Salesforce Channel Order App User Guide

@salesforcedocs

CONTENTS

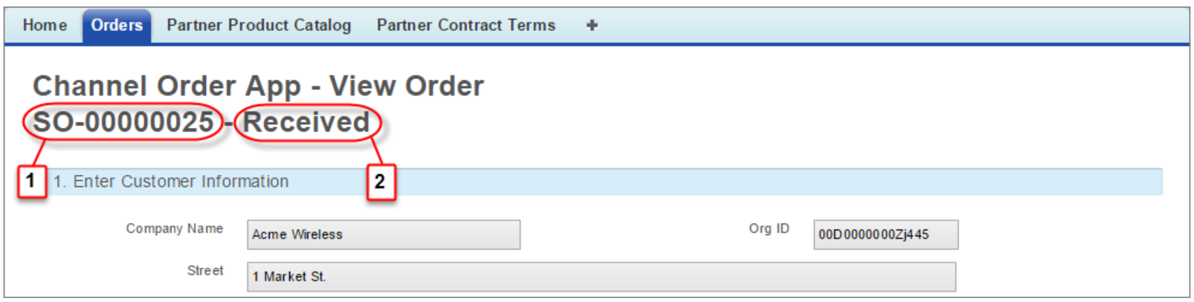
WHAT'S NEW IN THE CHANNEL ORDER APP?

Version 1.38 of the Channel Order App (COA) includes UI enhancements to make managing orders easier. You can also delete draft orders, which reduces clutter in the COA.

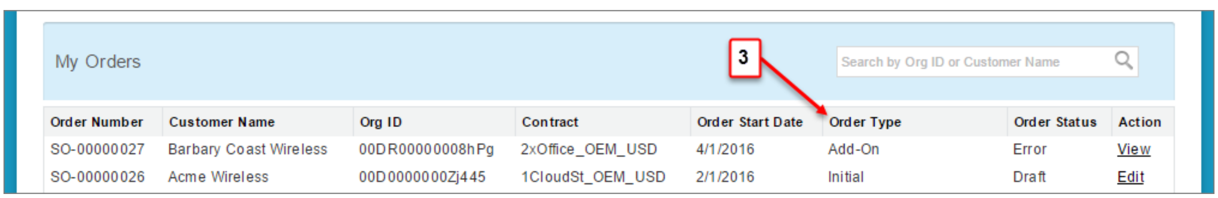
Key Order Information, Where You Need It

The latest version of the COA puts key order information throughout the UI, so you spend less time navigating between screens to find the information you want.

Order number **[1]** and status **[2]** now appear on the order detail page. Previously, if you wanted to view this information, you had to navigate back to My Orders.

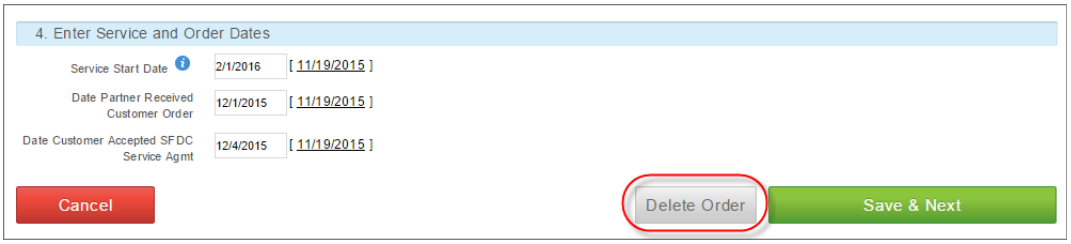


An Order Type column **[3]** now appears in My Orders, allowing you to quickly scan and sort orders by type. To sort orders by type, click the column header.



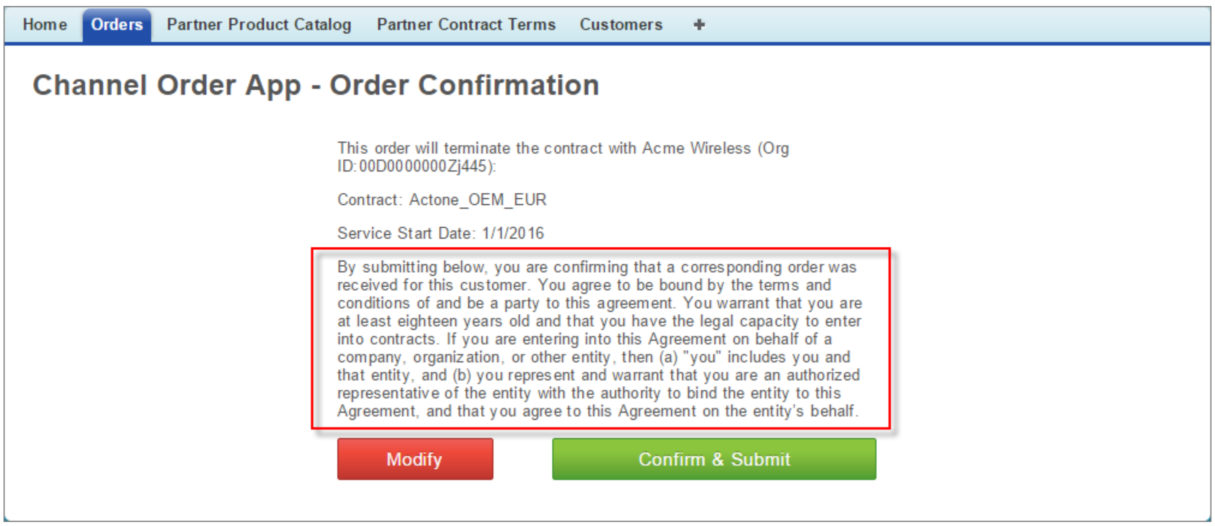
Delete Draft Orders

If your Orders tab is feeling cluttered, we've got good news: now, you can delete unwanted draft orders, like duplicates, to make room for those that matter. To delete a draft order, go to the Orders tab and find the order that you want to delete. Then, edit the order and select **Delete Order**.



Other Changes

We've updated the Terms & Conditions for new orders. You can read the updated Terms & Conditions on the Order Confirmation page.



SEE ALSO:

Delete a Draft Order

KEY OBJECTS IN THE CHANNEL ORDER APP

Before you start placing orders using the COA, you should be familiar with the following terms/objects.

- Contract Terms: This object defines how you are able to sell products to customers, according to your contract with salesforce.com.
- Product Catalog: This object defines the list of products you can sell under your contact and the associated revenue sharing details.
- Service Order and Service Order Detail: These two objects are used to submit the details of your orders to salesforce.com. The Channel Order App collects the necessary data and populates these objects automatically.
- Customer: This custom object in the Channel Order App package stores the name, org ID, and address information for each of your customers. The Service Order has a lookup to this object to obtain the customer information for your order.

INSTALLING AND CONFIGURING THE CHANNEL ORDER APP

Before you use the Channel Order App, you must install it in your org and configure the associated resources. This section walks you through the installation and configuration process.

Install the Channel Order Application

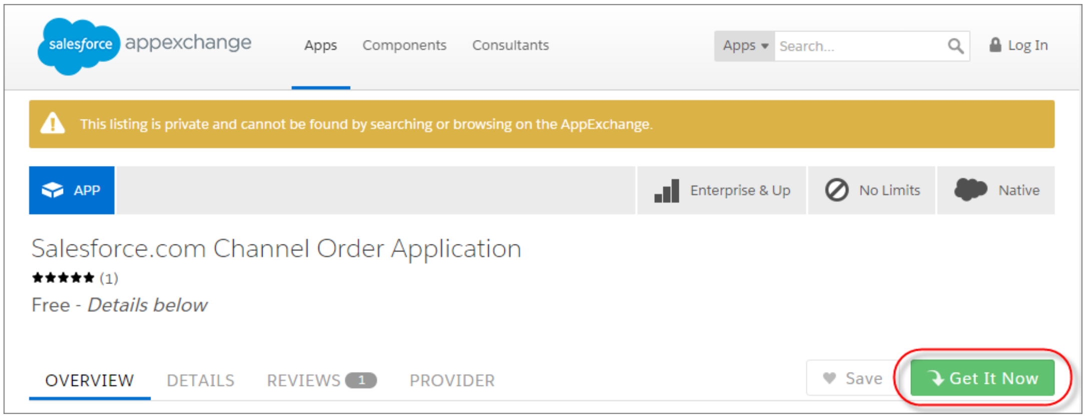
This page explains how to get the Salesforce Channel Order Application from the AppExchange and install it in your production org.

