
The Generate Orders Package Implementation Guide

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INTRODUCTION TO THE GENERATE ORDERS PACKAGE

Generate Orders Package Overview

The Generate Orders package is a set of flow templates that you install and customize to help your sales and operations teams automatically create orders with order products from opportunities or quotes. These templates also let your teams generate contracts and relate orders to those contracts.

Let's imagine that one of your sales reps just closed a won opportunity. And, her customer has accepted a quote. You want to help your sales reps generate orders to automate hand-offs between sales and operations. Salesforce Labs has developed the Generate Orders package to help you automate this process.

Understanding Flow Templates

Flow templates let your sales reps convert opportunities or quotes into orders by providing a declarative way for you to create and configure flows that generate or update records in Salesforce.

After you've created a flow, you can set up a custom button to launch the flow, and then add the button to opportunity or quote page layouts.

As your business changes, you can easily modify flows to accommodate your teams' new process and data requirements.

For more information on automating business processes with flows, check out [Flows](#) in the Salesforce Help.

Customizing Flow Templates for Your Business

Generate Orders flow templates retrieve selected data from opportunities or quotes and from the accounts that are used to create orders and order products. Depending on the template you set up, flows can also create contracts and relate them to opportunities or quotes. These flows create orders, look up the relevant opportunity products or quote line items, and create order products for each line.

If these flow templates don't meet your business requirements, you can modify the flow templates to fit your needs. For example, you can modify any of the templates to retrieve additional fields from other objects and map those fields to fields on the contracts, orders, or order products that the flows create when your sales reps convert opportunities or quotes. Or, you might want to include or exclude certain opportunity products or quote lines when generating order products. You might also want to modify flow templates to create records for other objects and relate those records to the orders, order products, or contracts created by your flows.

EDITIONS

Available in: Salesforce Classic

Available for: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To create and edit custom buttons and links:

- Customize Application

To edit page layouts:

- Customize Application

To view workflow rules and actions:

- View Setup and Configuration

To open, edit, or create a flow in the Flow Builder:

- Manage Flow

USING FLOW TEMPLATES

Flow Template Types

Choose flow templates based on the source of your data, and on whether you want to generate orders, contracts, or both.

If you need to	Start with this template
Create an order from an opportunity	Opportunity to Order
Create an order and a contract from an opportunity	Opportunity to Order with Contract
Create an order from a quote	Quote to Order
Create an order and a contract from a quote	Quote to Order with Contract
Create a contract from an opportunity	Opportunity to Contract
Create a contract from a quote	Quote to Contract

Using the Opportunity to Order Flow Template

Create orders from the opportunities your sales reps close. The Opportunity to Order flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter *Flows* in the **Quick Find** box, select **Flows**, click **Opportunity to Order**, and then click **Open**.

Element Name	Description	Usage Tips
Get Opportunity Fields	Uses the <code>Opportunity</code> ID passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable.	Review the opportunity fields, and add any additional fields that you need to the record variable.
Order Generated?	Evaluates whether an order has already been created from the opportunity.	If an order has already been generated from the opportunity, a new order will not be generated.
Get Account Fields	Queries the account on the opportunity, and stores selected account fields in a record variable.	Review the account fields, and add any additional fields that you need to the record variable.
Assign Order Fields	Uses the opportunity's or account's field values to assign field values to the order.	Review the order fields, and add or remove fields as needed. If you need fields from another object, use a <code>Get Records</code> element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order here.

Element Name	Description	Usage Tips
Create Order	Uses the field values that are stored in the record variable to create a new order	
Get Oppty Products	Queries the opportunity products that are related to the opportunity, and stores selected field values in a record collection variable	Review the opportunity product fields, and add additional fields as needed to the record collection variable.
Loop Oppty Products	Iterates through each opportunity product in the record collection variable	
Assign Order Product Fields	Uses the opportunity product's or order's field values to assign field values to the order product	Review the assigned order product fields. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, then assign the stored values to the order product here.
Add Order Product to List	Adds the order product to the list of order products in the record collection variable	
Order Products List Empty?	Evaluates whether the record collection variable contains any order products	
Create Order Products	Uses the field values that are stored in the record collection variable to create order products	
Update Order Generated	Sets the opportunity's <code>Order Generated</code> field to <code>true</code>	
Update Oppty	Uses the field values that are stored in the record variable to update the opportunity	
Set Order Status to Activated	Sets the order's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Order) if you want the new Order to be activated.
Activate Order	Uses the field values that are stored in the record variable to update the order's field values	Include this element (and Set Order Status to Activated) if you want the new Order to be activated.

