



AutoSplit

Splitting service contracts made easy!

User Manual and installation steps for Salesforce CRM users to Split Service Contract based on Split Threshold Limit that shifts Contract Line Items from Master Service Contract to New Service Contract.

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About AutoSplit

Auto Split is used when Large Service Contract need to be processed or when a user wants to split a Service Contract into multiple Service Contract's for separate processing.

When a user has a Service Contract with large number of Contract Line Items, sometime they may face issues during Amending or Renewal of that service contract. The Auto Split App provides functionality to split the Service Contracts automatically on click of a button.

The Master Service Contract can be split into two or more New Service Contract based on Split Threshold limit. By shifting Contract Line Items, it will be easy to perform amendment & renewal operations within less time.

Pre-requisites

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

How to Download the App

1. Installation of AutoSplit 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 **Link Account**.

2. Steps to Install Application to Salesforce Org-

- 2.1. In a new browser tab, open **AppExchange**.
- 2.2. Search for **AutoSplit**.
- 2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
- 2.4. Click on the **AutoSplit** 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.**

Introduction to Split Thresold

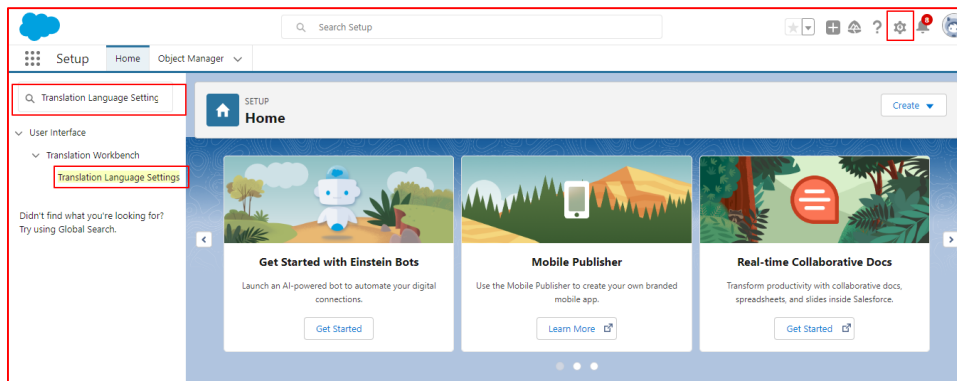
Post App Installation you will find few new fields in your Org, One such field is "**Split Threshold**". The value entered in this field defines approximate number of contract lines that will remain in a service contract after AutoSplit.

Split Threshold is the limit we set on Contract Line Items. Lines in excess to this limit will be shifted from Master Service Contract to New Service Contracts that will be generated during Auto Split process.

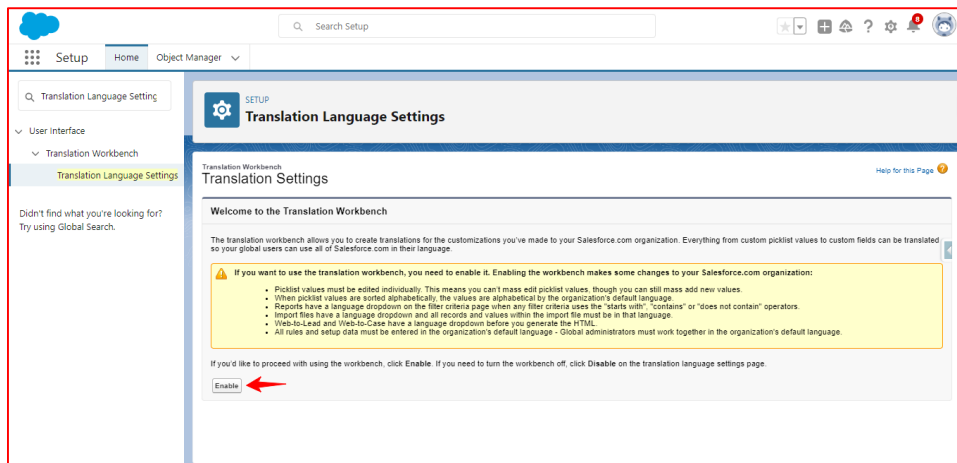
By default we have set the value of "**Split Threshold**" to **150** CLI per Service Contract. We recommend not exceeding the value of "**Split Threshold**" to more than 150. If your organization requires the value to be tweaked then you can reduce it to less than 150 as per your use case. Generally, if your product configuration involves lot of bundles and options, then lower limit is recommended.