Before you begin, confirm that you have admin access to the org you will use to submit and track production orders.

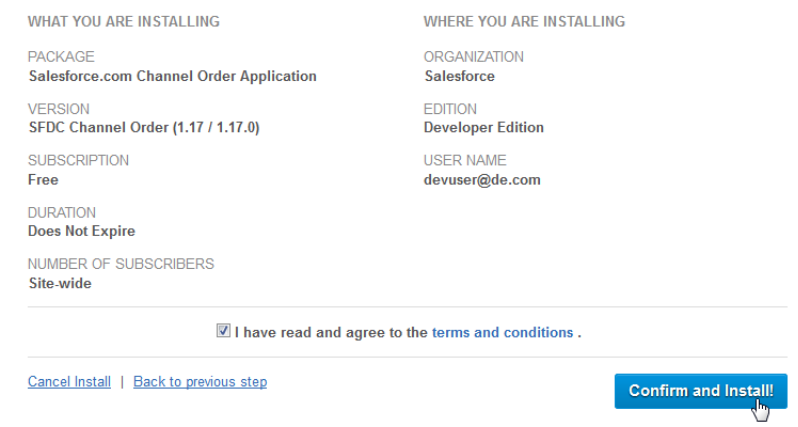
1. Go to the application listing for the Channel Order App on the AppExchange:
   https://appexchange.salesforce.com/listingDetail?listingId=a0N300000055ailEAA

   You must use the link; the listing is private and can't be found by searching or browsing.

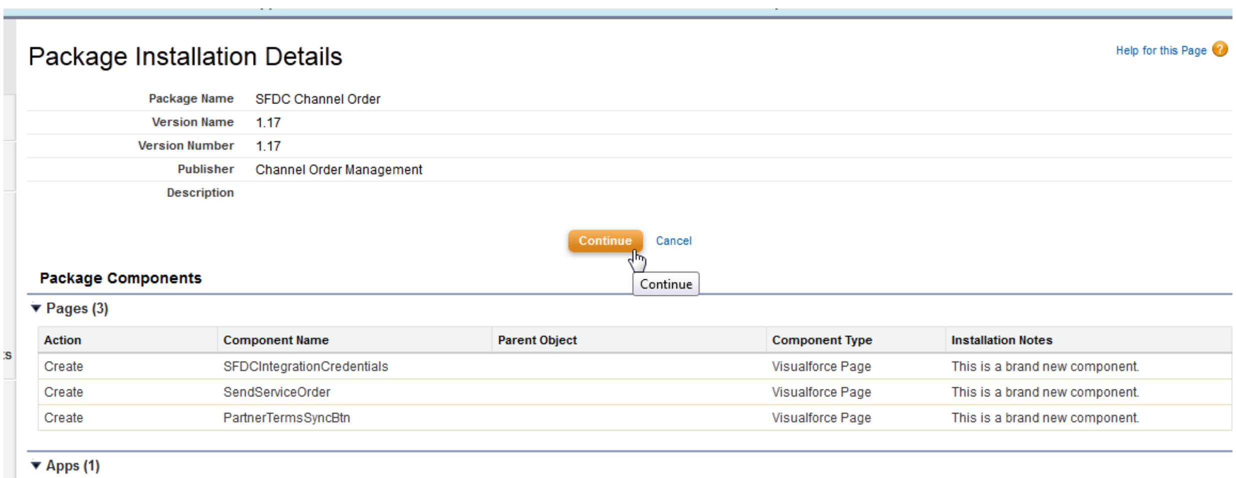
2. If you are not already logged in, log in to the AppExchange using the credentials for the org where the app will be installed.
3. On the Salesforce.com Channel Order Application page, click **Get It Now**.



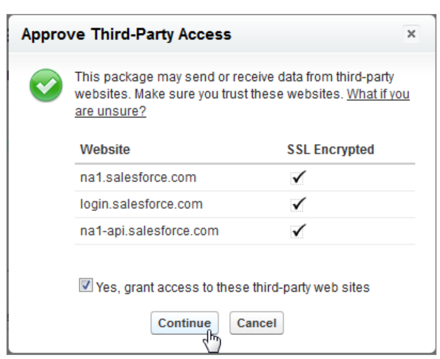
4. Click **Install in production**.
5. On the Installation Summary page, confirm that you are installing the app in the correct org. Review the Terms & Conditions and select "I have read and agree to the terms & conditions." Click **Confirm and Install**.



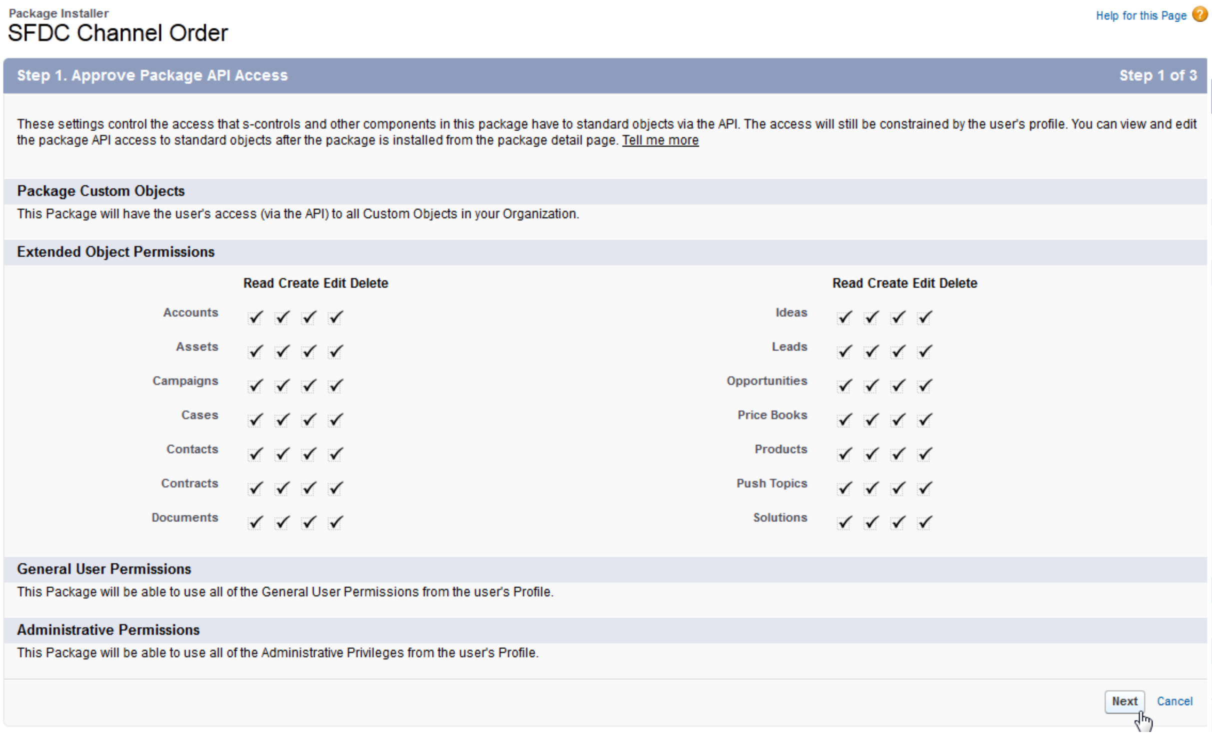
6. Enter your Salesforce administrative credentials again and click **Login**.
7. Before beginning installation, the installer displays the Package Installation Details. Click **Continue**.



8. In the Approve Third-Party Access popup window, review the list of websites and select "Yes, grant access to these third-party websites." Click **Continue**.

