

APTTUS[®]

CPQ Summer 2017 Patch 20 Release Notes - Salesforce Platform

20 July 2018

Table of Contents

| | |
|--|----|
| Links in this Document | 4 |
| About Release Notes..... | 5 |
| Packages | 6 |
| System Requirements and Supported Platforms..... | 7 |
| Resolved Issue | 8 |
| Known Issues..... | 10 |
| Apttus Copyright Disclaimer | 14 |


Links in this Document

To access the content provided by external links in this document you must be logged into the Apttus Community Portal. If you encounter a Salesforce login page, enter your Apttus Community login and password. For assistance with your Community credentials, please contact Apttus Support.

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
- [Resolved Issues](#)
- [Known Issues](#)

 This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

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 | Summer 2017 Patch 20 (10.1298.114) |
| 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 (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) | 8.3.0164 (8.164) |
| Apttus Quote/Proposal Approvals Management | 6.5.0004 (6.4) |
| Apttus Quote/Proposal-Asset Integration | 6.5.0014 (6.14) |
| Apttus Quote/Proposal-Contract Integration | 8.0.0044 (8.44) |
| Apttus Quote/Proposal-Configuration Integration (New) (Required if you are using CPQ and Proposal Management) | 10.0.0240.9 (10.240.9) |

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using CPQ.

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

Upgrade Notes

After upgrading to this release, it is recommended that you create custom labels for any custom actions; otherwise, buttons will not display on the cart.

For more information on pre and post upgrade, see *Upgrade Information* in the admin guide.

Resolved Issue

The following table represents a resolved issue in this release.

| Case Number | Description | Apttus Internal ID |
|--------------------------|---|--------------------|
| CPQ 10.1298.114 | | |
| CAS-03 122- T2F3P1 | <p>After clicking on Apply Pricing in the X-author Excel, it navigates to a screen in Salesfoce, which stated to Continue or Cancel. When two users were creating two different carts in two different Quotes, and click on Continue at the same time, one of the User's screen displayed Record Deleted. However when that User refreshed the page, it showed the progress bar.</p> <p>This issue is now resolved. When two users simultaneously clicked Reprice Quote, nobody gets any error and the reprice quote occurs successfully.</p> | CPQ-349 57 |

Known Issues

The following table represents known issues in this release.

| Apttus Internal ID | Description |
|-------------------------|---|
| ASSETS-784 / ASSETS-772 | When you Change or Renew 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 you perform a Swap operation on assets with one-time charge type, the Start Date of the upgraded asset is taken from the Proposal Start Date rather than the Swap Effective Date . Workaround: You can choose to keep the Start and End Dates on the proposal <i>blank</i> and then swap the assets. |
| ASSETS-1173 | When you cancel ramp lines and accept an order, positive delta price instead of negative price is displayed in the records under the Asset Line Item related list. |
| ASSETS-1276 | After you have configured an asset with ramp lines and changed the attribute values, when you renew and reconfigure the attribute values, the previously defaulted attributes values are retained for the renewal quote. |
| ASSETS-1298 | When you cancel an asset, Apttus CPQ does not update the pre-generated renewal quote or cart associated with the asset to reflect the cancelled asset line items. |
| ASSETS-1378 | After setting Enable Auto Ramp Creation to true at the PLI level, you are unable to add a new ramp line or delete an existing ramp line. |
| ASSETS-1608 | Without Asset Pricing, the option price is not rolled up to bundle and pure rollup shows \$0 during Renew and on the Renewal Quote. |
| ASSETS-1892 | When you cancel an asset, in one-time cancellation scenario, Apttus CPQ shows the prorated value (in the negative) of the cancelled one-time line. Also, the delta price is displayed as zero. |
| ASSETS-1893 | In one-time option upgrade scenario, Apttus CPQ does not bring back start date or end date (proposal start/end date). This displays duplicate rollup lines for option on the cart. |
| ASSETS-2168 | ABO Flat price: Incorrect delta on 2nd option when quantity of bundle got increased with discount amount during MTU. |
| CPQ-6562 | In the community org for classic UI, the Apttus CPQ does not show values for the Search Filters on the catalog page. Under Refine Your Search section, you can see all the search filters without their values to select. |

