



---

## CPQ February 2017 Release Notes

06 March 2017



# Table of Contents

<b>Links in this Document</b>	<b>5</b>
<b>About Release Notes</b>	<b>6</b>
<b>Packages</b>	<b>7</b>
<b>Data Model Changes</b>	<b>9</b>
<b>Feature Summary</b>	<b>19</b>
<b>Cart Locking for Concurrent Access</b>	<b>19</b>
Get Started	19
<b>Optional Line Items for Configuration</b>	<b>20</b>
Get Started	20
<b>Improved Usability and Customization for Favorite Configurations</b>	<b>21</b>
Get Started	21
<b>Smart Search Powered by Azure</b>	<b>21</b>
Get Started	21
<b>Usability Enhancements for Analyze Quote Page (Cost and Profitability)</b>	<b>22</b>
Get Started	22
<b>Hiding Empty Option Groups during Configuration</b>	<b>22</b>
Get Started	22
<b>Invoking Proposal Document Generation Wizard from the Cart</b>	<b>23</b>
Get Started	23
<b>Support for SF1</b>	<b>23</b>

<b>Asset-Based Ordering Enhancements</b>	<b>24</b>
Filtering assets on the Installed Products page	24
Renewing a Single Ramp Asset	24
Filtering assets for Opportunity-based renewal Quotes	24
Package Visualforce pages and Controllers required for Opportunity-based renewal Quotes	25
Updating Assets for Opportunity-based renewal Quotes	25
<b>Application Management Settings and User Interface Enhancements</b>	<b>26</b>
Get Started	26
<b>Quote Collaboration - Merge Operation and Queue Filtering Enhancements</b>	<b>27</b>
Get Started	27
<b>Favorite Configuration API</b>	<b>27</b>
Get Started	28
<b>Loyalty Management</b>	<b>28</b>
Loyalty Program Setup	28
Loyalty APIs	28
Loyalty Calculation	29
<b>Lookup Field Setting Enhancements</b>	<b>29</b>
Get Started	29
<b>Cart Line Item Enhancements for Handling Dates</b>	<b>30</b>
Get Started	30
<b>Resolved Issues</b>	<b>31</b>
<b>Known Issues</b>	<b>39</b>

## 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
- [Data Model Changes](#) from the previous major release
- [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](#)



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	Minimum Version	Latest Certified Version
Apttus Approvals Management <b>(New)</b> (Required if you are using Approvals)	N/A	8.0.0395 (8.395)
Apttus Configuration & Pricing <b>(New)</b>	N/A	February 2017 (10.1215)
Apttus Contract Management	8.5.0361 (8.361)	8.5.0361 (8.361)
Apttus Contract-Configuration Integration <b>(New)</b> (Required if you are using CLM)	N/A	9.6.0090 (9.90)
Apttus CPQ API <b>(New)</b>	N/A	9.3.0064 (9.64)
Apttus CPQ Admin <b>(New)</b> (Required if you are using CPQ Admin Console)	N/A	3.17
Apttus CPQ Approvals Management (Required if you are using Approvals on CPQ objects)	6.5.0067 (6.67)	6.5.0067 (6.67)
Apttus Order Management	1.0.0000 (1.0)	1.0.0000 (1.0)
Apttus Promotion Management (Required if you are using Promotions)	1.0.0000 (1.0)	1.0.0000 (1.0)

Release Notes

Product	Minimum Version	Latest Certified Version
Apttus Proposal Management <b>(New)</b> (Required if you are using Proposal Management)	N/A	8.2.0144 (8.144)
Apttus Quote/Proposal Approvals Management	6.5.0003 (6.3)	6.5.0003 (6.3)
Apttus Quote/Proposal-Asset Integration	6.5.0014 (6.14)	6.5.0014 (6.14)
Apttus Quote/Proposal-Contract Integration	8.0.0044 (8.44)	8.0.0044 (8.44)
Apttus Quote/Proposal-Configuration Integration <b>(New)</b> (Required if you are using CPQ and Proposal management)	N/A	9.7.0206 (9.206)



# Data Model Changes

The following table lists the data model changes from the November 2016 SP1 release to February 2017 release.



System depicts fields used by the System Only and User depicts fields that can be used for integration updates.

Object	Fields	Description	State	Feature
Application Feature		An object to contain features in the Applications, where Applications are Apttus products like CPQ, CLM etc.	Existing	Application setting in new Admin UI
	External Id	External Id pointing to the original ApplicationFeature__c record.	New	
	Sequence	Sequence of application feature.	New	
Application Setting		Object to contain metadata about application settings.	Existing	Application setting in new Admin UI

Release Notes

Object	Fields	Description	State	Feature
	Data Type	The type of field in application setting.	New	
	Display Type	Display type of the field in application setting.	New	
	External Id	External Id pointing to the original ApplicationSetting__c record.	New	
	External Setting Group Id	External Id pointing to the SettingGroup__c original parent record.	New	
	Field Precision	Field precision for numeric custom settings.	New	
	Help Link	The URL accompanying the custom setting for more information.	New	
Asset Line Item		Represents a product or service asset line item.	Existing	Opportunity-based renewals