How to change Split Threshold label value

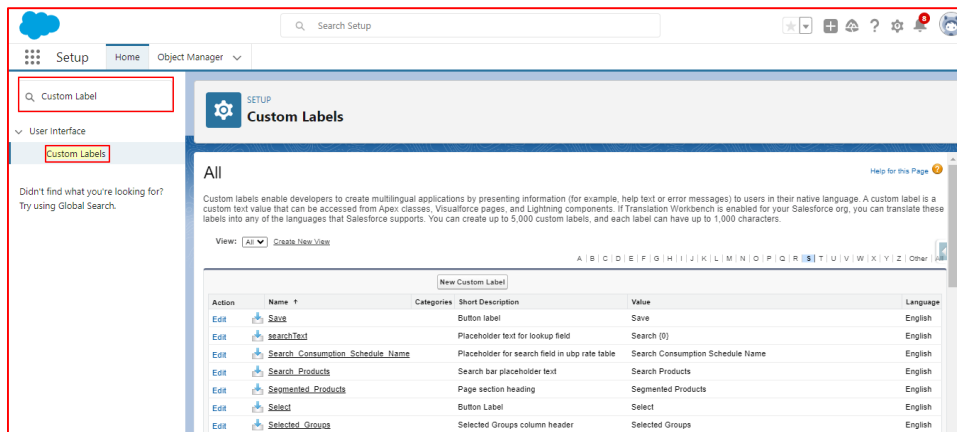
1. Search and open "Translation Language Settings" from setup.



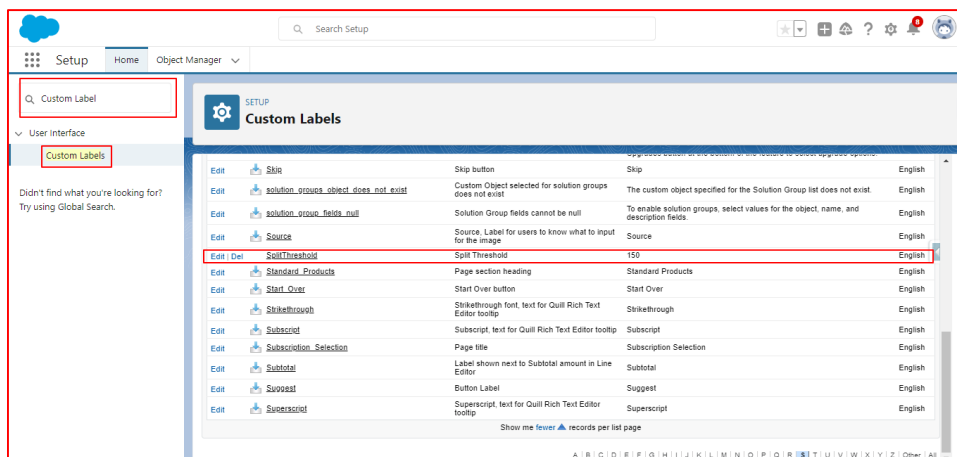
2. Enable Translation Language Settings.



