Administering Asset-Based Ordering

Standard ordering systems end the customer relationship after the order is complete. However, not all orders are about buying new products or services. An existing customer may want to modify the existing assets or services in the following ways:

- Add services, for example, enable international roaming.

- Update services, for example, change the Internet speed.

- Disconnect services, for example, cancel cable.

Using asset-based ordering (ABO), Vlocity manages customers' products and services throughout their life cycles.

Asset-based ordering does not require any complex configuration or custom settings. To use asset-based ordering, you must complete the following administrative tasks:

- Select the asset-based ordering implementation.

- Map fields for asset-based ordering.

- Map objects for asset-based ordering.

You should also be aware of the asset-based ordering Visualforce pages.

Understanding Asset-Based Ordering Concepts

An asset is an item of value that an account or contact owns. Asset-based ordering is based on a customer's existing products and services. In Vlocity Communications, Media, and Energy, assets are subscribed services and products.

Asset is a standard Salesforce object. Vlocity Communications, Media, and Energy extensions to the Asset object support discounts, special pricing, and customer preferences.
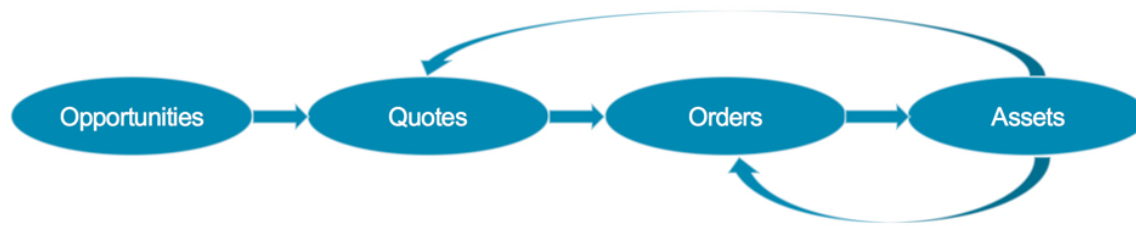
Assets are created during the CPQ order management process. Whether an asset is created right away depends on the product or service. Until a service starts, an asset is not active.

The asset provisioning status indicates the current state of the product or service:

- New—the order has been placed, but it has not been provisioned or activated.

- Active—the customer currently enjoys the asset.

- Deleted—the product or service is no longer available to the customer.

Vlocity Communications, Media, and Energy has the ability to work across line items and objects (XLI). Using Field Mapper, you map fields in the Opportunity, Order, Quote, and Asset

objects. For more information, see **Mapping Fields for Asset-Based Ordering** on page 282. Using Object Mapper, you can move data to and from any object. For more information, see **Mapping Objects for Asset-Based Ordering** on page 285.

Move, Add, Change, Delete (MACD)

MACD stands for move, add, change, and delete or disconnect.

- Move means to move products or services from one location to another.

- Add means to add new products or services.

- Change means to change the existing products or services.

- Delete means to discontinue existing products or services.

Changing an asset to an order or a quote initiates the MACD process. Asset-based ordering ensures that data is accurately captured through any channel or device. You can add first-level assets using a new opportunity to quote to order to asset cycle.

The ability to move an existing product or service was introduced in Vlocity CMT V12. A guided move process provides the ability to move one or more assets between service locations. The customer sets the move in and move out dates, selects the move location, and generates an order to disconnect assets from the original location and connect them to the new location.

Asset Reference IDs

Each line item in an order has an asset reference ID. Vlocity Communications, Media, and Energy uses the asset reference ID and the provisioning status to track the asset across objects in the ABO life cycle.
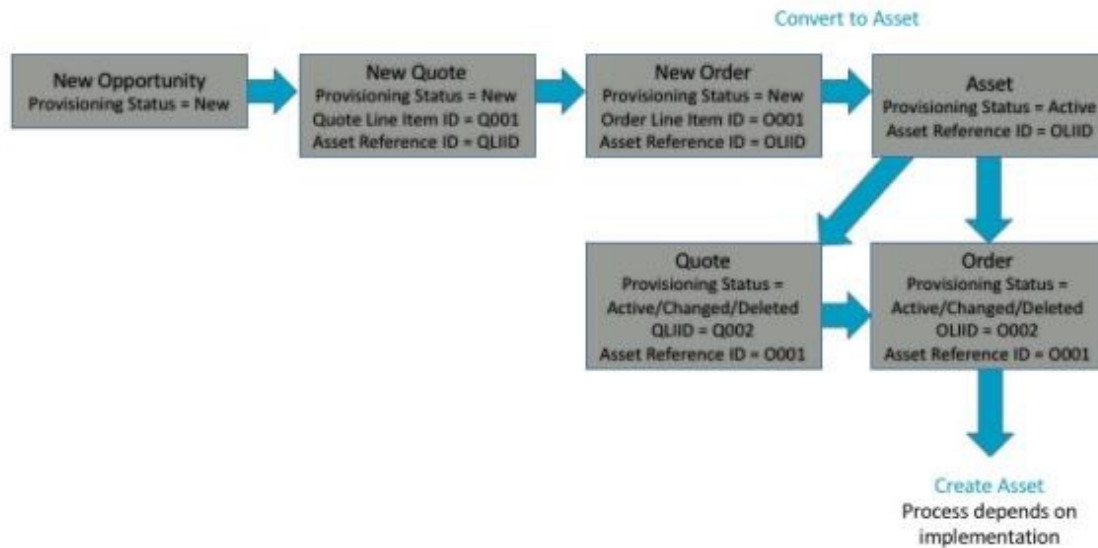
If the assets are created or mastered in Salesforce, Vlocity populates the asset reference ID with the internal Salesforce record ID. If the assets are created or mastered in an external system, Vlocity populates the asset reference ID with the external reference ID.

