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**CPQ**

**on Apttus Intelligent Cloud™**

*— Powered by Salesforce*

*Summer 2017 Patch 2 Release Notes*

21 September 2017



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## Links in this Document

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# About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#) that are required to upgrade to this release
- [System Requirements and Supported Platforms](#) information pertaining to the requirements and recommendations you must consider before you proceed with the installation
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features, with links to Get Started topics to help you set up and use the new feature or enhancement
- [Resolved Issues](#)
- [Known Issues](#)



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# Packages

The following packages and dependent packages are required to upgrade to this release. These are the *minimum* required versions; later versions are also supported. The packages marked as **(New)** are new packages for this release and must be installed to upgrade to this version .

Product	Latest Certified Version
Apttus Approvals Management (Required if you are using Approvals)	8.0.0396 (8.396)
Apttus Configuration & Pricing <b>(New)</b>	Summer 2017 Patch 2 (10.1298.26)
Apttus Contract Management	8.5.0361 (8.361)
Apttus Contract-Configuration Integration (Required if you are using CLM)	9.6.0091 (9.91)
Apttus CPQ API	9.4.0067 (9.67)
Apttus CPQ Admin <b>(New)</b> (Required if you are using CPQ Admin Console)	3.48.1
Apttus CPQ Approvals Management (Required if you are using Approvals on CPQ objects)	6.5.0067 (6.67)
Apttus Order Management	1.0.0000 (1.0)
Apttus Promotion Management (Required if you are using Promotions)	1.0.0000 (1.0)
Apttus Proposal Management (Required if you are using Proposal Management)	8.3.0154 (8.154)

<b>Product</b>	<b>Latest Certified Version</b>
Aptus Quote/Proposal Approvals Management	6.5.0004 (6.4)
Aptus Quote/Proposal-Asset Integration	6.5.0014 (6.14)
Aptus Quote/Proposal-Contract Integration	8.0.0044 (8.44)
Aptus Quote/Proposal-Configuration Integration (Required if you are using CPQ and Proposal Management)	10.0.0240 (10.240)

# System Requirements and Supported Platforms

Before you install and start using CPQ, you must ensure the minimum requirements as mentioned below:

System Requirements	
Item	Requirement
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See <a href="#">Salesforce PDF</a> .
Browser	Standard <a href="#">Salesforce.com</a> requirements. Also, see <a href="#">Salesforce PDF</a> . Apttus recommends you to use the following browsers for better performance: <ul style="list-style-type: none"><li>• Mozilla Firefox</li><li>• Google Chrome</li></ul>
Microsoft Office	<ul style="list-style-type: none"><li>• Microsoft Word 2003 with Service Pack 3</li><li>• Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number has to be greater than 12.0.6520.4999)</li><li>• Microsoft Word 2010 (32 bit &amp; 64 bit)</li></ul>

## Upgrade Information

After upgrading to this release, it is recommended that you create custom labels for any custom actions, otherwise, none of the buttons are displayed on the cart.

For more information on pre and post upgrade, see [Upgrade Information](#) in the Admin Guide.



# Feature Summary

This release introduces the following update to CPQ:

## Improvement to the `OptionDefaultOptionFilterCallback` class

The new **`OptionDefaultOptionFilterCallback1`** class returns the *ConfigurationId* for a particular Quote/Proposal. The product configuration record can consist of any type of products. This callback is used to hide or exclude the option products.

### Get Started

For details, refer to [Default Option Filter Callback](#) in the admin guide.

## Resolved Issues

The following table represents resolved issues on the CPQ SFDC Summer 2017 Patch 2 release.

