
Checkout User Guide

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CHECKOUT USER GUIDE

Checkout is the online store where you can purchase seats and other related products for Salesforce and Data.com. With Checkout, you can:

- View and manage your previously saved [quotes](#), or [create a quote](#) to purchase additional seats or products
- Place orders
- [View installed products](#) and their related orders and contracts
- [View and print Salesforce statements](#)
- [View and manage invoices](#) for your organization
- [View payments](#) received by Salesforce
- [View and manage credit memos](#) issued to your organization
- Email your Salesforce account contact
- [Change billing addresses or credit card information](#)
- [Log a case](#) for any Checkout issue or concern
- [Request assistance](#) with Checkout

When Checkout is enabled for your organization, users with the “Manage Billing” permission have access to it. These users can also grant access to other users within your organization.

SEE ALSO:

[Checkout Glossary](#)

MANAGING YOUR QUOTES

A Checkout quote is a convenient, risk-free way to price products or services and terms before placing an order. You can use Checkout to create multiple quotes using different combinations of products and quantities so that you can compare prices and feature combinations.

You can create quotes for the following:

- **New business:** you are a new customer who has a trial version of Salesforce and you want to purchase Salesforce seats and other related products.
- **Upgrade:** you are an existing Salesforce customer and you want to upgrade your Edition. To process an upgrade, contact your Salesforce account executive.
- **Renewal:** you are an existing Salesforce customer and your contract is expiring. To process a renewal of the same Edition, contact your Salesforce account executive.
- **Add-on:** you are a current customer and you want to add a product or seats through the end of the current contract.

The process you follow to [create a quote](#) is very similar regardless of whether you are a new or existing customer.

Once you create a quote, you can use Checkout to access a list of your quotes and perform the following tasks:

- Print
- Email
- [Request assistance](#), if you are having a problem creating a quote or would prefer your account contact complete the quote creation process
- Save for later, to access the quote at a later time from the Quotes home page
- Place an order

To access Checkout from Salesforce, select Checkout from the Force.com apps drop-down at the top-right of any page.

SEE ALSO:

[Viewing Your Quotes](#)

[Creating a Quote](#)

[Viewing Your Installed Products](#)

[Viewing Statements](#)

[Viewing Your Orders](#)

[Viewing Your Contracts](#)

Viewing Your Quotes

A Checkout quote is a convenient, risk-free way to price products or services and terms before placing an order. Quotes can be for new business or add-ons.

Click the **Quotes** tab to view the Quotes home page.

The Quotes home page lists all quotes created by users in your organization. From this page, you can:

- Filter the list to show certain quotes, such as saved quotes or completed quotes.
- In the Actions column, you can:

- If the quote is a draft, click **Clone** to create a new quote with the same billing information, Edition, and products. You can change information on the new quote.

 **Note:** You can [create a quote](#) without cloning an existing quote.

- Click **Checkout** to begin the process of placing an order based on a quote.
- Click **Delete** to remove a quote from the list. You can only delete active quotes that you have created in Checkout.
- **View** to view quote details, if a quote has been submitted and converted into an order.

 **Note:** Not all actions are available for all quotes.

- In the `Quote Number` column, click on a quote number to view the quote details.
- See the quote name, the user who created it, quote total amount, and quote currency.
- In the `Status` column, see the status of a quote.

Status	Description
Draft	Quote was created and saved through Checkout or by a Salesforce account executive, but hasn't yet been accepted or approved.
Order Completed	Quote has been converted to an order.
Order Processing	Quote has been submitted to your Salesforce account executive and is waiting for approval.
Quote Expired	Quote has been closed because a similar quote was converted to an order or the quote's expiration date has passed.
Ready for Checkout	Quote has been approved by your Salesforce account executive and you can now place an order.

- In the `Expires On` column, find the last day the quoted price is valid.
- In the `Accepted By` column, find the name of the user that accepted the quote and placed the order.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

SEE ALSO:

[Managing Your Quotes](#)

[Creating a Quote](#)

[Selecting Additional Products](#)

[Selecting Partner Products](#)

Creating a Quote

Quotes are a convenient way to estimate prices for products and negotiate contract terms before placing an order. With Checkout, you can create a new quote, print a quote, email the quote, or share it with other users within your organization. The prices and terms on a

quote are valid for the day the quote was created. If you save a quote and come back to it later, it is automatically recalculated based on any price changes.



Note: At any point during the quote creation process, you can click **Request Assistance** to contact your Salesforce account representative.

The quote creation process may vary slightly based on what type of quote you are creating.