3. Search Custom label in setup.

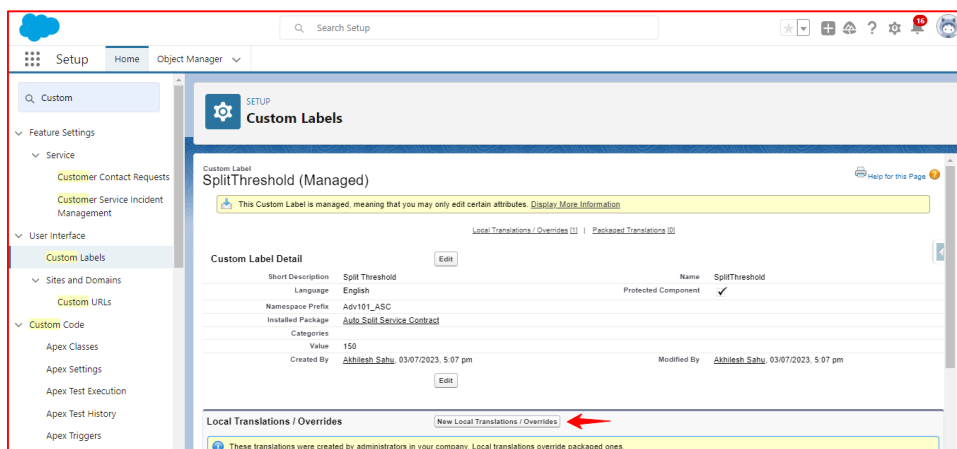


4. Open the "SplitThreshold" custom label by clicking on the name.



5. Click on "New Local Translations / Overrides" to override the value.

Note – By Default, it is 150 CLI per New Service Contract. We recommend you not to set its limit to more than 150 but you can reduce the value.



6. Select the “**language**” it should be English and enter the new value in “**Translation text**” for split threshold and then click on **save**.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like 'Feature Settings', 'Service', 'User Interface', 'Sites and Domains', and 'Custom Code'. The 'Custom Code' section is expanded, showing 'Apex Classes', 'Apex Settings', 'Apex Test Execution', and 'Apex Test History'. The main content area is titled 'New Translation' and contains a 'Translation Edit' form. The form has two sections: 'Master Label Information' and 'Translation Information'. In the 'Master Label Information' section, the 'Master Label' is 'SplitThreshold' and the 'Master Label Text' is '150'. In the 'Translation Information' section, the 'Language' is set to 'English' and the 'Translation Text' is '200'. A red arrow points to the 'Save' button at the bottom of the form.

Search Setup

Setup Home Object Manager

Custom

Feature Settings

Service

Customer Contact Requests

Customer Service Incident Management

User Interface

Custom Labels

Sites and Domains

Custom URLs

Custom Code

Apex Classes

Apex Settings

Apex Test Execution

Apex Test History

SETUP

New Translation

Translation Edit

Save Cancel

Master Label Information

Master Label SplitThreshold

Master Label Text 150

Master Label Language English

Translation Information

Language English

Translation Text 200

Save Cancel

7. After saving, you can see old value and newly created “Local Translation” value as well.

The screenshot shows the Salesforce Setup interface for Custom Labels. The left sidebar contains a navigation menu with 'Custom' selected. The main content area is titled 'Custom Labels' and includes a 'Custom Label Detail' section with fields for Name, Language, Split Threshold, Protected Component, and Installed Package. Below this is a 'Local Translations / Overrides' section with a table showing the current value and a new local translation.