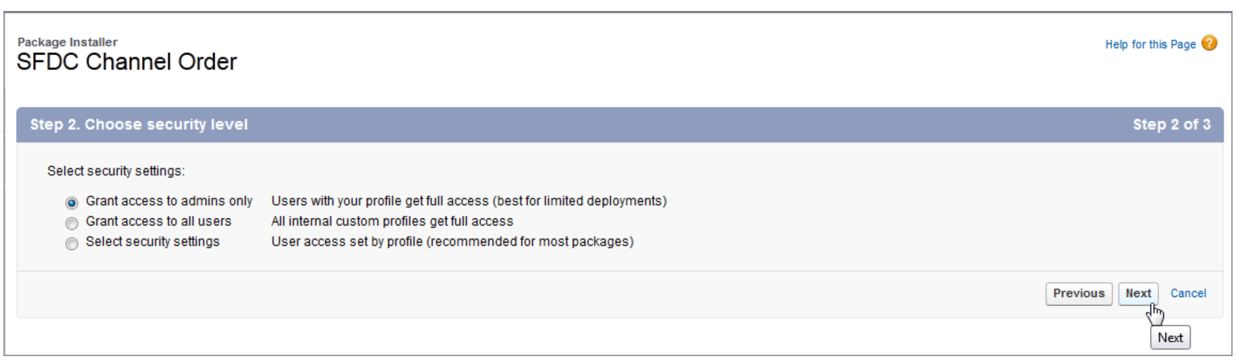


9. In Step 1: Approve Package API Access, the installer lists the permissions required by the Channel Order App. Review the page and approve the required access by clicking **Next**.



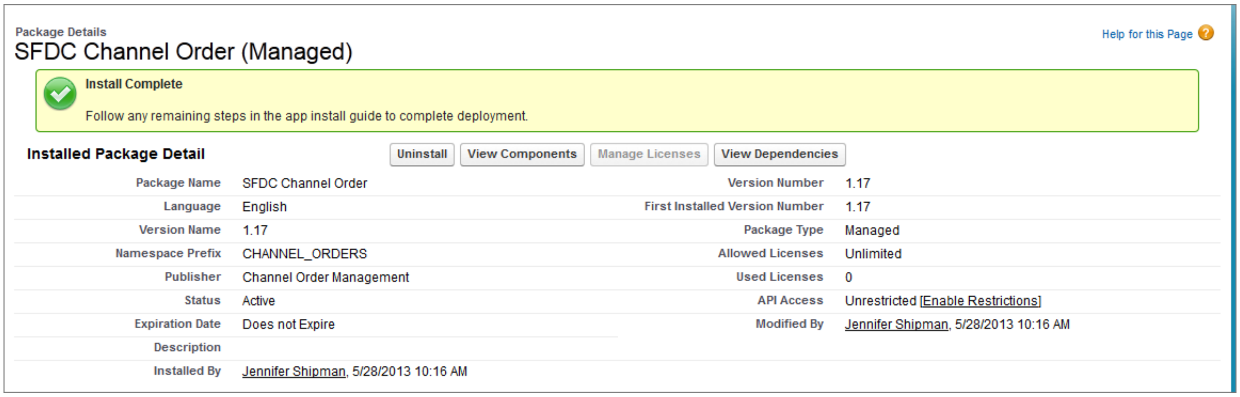
10. In Step 2: Choose Security Level, you can define which user profiles can access the app. Select Grant access to admins only and click **Next**.

Note: For details on how security settings affect profiles in your org, click the help link on the page.



11. Click **Install** to start installation.

12. Installation can take two to three minutes. If you don't see the Install Complete page, from Setup, enter `Installed Packages` in the `Quick Find` box, then select **Installed Packages**. Look for SFDC Channel Order. If the package is not available, refresh the page every minute until you see the package.



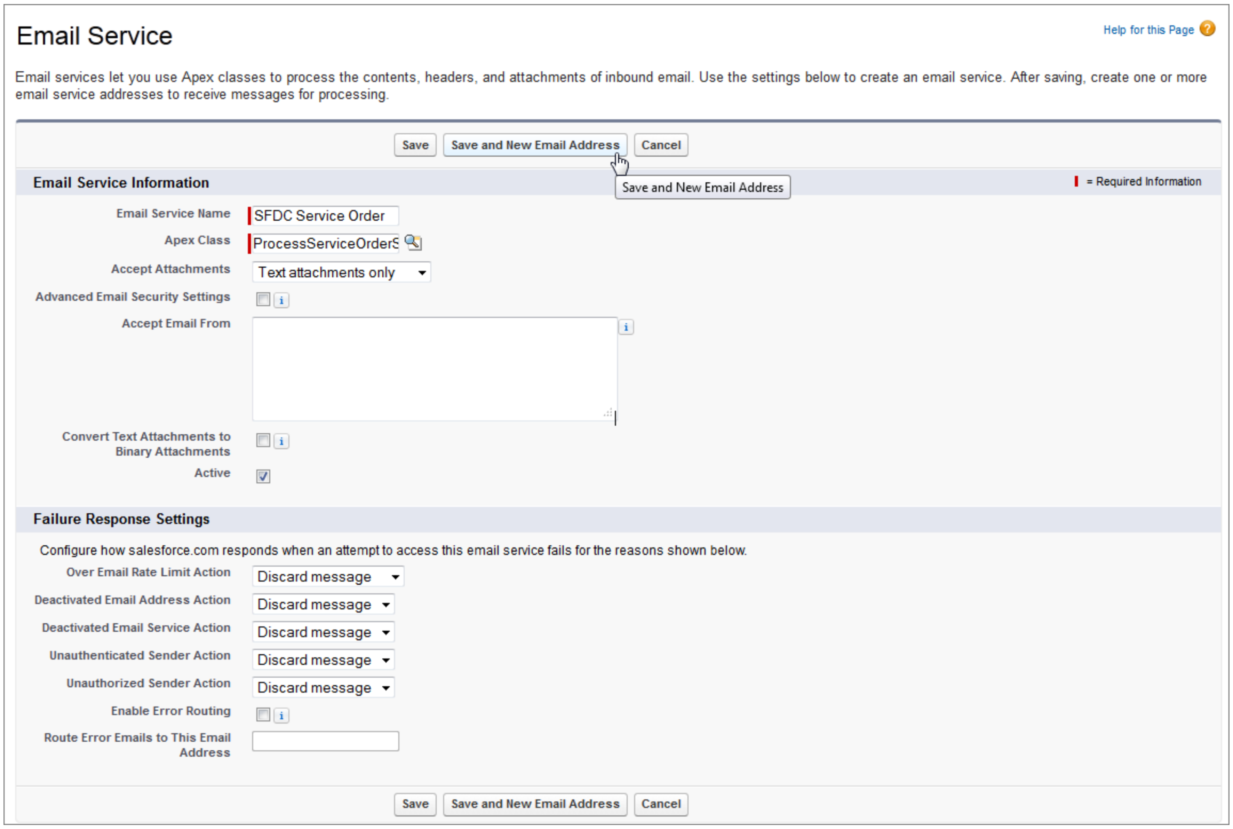
Configure the Channel Order App: Define a New Email Service

The first step in configuring the Channel Order App is defining a new Email Service.

1. From Setup, enter *`Email Services`* in the `Quick Find` box, select **Email Services**, then select **New Email Service**.
2. On the Email Service Information page, enter the following:
   - Email Service Name: *`SFDC Service Order`*
   - Apex Class: *`ProcessServiceOrderStatus`*
   - Accept Attachments: `Text attachments only`
   - Active (selected)

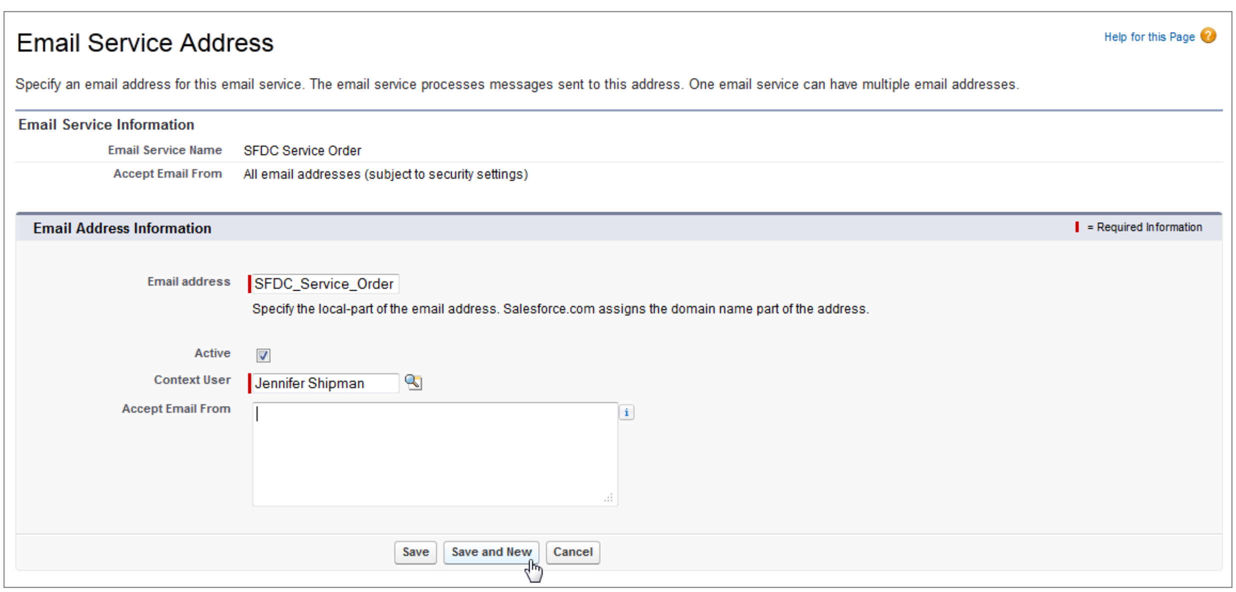
   Note: Leave all other fields blank, including Accept Email From.

