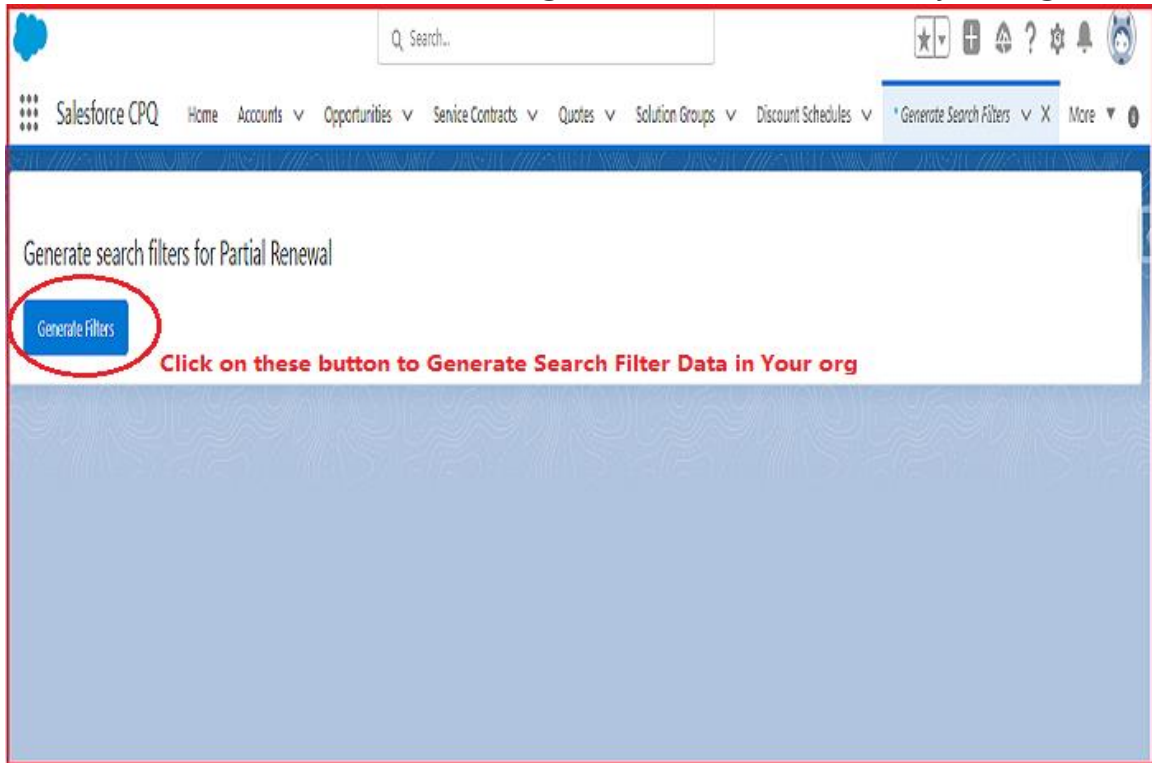
In PartEase, Search filters are used to filter Contract Lines based on different parameters like Contract Number, Start Date, End Date, Product Name.

Post installation of PartEase app you will be able to create search filters records from Generate Search Filters Tab so that while renewing service contract you can filter the contract lines. The steps to generate search filters are as follows:

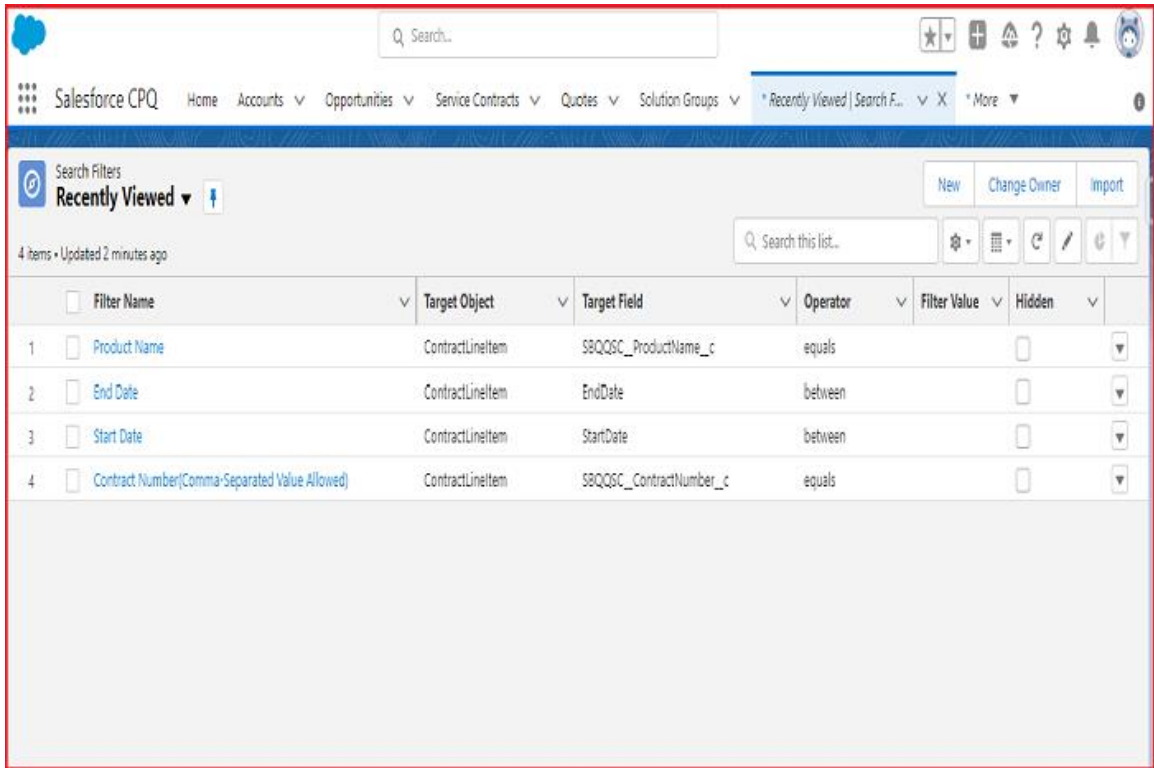
1. Search for "Generate search filters" on the App Launcher.