Initiate the quote creation process by performing one of the following actions:

From within Salesforce:

- If you are a trial user, click **Subscribe Now**.
- If you want to add more users, but do not have sufficient seats, from Setup, enter “visit Checkout” in the **Quick Find** box, then select **visit Checkout**.
- If you want to add more user or feature licenses, from Setup, enter “Company Information” in the **Quick Find** box, then select **Company Information** and click **Buy More Licenses** in the appropriate related list.

In Checkout:

- On the Checkout Home page, click **Add More Salesforce.com Seats** or **Buy Additional Products**.
- On the Installed Products page, click **Add Seats or Products**.
- Click **Create Another Quote** after saving a quote, or from the Quotes home page.
- On the Quotes home page, click **Clone** to clone an existing quote.

SEE ALSO:

[Managing Your Quotes](#)

[Selecting Additional Products](#)

[Selecting Partner Products](#)

Comparing Editions

At any time, you can click **Quotes** at the top of the page to return to your quotes list.


If an Edition subscription isn't available for purchase based on your current trial Edition, you'll see a **New Trial** button in the column for that Edition, instead of a **Buy Now** button. For example, if you have an Enterprise Edition trial, you can't purchase a subscription for a lesser Edition. Instead, you must sign up for a new trial of the lesser Edition, then purchase a subscription for it.

Viewing and Editing Subscription Information

If you're a new user, or creating or editing a quote from a trial, enter and confirm the information on the Subscription Information tab.

To learn more about other Salesforce Editions, or to create a quote for a different Edition, click **Editions and Pricing**.

1. Select the number of users, then click **Update**.
2. If available, select your country and currency from the drop-down lists. The country selection determines which currencies are available.
3. Under Billing Information, enter the billing address and contact information for your account. If your billing and shipping addresses are not the same, select **Enter a different shipping address** and enter the shipping address for your account.
4. Click **Payment** to enter your credit card information.
5. To review your order, click **Jump to Order Review**.

 **Important:** If at any point during quote creation you close the window, you lose all changes. If you are creating a new quote, you lose the entire quote. You can click **Save for Later** on any page if you want to save your changes and continue editing it later.


SEE ALSO:

[Managing Your Quotes](#)

Selecting Additional Products

The Products page displays products available for the quote, based on Edition.

1. Select when you would like the additional service to begin.
2. Select the checkbox next to a product or service to add it to the quote.
 - a. If required, enter a start date. The date must fall within the contract start and end dates.
 - b. If required, enter an end date. The date must come before the contract end date.
3. Click one of the following:
 - **Continue to Partner Products**, if you're creating a new quote and have partner products installed
 - **Continue to Order Review**, if you're adding products to an existing contract

 **Important:** If at any point during quote creation you close the window, you lose all changes. If you are creating a new quote, you lose the entire quote. You can click **Save for Later** on any page if you want to save your changes and continue editing it later.

If you are a trial user creating a quote, the products and quantities default to match those in your trial.

1. Click **Editions and Pricing** to create a new quote with a different Edition.
2. Optionally, update your country and service term in the Basic Information section.
3. Select the checkbox next to a product or service to add it to the quote.
4. Click **Continue to Billing Information**.

Tips & Considerations

- Click **Save for Later** to save your changes for a later time. All information you entered up to this point is saved and the quote becomes available on the Quotes home page.
- To see descriptions for products within a specific section, click **Show All Descriptions**.
- After selecting additional products or seats, click **Update Prices** to refresh the Total Additional Price in Quote (USD) column.
- If you need help selecting products, click **Request Sales Assistance**.

SEE ALSO:

[Managing Your Quotes](#)

[Creating a Quote](#)

[Selecting Partner Products](#)


Selecting Partner Products

The Partner Products page displays products available for sale from Checkout. Checkout only displays eligible partner products. If you don't see the product you want, you must install the application as a trial. Be sure to save your quote before going to AppExchange.

 **Note:** If you have already purchased the application directly from a partner, you must contact the partner to purchase additional seats.

To add a partner product or seats to your quote, follow the steps below.

1. Select the checkbox next to the appropriate product.
2. If the application requires a start date, enter a date that is on or after the [contract](#) start date and before the contract end date. The end date is the end date of your current Salesforce contract.
3. Optionally, adjust the quantity being provisioned.
4. To continue with quote creation, click **Continue to Billing Information**.
5. Click **Save for Later** to save your changes for a later time. All information you entered up to this point is saved and the quote becomes available on the Quotes home page.

 **Important:** If at any point during quote creation you close the window, you lose all changes. If you are creating a new quote, you lose the entire quote. You can click **Save for Later** on any page if you want to save your changes and continue editing it later.