The typical order flow includes a quote. The quote line item has an ID, for example, Q001. When the quote becomes an order, the order line item has an ID, for example, O001. When the order becomes an asset, the asset reference ID is based on the order line item ID, O001.

When the asset is used to create a quote, the quote line item ID changes, for example, Q002. The asset reference ID remains the same, O001. When that quote becomes an order, the order line

item ID changes, for example O002. Again, the asset reference ID remains the same, O001. When you use the RetireABOAssetImplementation, a new asset is created. When you use the DefaultABOAssetImplementation, the old asset is updated. Either way, the asset reference ID remains the same, O001.

Asset-Based Ordering Process with IDs

Selecting the Asset-Based Ordering Implementation

Asset-based ordering uses the Vlocity interfaces and implementations paradigm. Copying a set of fields on one object to a mapped set of fields on another object triggers the FieldMapperInterface. Field Mapper is central to the asset-based ordering process. For more information, see **Mapping Fields for Asset-Based Ordering** on page 282.

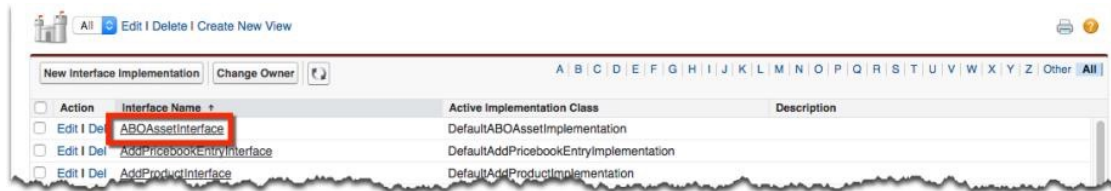Clicking the **Submit Order** button triggers the ABOAssetInterface implementation.

Vlocity provides two ABOAssetInterface implementations:

- When you use the DefaultABOAssetImplementation, the asset is updated and the provisioning status becomes active. This implementation does not create two asset records.

- When you use the RetireABOAssetImplementation, the current asset is replaced by a new asset. The old asset has the provisioning status retired, and the new asset has the provisioning status active. This implementation always creates more than one asset record.
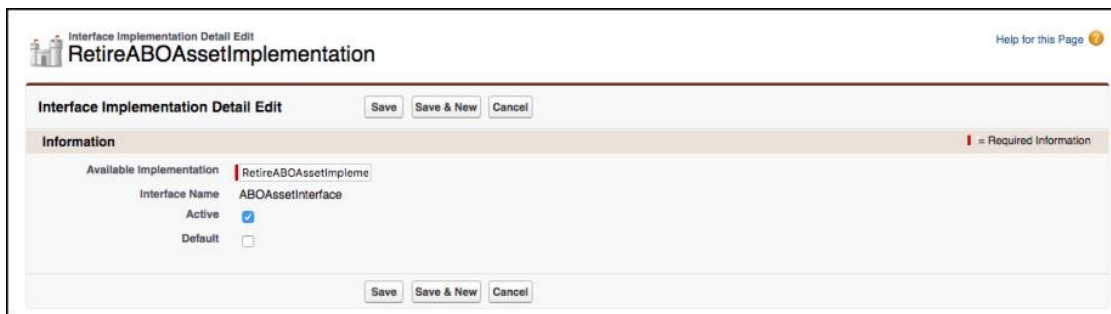
You can also create your own implementation. For more information, see the *Vlocity Interfaces and Implementations Reference Guide*.

To set the asset-based ordering implementation:

1. Go to the Interface Implementations tab.

2. From the `View` picklist, select `All`.

3. Click **Go**.

4. Click **ABOAssetInterface**.

5. Next to the appropriate implementation, click **Edit**.

6. On the *Interface Implementation Detail Edit* page, select `Active`.

7. Click **Save**.