2. Click on **Generate filters** buttons, to generate the search filter in your org.



3. After clicking upon the button, user can verify the search filter record by going to the "Search Filter" tab. Users will be able to see 4 newly added "Search filter" records.

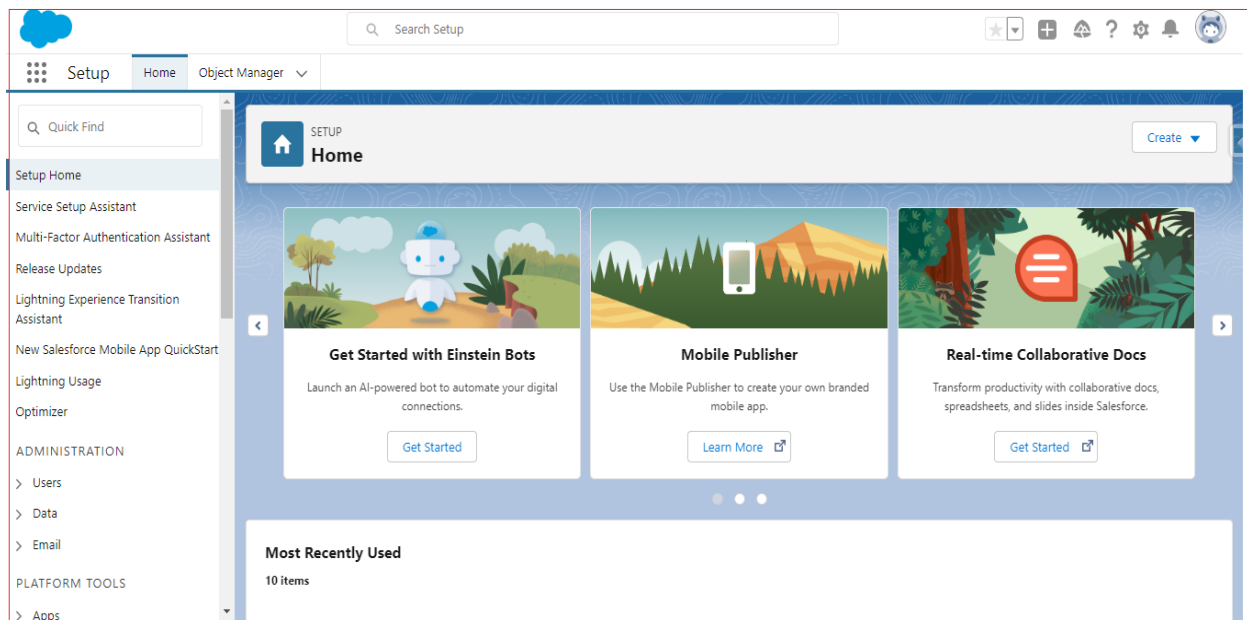


The screenshot displays the Salesforce CPQ interface. At the top, there is a navigation bar with the Salesforce CPQ logo and various tabs: Home, Accounts, Opportunities, Service Contracts, Quotes, Solution Groups, and a tab for "Recently Viewed | Search F...". Below the navigation bar, the "Search Filters" section is visible, showing "Recently Viewed" with a dropdown arrow and a lightning bolt icon. The section indicates "4 items • Updated 2 minutes ago". A search bar labeled "Search this list..." is present. Below the search bar, a table lists the search filter records.

	☐ Filter Name	Target Object	Target Field	Operator	Filter Value	Hidden	
1	☐ Product Name	ContractLineItem	SBQQSC_ProductName__c	equals		☐	▼
2	☐ End Date	ContractLineItem	EndDate	between		☐	▼
3	☐ Start Date	ContractLineItem	StartDate	between		☐	▼
4	☐ Contract Number(Comma-Separated Value Allowed)	ContractLineItem	SBQQSC_ContractNumber__c	equals		☐	▼