   Click **Save and New Email Address**.



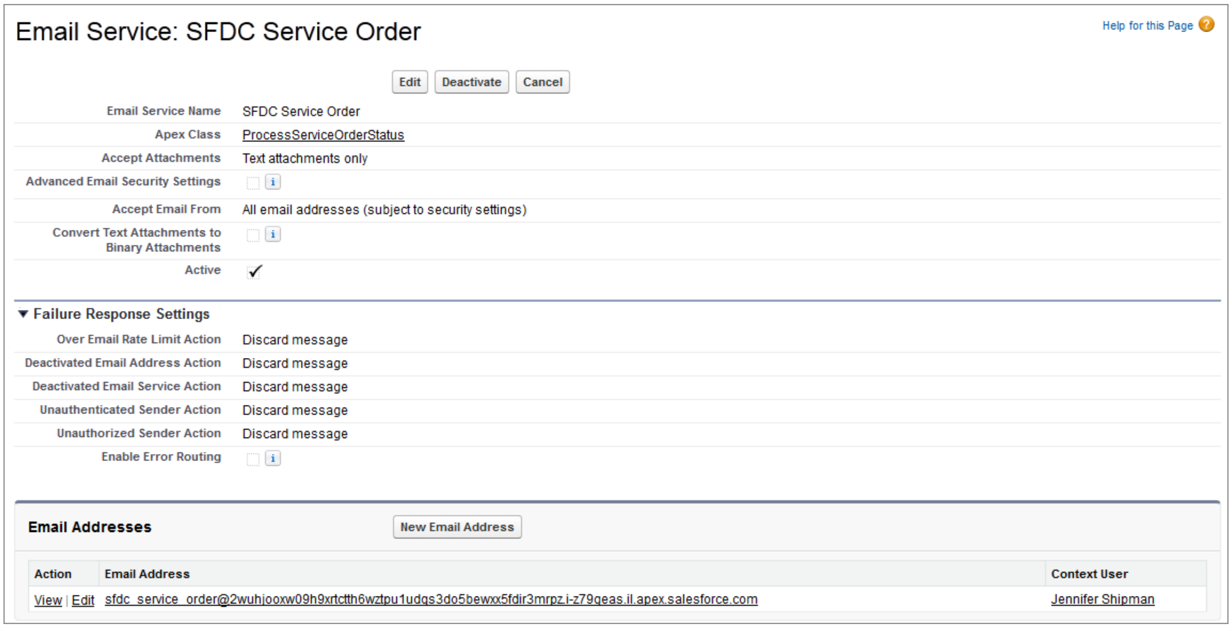
3. On the Email Address Information page, enter the following:
   - Email Address: `SFDC_Service_Order` (auto-populated)
   - Active (selected)
   - Context User: select a Salesforce admin user

Note: Leave the Accept Email From field blank.



4. Click **Save** or **Save and New**.

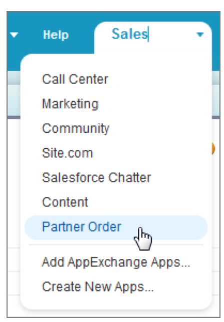
Note: Copy the generated email address at the bottom of the confirmation page; you will need it in the next step.



Configure the Channel Order App: Provide Service Order Credentials

Before using the Channel Order App, you must provide Service Order Credentials and import your Contract Terms and Product Catalogs.

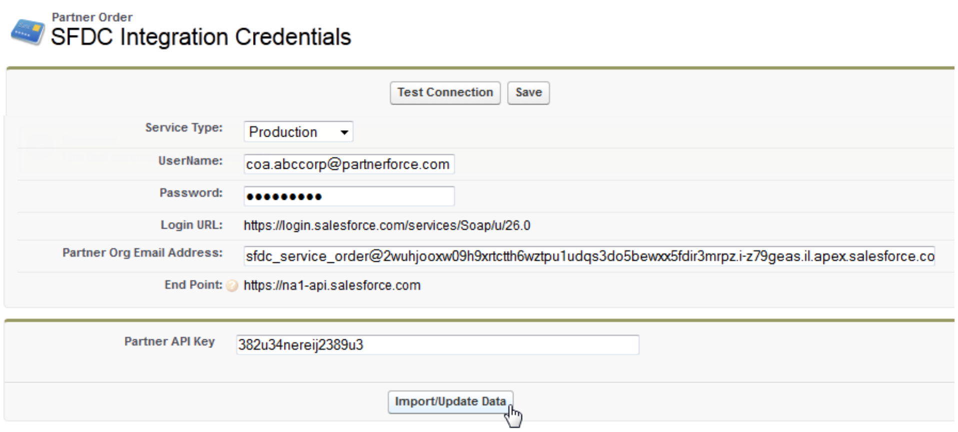
1. In the Force.com App menu, click **Partner Order**.



2. View all available tabs by clicking "+" next to the last tab.
3. Click **Service Order Credentials** and enter the following information:
   - Service Type: `Production`
   - Username: Enter the user name provided to you by the Salesforce Partner Ops team. (This is different from the credentials used to log in to the org where the Channel Order App is installed.)
   - Password: Enter the password provided to you by the Salesforce Partner Ops team.
   - Login URL: This value is auto-populated for production orgs.

- Partner Org Email Address: Enter the email address you created in the previous step (Configure the Channel Order App: Define a New Email Service). If you need to find this email address again, from Setup, enter `Email Services` in the `Quick Find` box, select **Email Services**, then select **SFDC Service**.
- End Point: This value is auto-populated for production orgs.

4. Click **Save** then **Test Connection** to verify the connection to Salesforce.
5. For `Partner API Key`, enter the API key provided to you by the Salesforce Partner Ops team.
6. Click **Import/Update Data** to import your Contract Terms and associated Product Catalogs.



When the import is complete, the page will display a success message.

After you have completed the process above, your Contract Terms and Product Catalogs will appear in the Channel Order App. For details, see Update Contract Terms and Product Catalogs and Add New Contract Terms.

Add Custom Fields to the Order Detail Page

You can add custom fields to the Order detail page to collect any data you want as orders are entered.

Follow the steps below to add custom fields to the Order detail page. All field types are accepted and the data entered is only stored locally in your org (not sent to Salesforce).

Note: You can't manage field sets in the Lightning Experience, so follow these steps only if you're using the Salesforce Classic.

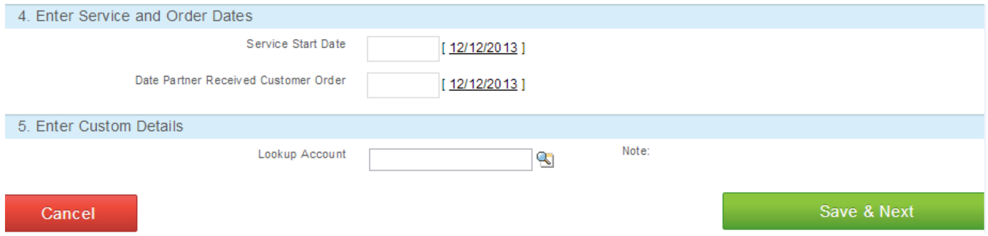
1. First, create the custom fields on the Service Order object. From Setup, enter `Objects` in the `Quick Find` box, then select **Objects** and select the Service Order object. In Custom Fields & Relationships, click **New**.