SEE ALSO:

[Managing Your Quotes](#)

[Creating a Quote](#)

[Selecting Additional Products](#)

Confirming a Quote

The Quotes confirmation page confirms if your quote was saved or if an error occurred. If the quote was saved, you can:

- Click **View List of Quotes** to view the list of quotes associated with your organization.
- If available, click **Create Another Quote** to return to the quote creation process and create a new quote.

If an error occurred:

1. Make a note of the error message.
2. Click **Request Assistance** to send an email to your Salesforce account executive.

SEE ALSO:

[Managing Your Quotes](#)

[Creating a Quote](#)

VIEWING YOUR CONTRACTS

Contracts are written agreements between your organization and Salesforce. Contracts determine how you are billed and contain the terms and conditions for your Salesforce account. For example, your payment method and billing address are specified in your contract. Your organization may have one contract for all your orders, or multiple contracts.

Click the **Contracts** tab to view the Contracts home page.

From this page, you can:

- View a list of all your organization's contracts, including each contract's number, billing last name, start date, end date, status, and payment method.
- Click a contract number to view contract details, change your billing address, or change your credit card information.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

SEE ALSO:

[Viewing Contract Details](#)

[Updating Your Billing Address or Contact Information](#)

[Viewing Your Installed Products](#)

[Viewing Statements](#)

[Managing Your Quotes](#)

[Viewing Your Orders](#)

Viewing Contract Details

Once you find a contract on the Contracts page, click the contract number to see its details.

From this page, you can:

- [Change your billing address](#) on page 9. If your payment method is Credit Card, your billing address must match the address on your credit card.
- If your payment method is Credit Card, [change your credit card information](#) on page 10.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
- View the contract, billing, and shipping details.
- View the contract special terms and purchase and pricing conditions, if applicable.
- View the list of orders placed under this contract.
- Click on an order number to view details for a particular order.



Note: If the contract has expired, you can't change the billing address or credit card information.

Contract Detail

Field	Description
Contract End Date	Last day the contract is active.
Contract Number	Unique number automatically assigned to the contract.
Contract Start Date	First day that the contract is active.
Status	<p>The stage the contract has reached in the contract business process. Available statuses include:</p> <ul style="list-style-type: none"> Activated-Contract is currently active. Expired-Contract has reached its end date and is no longer valid. Terminated-Contract has been canceled and is no longer valid.

Billing Information

Field	Description
Billing Address	Address associated with billing for this contract.
Billing Company Name	Company name for this contract.
Billing Frequency	Periodic billing interval.
Billing Language	Salesforce account executive responsible for the contract.
Billing Name	Billing contact name.
Payment Information	Payment details such as name, last four digits of the credit card used, credit card type, and more.
Payment Method	How invoices are paid.
Payment Terms	Payment terms for this contract.
Shipping Address	Address where products are sent.

To change this information, click **Change Billing Address** at the top of the page.

Special Terms

Your contract may contain special terms and purchase and pricing conditions. Both special terms and purchase and pricing conditions are negotiated by an account executive and only appear if you have an existing contract or if your quote was created by an account executive. Click the rule or term name to view its details.

Contract Purchase and Pricing Conditions

Your contract may contain purchase and pricing conditions on items that you order. The name of each affected product is listed along with the price or prices and, if applicable, the quantity required for that price.

Orders

Field	Description
Order Number	Order number-Click to view details.
Status	Status of the order: <ul style="list-style-type: none">• Activated-Order has been placed but products have not been installed in your organization• Provisioned-Products for this order have been installed in your organization• Pending-Order has not been processed
Order Start Date	Date the order was activated.
Order End Date	Date the order ends.
Order Type	Type of order: <ul style="list-style-type: none">• Add—Add more seats• Initial—First order for an Edition• Upgrade—Upgrading from a different Edition
Amount	Total amount billed for the order.

SEE ALSO:

[Viewing Your Contracts](#)

Updating Your Billing Address or Contact Information

For faster order processing, keep your billing address and contact information up to date. You can update your billing address on an existing contract for your organization, or wherever you see the link to change your billing address. For example:

1. Click the **Contracts** tab.
2. Click the contract number for the contract billing address you want to change.
3. Click **Change Billing Address**.
4. Change your billing address as necessary. If the payment method for this contract is Credit Card, the billing address you enter must be valid for that credit card.
5. If available, select **Enter a different shipping address** if your shipping address is different from your billing address.
6. Click **Save**.



Note: If your quote contains Dreamforce line items, complete the Dreamforce Contact section with the name, email and phone number of your Dreamforce contact.