How to add PartEase button

1. Click , and select Setup.

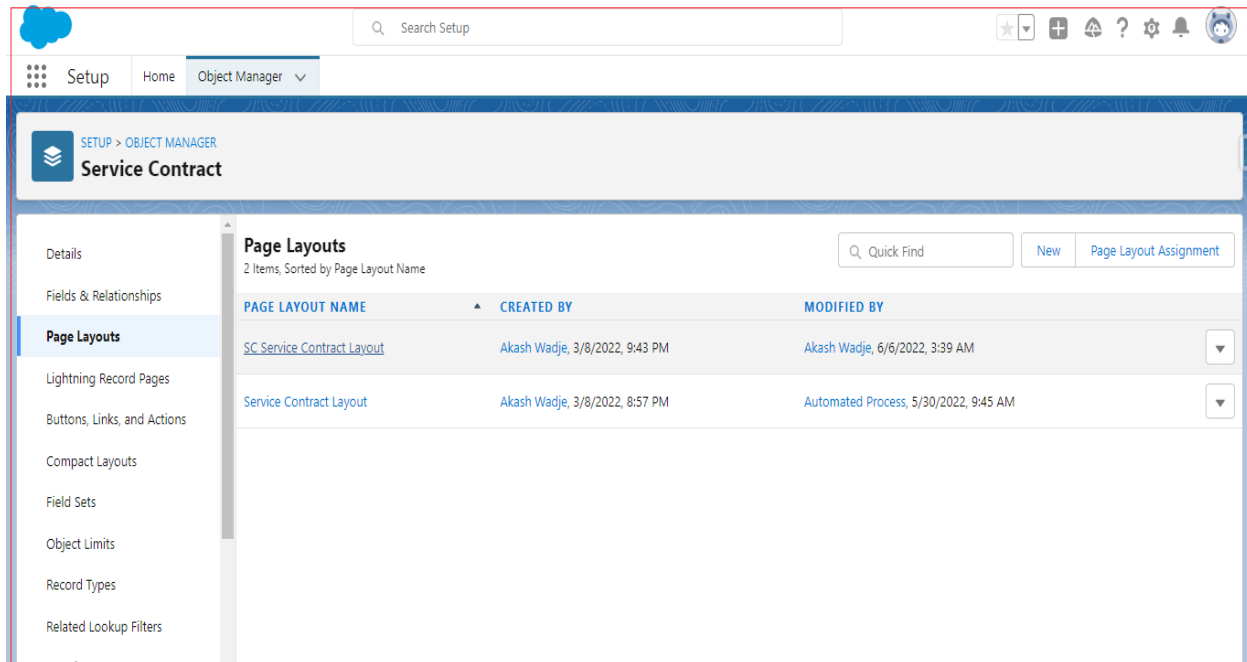


2. Select Object Manager and Enter “**Service Contract**” in the Quick Find box, and select “**Service Contract**” Object.

The screenshot displays the Salesforce Object Manager interface. At the top, there is a navigation bar with a 'Setup' button and a 'Home' button. The 'Object Manager' tab is selected. A search bar labeled 'Search Setup' is visible. Below the navigation bar, the 'Object Manager' section is active, showing a search bar with 'Service Contract' entered. To the right of the search bar are buttons for 'Schema Builder' and 'Create'. Below the search bar, a table lists the objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The first row shows 'Service Contract' with API name 'ServiceContract' and type 'Standard Object'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Service Contract	ServiceContract	Standard Object			

3. Click **Page Layouts** and open SC Service Contract Page Layout if you are using the default page layout for your Profiles. If you have created different page layout for your user then choose that one.



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Service Contract' object is selected. The left sidebar shows a list of setup options, with 'Page Layouts' highlighted. The main content area displays the 'Page Layouts' for 'Service Contract'. It shows a table with 2 items, sorted by Page Layout Name. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The first row is 'SC Service Contract Layout' created by 'Akash Wadje' on 3/8/2022 at 9:43 PM, modified by 'Akash Wadje' on 6/6/2022 at 3:39 AM. The second row is 'Service Contract Layout' created by 'Akash Wadje' on 3/8/2022 at 8:57 PM, modified by 'Automated Process' on 5/30/2022 at 9:45 AM. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
SC Service Contract Layout	Akash Wadje, 3/8/2022, 9:43 PM	Akash Wadje, 6/6/2022, 3:39 AM
Service Contract Layout	Akash Wadje, 3/8/2022, 8:57 PM	Automated Process, 5/30/2022, 9:45 AM

4. Click on **"Mobile and Lightning Actions"** search for **"PartEase"** then drag and drop **"PartEase"** under Salesforce Mobile & Lightning Experience section and Click **Save**.

The screenshot displays the Salesforce Setup interface. At the top, there is a search bar labeled 'Search Setup' and a navigation bar with 'Setup', 'Home', and 'Object Manager'. The main header shows 'SETUP > OBJECT MANAGER' and 'Service Contract'. A left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts' (selected), 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area shows the 'SC Service Contract Layout' configuration. A yellow banner at the top of the main area states: 'This Service Contract is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below this, the 'SC Service Contract Layout' section includes a 'Save' button, 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' search bar contains the text 'part', and a list below it shows 'PartEase'. The layout is divided into sections: 'Service Contract Sample', 'Highlights Panel' (with a text input for customization), and 'Quick Actions in the Salesforce Classic'.

5. "PartEase" button is now visible on service contract page.

The screenshot displays the Salesforce CPQ interface for a Service Contract. The top navigation bar includes the Salesforce CPQ logo, a search bar, and various utility icons. The main header shows the 'Service Contract' title and a 'PartEase' button, which is highlighted with a red rectangle. Below the header, the contract details are listed: Service Contract Owner (Akash Wadje), Contract Number (00000042), Account Name (A101 Coffee), and Contact Name. The 'Details' tab is active, showing a list of contract attributes and their values. The 'Activity' panel on the right shows filters and a section for 'Upcoming & Overdue' activities, which currently displays no activities.

Service Contract

PartEase New Contact New Opportunity

Service Contract Owner: Akash Wadje Contract Number: 00000042 Account Name: A101 Coffee Contact Name:

Related Details

Service Contract Owner	Status
Akash Wadje	Active
Contract Name	Start Date
Service Contract	3/20/2023
Master Contract	End Date
☐	3/19/2024
Evergreen	Term (months)
☐	12
Contract Number	Owner Expiration Notice
00000042	
Account Name	Company Signed By
A101 Coffee	
Customer Signed By	Company Signed Date
Customer Signed Title	
Customer Signed Date	

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

How Part Ease works

1. Go to Service Contract record whose contract lines you want to renew & Click on **PartEase** button.

The screenshot displays the Salesforce CPQ interface for a Service Contract record. The top navigation bar includes a search bar and various utility icons. The main header shows the record type 'Service Contract' and the name 'Service Contract'. Below this, a sub-header contains the 'PartEase' button, which is highlighted with a red box and a red arrow. The main content area is divided into two sections: 'Details' and 'Activity'. The 'Details' section shows a table of contract information, including the Service Contract Owner (Akash Wadje), Contract Number (00000042), Account Name (A101 Coffee), and Status (Active). The 'Activity' section shows a list of activities, with a filter set to 'All time • All activities • All types'. The 'Upcoming & Overdue' section indicates no activities to show.