Using the Opportunity to Order with Contract Flow Template

Create orders and contracts from the opportunities your sales reps close. The Opportunity to Order with Contract flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter *Flows* in the *Quick Find* box, select **Flows**, click **Opportunity to Order with Contract**, and then click **Open**.

Element Name	Description	Usage Tips
Get Opportunity Fields	Uses the <code>Opportunity ID</code> passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable	Review the retrieved opportunity fields, and add any additional fields that you need to the record variable.
Order Generated?	Evaluates whether an order has already been generated from the opportunity	If an order has already been generated from the opportunity, a new order will not be generated.
Get Account Fields	Queries the account on the opportunity, and stores selected account fields in a record variable	Review the retrieved account fields, and add any additional fields that you need to the record variable.
Contract on Oppty?	Evaluates whether the opportunity has a contract	If the opportunity has a contract (<code>ContractID</code> is non-null), the new order will be related to the existing contract.
Assign Contract Fields	Uses the opportunity or account's field values to assign field values to the contract	
Create Contract	Uses the field values that are stored in the record variable to create a new contract	
Set Contract Status to Activated	Sets the contract's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Contract) if you want the new contract to be activated when the flow updates the contract.
Activate Contract	Uses the field values that are stored in the record variable to update the contract	Include this element (and Set Contract Status to Activated) if you want the new contract to be activated.
Set Contract on Oppty	Relates the opportunity to the contract that was just created	
Get Contract Fields	Looks up the contract that's related to the opportunity, and stores selected field values in a record variable	Review the contract fields retrieved, and add additional fields as needed to the record variable.
Assign Order Fields	Uses the opportunity's or contract's field values to assign field values to the order	Review the order fields assigned, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order here.
Create Order	Uses the field values that are stored in the record variable to create an order	
Get Oppty Products	Looks up the opportunity products that are related to the opportunity, and stores selected field values in the record collection variable	Review the retrieved opportunity product fields, and add additional fields as needed to the record collection variable.

Element Name	Description	Usage Tips
Loop Oppty Products	Iterates through each opportunity product in the record collection variable	
Assign Order Product Fields	Uses the opportunity product's or order's field values to assign field values to the order product	Review the order product fields assigned, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order product here.
Add Order Product to List	Adds the order product to the list of order products in the record collection variable	
Order Product List Empty?	Evaluates whether the record collection variable contains any order products	
Create Order Products	Uses the field values that are stored in the record collection variable to create order products	
Update Order Generated	Sets the opportunity's <code>Order Generated</code> field to <code>true</code>	
Update Oppty	Uses the field values that are stored in the record variable to update the opportunity	
Set Order Status to Activated	Sets the order's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Order) if you want the new order to be activated.
Activate Order	Uses the field values that are stored in the record variable to update the order	Include this element (and Set Order Status to Activated) if you want the new order to be activated.

Using the Quote to Order Flow Template

Create orders from the quotes your sales reps' customers accept. The Quote to Order flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter `Flows` in the `Quick Find` box, select **Flows**, click **Quote to Order**, and then click **Open**.

Element Name	Description	Usage Tips
Get Quote Fields	Uses the Quote ID that's passed to the flow to look up the quote, and stores the selected quote fields in a record variable	Review the retrieved quote fields, and add additional fields as needed to the record variable.
Order Generated?	Evaluates whether an order has already been generated from the quote	If an order has already been generated from the quote, a new order will not be generated.