SEE ALSO:

[Viewing Your Contracts](#)

[Viewing Contract Details](#)

Updating Your Payment Information

For faster order processing, keep your credit card and direct debit information up to date.

Updating Your Credit Card Information

You can update your credit card information on an existing contract for your organization, or wherever you see the link to enter or change your credit card information. For example:

1. Click the **Contracts** tab.
2. Click the contract number for the credit card information you want to change.
3. Click **Enter Credit Card Information**.
4. Enter or change the credit card information as necessary. The credit card information must be valid for the billing address on the contract.
5. Click **Submit**.

Updating Your Direct Debit Information

1. Click the **Contracts** tab.
2. Click the contract number for the direct debit information you want to change.
3. Click **Enter Direct Debit Information**.
4. Fill in the form. All fields are required.
5. Click **Submit**.

VIEWING YOUR ORDERS

An order is a transaction indicating that you have agreed to purchase specific products and services from Salesforce. For example, an order could be for a seat, training course, or professional services. Each order is associated with one contract, which determines the terms for the order.

Click the **Orders** tab to view the Orders home page.

The Orders home page shows all orders placed by Checkout users within your organization. From this page, you can:

- Click an order number to view the order's details.
- Click a contract number to view the contract's details.
- Find out the status of an order by reviewing the **Status** column. Available statuses include:
 - Activated—Order has been placed but products have not been installed in your organization
 - Pending—Waiting for approval
 - Provisioned—Products for this order were successfully installed in your organization
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.



Note: If your quote included products from multiple vendors, you'll see a separate order for each vendor when you check out.

SEE ALSO:

[Viewing Order Details](#)

[Viewing Your Installed Products](#)

[Viewing Statements](#)

[Managing Your Quotes](#)

[Viewing Your Contracts](#)

Viewing Order Details

Once you have located an order on the Orders home page, click the order number to display detailed information. From the order detail page, you can:

- View information about the products ordered as well as details about the order.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
- Click on the contract number to view details of the associated contract.

The Order Detail section contains the following fields:

Field	Description
Account Name	Name of the account associated with the order.
Contract End Date	Last day the contract is active.

Field	Description
Contract Number	Contract number associated with the order. Click the number to view contract details.
Order End Date	Last day the order is active.
Order Start Date	Date the order originated.
Order Type	Type of order: <ul style="list-style-type: none"> • Add—Add more seats • Initial—First order for an Edition • Upgrade—Upgrading from a different Edition
Status	Status of the order. Available statuses include: <ul style="list-style-type: none"> • Activated—Order has been placed but products have not been installed in your organization • Pending—Waiting for approval • Provisioned—Products for this order were successfully installed in your organization

The Order Products section contains the following fields:

Field	Description
Monthly Unit Price	Invoiced cost of the product per month.
Product Name	Product being ordered.
Publisher Name	Name of the vendor that published the product.
Quantity	Number of a particular product provided to the invoiced company.
Total Amount	Net price for this product. The total amount is equivalent to the quantity multiplied by the unit price. This price is for the item only and does not include tax.

SEE ALSO:

[Viewing Your Orders](#)

[Creating a Case](#)

Reviewing Your Cart

The Cart page is a summary of your order. On this page you can:

- View the start and renewal dates for service on the product(s) in your cart.
- Change the quantity of a line item.
- Apply a promotion code if you have one.

- Review the order information. If any of it is incorrect, click **Cancel** or **Back to Products**.


If you're satisfied with the products and quantities in your cart, click **Proceed to Place Order** to enter payment information.

Reviewing an Order

The Order Review page is a summary of your order. Be sure to review the information carefully.

On this page, you can:

- Click **View Details** in the Product Information section to view any special considerations.
- Update the billing address. (Not applicable for Database.com orders.)
- Select **Enter a different shipping address** if your shipping address is different from your billing address. (Not applicable for Database.com orders.)
- If necessary, read and agree to contract special terms or the Master Subscription Agreement by checking the applicable box below each term.
- Click **Print this Page** to print a copy of the summary.
- Click **Email this Page** to email a copy of the order summary to yourself or another user. Then click **OK** to save and email your quote. An email is created with your quote name and number as the subject line. Enter email addresses, separated with commas, in the **To** field. If you want to receive a copy of the email, check the **Send me a copy** box. Make any additions to the **Message** field and click **Send Email** or click **Cancel** to return to the Order Review page without sending an email.
- If available, click **Go Back** to return to the previous screen.

 **Note:** If Dreamforce line items are included in your order, they show up in the Products With One-Time Fees section. Refer to the Product-Specific Terms section to find out more about your Dreamforce purchase.