Service Contract Owner	Contract Number	Account Name	Contact Name
Akash Wadje	00000042	A101 Coffee	

Service Contract Owner	Status
Akash Wadje	Active

Contract Name	Start Date
Service Contract	3/20/2023

Master Contract	End Date
☐	3/19/2024

Evergreen	Term (months)
☐	12

Contract Number	Owner Expiration Notice
00000042	

Account Name	Company Signed By
A101 Coffee	

Customer Signed By	Company Signed Date

Customer Signed Title

Customer Signed Date

Activity

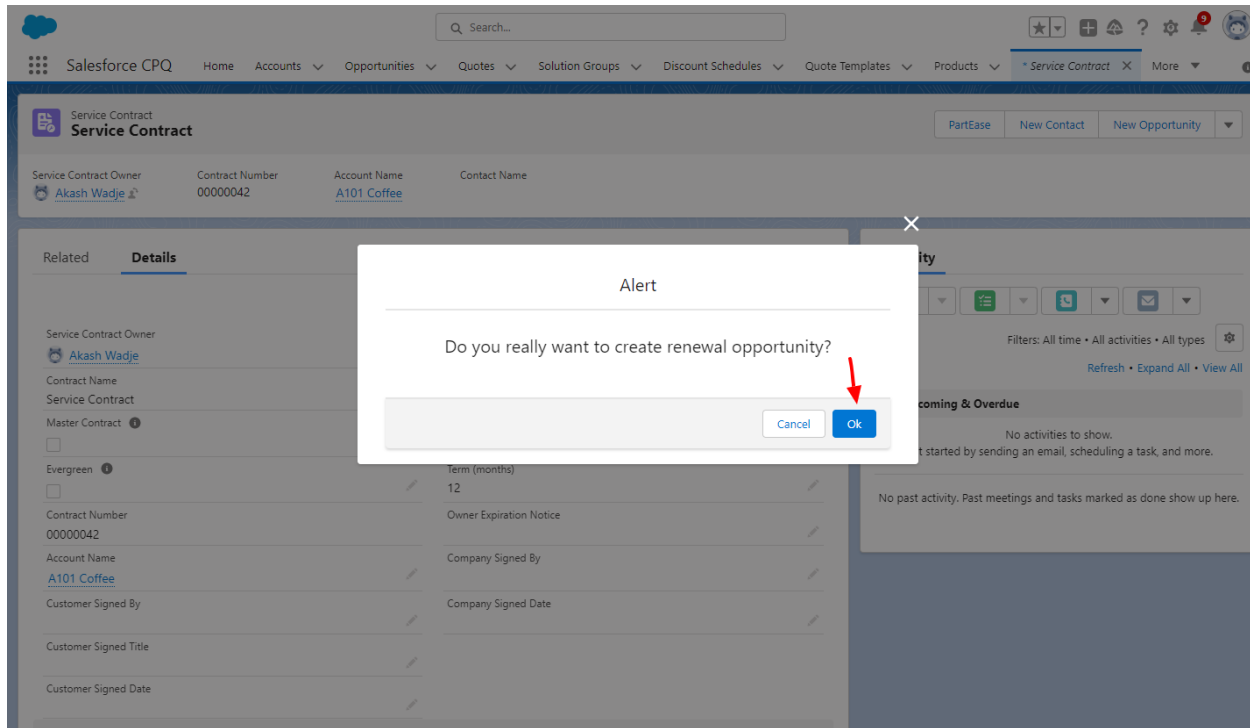
Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

2. On clicking **PartEase** button, you will see an alert message, Click on the “OK” button if you want to continue with creating renewal opportunity.



3. On the next window, you will be redirected to the newly created renewal opportunity. Go to **"Quotes"** on the related panel.

