



SETTING UP SALESFORCE ORDERS FOR YOUR ORGANIZATION

Summary

Use orders to automate your organization's post-deal process. Create orders using your contract and account data in Salesforce. Then, track order information using the Orders tab.

Setting Up Salesforce Orders for Your Salesforce Org

Life Cycle of an Order

Before using Salesforce Orders, review the basic order process.

1. Customer decides to purchase products or services.

This may be identified through a closed opportunity or through a shopping cart.

2. Order is created.

Your users can create an order from the Orders tab or through the Orders related list on an account or a contract. By default, the status of a new order is Draft. Once the order is created, add order products using the price book associated with the order.

3. Order is reviewed.

This step is optional and depends on whether you customize the Status picklist to include a review status, such as Ready for Activation. The only default statuses are Draft and Activated.

4. Order is activated.

When an order is complete (ready to be shipped or provisioned), users can activate the order. If the order is associated with a contract, the contract must be activated before the order is activated.

5. Order is provisioned or shipped.

Once an order is activated, users can respond to the order by provisioning services or shipping products that have been purchased.

6. Order is reduced.

This step is optional. If your organization supports reduction orders and a customer returns a product or requests a reduction of services, users can reduce an activated order.



Tip:

- Use the API to generate orders from closed opportunities. See the [SOAP API Developer's Guide](#) for information on opportunities and orders.
- Use the [Place Order API Developer Guide \(PDF | HTML\)](#) to create contracts, orders, and order products in a single call.
- If you have a custom object for invoices, create relationships between that object and orders.

Assign Order Permissions

By default, the standard Contract Manager, Marketing User, Read Only, Solution Manager, Standard User, and System Administrator profiles contain the following new order permissions.

Best Practices

- Add these new permissions to permission sets, and assign them to the appropriate users.
- Update your profiles or permission sets so that the Orders tab is visible to the appropriate users.

Activate Orders

Allows a user to activate orders.

Edit Activated Orders

Allows a user to edit orders, even if they've been activated, as well as deactivate orders. If a user doesn't have this permission but has "Edit" on orders, the user can change orders only if they aren't activated.

Create Reduction Orders

Allows a user to reduce orders that are activated.

User Permissions on Orders

Consider which users should be allowed to read, create, edit, and delete orders. Then revise their permissions as needed in the user profiles and permission sets.

If you remove a user's "Read" permission on orders, the user won't see any orders, order fields, or Orders related lists in Salesforce.

Some permissions automatically enable other permissions.

Users with these permissions...	Automatically get these permissions...
"Activate Orders"	"Read" and "Edit" on orders
"Edit Activated Orders"	"Read" and "Edit" on orders AND "Activate Orders"
"Create Reduction Orders"	"Read" and "Edit" on orders

Add the Orders Tab to Your Apps

Make sure your users can easily access your organization's order data by adding the tab to the appropriate apps.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the relevant Force.com apps, such as Sales.
3. Select **Orders** in *Available Tabs* and click the right arrow button to add the Orders tab to the app.
4. Click **Save**.

Once you add the Orders tab to one or more of your Force.com apps, users with at least "Read" access on orders will be able to view and edit existing orders in Salesforce1. For information about configuring Salesforce1, see "Put Salesforce1 In Your Users' Hands" in the Salesforce Help.

Customize Page Layouts

Salesforce Orders are designed to handle the most unique ordering business processes. Before you begin using orders, customize Salesforce to fit your order process.

Orders

You may have different page layouts for different types of orders, such as products or services. You may also follow a different order process depending on the type of order. Consider creating record types to distinguish between each type of order your organization needs. Then create a page layout for each of those record types, and assign each record type to the appropriate page layout. Record types are available in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

- Add the Orders related list to your account page layouts. Users can then create orders directly from an account by clicking **New** on the Orders related list. They can also view, edit, or delete orders directly from the account.
- Add the Orders related list to your contract page layouts. Users can then create orders directly from a contract by clicking **New** on the Orders related list. They can also view, edit, or delete draft orders directly from the contract. The contract and its related account are listed on the order by default.
- To allow your users to assign price books at the contract level, add the `Price Book` field to the contract page layouts using a custom lookup relationship field.
- To control whether fields are visible or editable by users in certain profiles, customize the field-level security.
- You can define mini page layouts to have the Console tab's Mini View display a subset of the information in existing order page layouts.

Contracts and Price Books

If a contract has a price book, that price book will be selected by default on that contract's new orders.

Order Products

- Customize the fields your users can update when they edit multiple order products at once. From the page layout editor for your Order Products layout, click **Edit Multi-Line Layout** and then add, remove, and reorder the fields.

Reduction Orders

If your organization uses reduction orders, here are tips for customizing your page layouts.

- Create a record type for each type of reduction order. You may need more than one record type for reduction orders if your organization uses different kinds of reduction orders, such as service reduction requests or defective products.
- Create a page layout for each type of reduction orders. Customize the page layout so it includes only the fields relevant to your reduction orders process.
- Add the Reduction Order Products related list to the Order Products page layout. Users can then see whether order products have been reduced.

Page Layouts in Professional Edition Organizations

Since Professional Edition doesn't provide the ability to create new page layouts, by default the `Price Book` field is visible on your contract page layout.

Defining Status Values

Each `Status` picklist value can belong to one of two categories: `draft` or `activated`. A status value in the `activated` category labels a record as an activated order. Activated orders cannot be edited unless a user has the “Edit Activated Orders” permission. Users need the “Activate Orders” permission to change an order to any of the status values in the `activated` category.

Customize Fields

Design the fields for the information that your users need to track.

- Customize the order `Status` picklist so that it contains the stages in your order process.
For example, your order process may require `Draft`, `Review`, `Activated`, and `Provisioned` stages. In this example, `Draft` and `Review` would have a status category of `Draft`, and `Activated` and `Provisioned` would have a status category of `Activated`.
- Create custom fields to hold data specific to your business. For example, you may want to track subscription type or discount amount.
- Create custom formula fields to automatically calculate values based on other values:
 - Calculate the discount percentage based on the `List Price` and `Unit Price` of an order product.
For example: $1 - (\text{UnitPrice} / \text{ListPrice})$
 - Estimate the tax of an order product using a custom field for expected tax rate and the `Unit Price`.
For example: $\text{UnitPrice} * \text{Tax_Rate_c}$

Create Views and Reports

List views

List views help you organize your orders at a glance from the Orders tab home page. By default, list views are available from the Orders tab for:

- All Activated Orders—orders with a status value in the `activated` category
- All Draft Orders—orders with a status value in the `draft` category
- All Orders—every order in your Salesforce organization

Consider creating custom list views that your users will need. For example, if your organization has a “Ready for Activation” status, you could create a list view for all orders with that status so that a user with the “Activate Orders” permission could keep track of the orders that need to be activated.

Reports Best Practices

- Generate custom reports to monitor your organization's orders. You may want to track orders by account, orders requiring activation, or orders expiring this quarter.
- Create a custom report folder called "Order Management Reports" and store all your custom order reports in this folder.

Reports

Use an orders report type to create custom reports.

1. Create a "Order Reports" folder to store your order reports.
2. Select the Reports tab and click **New Report**.
3. Choose **Contracts and Orders**, and select one of the options that includes orders.



Tip: If the report types available by default don't fit your organization's need, consider creating a custom report type. See "Create a Custom Report Type" in the Salesforce Help.