Case Number	Description	Apttus Internal ID
<b>CPQ 10.1298.26</b>		
213217	<p>Selecting a product that was associated with multiple categories in the catalog, the system assigned an incorrect category to your product on the cart.</p> <p>This issue is now resolved. The system assigns the correct category for the selected product in the product configuration record of the quote.</p>	CPQ-13544
	<p>In a rollup record containing numeric expression for attributes, which are shared across option products, the system displayed an error in the console.</p> <p>This issue is now resolved. The numeric expression is calculated correctly for the option products.</p>	CPQ-13960
214440	<p>For a large number of line items in the cart, scrolling the cart page did not freeze the header columns.</p> <p>This issue is now resolved. The header columns stay fixed in place and visible when you scroll through the cart page in Angular and Grid UI.</p>	CPQ-14104
215093	<p>The CSS for the catalog page caused misalignment of Search box and Browse Catalog section.</p> <p>This issue is now resolved. The CSS is correctly aligned for Search box and Browse Catalog section.</p>	CPQ-14366

Case Number	Description	Apttus Internal ID
215101	<p>In the CPQ Admin Console, for an attribute containing expressions, deleting an expression did not save the changes.</p> <p>This issue is now resolved. Deleting an expression for an attribute saves the changes correctly.</p>	CPQ-14372
215267	<p>Setting <b>Is Read Only</b> checkbox to <i>true</i> for a line item record in the Product Configuration record did not make the line item non-editable on the cart.</p> <p>This issue is now resolved. The <b>Is Read Only</b> checkbox works correctly for a line item record.</p>	CPQ-14415
215269	<p>An option product selected from the Constraint Rule prompt dialog box was added as an individual product in the cart.</p> <p>This issue is now resolved. An option product selected from the Constraint Rule prompt dialog box is added as a secondary line under the bundle product.</p>	CPQ-14417
215261	<p>For a client-side constraint rule, deleting an auto-included product brought the product back in the cart and did not allow you to finalize the product.</p> <p>This issue is now resolved. The auto-included product does not get added again in the cart after you have manually deleted the product.</p>	CPQ-14419
215355	<p>After setting <b>Disable Constraint Rules</b> to <i>true</i>, the system executed the constraint rules on the catalog page.</p> <p>This issue is now resolved. Disabling constraint rules with the above custom setting does not execute the constraint rule.</p>	CPQ-14442

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Case Number	Description	Apttus Internal ID
215492	<p>For a product with attributes, clicking the <b>Copy</b> icon on the cart displayed an error and did not allow you to proceed for cart finalization.</p> <p>This issue is now resolved. The <b>Copy</b> action works correctly for a product on the cart.</p>	CPQ-14492
215269	<p>In a client-side constraint rule scenario, with <b>Match in Options</b> and <b>Match in Primary Lines</b> set to <i>true</i>, the auto-included options were added as primary lines instead of secondary lines.</p> <p>This issue is now resolved. With the above configuration, the auto-included options are added as secondary lines for the cart.</p>	CPQ-14499

The following issues have been resolved from the previous release.


Apttus Internal ID	Description
ASSETS-1217	Deselection of an option with a rollup (no bundle level Price List Item for the corresponding charge type) does not cancel the underlying roll up an asset.
CPQ-12769	New Admin Console: The <b>Show Rules for Options</b> checkbox does not read the nested bundle rules.

## Known Issues

The following table represents known issues on the CPQ SFDC Summer 2017 Patch 2 release.

Apttus Internal ID	Description
ASSETS-784 / ASSETS-772	When you <b>Change</b> or <b>Renew</b> a bundle product, the options are not shown under the correct option group. This behavior is observed when option groups are shared across multiple option groups.
ASSETS-1016	When performing a <b>Swap</b> operation on assets with one-time charge type, the Start Date of the upgraded asset is taken from the <b>Proposal Start Date</b> rather than the Swap <b>Effective Date</b> . To avoid this, you can choose to keep the Start and End Dates on the proposal <i>blank</i> and then swap the assets.
ASSETS-1173	Cancelling Ramp lines and accepting Order displays positive delta pricing; whereas it should be negative.
ASSETS-1276	Ramp Renew single line fetches the default attribute values along with other stored values on re-configuring renewal quote.
ASSETS-1298	Cancellation of the asset does not update the pre-generated renewal quote or cart associated with the asset. Swapping of the asset does not update the pre-generated renewal quote or cart associated with the asset.
ASSETS-1321	The Default Asset Pricing Indicator is unchecked. When you have assets with attributes and asset pricing with some criteria, the Is Asset Pricing is checked. It should be unchecked.