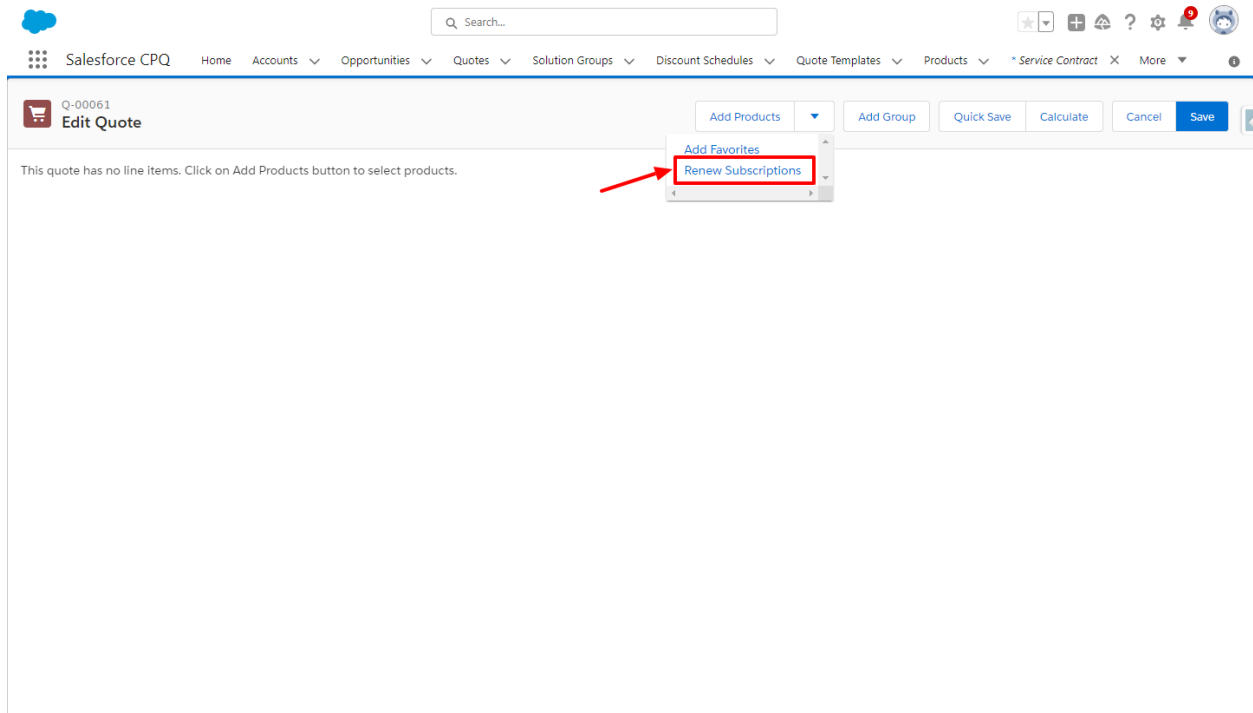
The screenshot displays the Salesforce CPQ interface. At the top, the navigation bar includes 'Salesforce CPQ', 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Solution Groups', 'Discount Schedules', 'Quote Templates', 'Products', and 'Service Contract'. A search bar is located on the right. Below the navigation bar, the main header shows the 'Opportunity' tab selected, with the title 'Renewal Opportunity #00000042' highlighted by a red box. The header also includes buttons for '+ Follow', 'Edit', 'New Contact', and 'New Opportunity'. Below the header, the 'Account Name' is 'A101 Coffee', 'Close Date' is '3/19/2024', and 'Opportunity Owner' is 'Akash Wadje'. The main body of the page shows a progress bar with stages: 'Prospecting', 'Qualification', 'Needs Analysis', 'Value Proposit...', 'Id. Decision Ma...', 'Perception Anal...', 'Proposal/Price ...', 'Negotiation/Re...', and 'Closed'. The 'Prospecting' stage is currently active. Below the progress bar, the 'Activity' tab is selected, showing a list of activities with filters for 'All time', 'All activities', and 'All types'. The 'Upcoming & Overdue' section shows 'No activities to show.' and 'No past activity. Past meetings and tasks marked as done show up here.' On the right side, the 'Related' panel is visible, showing 'Service Contracts (0)', 'Quotes (1)', 'Products (0)', and 'Quote Documents (0)'. The 'Quotes (1)' section is expanded, showing a quote with ID 'Q-00061' highlighted by a red box. A red arrow points to this quote with the text 'Open this Quote.' The quote details include 'Net Amount: \$0.00', 'Status: Draft', and 'Created By: Akash Wadje'.

4. Click on the newly generated **"Quote"**, you can see the source of Service contract from which it is generated under the **"Renewed Service Contract Number"** field.
Click on the **"Edit Lines"** button in the dropdown.

The screenshot displays the Salesforce CPQ interface for a Quote (Q-00061). The interface includes a top navigation bar with the Salesforce CPQ logo and a search bar. The main content area is divided into two sections: 'Details' and 'Activity'. The 'Details' section shows various fields for the Quote, including 'Quote Number', 'Primary', 'Sales Rep', 'Primary Contact', 'Renewed Service Contract Number', 'Contract Information', 'Master Contract', 'Master Evergreen Contract', 'Start Date', 'Subscription Term', 'Opportunity', 'Account', 'Type', 'Renewal', 'Status', 'Draft', 'Payment Terms', 'Delivery Method', 'Expires On', and 'Markup (%)'. The 'Renewed Service Contract Number' field is highlighted with a red box. The 'Activity' section shows a dropdown menu with options: 'New Case', 'New Lead', 'Delete', 'Clone', 'Change Owner', 'Printable View', 'Sharing', 'Sharing Hierarchy', 'Clone with Related', 'Edit Lines', 'Include Document', and 'Generate Document'. The 'Edit Lines' option is highlighted with a red box and a red arrow.

Field	Value
Quote Number	Q-00061
Primary	☒
Sales Rep	Akash Wadje
Primary Contact	
Renewed Service Contract Number	00000042
Contract Information	
Master Contract	
Master Evergreen Contract	
Start Date	3/20/2024
Subscription Term	12
Opportunity	Renewal Opportunity #00000042
Account	A101 Coffee
Type	Renewal
Status	Draft
Payment Terms	Net 30
Delivery Method	
Expires On	4/20/2023
Markup (%)	