Element Name	Description	Usage Tips
Get Opportunity Fields	Uses the <code>Opportunity</code> ID passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable	Review the opportunity fields retrieved, and add additional fields as needed to the record variable.
Get Account Fields	Looks up the account that's related to the opportunity, and stores selected account field values in a record variable	Review the account fields retrieved, and add additional fields as needed to the record variable.
Assign Order Fields	Uses the quote's or opportunity's field values to assign field values to the order	Review the order fields assigned, and add or remove fields as needed. If you need fields from another object, use a <code>Get Records</code> element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order here.
Create Order	Uses the field values that are stored in the record variable to create an order	
Get Quote Lines	Looks up the quote line items that are related to the quote, and stores selected field values for each quote line item in the record collection variable	Review the retrieved quote line item fields, and add additional fields as needed to the record collection variable.
Loop Quote Lines	Iterates through each quote line item in the record collection variable	
Assign Order Product Fields	Uses the quote line item's or order's field values to assign field values to the order product	Review the order product fields assigned, and add or remove fields as needed. If you need fields from another object, use a <code>Get Records</code> element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order product here.
Add Order Product to List	Adds the order product to the list of order products in the record collection variable	
Order Products List Empty?	Evaluates whether the record collection variable contains any order products	
Create Order Products	Uses the field values that are stored in the record collection variable to create order products	
Update Order Generated	Sets the quote's <code>Order Generated</code> field to <code>true</code>	
Update Quote	Uses the field values that are stored in the record variable to update the quote	

Element Name	Description	Usage Tips
Set Order Status to Activated	Sets the order's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Order) if you want the new order to be activated.
Activate Order	Uses the field values that are stored in the record variable to update the order	Include this element (and Set Order Status to Activated) if you want the new order to be activated.

Using the Quote to Order with Contract Flow Template

Generate orders and contracts from the quotes your sales reps' customers accept. The Quote to Order with Contract flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter `Flows` in the `Quick Find` box, select **Flows**, click **Quote to Order with Contract**, and then click **Open**.

Element Name	Description	Comment
Get Quote Fields	Uses the <code>Quote ID</code> that was passed to the flow to look up the quote, and stores the selected quote fields in a record variable	Review the quote fields retrieved, and add additional fields as needed to the record variable.
Order Generated?	Evaluates whether an order has already been generated from the quote	If an order has already been generated from the quote, a new order will not be generated.
Get Opportunity Fields	Uses the <code>Opportunity ID</code> passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable	Review the opportunity fields retrieved, and add additional fields as needed to the record variable.
Get Account Fields	Looks up the account that's related to the opportunity, and stores selected account field values in a record variable	Review the account fields retrieved, and add additional fields as needed to the record variable.
Contract on Quote?	Evaluates whether the quote is related to a contract	If the quote has a contract (<code>ContractID</code> is non-null), the new order will be related to the existing contract.
Assign Contract Fields	Uses the opportunity's or account's field values to assign field values to the contract	Review the contract fields assigned, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the contract here.
Create Contract	Uses the field values that are stored in the record variable to create a contract	
Set Contract Status to Activated	Sets the contract's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Contract) if you want the new contract to be activated.

Element Name	Description	Comment
Activate Contract	Uses the field values that are stored in the record variable to update the contract	Include this element (and Set Contract Status to Activated) if you want the new contract to be activated.
Set Contract on Quote	Relates the quote to the contract that was just created	
Set Contract on Oppty	Relates the opportunity to the contract that was just created	
Update Oppty	Uses the field values that are stored in the record variable to update the opportunity	
Get Contract Fields	Looks up the contract that's related to the quote, and stores selected contract fields in a record variable	Review the retrieved contract fields, and add additional fields as needed to the record variable.
Assign Order Fields	Uses the quote's, opportunity's, or contract's field values to assign field values to the order	Review the order fields assigned, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order here.
Create Order	Uses the field values that are stored in the record variable to create an order	
Get Quote Lines	Looks up the quote line items that are related to the quote, and stores selected field values in a record collection variable	Review the quote line item fields, and add additional fields as needed to the record collection variable.
Loop Quote Lines	Iterates through each quote line item in the record collection variable	
Assign Order Product Fields	Uses the quote line's or order's field values to assign field values to the order product	Review the order product fields, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the order product here.
Add Order Product to List	Adds the order product to the list of order products in the record collection variable	
Order Product List Empty?	Evaluates whether the record collection variable contains any order products	