   For detailed instructions, see Creating Custom Fields in the Salesforce Help.

2. Add the new fields to the Custom Fields Field Set for the Service Order object and order them as they should appear on the Order detail page.

   For details on field sets, see Creating and Editing Field Sets in the Salesforce Help.

3. When you save the additions to the Service Order object, a new section called Enter Custom Details will appear on the Order detail page that contains the custom fields.



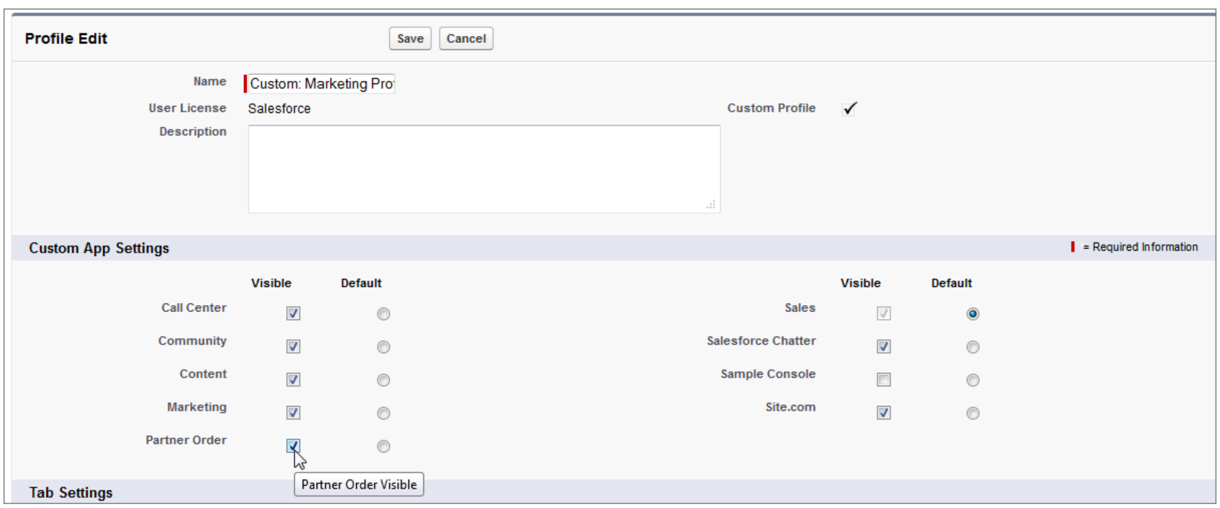
Enable the Channel Order App for Non-Admin Users

To make the Channel Order App accessible to users without admin permissions, modify the custom profile for those users.

You must have admin access to modify profiles.

Note: The modifications required to access the Channel Order App can only be made to a custom profile. For details on creating custom profiles, see the Salesforce online help.

1. From Setup, enter *`Profiles`* in the `Quick Find` box, then select **Profiles** and find the custom profile you want to modify.
2. Click the profile name. On the Profile Detail page, click **Edit**.
3. Under Custom App Settings, find Partner Order and select the checkbox in the Visible column.



4. Under Custom Tab Settings, set the Partner Order custom tabs as follows:
   - Orders: `Default On`
   - Partner Contract Terms: `Default On`
   - Partner Product Catalog: `Default On`
   - Service Order Credentials: `Tab Hidden`

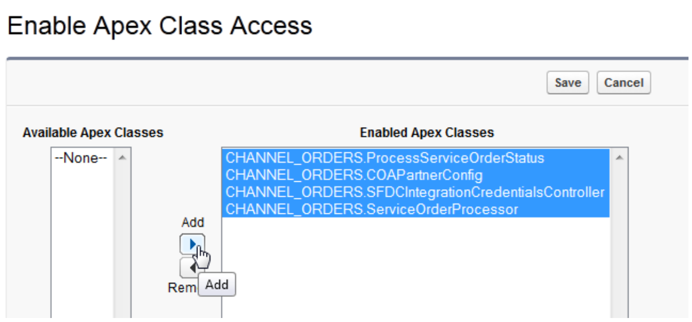
     Note: For security purposes, the Service Order Credentials tab must be hidden for non-admin profiles.

   - Service Order Detail: `Tab Hidden`
   - Service Orders: `Tab Hidden`

5. Under Custom Object Permissions, set the following access options:
   - Customers: Read, Create, and Edit
   - Partner Contract Terms: Read
   - Partner Product Catalog: Read
   - Service Orders: Read, Create, and Edit
   - Service Order Detail: Read, Create, and Edit

   Note: You cannot update object permissions for a standard profile; to make these changes to a standard profile, you must clone the profile.

6. Click **Save**.
7. Back on the Profile Detail page, scroll down to Enable Apex Class Access and click **Edit**.
8. On the Enable Apex Class Access page, select all the classes under Available Apex Classes that begin with "CHANNEL_ORDERS" and click **Add** to move them to Enabled Apex Classes. Click **Save**.

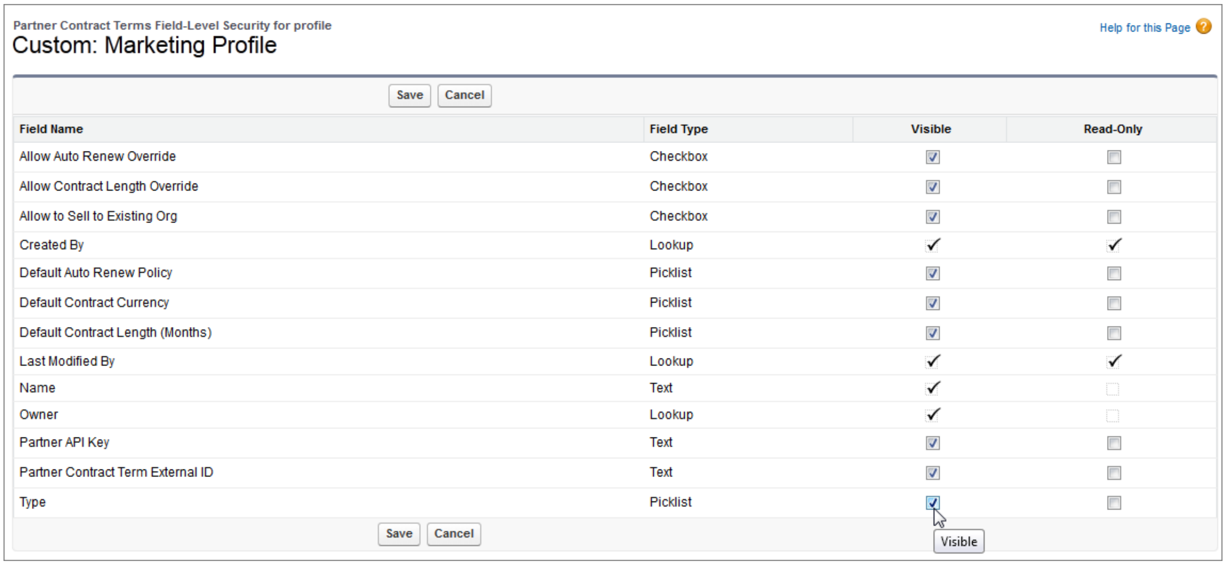


9. On the Profile Detail page, scroll to **Enable Visualforce Page Access** and click **Edit**.
10. On the Enable Visualforce Page Access page, select all the pages under **Available Visualforce Pages** that begin with "CHANNEL_ORDERS" and click **Add** to move them to **Enabled Visualforce Pages**. Click **Save**.
11. Back on the Profile Detail page, scroll to the Field-Level Security: Custom Field-Level Security section and complete the steps below for each of the following items:
    - Customer
    - Partner Contract Terms
    - Partner Product Catalog
    - Service Order
    - Service Order Details

    a. Click **View** to open the field list.

b. Click **Edit**.

c. Select all checkboxes in the Visible column. Leave the Read-Only column as is.



d. Click **Save**.

e. Click **Back to Profile**. (Repeat for the next object.)

After these steps are complete, users with the profile should be able to access the Channel Order App.

MANAGING CONTRACT TERMS AND PRODUCT CATALOGS

This section explains how to import your Contract Terms and Product Catalogs into the Channel Order App so you can create and submit orders.