To complete the order, click **Place Order**. If the quote is incomplete or contains invalid information, you won't see the **Place Order** button. Click **Cancel** to return to the Quotes home page.

 **Note:** If your quote included products from multiple vendors, you'll see a separate order for each vendor when you check out.

SEE ALSO:

[Viewing Your Orders](#)

[Confirming an Order](#)

Completing an e-Signature in Checkout

If your Salesforce account executive has published a quote for you, and your payment type is set to wire transfer or check, you have the option of using the Checkout e-signature feature to [convert a trial](#) or [add new products to an existing order](#).

On the Order Review e-signature page in Checkout, you can:

- Review, sign and save your order form.
- Click the Adobe Acrobat PDF icon to download a PDF of your order form.
- Click the printer icon to get a printable version of your order form.
- On the More Options drop-down list, click **View History** to see your quote activity from DocuSign®.
- On the More Options drop-down list, click **View Certificate** to view the Certificate of Completion from DocuSign®.

- On the More Options drop-down list, click **View Consumer Disclosure** to view the legal acknowledgement associated with your use of the e-signature feature.
- On the More Options drop-down list, click **Decline to Sign** to decline to sign the quote. A dialog box appears for you to provide a reason for declining to sign. Optionally, select the **I withdraw . . .** checkbox to dissolve the electronic signature partnership altogether.
- On the More Options drop-down list, click **Finish Later** to save the incomplete order.
- Click **Request Sales Assistance** if you need help with your quote or the e-signature process.
- Send email to your account contact.

The first time you go through the e-signature process, you'll be asked to set up or "adopt" your e-signature. Enter your full name and initials, and select a signature style. Once you adopt your signature, you won't have to do it again unless you change your name or email address.

Converting a Trial with e-Signature

Once your account executive publishes the quote to convert your trial, you receive an email notification that you have a document ready for signature.

If you have access to Checkout, follow the steps in the email to get to your quote, and you should see the Order Review screen in Checkout with the electronic document embedded. If you don't have access to Checkout, click the **Sign Now** link in the email to go directly to the electronic document.

1. If it's your first time through the e-signature process and you're coming through Checkout, select **I agree to do business electronically . . .** This checkbox only shows up the first time you complete an e-signature form.
2. Click **Review Document**.
3. Review the Address, Terms and Conditions, and Products sections of the document for accuracy.
4. Click the **Start** button, or scroll down the document to the first red-outlined area.
5. Electronically sign and initial where indicated. You must fill in the fields marked with red boxes to complete the e-signature process.
6. When finished, click **Confirm Signing**. A confirmation letter with a PDF copy of the order form should show up in your email shortly.
7. If you're in Checkout, click the **Quotes** tab to view the status of your order.

Adding New Seats, Products or Services with e-Signature

When using Checkout to add new Salesforce seats, products or services onto an existing contract, once you click **Continue to Order Review** on the product selection page, you'll see a new Order Review screen with a virtual order form ready for e-signature. Follow the steps above.

Confirming an Order

The Order Confirmation page in Checkout confirms if your order was placed or if an error occurred. If the order was placed successfully, you can:

- Click the order number to view the order's details.
- Click **View Orders** to view a list of your completed orders.



Note: If your quote included products from multiple vendors, you'll see a separate order for each vendor when you check out.

- If you're a trial user, click **Editions and Pricing** to view available Editions.

If you got an error:

1. Make a note of the error message.
2. Click **Request Assistance** to send an email to your Salesforce account executive.

SEE ALSO:

[Viewing Your Orders](#)

[Reviewing an Order](#)

VIEWING YOUR INSTALLED PRODUCTS

The Installed Products page contains a list of all products purchased through Checkout and installed in your organization.

Click the **Installed Products** tab to view the Installed Products page.

The Installed Products list contains all Editions, apps, and services you have purchased. Using this list, you can:

- Click the order number to view the order with which a product is associated.
- Click the contract number to view the contract with which a product is associated.
- View the start and end dates, term, quantity, and status of your installed products or services.
- Click **Add Seats or Products** to create a new quote for additional seats, products, or services.

Installed Products Fields

Field	Description
Product	Name of the product and order number associated with the product.
Start Date	Date on which the product was installed in your organization.
End Date	Date on which the contract for this product expires.
Term (Months)	Number of months that you subscribed to use the purchased product.
Quantity	Quantity of this product that you purchased. If you chose to reduce the quantity of a specific product, this field shows a negative number.
Status	Status of the product. Available statuses are: <ul style="list-style-type: none">• Provisioned—Product was successfully installed in your organization• Pending—Waiting for approval
Contract	Contract number of the contract associated with this product.