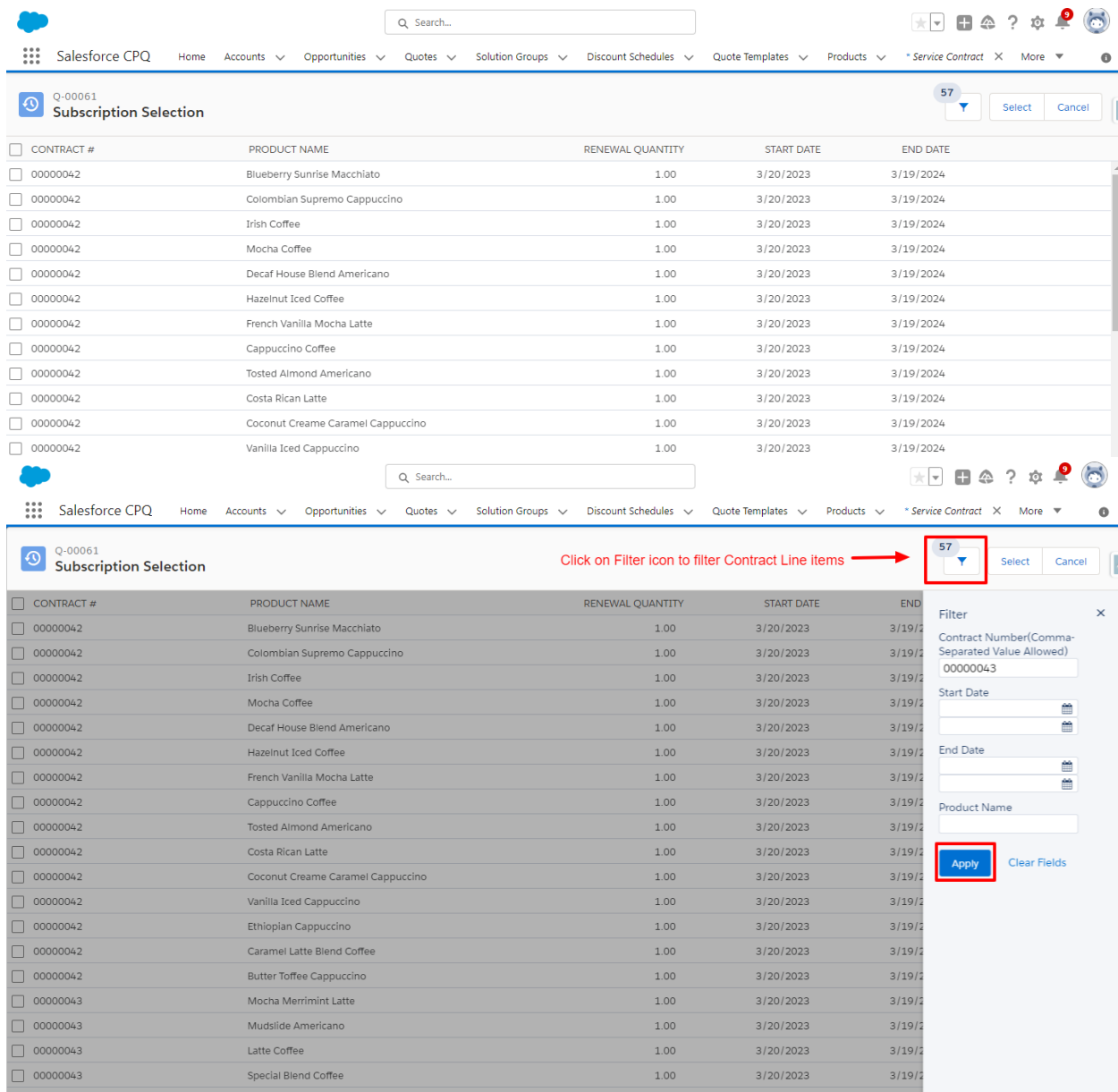
5. After clicking **"Edit Lines"** button in the dropdown Edit Quote will be visible. You can now click on the **Dropdown button** besides **Add Product**, click on **"Renew Subscription"** button.



6. After clicking on 'Renew Subscription', Contract Lines will be visible, select the products (Contract Line Items) that you want to renew. You can also filter products selection by different parameters like Contract Number, Start Date, End Date, Product Name.

Note: By default, service contract number from which you generated partial renewal quote will be entered in the "Contract Number" search filter.

You can make that field blank to view all the Contract Line Items present in same Account related to Service Contract.



Q-00061
Subscription Selection

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Select Cancel

CONTRACT #	PRODUCT NAME	RENEWAL QUANTITY	START DATE	END DATE
00000042	Blueberry Sunrise Macchiato	1.00	3/20/2023	3/19/2024
00000042	Colombian Supremo Cappuccino	1.00	3/20/2023	3/19/2024
00000042	Irish Coffee	1.00	3/20/2023	3/19/2024
00000042	Mocha Coffee	1.00	3/20/2023	3/19/2024
00000042	Decaf House Blend Americano	1.00	3/20/2023	3/19/2024
00000042	Hazelnut Iced Coffee	1.00	3/20/2023	3/19/2024
00000042	French Vanilla Mocha Latte	1.00	3/20/2023	3/19/2024
00000042	Cappuccino Coffee	1.00	3/20/2023	3/19/2024
00000042	Tosted Almond Americano	1.00	3/20/2023	3/19/2024
00000042	Costa Rican Latte	1.00	3/20/2023	3/19/2024
00000042	Coconut Cream Caramel Cappuccino	1.00	3/20/2023	3/19/2024
00000042	Vanilla Iced Cappuccino	1.00	3/20/2023	3/19/2024

Click on Filter icon to filter Contract Line items

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Select Cancel

Filter

Contract Number(Comma-Separated Value Allowed)
00000043

Start Date

End Date

Product Name

Apply Clear Fields

7. After selecting the respective Contract Lines that you want to renew, click on the "Save" button.












[Home](#)
[Accounts](#)
[Opportunities](#)
[Quotes](#)
[Solution Groups](#)
[Discount Schedules](#)
[Quote Templates](#)
[Products](#)
[Service Contract](#)
[More](#)



Q-00061

Edit Quote

[Add Products](#)
[Add Group](#)
[Quick Save](#)
[Calculate](#)
[Cancel](#)
[Save](#)

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	Coffee 22	Blueberry Sunrise Macchiato	1.00	\$77.00		\$77.00	\$77.00
2	Coffee 23	Butter Toffee Cappuccino	1.00	\$84.00		\$84.00	\$84.00
3	Coffee 10	Caramel Latte Blend Coffee	1.00	\$99.00		\$99.00	\$99.00
						SUBTOTAL:	\$260.00
							QUOTE TOTAL: \$260.00

8. Generate service contract of the selected contract line items by marking renewal Opportunities 'Contracted' checkbox as **True**.