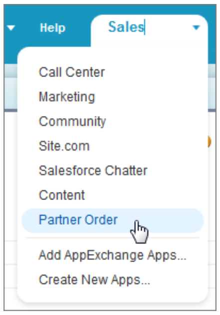
Note: Contract Terms and Product Catalogs installed with the Channel Order App are owned and maintained by the Salesforce.com Partner Operations team and should not be modified.

Add New Contract Terms

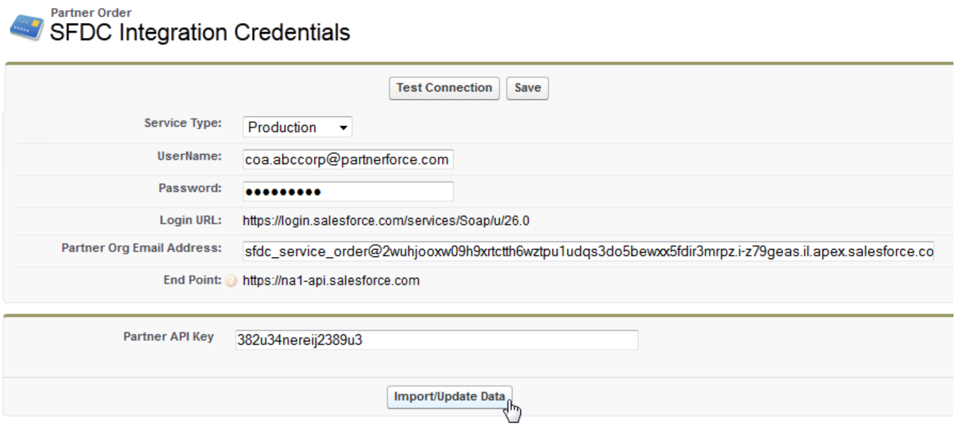
To add Contract Terms to your Channel Order App, first obtain a new Partner API Key from salesforce.com, then follow the steps below to configure the new Contract Terms.

Each Contract Terms record is associated with a unique Partner API Key.

1. In the Force.com App menu, click **Partner Order**.



2. View all available tabs by clicking "+" next to the last tab.
3. Click **Service Order Credentials**. Leave all the login information as is and enter the new Partner API Key you obtained from salesforce.com.



4. Click **Import/Update Data**.

5. A confirmation message will display when the update is complete.

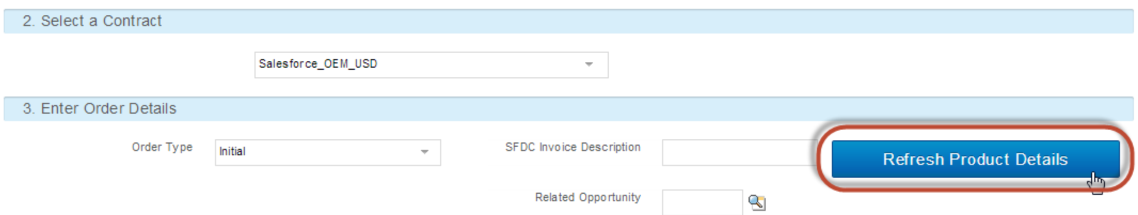
You can now manage the new Contract Terms as described in Update Contract Terms and Product Catalogs.

Update Contract Terms and Product Catalogs

Salesforce.com Partner Operations will push any necessary updates to your Channel Order App, but if you think your Contract Terms or Product Catalogs are outdated, you can update them to the latest version yourself.

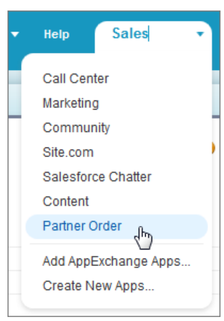
You can update your contract terms when you're submitting an order, or from a Contract Terms record.

To update your Contract Terms and Product Catalog when you're submitting an order, click **Refresh Product Details** on the order detail page.

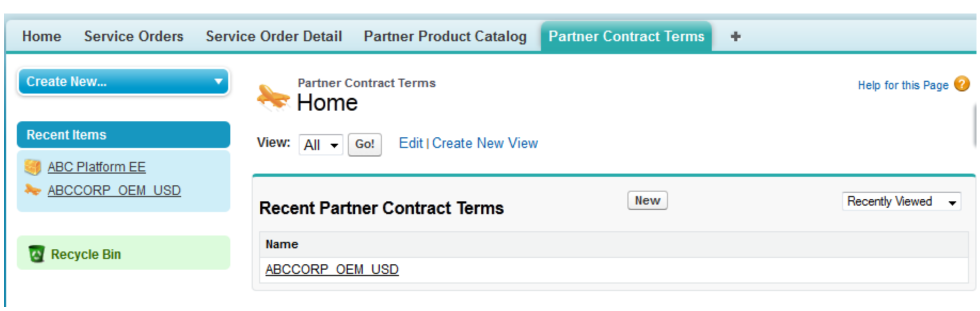


To update Contract Terms from a Contract Terms record, follow the steps below:

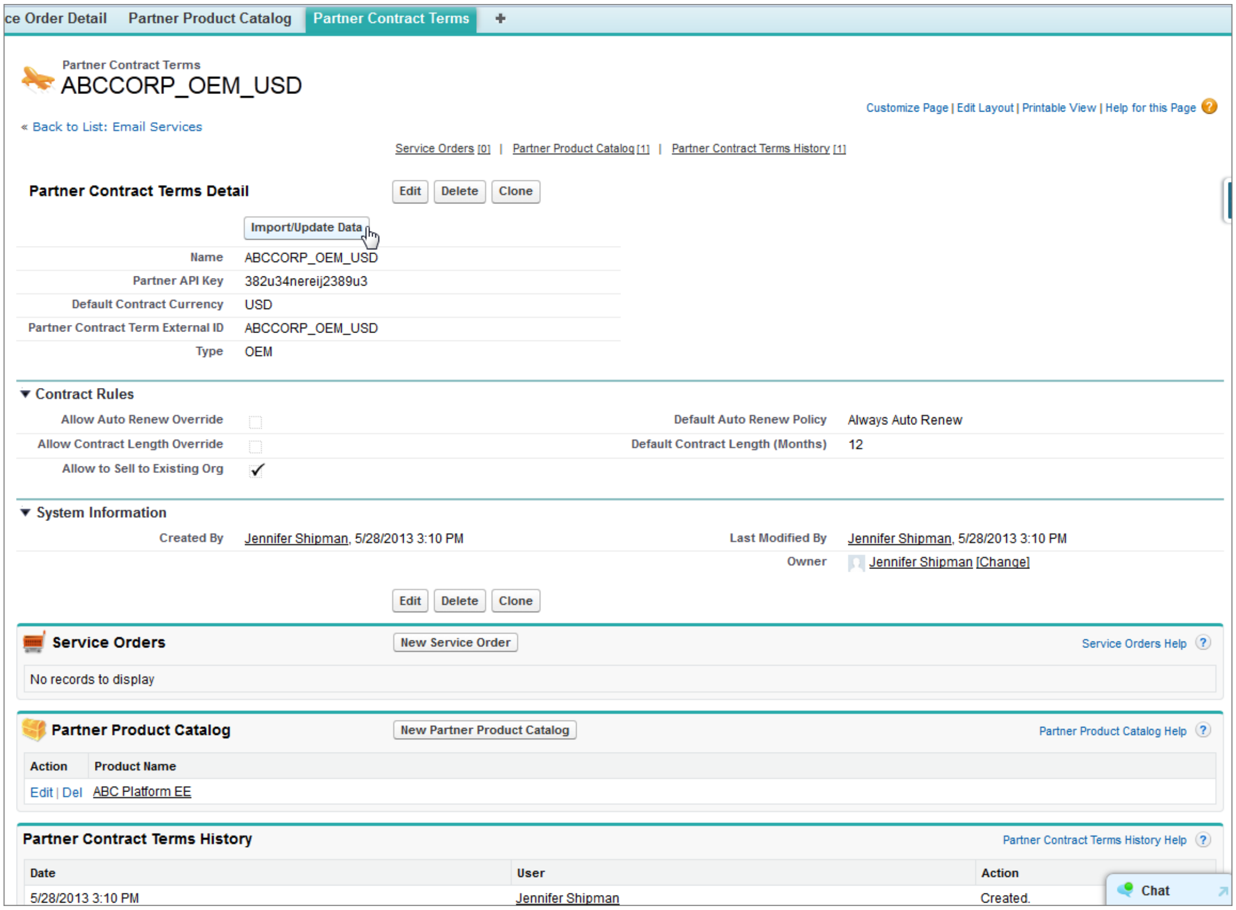
1. In the Force.com App menu, click **Partner Order**.