| Apttus Internal ID | Description |
|--------------------|---|
| CPQ-8674 | When you apply adjustments to the Line Items in the Summary section and do not click Reprice on the Cart, the Apttus CPQ allows you to finalize the Cart without giving any error. |
| CPQ-9433 | If the character limit for the name of the Quote/Proposal document generated using Proposal Document Generation exceeds 80, the Apttus CPQ throws an error while merging this document with other additional documents. |
| CPQ-10044 | For a sub-bundle product, when Show Tab is set to <i>False</i> and option group has Is Picklist 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 Config System Properties > Revalidation Product Columns , the Apttus CPQ 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. |
| CPQ-12011 | With Related Price Scope 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 roll back to the original value during product configuration. |
| 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. |
| CPQ-12097 | New Admin Console: Updating a custom setting record in Salesforce does not update the corresponding application settings record in the Admin Console. Workaround: Do not create more than one entry with the name <i>System Properties</i> for custom settings. |

| Apttus Internal ID | Description |
|--------------------|---|
| CPQ-123 41 | <p>New Admin Console: At the following places, you cannot use Product Attribute value extension object fields:</p> <ul style="list-style-type: none"> • Rules Tab: Constraint Rule Condition Criteria • Rules Tab: Constraint Rule Action Criteria • Rules Tab: PAR Condition Criteria • Options Tab: Numeric Expression • Attributes Tab: Numeric Expression • PLI Charge Type Criteria pop-up |
| CPQ-124 18 | <p>For Proposal Document Generation, if you delete a Proposal Document from the Proposals tab the Apttus CPQ does not remove the document from Documents to be Merged section. Hence, you must refresh your browser tab to remove the document.</p> |
| CPQ-124 76 | <p>For Proposal Document Generation in the SF1 mobile app, the drag and drop functionality for merging and uploading documents from local storage or Salesforce is not available.</p> |
| CPQ-125 04 | <p>In the new Admin Console, the Lookup Field tab available at CPQ Admin > Application Management > Developer tab is not functional with the current release.</p> |
| CPQ-126 47 | <p>You are getting numeric expression related errors on configuring a product and numeric expression values are also not getting set on picklist or multi picklist.</p> <p>However, when you use an empty string to reset the value, it works fine if you set it to null.</p> |
| CPQ-126 62 | <p>The Option lines on the right panel of the Cart are not visible when a bundle has almost 10 price ramp lines.</p> |
| CPQ-126 79 | <p>For Application Management Settings in the Admin Console, in the Cart Page tab, no data is rendered for different columns such as Agreement Price Rule and Tiered Price.</p> <p>Workaround: Update the setting group display type to a column to make it work.</p> |
| CPQ-134 37 | <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>Workaround: From the existing Visual Force page, configure display column settings record.</p> |
| CPQ-134 60 | <p>New Admin Console: In Application Management > Analyze Deal tab, data is not rendered as per the flow settings in multiple sections.</p> |
| CPQ-134 71 | <p>Nova UI: Termination validation message is not visible on Termination Intermediate page.</p> |

| Apttus Internal ID | Description |
|--------------------|---|
| CPQ-134 93 | <p>New Admin Console: For a newly installed org, in the Application Management settings, clicking the Load Default button does not render the required data.</p> <p>Workaround: You must save the Display Column Settings and Display Action Settings for the default flow in Salesforce before clicking Load Default in Application Settings.</p> |
| CPQ-135 06 | <p>New Admin Console: For a Price Rule, the lookup field in the Condition Criteria pop-up dialog does not show all the relevant fields.</p> |
| CPQ-138 83 | <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>Workaround: Do not include net adjustment column in display column settings.</p> |
| CPQ-139 89 | <p>New Admin Console: An Apttus CPQ 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>Workaround: Keep the product schema definition as mandatory on the field in the New Admin UI.</p> |

Apttus Copyright Disclaimer

Copyright © 2018 Apttus Corporation (“Apttus”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Apttus. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Apttus makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this document may contain descriptions of software modules that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document.

U.S. GOVERNMENT END USERS: Apttus software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Apttus and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus and X-Author are registered trademarks of Apttus and/or its affiliates.

The documentation and/or software may provide links to Web sites and access to content, products, and services from third parties. Apttus is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Apttus is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Apttus is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

For additional resources and support, please visit <https://community.apttus.com>.