Custom Label Detail

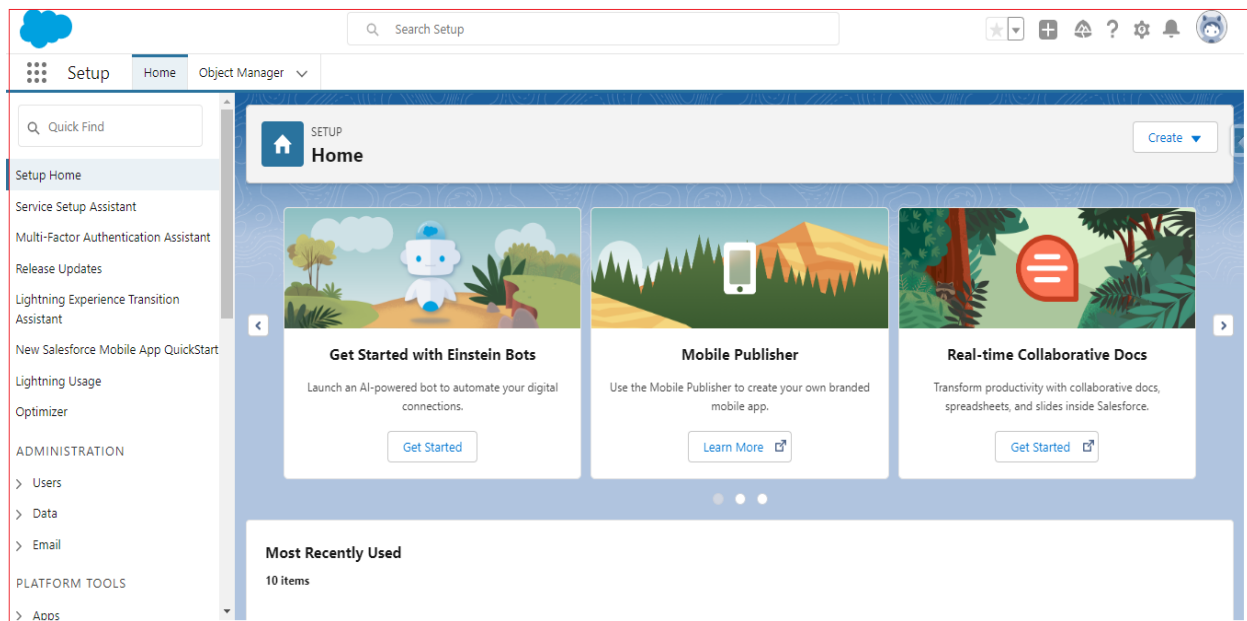
Field	Value
Name	SplitThreshold
Language	English
Split Threshold	150
Protected Component	✓
Installed Package	Adv101_ASC
Created By	Akhilesh Sahu
Modified By	Akhilesh Sahu

Local Translations / Overrides

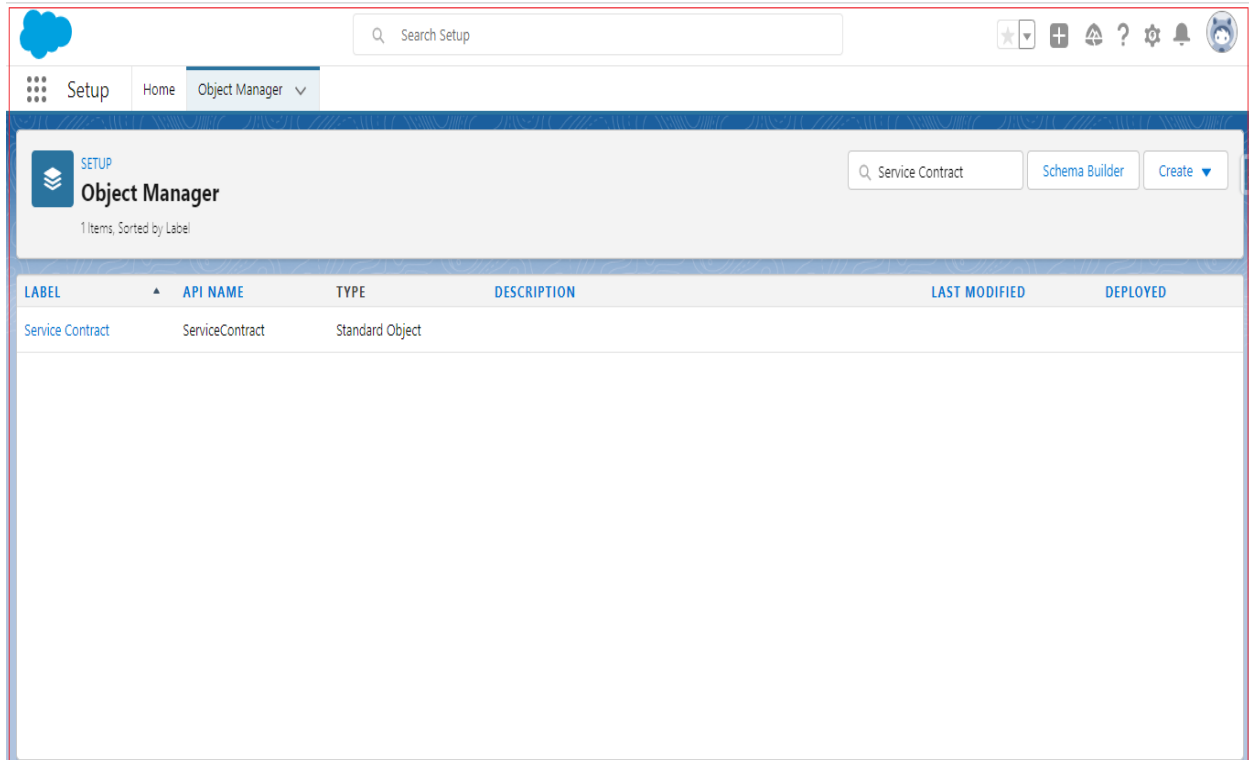
Action	Language	Translation Text	Is Out Of Date
Edit Del	English	200	☐