2. Go to the Partner Contract Terms tab and select the Contract Terms record you want to update.



3. On the Contract Terms record page, click **Import/Update Data** to update the Contract Terms and any associated Product Catalog records, and add any new Product Catalog records that have been added to your Contract Terms.



4. A confirmation message will display when the update is complete.

SEE ALSO:

Submit an Order

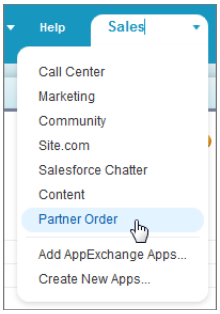
SUBMITTING AND MANAGING ORDERS

The Orders tab in the Channel Order App displays the status of your current orders and allows you to view, edit, and submit orders.

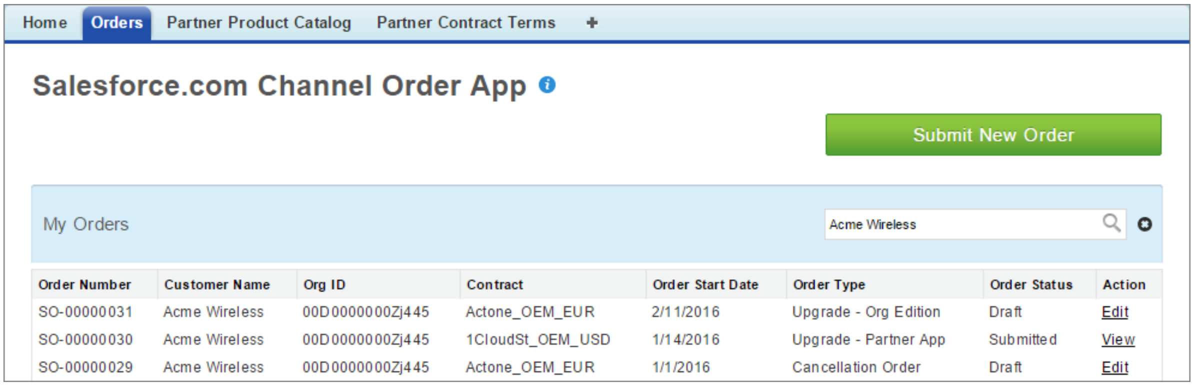
View and Manage Orders

Navigate to the Orders tab to view order status or edit and submit orders in the Channel Order App.

1. In the Force.com App menu, click **Partner Order**.



2. Go to the Orders tab.



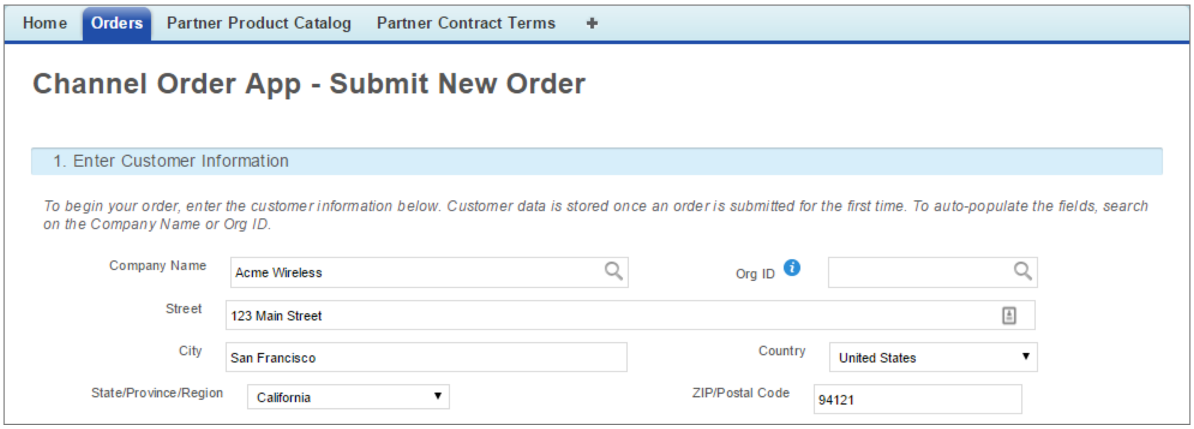
- Use the search box to find orders by Customer Name or Org ID.
- Click any column to sort orders by the corresponding value.
- Use the Order Status column to track your orders.
- Click a link in the Action column to view a completed order or edit an unsubmitted order.
- Click **Submit New Order** to enter details for a new order.

Submit an Order

Create and submit orders from the Orders tab in the Channel Order App.

To start a new order, click **Submit New Order**. To edit an unfinished order or continue with an unsubmitted order, click the **Edit** link for the order in the Action column. You define the specifics of an order using the Order detail page.

1. Enter Customer Information: Enter customer information in the fields provided. To auto-populate the details, search on the `Company Name` or `Org ID`. (If you use the License Management App to provision and control licenses, the `Org ID` is the same as the Subscriber ID on the license record.)



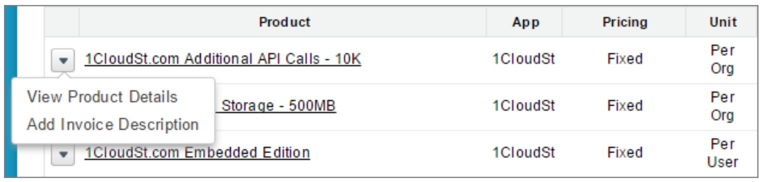
2. Select a Contract: Choose the appropriate contract from the list.
3. Enter Order Details: Define the specifics of the order, including the type of order and the products to include.

Note: If you have recently upgraded the Channel Order App, or think your Contract Terms or Product Catalogs are outdated, click **Refresh Product Details** to sync with the AppExchange and update data for the contract selected and the associated product catalogs. The page will display a Success message when the sync is complete.

- Choose the `Order Type`.

Order Type	Use to:
Initial	Create an order for a new customer who hasn't purchased something from you before. You must include an admin user subscription for each reseller customer org in your order. Order one admin user subscription per 50 user subscriptions.
Add-On	Add licenses or products for an existing customer.
Reduction	Remove licenses or products for an existing customer. The quantity and product you specify should reflect what you want reduced in the existing contract. If you want to cancel all services for a customer, submit a cancellation order instead.
Cancellation	Terminate a contract with an existing customer. Cancellations terminate the contractual relationship with the customer, which includes all products on the contract. If you are canceling individual products for a customer, submit a reduction order instead.
Renewal	Renew service and contract terms with an existing customer when the anniversary date of a contract approaches.
Upgrade	Upgrade an existing customer to a different edition of Salesforce, or adjust pricing for existing users on a contract.

- Enter an optional `SFDC Invoice Description`. This field should contain anything extra you want included on the invoice, including your identification information.
- Select an optional `Related Opportunity` to associate an opportunity from your org with the order. This data will not be sent to Salesforce.
- Modify the order details as necessary using the fields provided. Quantity is always required, and customer price is required for % Net Revenue products. Many fields on this page are defined by your product catalog and contract. Use the action menu next to each product listing to view product details, add line item descriptions that will appear on your invoice from Salesforce, or to clone a product line item if you sell it at two price points to the same customer.



Note: If the selected contract allows you to override contract or billing terms, you can update those terms on this page. The updated terms will be applied to all products in the order.

Note: You can include custom fields to collect additional data about orders; for details, see Add Custom Fields to the Order Detail Page.

4. Enter Service and Order Dates: For each field, click the text box to pick a date or click the link to choose today's date.
5. Click **Save & Next** to continue or save the order with an `Order Status` of *`Draft`*. If there are any errors in your order, a detailed message will be displayed. After you save an order, you can exit the application and return to the order later.
6. The Channel Order App – Order Confirmation page displays details about your order. If the details are correct and you agree to the stated terms, click **Confirm & Submit**. To make changes, click **Modify**.