SEE ALSO:

- [Checkout Glossary](#)
- [Viewing Statements](#)
- [Managing Your Quotes](#)
- [Viewing Your Orders](#)
- [Viewing Your Contracts](#)

VIEWING STATEMENTS

You can easily generate and view statements in Checkout. A statement provides an overview of financial transactions for all of your Salesforce organization's contracts, for a given period of time. By default, a statement shows activity for the last 365 days. However, you can also select 30, 60, 90, or 120 days or enter start and end dates.

To generate a statement:

1. Click the **Statements** tab.
2. From the **Duration** drop-down list, select a predefined duration or enter start and end dates if those fields are enabled.
3. If your organization has contracts in different currencies, choose a currency from the **Contract Currency** drop-down list. This drop-down list is disabled if your contracts are in a single currency.
4. Click **Generate Statement**. The statement displays at the bottom of the page.

The statement contains a summary section that lists the starting balance, the total of all invoices, payments, credits, and adjustments, and the current balance. The current balance is the amount due or the amount to be refunded after all adjustments, credit memos, and payments have been applied to all invoices for the organization.

Once you have generated a statement, you can:

- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.
- Click **Print this Page** to view the statement in a printable format. Use your browser's print function to print the statement.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
- Click the **Export to Excel** link to export the statement details into a Microsoft® Excel® or similar spreadsheet program.
- Click on a reference number to view details for a particular payment, invoice, credit memo, or adjustment.
- Click on a contract number to view details for a particular contract.

The Statement Activity table displays information about each invoice:

Field	Value
Date	Date the statement was generated.
Description	Type of information in the statement: invoice, credit memo, or adjustment.
Reference	Reference number used to identify the payment, invoice, credit memo, or adjustment.
Provider	Vendor whose products appear in the statement.
Contract	Contract number associated with this statement.

Viewing Statements

Field	Value
Amount	Amount of the invoice, credit memo, or adjustment. A negative number indicates money credited to your account.

SEE ALSO:

- [Viewing Your Installed Products](#)
- [Viewing Your Orders](#)
- [Viewing Your Invoices](#)
- [Viewing Credit Memos](#)
- [Viewing Your Payments](#)

VIEWING YOUR INVOICES

The Invoices home page contains a list of invoices for your organization. Every time you place an [order](#) using Checkout, an invoice is generated. The invoice contains a list of all products purchased along with pricing and any additional charges and taxes that are owed.

Click the **Invoices** tab to view the Invoices home page. From this page, you can:

- Filter the list of invoices using the **View** drop-down list.
- Click the invoice number to view transaction details.
- Click the contract number to view the associated contract.
- Find out if an invoice is past due.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

Invoice List

Field	Value
Invoice Number	The identification number for this invoice. Click to view details.
Contract	The contract number associated with this invoice.
Invoice Date	The date the invoice was created.
Invoice Due Date	The date that payment is due for this invoice.
Total Amount	The total amount due for the invoice before any payments are applied. May include additional charges and discounts.
Balance Due	The total amount due after all previous payments and credits have been applied.
Past Due	A red icon displays if the invoice is past due.

SEE ALSO:

[Viewing Invoice Details](#)

[Viewing Statements](#)

[Viewing Credit Memos](#)

[Viewing Your Payments](#)

Viewing Invoice Details

On the Invoices home page, click an invoice number to display detailed information.

From this page, you can:

- View information about the invoice including payment and billing information, line item details, and associated applications.

- Click **Print this Page** to generate a printable version of the invoice.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
- Click **Email** to send the invoice as an email attachment.
- Click the contract number to view details of the associated contract.

Invoice details are divided into four sections.

The Information table displays basic information about the invoice.

Field	Description
Invoice Number	The identification number for this invoice.
Account Name	The name of the account associated with the invoice.
Contract	The contract number associated with this invoice. Click the number to view contract details.
Invoice Date	The date the invoice was created.
Invoice Due Date	The date that payment is due for this invoice.
Total Amount	The total amount due for the invoice before any payments are applied. May include additional charges and discounts.
Total Payment	The net amount due with invoice.
Total Credit	The credit available in the invoiced company's account.
Balance Due	The total amount due after all previous payments and credits have been applied.
Payment Method	The method used to make payments.
Payment Term	The terms for submitting payment. For example, if the Payment Terms are NET 30, the payment is due within 30 days.

The Billing Information table displays the billing and shipping information associated with this invoice.