How to add Auto Split 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' menu and a search bar labeled 'Search Setup'. Below this, the 'Object Manager' section is active, showing a search bar with 'Service Contract' entered. The interface lists one object, 'Service Contract', with the following details:

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 contains a list of setup options: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a table with 2 items. 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, last 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, last 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 **"Auto Split"** then drag and drop **"Auto Split"** under Salesforce Mobile & Lightning Experience section and Click **Save**.

The screenshot shows the Salesforce Setup interface for the 'Service Contract' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts for. The main content area is titled 'Service Contract' and includes a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties' buttons. Below this is a 'Quick Find' search bar with the text 'auto' and a list of results showing 'Auto Split'. The 'Mobile & Lightning Actions' section is expanded, displaying a grid of action buttons: 'Auto Split', 'Manual Split', 'Amend', 'New Task', 'New Contact', 'Log a Call', 'New Opportunity', 'New Case', 'New Lead', 'New Event', 'Poll', 'Question', 'Email', 'Post', 'File', 'Link', 'Edit', 'Change Owner', 'Change Record Type', 'Submit for Approval', 'Clone', 'Delete', 'Printable View', 'Sharing', and 'Sharing Hierarchy'. Below the action grid is the 'Service Contract Detail' section, which includes 'Standard Buttons' (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy) and 'Custom Buttons' (Amend). The bottom section, 'Service Contract Information (Header visible on edit only)', displays fields for 'Service Contract Owner' (Sample Text), 'Contract Number' (GEN-2004-001234), 'Contract Name' (Sample Text), 'Status Icon', 'Start Date' (6/7/2022), and 'End Date' (6/7/2022).

