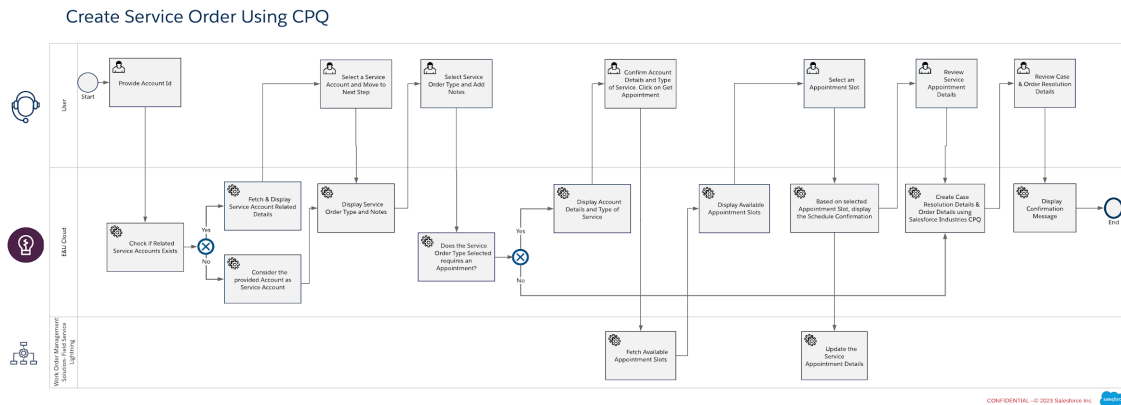


Create Service Order Using CPQ

The Create Service Order process guides a User or Customer through the process to Create a new Service Order by using CPQ APIs.



Overview

The Create Service Order process allows the user to request for a new Service Order for the required type of service. The process also allows booking a service appointment for the products which require Appointment scheduling through Salesforce Field Service Lightning App. Accordingly, the Appointment, Case and Service Order is created with the acquired details from the User or Customer. The whole Service Order Creation orchestration is done through Salesforce Industries CPQ APIs.

Use Case Scenario

A customer requests a service that requires a service order.

The user accesses the Create Service Order OmniScript and Creates a service order.

The User can also request for Service Appointment Slot for the Service Order which requires service appointment scheduling through Salesforce Field Service Lightning App.

Assumptions

- The process uses the Order object to store and manage service orders
- The process uses the Salesforce Industries Product Catalogue to maintain service order types. Pricing within the product configuration can be set to \$0 or can be maintained based on applicable service order fees.
- The Service Order Type products are configured.
- Service orders can be integrated with external systems during implementation.
- The Service Order is created with the Request Date set to Current Date and the Request Completion Date defaults to Current Date + 5 Days. However, this can be customized to set the completion date based on order type.

User Story

- The Create Service Order process allows the user to select the Service Account associated with the Consumer Account.
- If the Service account does not exist, the current account will be considered as the Service Account.
- The user will select the Type of Service Order Product and accordingly based on the product which requires appointment scheduling, the user will be guided through the service appointment booking process.
- Based on appointment booking and selected account details, a case will be created in the back-end, along with an Order containing the selected product as Order Product to submit the order in the back-end.
- The user will be provided with confirmation information to review the Appointment id, Case Id and Order Id.
- The Orders will be created through CPQ APIs.