Field	Description
Billing Contact	The contact at the company associated with the invoice.
Billing Company Name	The name of the company used for billing.
Billing Address	The address used for billing.
Shipping Address	The address used for shipping.

The Invoice Lines table displays information about each invoice line item.

Field	Description
Service	The name of a product or service associated with the invoice line item.
Provider	Company that provided the product or service, for example Salesforce or a partner.
Billing Reference	Reference to the company's billing information.
Quote	The quote associated with this invoice line item.
Start Date	The first day that the product or service is active.
End Date	The last day that the product or service is active.
Quantity	The number of a particular product or service provided to the invoiced company.
Total Amount	The net amount for this product or service. The total price is equivalent to the quantity multiplied by the unit price. This price is for the item only and does not include tax.

The Applications table displays information about the payments and credit memos applied to this invoice.

Field	Description
Payment	A link to the payment detail page associated with this invoice.
Credit Memo	A link to the credit memo associated with this invoice.
Application Date	The date that the amount was applied.
Amount	The amount applied.

SEE ALSO:

[Viewing Your Invoices](#)

[Viewing Statements](#)

[Viewing Credit Memos](#)

[Viewing Your Payments](#)

VIEWING YOUR PAYMENTS

The Payments home page contains a list of all payments made by your organization.


Click the **Payments** tab to view the Payments home page.

From this page, you can:

- Choose a view from the drop-down list to filter the list of payments.
- Click the payment number to view payment details.
- Click the contract number to view the associated contract.
- View the amount, date, and method of each payment.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

Payments

To filter the payments displayed, select a filter from the drop-down list. Information about each payment that meets the filter criteria is displayed:

Field	Value
Payment Number	Identification number for this payment. Click the number to view payment details.
Contract	Number for the contract associated with this payment. Click to view contract details.
Payment Date	Date that this payment was issued.
Payment Method	Type of payment. Available types include: <ul style="list-style-type: none">• Adjustment-Partial payment or change to the total owed• Check• Credit Card  Note: Credit card is the only payment method available for new self-service users.
Amount	Amount of this payment applied to invoices associated with the contract.

Field	Value
Unapplied Amount	Amount of this payment that has not yet been applied to an invoice for the corresponding contract.

SEE ALSO:


- [Viewing Statements](#)
- [Viewing Your Invoices](#)
- [Viewing Credit Memos](#)

Viewing Payment Details

Once you have located a payment on the Payments home or list pages, click the payment number to display detailed information. From this page, you can:

- Click the invoice number to view the associated invoice.
- Click the contract number to view the associated contract.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.

The Payments table provides information about the payment:

Field	Description
Payment Number	Identification number for this payment.
Account	Name of the account associated with the payment.
Contract	Number for the contract associated with this payment. Click to view contract details.
Payment Date	Date that this payment was issued.
Payment Method	Type of payment. Available types include: <ul style="list-style-type: none"> • Adjustment-Partial payment or change to the total owed • Check • Credit Card  Note: Credit card is the only payment method available for new self-service users.
Payment Amount	Amount of this payment applied to invoices associated with the contract.
Unapplied Amount	Amount of this payment that has not yet been applied to an invoice for the corresponding contract.

The Applications table lists and describes all invoices covered by this payment. The table contains the following fields:

Field	Description
Applied To	Invoice to which this payment was applied.
Contract	Contract associated with the invoice to which this payment was applied.
Application Date	Date the payment was applied to the invoice.
Amount	Amount applied to the invoice.

VIEWING CREDIT MEMOS

The Credit Memos home page contains a list of credits issued to your organization. Credit memos are generated by the billing system to show adjustments to an account and are directly related to invoices.

Click the **Credit Memos** tab to view the Credit Memos home page.

From this page, you can:

- Select a view from the drop-down list to filter the list of credit memos.
- Click the credit memo number to view details.
- Click the contract number to view the associated contract.
- Click the invoice number to view the associated invoice.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

Credit Memo Fields

To filter the credit memos displayed, select a filter from the drop-down list. Information about each credit memo that meets the filter criteria is displayed:

Field	Value
Credit Memo Number	Number assigned to the credit memo when it was created. Click the number to see details.
Contract	Number of the contract associated with this credit memo. Click the contract number to view the contract details.
Related Invoice	Number of the invoice to which this credit memo applies.
Credit Memo Date	Date that this credit memo was issued.
Total Credit	Total amount of this credit memo. The number is negative because this amount is being credited to your account.

SEE ALSO:

- [Viewing Credit Memo Details](#)
- [Viewing Statements](#)
- [Viewing Your Invoices](#)
- [Viewing Your Payments](#)

Viewing Credit Memo Details

On the Credit Memos home page, click the credit memo number to display detailed information. From this page, you can:

- View information about the credit memo, including details of the products, services, and associated invoices.