5. Now you can see “Auto Split” button on service contract page.

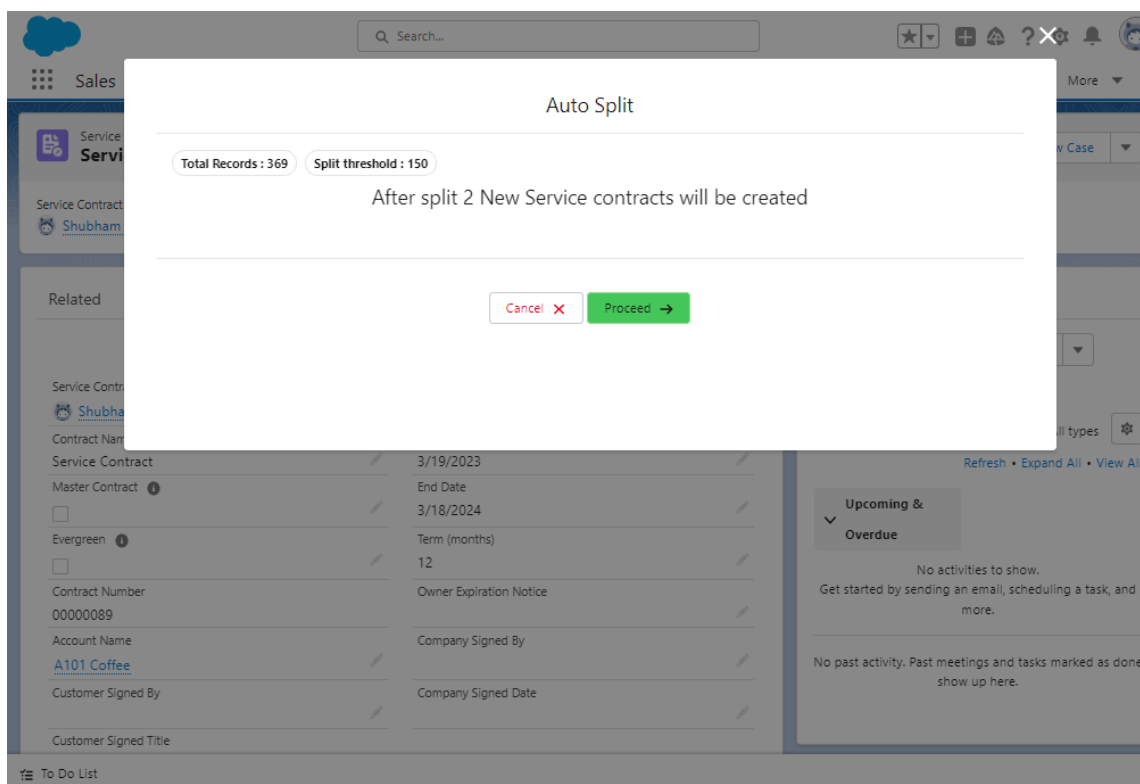
The screenshot displays the Advanz 101 user interface. At the top, there is a navigation bar with a search bar and various icons. Below this, a secondary navigation bar shows tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, and a selected tab for Service Contract. The main content area is titled 'Service Contract' and features a red box highlighting the 'Auto Split' button, along with 'New Contact' and 'New Case' buttons. Below the header, a summary section shows the Service Contract Owner (Shubham Lashkan), Contract Number (00000089), Account Name (A101 Coffee), and Contact Name. The main body is divided into two sections: 'Related' and 'Details'. The 'Details' section is currently active, showing a table of contract information. The 'Activity' section on the right shows filters for 'All time', 'All activities', and 'All types', with a 'Refresh' button and a message stating 'No activities to show. Get started by sending an email, scheduling a task, and more.'

Related	
Service Contract Owner	Status
Shubham Lashkan	Active
Contract Name	Start Date
Service Contract	3/19/2023
Master Contract	End Date
☐	3/18/2024
Evergreen	Term (months)
☐	12
Contract Number	Owner Expiration Notice
00000089	
Account Name	Company Signed By
A101 Coffee	

How Auto Split works

1. Click on **Auto Split** button, then based on Split Threshold limit we set, which is **150**(by default) **Contract Line Items** per new Service Contract. The auto selected 150 contact lines will be shifted from Master Service Contract to New Service Contract. Assuming the default value 150 CLI is maintained.

E.g.1, **Split Threshold Limit- 150 CLI** . If a Service Contract has **369** Contract Line Items, then 2 New Service Contract with approximately 150 CLI will be created and all remaining CLI will stay as it is in the Master Service Contract.