Element Name	Description	Comment
Create Order Products	Uses the field values that are stored in the record collection variable to create order products	
Update Order Generated	Sets the quote's <code>Order Generated</code> field to <code>true</code>	
Update Quote	Uses the field values that are stored in the record variable to update the quote	
Set Order Status to Activated	Sets the order's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Order) if you want the new order to be activated.
Activate Order	Uses the field values that are stored in the record variable to update the order	Include this element (and Set Order Status to Activated) if you want the new order to be activated.

Using the Opportunity to Contract Flow Template

Create contracts from the opportunities your sales reps close. The Opportunity to Contract flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter `Flows` in the `Quick Find` box, select **Flows**, click **Opportunity to Contract**, and then click **Open**.

Element Name	Description	Usage Tips
Get Opportunity Fields	Uses the <code>Opportunity ID</code> passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable	Review the opportunity fields, and add additional fields as needed to the record variable.
Get Account Fields	Looks up the account that's related to the opportunity, and stores selected account fields in a record variable	Review the account fields, and add additional fields as needed to the record variable.
Contract on Oppty?	Evaluates whether the opportunity is related to a contract	If the opportunity is already related to a contract, a new contract will not be generated.
Assign Contract Fields	Uses the opportunity's or account's field values to assign field values to the contract	Review the contract fields, and add or remove fields as needed. If you need fields from another object, use a Get Records element to store the fields in another record variable before this element in the flow, and then assign the stored values to the contract here.
Create Contract	Uses the field values that are stored in the record variable to create a contract	
Set Contract Status to Activated	Sets the contract's <code>Status</code> field to <code>Activated</code>	Include this element (and Activate Contract) if you want the new contract to be activated.

Element Name	Description	Usage Tips
Activate Contract	Uses the field values that are stored in the record variable to update the contract	Include this element (and Set Contract Status to Activated) if you want the new contract to be activated.
Set Contract on Oppty	Relates the opportunity to the contract that was just created	
Update Oppty	Uses the field values that are stored in the record variable to update the opportunity	

Using the Quote to Contract Flow Template

Create contracts from the quotes your sales reps' customers accept. The Quote to Contract flow template contains the following elements, which are listed in the order in which you'll see them in Flow Builder. To access this flow template, from Setup, enter *Flows* in the *Quick Find* box, select **Flows**, click **Quote to Contract**, and then click **Open**.

Element Name	Description	Usage Tips
Get Quote Fields	Uses the <code>Quote ID</code> passed to the flow to look up the quote, and stores the selected quote fields in a record variable	Review the quote fields, and add additional fields as needed to the record variable.
Get Opportunity Fields	Uses the <code>Opportunity ID</code> passed to the flow to look up the opportunity, and stores the selected opportunity fields in a record variable	Review the opportunity fields, and add additional fields as needed to the record variable.
Get Account Fields	Looks up the account that's related to the opportunity, and stores selected account fields in a record variable	Review the account fields, and add additional fields as needed to the record variable.
Contract on Quote?	Evaluates whether a quote is related to a contract	If the quote is already related to a contract, a new contract will not be generated.
Assign Contract Fields	Uses the opportunity's or account's field values to assign field values to a contract	Review the contract fields, and add or remove fields as needed. If you need fields from another object, use a <i>Get Records</i> element to store the fields in another record variable before this element in the flow, and then assign the stored values to the contract here.
Create Contract	Uses the field values that are stored in the record variable to create a contract	
Set Contract Status to Activated	Sets the contract's <code>Status</code> field to <code>Activated</code> in the record variable	Include this element (and <i>Activate Contract</i>) if you want the flow to activate the new contract.