- Click **Print this Page** to generate a printable version of the credit memo.
- [Log a case](#) if you have issues or concerns. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
- Click the contract number to view the associated contract.
- Click the invoice number to view the associated invoice.

Credit memo details contain the following fields:

Field	Description
Credit Note Number	Number assigned to the credit memo when it was created.
Account Name	Name of the account associated with the credit memo.
Account Number	Number assigned to the account.
Related Invoice	Number of the invoice to which this credit memo applies
Credit Note Date	Date that this credit memo was issued.
Total Credit	Total amount of this credit memo. The number is negative because this amount is being credited to your account.
Contract	Number of the contract associated with this credit memo. Click the contract number to view the contract details.

The Credit Note Lines table lists and describes the products and services associated with this credit memo. The table contains the following fields:

Field	Description
Service	Name of a product or service associated with the credit memo line item.
Provider	Company that provided the product or service, for example Salesforce or a partner.
Billing Reference	Reference to the company's billing information.
Total Amount	Total amount of this credit memo line item.

The Applications table lists and describes the invoices associated with this credit memo. The table contains the following fields:

Field	Description
Applied To	Number of the invoice to which this credit memo was applied.
Application Date	Date that the credit amount was applied.

Field	Description
Amount	Amount applied to the application.

SEE ALSO:
[Viewing Credit Memos](#)

CREATING A CASE

You can create a case to provide detailed descriptions of your feedback, problems, or questions related to Checkout.

1. Click **Log a Case** from any page that displays it. Salesforce captures which contract, order, statement, invoice, payment, or credit memo is associated with the page you are viewing, so your case is assigned to the correct representative.
2. Enter a description of your issue.
3. Click **Submit**.

To return to the previous page without logging a case, click **Cancel**.

When you request assistance, a case is created. Make note of your case number for future communication.

REQUESTING ASSISTANCE

You can request assistance if you need help creating a quote or using Checkout. To request assistance:

1. Click **Request Assistance**.
2. Select a topic from the **Topic** drop-down menu.
 - Using this site requests are sent to Checkout Support.
 - Purchasing requests are sent to your Salesforce account executive.
 - My Account requests are sent to the Salesforce billing department.
 - Other requests are sent to your Salesforce account executive.
3. Enter the subject and a description of your inquiry. The subject should include your quote number.
4. Click **Submit**.

To return to the previous page without logging a case, click **Cancel**.

When you request assistance, a case is created. Make note of your case number for future communication.

CHECKOUT GLOSSARY

The following terminology is used in Checkout:

Add-on

An add-on is a type of quote for a current customer who wants to add a license or product through the end of the current contract.

Case, Checkout

A case is a detailed description of your feedback, problem, or question. It is used to track and solve your Checkout issues.

Checkout

Checkout is the online store where you can purchase seats and other related products for Salesforce and Data.com.

Contract, Checkout

A contract is a written agreement defining the terms of doing business between Salesforce and your organization.

Credit Memo

A credit memo is a pricing adjustment that credits your account.

Installed Product

An installed product is a product purchased through Checkout and installed in your organization.

Invoice

An invoice is a printable statement in Checkout that lists all products and charges for an order.

New Business Quote

A new business quote is a type of quote for a new customer who has a trial version of Salesforce and would like to purchase Salesforce seats and other related products.

Order

An order is a transaction indicating that you have agreed to purchase specific products and services from Salesforce. For example, an order could be for a seat, training course, or professional services.

Payment

A payment is an amount of money that was paid toward your account. Checkout shows all payments made for orders placed by users within your organization.

Product, Checkout

A product is any item or service you purchase from Checkout. For example, a product could be a Professional Edition license, a support package, or extra storage.

Purchase Rules

Purchase rules are the criteria your organization must satisfy before a purchase is approved.

Quote, Checkout

A Checkout quote is a convenient, risk-free way to price products or services and terms before placing an order. Quotes can be for new business, add-ons, upgrades, or renewals.

Renewal

A renewal is a type of quote for a Salesforce customer whose contract is expiring.

Special Terms

Any terms that you have specifically agreed to and want to track in your contract.

Statement

A statement that you can generate. A statement summarizes payments, invoices, and credit memos.

Transaction, Checkout

A transaction is a financial adjustment to your account. Transactions are reflected in invoices or credit memos.

Upgrade, Checkout

An upgrade is a type of quote for a Salesforce customer who wants to upgrade their Salesforce Edition.