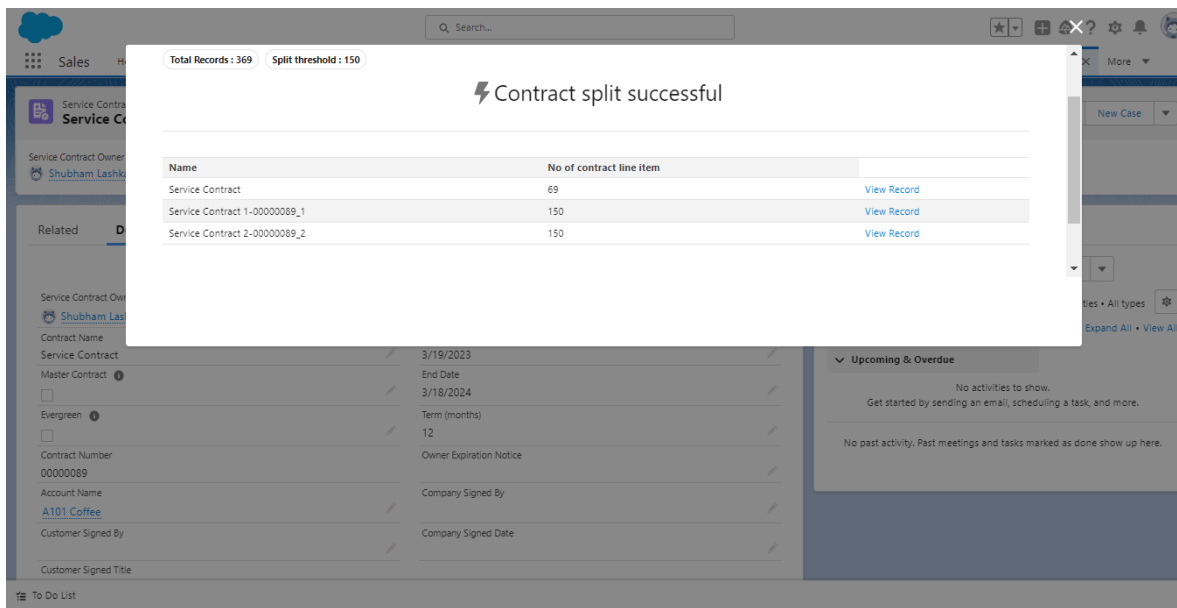


Eg.2, **Split Threshold Limit Set- 100 CLI**. If a Service Contract has **420** Contract Line Items, then 4 New Service Contract with approximately 100 CLI(Based on the Split

Threshold Value Set) will be created and all remaining CLI will stay as it is in the Master Service Contract.

2. Click **Proceed**, user will now see the result screen with count of Contract Line Item in Master Service Contract and the count of Contract Line Item shifted in newly generated Service Contracts if Service Contract is successfully split.

In our example 1 of Service Contract having **369** Contract Line Items, after splitting Master Service Contract approximately **150** Contract Line Items will be shifted into 2 New Service Contract each after successful Auto Split and **remaining** Contract Line Items will stay in Master Service Contract.



Total Records : 369 Split threshold : 150

Contract split successful

Name	No of contract line item	
Service Contract	69	View Record
Service Contract 1-00000089_1	150	View Record
Service Contract 2-00000089_2	150	View Record

Service Contract Details:

- Service Contract Owner: Shubham Lashu
- Contract Name: Service Contract
- Master Contract: 3/19/2023
- End Date: 3/18/2024
- Term (months): 12
- Owner Expiration Notice: 12
- Contract Number: 00000089
- Account Name: A101 Coffee
- Customer Signed By: Company Signed By
- Customer Signed Date: Company Signed Date
- Customer Signed Title: Company Signed Title

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.

Conditions when you cannot use Auto Split Functionality

1. User cannot split Service Contract which has related Renewal opportunity or Renewal Forecast field checkbox checked before we perform split operation.