Element Name	Description	Usage Tips
Activate Contract	Uses the field values that are stored in the record variable to update the contract	Include this element (and Set Contract Status to Activated) if you want the flow to activate the new contract.
Set Contract on Quote	Relates the quote to the contract that was just created	
Update Quote	Uses the field values that are stored in the record variable to update the quote	
Set Contract on Oppty	Relates the opportunity to the contract that was just created	
Update Oppty	Uses the field values that are stored in the record variable to update the opportunity	

MODIFYING FLOW TEMPLATES

Examples of Modifying Flow Templates

We've included some examples of how you can modify flow templates to work for your business.

Set Order Start Date to a Custom Opportunity Field

In this example, your schema includes a custom opportunity field called `Order Start Date`. You can update flows to retrieve the value for `Order Start Date` from opportunities and assign this value to orders.

1. In your flow, open the *Get Opportunity Fields* Get Records element.
 - a. In the Select Opportunity Fields to Store in Variable section, click **Add Field**.
 - b. Select `Order Start Date`.
 - c. Click **Done**.
2. Open the *Assign Order Fields* Assignment element.
 - a. Find the assignment row for `EffectiveDate`.
 - b. In the Value column, select `oOppty > Order Start Date`.
 - c. Click **Done**.
3. Save your flow as a new version.
4. Activate the new version of your flow.
5. On an opportunity, populate `Order Start Date` and click **Generate Order** to generate the order.

Set Record Type on Order

In this example, you can create a new version of an order-generating flow that sets Record Type.

1. Add a Get Records element to look up the Record Type object.
 - a. Drag a Get Records element onto the canvas.
 - b. For Object, select **Record Type**.
 - c. Set the condition requirements to **Conditions Are Met**, and filter for the specific record type you want by selecting Field: **Name**; Operator: **equals**; Value: **[the specific record type name, or a variable or custom field that contains the record type name]**.
 - d. Store the record type's field values. For Record Variable, click **New Resource**. Give the variable an API name (for example, `oRecordType`), set Data Type to **Record**, and set Object to **Record Type**.
 - e. Click **Done**.
2. Remove the connector to the Assign Order Fields element from the element preceding it.
3. Connect the preceding element to the Get Records element you just created.
4. Connect the new element to the Assign Order Fields element.

5. Modify the Assign Order Fields element.
 - a. In the Assignments section, click **Add Assignment**.
 - b. In the Variable column, select **oOrder > RecordTypeID**.
 - c. In the Operators column, select **equals**.
 - d. In the Value column, select **[the variable you just created] > Id**
 - e. Click **OK**.
6. Save your flow as a new version.
7. Activate your new version.

IMPLEMENTING YOUR FLOWS

Distributing Flows to Your Users

After you modify flows to meet your business needs, you can add the appropriate custom button to your page layouts. Consider renaming the custom button label to match your business terminology (for example, Convert Opportunity or Place Order).

For Flow Template	Add Custom Button	To the Page Layout for
Opportunity to Order	Generate Order	Opportunity
Opportunity to Order with Contract	Generate Order & Contract	Opportunity
Opportunity to Contract	Generate Contract	Opportunity
Quote to Order	Generate Order	Quote
Quote to Order with Contract	Generate Order & Contract	Quote
Quote to Contract	Generate Contract	Quote

If you cloned a template or created your own flow, update the URL in the custom button to point to the right flow.

Automatically Launching Flows

In addition to launching Generate Orders flows using custom buttons, your sales reps can also launch flows automatically, by activating workflow rules with flow trigger workflow actions. This might be useful if you want your sales reps to automatically generate orders when the opportunity stage is set to `Closed Won` or when the quote status is set to `Accepted`.

Flow trigger workflow actions are available through a pilot program. For information on enabling this feature, contact Salesforce.

Troubleshooting Generate Orders Flows

Because Generate Orders templates use flows built using Flow Builder, you can troubleshoot your Generate Orders flows using the same tools you'd work with when using other flows.

Your sales reps will experience problems if they're prevented from viewing fields referenced by the flows they need to use. Ensure that Field-Level Security is enabled on the following fields.

- `Contract.Shipping Address`
- `Opportunity.Contract`
- `Order.Opportunity`
- `Order.Quote` (if using Quotes)

- `OrderItem.Quote Line Item` (if using Quotes)

SEE ALSO:

[Flow Builder](#)

[Field-Level Security Overview](#)