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Apttus Internal ID	Description
ASSETS-1323	Ramp cancellation is not working for Option assets. When a user tries to delete one of the ramps on a ramp option (using the trash icon on the ramp pop up), no cancelled line is generated and no delta price is computed.
ASSETS-1378	For Auto Ramp feature on the cart, you are unable to add a new ramp line or delete an existing ramp line.
CPQ-5840	When you unlock the default quantity for a Product Option, Apttus CPQ continues to use the default quantity value derived from the numeric expression which you defined. This, in turn, affects the Product Quantity and the Price.
CPQ-6562	In the community org for classic UI, the system does not show values for the Search Filters on the catalog page. Under <b>Refine Your Search</b> section, you can see all the search filters without their values to select.
CPQ-6586	<p>When you specify "Date Time" value for the product attribute and click <b>Go To Pricing</b>, the system shows the following error on the Cart page:</p> <p><i>!Unexpected type for Apttus_Config2. RemoteCPQController.performAction(Apttus_Config2.RemoteCPQ.CartRequestDO).</i></p> <div data-bbox="350 1289 1458 1413" style="border: 1px solid #add8e6; padding: 10px;"> <p> "Date time" attribute type is not supported in this release.</p> </div>
CPQ-7187	The Constraint Rule triggered while deleting a Line Item displays the validation message twice on the Catalog and Cart pages. This behavior is observed when the validation message is triggered from an <i>addError</i> method in the trigger for Line Item object.
CPQ-8674	When you apply adjustments to the Line Items in the Summary section and do not click <b>Reprice</b> on the Cart, the system allows you to finalize the Cart without giving any error.

Apttus Internal ID	Description
CPQ-9433	If the character limit for the name of the Quote/Proposal document generated using Proposal Document Generation exceeds 80, the system throws an error while merging this document with other additional documents.
CPQ-10044	For a sub-bundle product, when <b>Show Tab</b> is set to <i>False</i> and option group has <b>Is Picklist</b> set to <i>True</i> , the Product Options tab displays the product attributes on the configuration page.
CPQ-10286	If you have added <i>Apttus_Config2__Version__c</i> field in the <b>Config System Properties &gt; Revalidation Product Columns</b> , the system throws a <i>"duplicate error"</i> on the revalidation pop-up on the cart page.
CPQ-10659	When you upgrade to this release, intermittently you may get the following error message: <i>Field \$Label.Choose does not exist. Check spelling. RemoteCPQ: Field \$Label.Choose does not exist. Check spelling.</i>
CPQ-10670	PAV extension attribute fields, which are marked as primary attributes, do not get merged from the child to parent cart in the quote collaboration process.
CPQ-11866	The enhanced smart search displays filter values in the slider, which are applicable for inactive products also. Ideally, the system must not consider the inactive products.
CPQ-12011	With <b>Related Price Scope</b> set as <i>Cart</i> , for a scenario where the price of bundle A is related to the price of bundle B, after removing bundle B, the price of bundle A does not revert to the original price.
CPQ-12074	Currently for Application Management Settings in the Admin Console, there is no provision to read all the flow related actions or columns in one setting group. As an admin, you have to create one setting group for each flow.