The screenshot shows the Salesforce CPQ interface for a Renewal Opportunity #00000042. The 'Contracted' checkbox is checked and highlighted with a red box. The 'Save' button is also highlighted with a red box. The form includes fields for Description, Primary Quote (Q-00061), Create Contracted Prices, Renewal, Renewed Contract, and Amended Contract. The right sidebar shows details for the selected item, including Sales Price (\$84.00), Date, Quantity (1.00), and Sales Price (\$99.00). The sidebar also lists various document types: Quote Documents (0), Contracts (0), Renewal Contracts (0), Contact Roles (0), Partners (0), and Notes & Attachments (0).

Search...

Salesforce CPQ Home Accounts Opportunities Quotes Solution Groups Discount Schedules Quote Templates Products Product Rules More

Opportunity
Renewal Opportunity #00000042

+ Follow Edit New Contact New Opportunity

Description

▼ Salesforce CPQ Information

Primary Quote ⓘ
Q-00061

Create Contracted Prices ⓘ
☐

Contracted ⓘ
☒

Renewal ⓘ
☒

Renewed Contract ⓘ
Search Contracts...

Amended Contract ⓘ
Search Contracts...

Created By
Akash Wadje, 3/21/2023, 4:37 AM

Last Modified By
Akash Wadje, 3/21/2023, 4:45 AM

Cancel Save

Sales Price: \$84.00
Date:
Caramel Latte Blend Coffee
Quantity: 1.00
Sales Price: \$99.00
Date:
View All

Quote Documents (0)

Contracts (0)

Renewal Contracts (0)

Contact Roles (0)

Partners (0)

Notes & Attachments (0)

9. After contracting that Opportunity, a new Service Contract will be generated with the previously selected Contract Line Items.

Service Contract

New Service Contract will be generated with the Selected Contract Line Items.

PartEase New Contact New Opportunity

Service Contract Owner: Akash Wadje Contract Number: 00000044 Account Name: A101 Coffee Contact Name:

Related Details

Entitlements (3) New

Entitlement	Start Date	End Date	Status
Blueberry Sunrise Macchiato	3/20/2024	3/19/2025	Inactive
Butter Toffee Cappuccino	3/20/2024	3/19/2025	Inactive
Caramel Latte Blend Coffee	3/20/2024	3/19/2025	Inactive

[View All](#)

Contract Line Items (3) New Line Items

Line Item Number	Product Name	Start Date	End Date
00000001	Blueberry Sunrise Macchiato	3/20/2024	3/19/2025
00000002	Butter Toffee Cappuccino	3/20/2024	3/19/2025
00000003	Caramel Latte Blend Coffee	3/20/2024	3/19/2025

[View All](#)

Activity

Filters: All time • All activities • All types

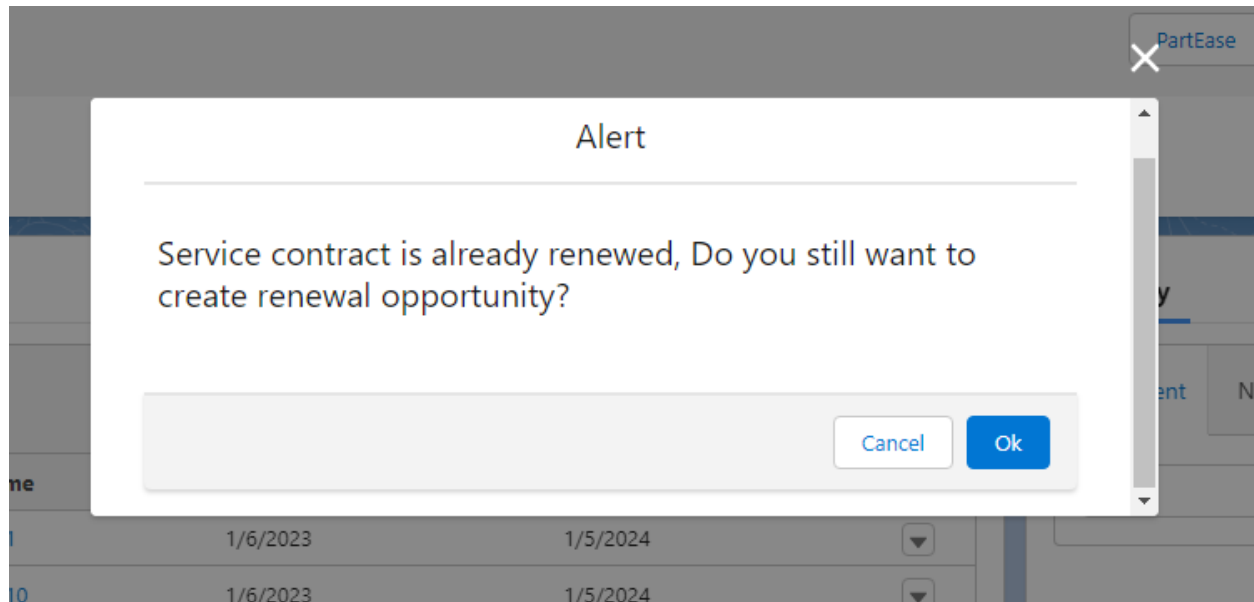
[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