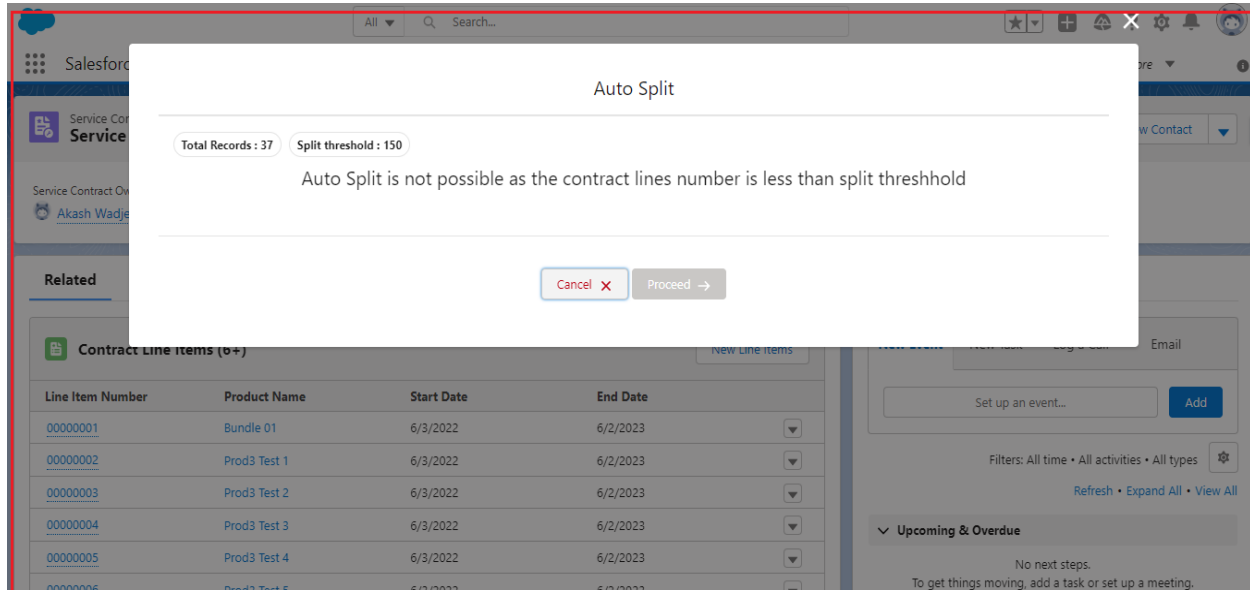
The screenshot displays the Salesforce CPQ interface for a Service Contract. A red error message box is overlaid on the page, stating: "Error ! The Service Contract has been renewed and cannot be split." The error box is highlighted with a green border. The page shows the Service Contract details for "Akash Wadje" with Contract Number "00000144". The Account Name is "Auto Demo 03". The page includes tabs for "Related" and "Details", and an "Activity" section on the right. The "Details" tab is active, showing fields like "Service Contract Owner", "Contract Name", "Master Contract", "Evergreen", "Contract Number", "Status", "Start Date", "End Date", "Term (months)", and "Owner Expiration Notice". The "Activity" section on the right has a "New Event" button and a "Set up an event..." input field. Below the activity section, there is a section for "Upcoming & Overdue" with the text "No next steps. To get things moving, add a task or set up a meeting."

Service Contract Owner: Akash Wadje
Contract Number: 00000144
Account Name: Auto Demo 03
Contact Name: Auto Demo 03

Service Contract Owner: Akash Wadje
Contract Name: Service Contract
Master Contract: ☐
Evergreen: ☐
Contract Number: 00000144
Status: Active
Start Date: 6/3/2022
End Date: 6/2/2023
Term (months): 12
Owner Expiration Notice

Activity
New Event
New Task
Log a Call
Email
Set up an event...
Add
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No next steps.
To get things moving, add a task or set up a meeting.

2. User cannot Split Service Contract if it has number of Contract Line Items less than the “Split Threshold” limit (i.e. 150) CLI. If for any reason you need to split such contract we recommend you to use our other app **SplitEase**



Bundled Product Behavior during Splitting

If User has any bundled product CLI in the Service Contract then the bundle relationship will not be broken after Auto Split, rather the bundled CLI will either be shifted to the new Service Contract or remain in the same Master Service Contract maintaining the Bundle relationship, thus keeping the Bundled CLI intact in the same Service Contract.

Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **MergeEase**
Merge multiple service contract.
- **PartEase**
User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items.
- **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 AutoSplit 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