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Apttus Internal ID	Description
CPQ-12097	<p>A system does not update the custom setting record name when you attempt to configure the custom settings.</p> <p><b>Workaround:</b> Avoid keeping more than one entries in the backend. For example, on config system properties; create only "System Properties" same with other custom setting records for primary settings. Leaving custom setting with just one default expected records works well.</p>
CPQ-12341	<p>New Admin Console: At the following places, unable to use Product Attribute value extension object fields:</p> <ul style="list-style-type: none"> <li>• <b>Rules Tab:</b> Constraint Rule Condition Criteria</li> <li>• <b>Rules Tab:</b> Constraint Rule Action Criteria</li> <li>• <b>Rules Tab:</b> PAR Condition Criteria</li> <li>• <b>Options Tab:</b> Numeric Expression</li> <li>• <b>Attributes Tab:</b> Numeric Expression</li> <li>• PLI Charge Type Criteria pop-up</li> </ul>
CPQ-12418	<p>For Proposal Document Generation, deleting a Proposal Document from the Proposals tab doesn't remove the document from Documents to be Merged section. You must refresh your browser tab to remove the document.</p>
CPQ-12476	<p>For Proposal Document Generation in SF1 mobile app, the drag and drop functionality for merging and uploading documents from local storage or Salesforce is not available.</p>
CPQ-12504	<p>In the new Admin Console, the Lookup Field tab available at <b>CPQ Admin &gt; Application Management &gt; Developer</b> tab is not functional with the current release.</p>
CPQ-12647	<p>Getting numeric expression related errors on configuring a product and its values are also not getting set on picklist or multi picklist. When you use an empty string to reset the value, it works fine if set to null.</p>



Apttus Internal ID	Description
CPQ-12662	The Option lines on the right panel of the Cart are not visible when a bundle has almost 10 price ramp lines.
CPQ-12679	<p>For Application Management Settings in the Admin Console, in the Cart Page tab, no data is rendered for different columns such as <b>Agreement Price Rule</b> and <b>Tiered Price</b>.</p> <p><b>Workaround:</b> On the backend, update the setting group display type to column then it starts working.</p>
CPQ-13437	<p>New Admin Console: In Application Management when you do the Mass Update on the cart page, the data and the newly created flows are not getting rendered.</p> <p><b>Workaround:</b> From the existing Visual Force page, configure display column settings record.</p>
CPQ-13460	New Admin Console: In <b>Application Management &gt; Analyze Deal</b> tab, data is not rendered as per the flow settings in multiple sections.
CPQ-13471	Nova UI: Termination validation message is not visible on Termination Intermediate page.
CPQ-13493	<p>New Admin Console: For a newly installed org, in the Application Management settings, clicking the <b>Load Default</b> button does not render the required data.</p> <p><b>Workaround:</b> You must save the Display Column Settings and Display Action Settings for the default flow in Salesforce before clicking <b>Load Default</b> in Application Settings.</p>
CPQ-13506	New Admin Console: For a Price Rule, the lookup field in the Condition Criteria pop-up dialog does not show all the relevant fields.

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Apttus Internal ID	Description
CPQ-13883	<p>Cart Grid UI: When <code>EnableContextualTotals</code> setting is ON, the subtotals lines do not allow you to apply adjustments on the cart.</p> <p><b>Workaround:</b> Do not include net adjustment column in display column settings .</p>
CPQ-13989	<p>New Admin Console: A system does not follow the mandatory fields list logic from "Apttus_Config2__ProductDetailFields", rather it has started following the logic from ProductDetails Schema definition.</p> <p><b>Workaround:</b> Keep the product schema definition as mandatory on the field in the New Admin UI.</p>
CPQ-14027	<p>New Admin Console: Lack of field-level security on the custom fields, which are created on the object "Apttus_Config2__ProductAttributeValue_c", causes issues. As a result, the system cannot fetch data from those custom fields during extraction of CSV file and the Attribute Value Matrix entries have no content in them.</p> <p><b>Workaround:</b> Ensure that Salesforce field level security rights are set correctly for all the fields that you are using for the Attribute Value Matrix.</p>
CPQ-14133	<p>Cart Grid UI: A system does not auto-update the Adjustment Amount field value when you select the Adjustment Type as Discount Amount.</p> <p><b>Workaround:</b> Click the Adjustment Amount field so that the value gets updated.</p>

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