After your order is successfully submitted, it will appear in the My Orders list on the Orders tab with an `Order Status` of `Received`. Orders that have not been submitted have an `Order Status` of `Draft`.

SEE ALSO:

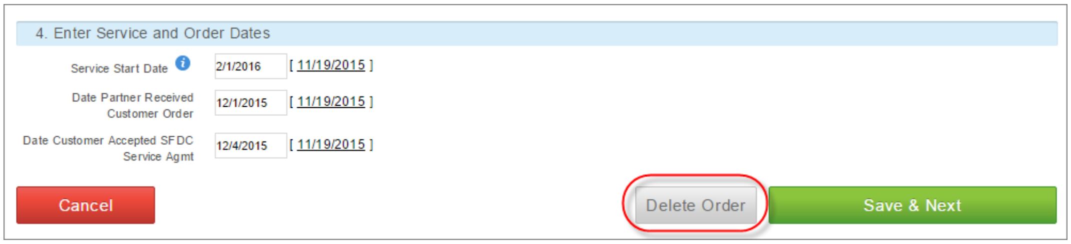
Update Contract Terms and Product Catalogs

Add New Contract Terms

Delete a Draft Order

You can delete orders that you no longer need, such as duplicates, to reduce clutter in the Channel Order App. To delete an order, `Order Status` must be `Draft`. Once you delete an order, you can't recover it later.

1. In the Force.com App menu, select **Partner Order**.
2. On the Orders tab, find the draft order that you want to delete, and then select **Edit**.
3. Select **Delete Order**.



4. Confirm that you want to delete the order by selecting **Delete**.

USING THE PARTNER ORDER SUBMIT API

The Channel Order App Partner Order Submit API allows you to submit orders programmatically via Apex from the ISV org where the Channel Order App is installed directly to Salesforce for provisioning of base licensing for your app.

Partner Order Submit API

The Partner Order Submit API can be used to submit orders immediately or asynchronously.

Syntax

```
channel_orders.ServiceOrderProcessor.sendOrder()
channel_orders.ServiceOrderProcessor.sendOrderAsync()
```

Usage

Use `sendOrderAsync` when you want to create or update multiple orders and send them in the same transaction. See the example in this section for more details.

Rules and Guidelines

This is an Apex implementation, so all Apex usage rules and limits apply. Currently we only support 1 order per call.

The Partner Submit API is used to send an order after it has been created, using a valid `Service Order ID`. You can create Service Order and Service Order Detail records using the Channel Order App, data loading, or automated processing.

Each order must include the following fields:

Note: Field names are prefixed with `CHANNEL_ORDERS__` unless noted.

Table 1: Service Order Fields

Field Label	Field Name	Description
Created with New COA	`Created_with_new_COA__c`	Indicates you are using the latest version of the Channel Order App. Note: Always check this field to ensure proper processing.
Contract	`Partner_Contract_Rules__c`	This field is a lookup to the Contract Terms record.

Field Label	Field Name	Description
Customer Company Name	`Customer__c`	This field is a lookup to the Customer record, which includes the address and org details. Note: You must use an existing Customer record; you can't populate the customer name and address fields using the API.
Date Partner Received Customer Order	`Date_Partner_Received_Customer_Order__c`	The date you received the order.
Date Customer Accepted SFDC Service Agreement	`Date_Customer_Accepted_SFDC_Svc_Agrmnt__c`	The date the customer accepted the salesforce.com service agreement. Only required for OEM contracts.
I Certify a Corresponding Order is Rec'd	`I_certify__c`	Confirmation that the order has been received.
Order Type	`Order_Type__c`	Accepted values: • `Initial` • `Add-On` • `Reduction` • `Cancellation Order` • `Upgrade-Partner App` • `Upgrade-Org Edition`
Service Order ID	`Name`	The ID of the service order. (Standard field; not prefixed with `CHANNEL_ORDERS__`.)
Service Order Status[1]	`Service_Order_Status__c`	The current status of the service order: • `Draft` • `Error` • `Received` • `Processed` Note: You can only submit orders with a status of `Draft`.

Field Label	Field Name	Description
Service Start Date	`Service_Start_Date__c`	The date service should begin.

Note:

- [1] In certain situations, a query to the Partner Order Submit API may return `Service_Order_Status1__c` in addition to `Service_Order_Status__c` in the REST response. The `Service_Order_Status1__c` field is for internal use by Salesforce and can be ignored.

Table 2: Service Order Details Fields

Field Label	Field Name	Description
App	`Application__c`	[TBD]. This field is a lookup to the Product Catalog record.
Billing Frequency	`pc_Billing_Frequency__c`	Must match contract with Salesforce unless you have been granted override permissions.
Cancellation Terms (days)	`pc_Cancellation_Terms__c`	Must match contract with Salesforce unless you have been granted override permissions.
Contract Auto Renew	`pc_Contract_Auto_Renew__c`	Must match contract with Salesforce unless you have been granted override permissions.
Contract Length	`pc_Contract_Length__c`	Must match contract with Salesforce unless you have been granted override permissions.
Currency	`Currency__c`	The currency of the contract. This field is a lookup to the Contract Terms record.
Customer Price	`Customer_Price_Per_Month__c`	The price in units per month. Only required for PNR products.
Fixed Price	`pc_Fixed_Price__c`	[TBD]. This field is a lookup to the Product Catalog record.
Floor Price	`pc_Floor_Price__c`	The minimum price paid to Salesforce when you sell the product. This field is a lookup to the Product Catalog record.
Partner Contract Term	`pc_Partner_Contract_Term__c`	This field is a lookup to the Contract Terms record.
PNR %	`PNR__c`	Percent net revenue for the product. This field is a lookup to the Product Catalog record.

Field Label	Field Name	Description
Pricing	`pc_Pricing_Type__c`	The type of pricing for the product. You can choose fixed, PNR, or list. This field is a lookup to the Product Catalog record.
Product	`Product_Name__c`	This field is a lookup to the Product Catalog record.
Product ID	`Product_ID__c`	The user-specified product ID. This field is a lookup to the Product Catalog record.
Renewal Terms (Months)	`pc_Renewal_Terms__c`	Must match contract with Salesforce unless you have been granted override permissions.
Service Order	`Partner_Order__c`	This field is a lookup to the Service Order.
SFDC Invoice Description	`Product_Line_Description__c`	Optional. This field should contain anything extra you want added to the invoice, including your identification information.
Total Quantity	`Quantity__c`	The total quantity of Product Catalogs in the service order.
Unit	`pc_Pricing_Unit__c`	The per-unit pricing method for the product. You can choose per user, per org, or define a custom method. This field is a lookup to the Product Catalog record.

Methods

The ServiceOrderProcessor object supports the following methods:

Name	Arguments	Description
`sendOrder`	ID	Submit an order with a single ID immediately.
`sendOrder`	Set of IDs	Submit an order with a set of IDs immediately.
`sendOrderAsync`	ID	Submit an order with a single ID asynchronously (`@future`).
`sendOrderAsync`	Set of IDs	Submit an order with a set of IDs asynchronously (`@future`).

Example: Batching on the Partner Order Submit API

As noted above, only 1 call can be processed at a time. This example uses a batch job to work around this limitation.

In the example below, if you have 100 orders in `Draft` status, the code will create one batch job with 100 executions, because only one record is processed per execution, in the last line in the example.

```
//Batch Apex class
global class COABatchClass implements Database.batchable<sObject>, Database.AllowsCallouts,
 Database.Stateful{
   final String DRAFT_STATUS = 'Draft';
   global final String query =
      'select Id, CHANNEL_ORDERS__Service_Order_Status__c ' +
     ' from CHANNEL_ORDERS__Service_Order__c where CHANNEL_ORDERS__Service_Order_Status__c
 =: DRAFT_STATUS';

   global Database.QueryLocator start(Database.BatchableContext BC){
      return Database.getQueryLocator(query);
   }

  global void execute(Database.BatchableContext info, List<CHANNEL_ORDERS__Service_Order__c>
 scope){
       for(CHANNEL_ORDERS__Service_Order__c s : scope){
         CHANNEL_ORDERS.ServiceOrderProcessor.sendOrder(s.Id);
         }
   }
   global void finish(Database.BatchableContext BC){}
}

//Batch call
Id batchInstanceId = Database.executeBatch(new COABatchClass(), 1);
```

SEE ALSO:

Understanding Execution Governors and Limits

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