



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 Orders in Salesforce

Life Cycle of an Order

Before using Salesforce orders, review the basic order process.

1. Customer decides to purchase products or services.

Check for closed opportunities or shopping cart items.

2. Rep creates an order.

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. Next, add order products using the price book associated with the order.

3. Order is reviewed.

This step 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), activate the order. If the order is associated with a contract, activate the contract before activating the order.

5. Order is provisioned or shipped.

After an order is activated, users can respond to the order by provisioning services or shipping products that were purchased.

6. Order is reduced.

If you use reduction orders and a customer returns a product or requests a reduction of services, you can reduce an activated order (Salesforce Classic only).

Tip:

- Use the API to create orders from closed opportunities. See the [SOAP API Developer Guide](#).
- Use the [Place Order API Developer Guide \(PDF | HTML\)](#) to create contracts, orders, and order products in one 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 order permissions.

Best Practices

- Add these 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 the orders were activated, and to 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 (Salesforce Classic only).

User Permissions on Orders

Allows users to read, create, edit, and delete orders. Consider which users need these permissions, and then revise their user profiles and permission sets accordingly.

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

Some permissions enable other permissions.

Users with these permissions ...	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 that your users can easily access your order data.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps** (Salesforce Classic) or **App Manager** (Lightning Experience).
2. Click **Edit** next to the relevant Lightning Platform apps, such as Sales.
3. Select **Orders** in the list of available items, and then click the right arrow button to add the Orders tab to the app.
4. Save your changes.

After you add the Orders tab to a Lightning Platform app, users with at least "Read" access on orders can view and edit orders in Salesforce. For information about configuring for mobile, see "Put the Salesforce App 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 can have different page layouts for different types of orders, such as products or services. You can also follow a different order process depending on the type of order. Consider creating record types to distinguish between each type of order you need. Then create a page layout for each record type, 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 so that the Console tab's Mini View displays a subset of the information in order page layouts.

Contracts and Price Books

If a contract has a price book, the price book is 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 the same time. 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 you use reduction orders, here are tips for customizing your page layouts.

- Create a record type for each type of reduction order. If you use different kinds of reduction orders, such as service reduction requests or defective products, you might need multiple record types for reduction orders.
- Create a page layout for each type of reduction order. Customize the page layout so that it includes only the fields relevant to your reduction order process.
- Add the Reduction Order Products related list to the Order Products page layout. Users can then see whether order products were reduced.

Page Layouts in Professional Edition

Because Professional Edition doesn't support creating page layouts, the `Price Book` field is visible by default 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. Only users with the “Edit Activated Orders” permission can edit activated orders. Users need the “Activate Orders” permission to change an order to any status value 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 can require Draft, Review, Activated, and Provisioned stages. In this example, Draft and Review have a status category of Draft, and Activated and Provisioned have a status category of Activated.
- Create custom fields to hold data specific to your business. For example, track subscription type or discount amount.
- Create custom formula fields to 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 the 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 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 Salesforce

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

Reports

Use an orders report type to create custom reports.

1. Create an Order Reports folder to store your order reports.
2. On the Reports tab, click **New Report**.
3. Select **Contracts and Orders**, and then select an option that includes orders.



Tip: If the default report types don’t meet your needs, create a custom report type. See “Create a Custom Report Type” in the Salesforce Help.

Reports Best Practices

- Generate custom reports to monitor your orders. 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.