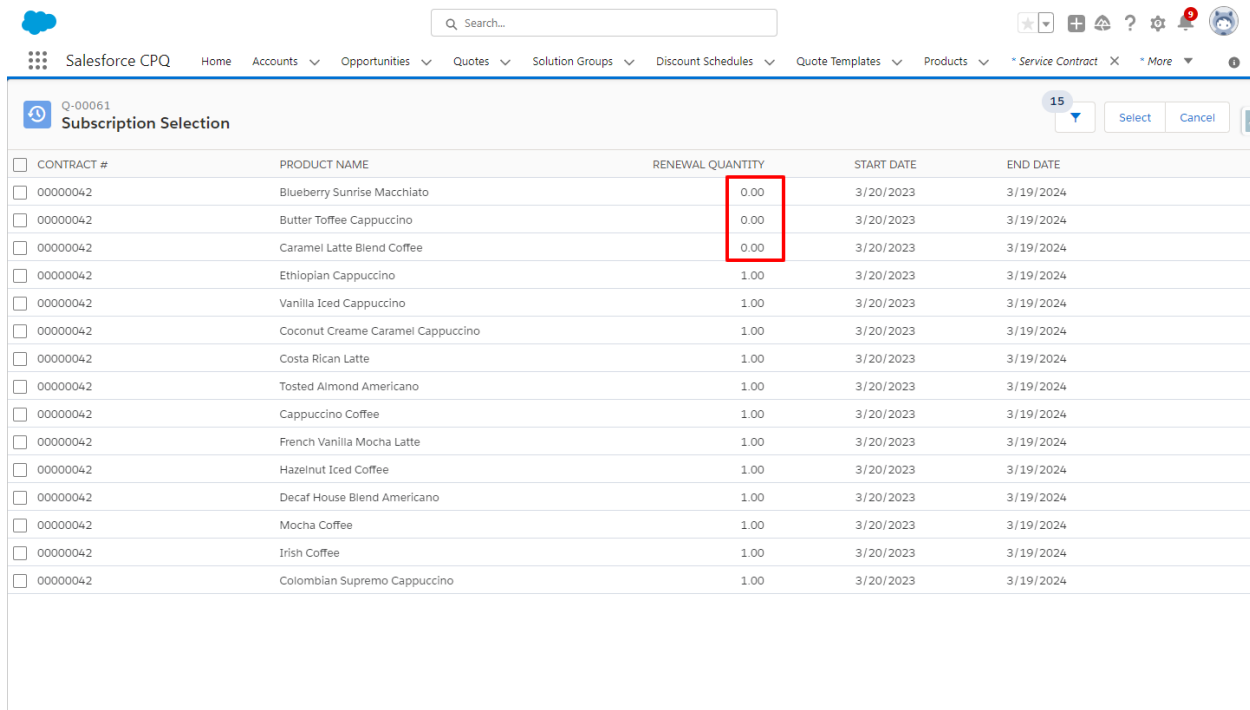
No past activity. Past meetings and tasks marked as done show up here.

If you have already renewed and contracted a Service Contract by the standard renewal method I.e., by checking the **Renewal Quoted & Renewal Forecast** checkbox. And that newly generated renewal Opportunities '**Contracted**' Checkbox is "True". Then when you click on PartEase button, an alert screen like below image will appear to let you know that this service contract's all Contract Line Items are already renewed. But you can still renew Contract Line Items of other Service contracts available in the same Account by clicking **Ok** button and following the steps mentioned above.



Conditions when you cannot use PartEase Functionality

A Contract Line Item in which all its Quantities are already renewed & contracted, then for that Contract Line-Item Quantity will be set to 0, during the partial renewal. This will show that all Quantities of these Contract Line Items are already renewed.



CONTRACT #	PRODUCT NAME	RENEWAL QUANTITY	START DATE	END DATE
☐ 00000042	Blueberry Sunrise Macchiato	0.00	3/20/2023	3/19/2024
☐ 00000042	Butter Toffee Cappuccino	0.00	3/20/2023	3/19/2024
☐ 00000042	Caramel Latte Blend Coffee	0.00	3/20/2023	3/19/2024
☐ 00000042	Ethiopian Cappuccino	1.00	3/20/2023	3/19/2024
☐ 00000042	Vanilla Iced Cappuccino	1.00	3/20/2023	3/19/2024
☐ 00000042	Coconut Cream Caramel Cappuccino	1.00	3/20/2023	3/19/2024
☐ 00000042	Costa Rican Latte	1.00	3/20/2023	3/19/2024
☐ 00000042	Tosted Almond Americano	1.00	3/20/2023	3/19/2024
☐ 00000042	Cappuccino Coffee	1.00	3/20/2023	3/19/2024
☐ 00000042	French Vanilla Mocha Latte	1.00	3/20/2023	3/19/2024
☐ 00000042	Hazelnut Iced Coffee	1.00	3/20/2023	3/19/2024
☐ 00000042	Decaf House Blend Americano	1.00	3/20/2023	3/19/2024
☐ 00000042	Mocha Coffee	1.00	3/20/2023	3/19/2024
☐ 00000042	Irish Coffee	1.00	3/20/2023	3/19/2024
☐ 00000042	Colombian Supremo Cappuccino	1.00	3/20/2023	3/19/2024

Note: If the Contract line Item is renewed with only the partial quantities but not with the full quantities, then you can renew that Contract Line Item for those remaining quantities.

Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **MergeEase**
Merge multiple service contract.
- **AutoSplit**
Split Service Contract into multiple contracts to avoid large cart errors
- **MoveEase**
Transfer asset from one account to another
- **EaseQuotePDF**
Automate quote PDF generation on status change.
- **CaseAutoMail**
Transform case communication with CaseAutoMail.
- **AccountMerge**
Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find our PartEase App useful. We would love to hear about our app from you. In case of any query or further clarification please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us at info@advanz101.com