Object	Fields	Description	State	Feature
	Is Renewal Pending	Indicates whether renewal is pending for the asset line item.	New	
	Next Renew End Date	The next renew end date for the asset line item.	New	
Asset Line Item History		Represents a product or service asset line item.history.	Existing	Opportunity-based renewals
	Is Renewal Pending	Indicates whether renewal is pending for the asset line item.	New	
	Next Renew End Date	The next renew end date for the asset line item.	New	
Document Collate Info		Object to contain information about all collated documents.	Existing	Proposal Document Generation
	Full Name	The full name of the document collate info.	New	

Release Notes

Object	Fields	Description	State	Feature
Incentive		Represents an incentive associated with one or more products.	Existing	Updated Incentive object to include fields for Loyalty
	Cycle End Date	The cycle end date. Indicates the end of a loyalty program cycle.	New	
	Cycle Start Date	The cycle start date. Indicates the start of a loyalty program cycle.	New	
Incentive Benefit Data		Represents a single benefit data row associated with the incentive benefit	Existing	
	Criteria Bundle	ID of the criteria ad hoc bundle associated with the benefit.	New	
Incentive Loyalty Enrollment		Represents a single customer enrollment into an incentive loyalty program	Existing	Loyalty management

Object	Fields	Description	State	Feature
	Loyalty Level (Earned)	The loyalty level earned by the account /contact or custom point accrual level based on points accrued for the incentive.	New	
	Loyalty Level (Initial)	The loyalty level granted to the account /contact or custom point accrual level from the previous cycle. This level becomes the starting level for the new cycle unless an override is in effect.	New	
	Loyalty Level (Override)	The loyalty level override granted to the account/contact or custom point accrual level.	New	
	Override Date	The date the loyalty level was overridden.	New	
	Override Reason	The reason for the loyalty level override.	New	

Release Notes

Object	Fields	Description	State	Feature
Line Item		Represents a product or service line item.	Existing	Quote Collaboration and Cost and Profitability
	Collaboration Parent Line Number	Line number of the collaborated line item from parent configuration.	New	
	Is Optional	Indicates whether the line item is optional	New	
Loyalty Point Accrual Summary		Represents a summary of loyalty points accrued for the account or contact.	Existing	Loyalty management
	Cycle End Date	The loyalty cycle end date associated with the point accrual summary.	New	
	Cycle Start Date	The loyalty cycle start date associated with the point accrual summary.	New	

Object	Fields	Description	State	Feature
	Loyalty Level (Earned)	The loyalty level earned by the account /contact or custom point accrual level based on points accrued for the incentive.	New	
	Loyalty Level (Override)	The loyalty level override granted to the account/contact or custom point accrual level.	New	
	Override Date	The date the loyalty level was overridden.	New	
	Override Reason	The reason for the loyalty level override.	New	
Product Configuration		Represents a product configuration.	Existing	Cart Locking and Concurrent Access
	Current User	Holds the User Id of the user who accessed this configuration in edit mode.	New	

Release Notes

Object	Fields	Description	State	Feature
Product Group			Existing	
	Group Type	The group type.	New	
Product Group Member		Represents a single product in a product group.	Existing	
	Ratio	The ratio of the product in the bundle. Only applicable to ad-hoc bundles.	New	
Proposal Line Item		Represents a product or service line item associated with a Quote/Proposal.	Existing	
	Is Optional	Indicates whether the line item is optional.	New	



Object	Fields	Description	State	Feature
Quote /Proposal		Quote/Proposal object which holds dates and line items, many quotes/proposals may be related to a single opportunity, a quote /proposal may have many detail lines.		Proposal Document Generation
	Send Proposal	Generate and send a Quote/Proposal.	New	
Setting Group		Object to group settings into logical sets.	Existing	Application setting in new Admin UI
	Display Type	Display type of the setting group such as List, Actions, Columns or Field Set.	New	
	ExternalApplicationFeatureId	External Id pointing to the ApplicationFeature__c original parent record.	New	
	ExternalId	External Id pointing to the original SettingGroup__c record.	New	

Release Notes

<b>Object</b>	<b>Fields</b>	<b>Description</b>	<b>State</b>	<b>Feature</b>
	Sequence	Sequence of settings group.	New	

# Feature Summary

The following features are new to CPQ in this release.

- [Cart Locking for Concurrent Access](#)
- [Optional Line Items for Configuration](#)
- [Improved Usability and Customization for Favorite Configurations](#)
- [Smart Search Powered by Azure](#)
- [Usability Enhancements for Analyze Quote Page \(Cost and Profitability\)](#)
- [Hiding Empty Option Groups during Configuration](#)
- [Invoking Proposal Document Generation Wizard from the Cart](#)
- [Support for SF1](#)
- [Asset-Based Ordering Enhancements](#)
- [Application Management Settings and User Interface Enhancements](#)
- [Quote Collaboration - Merge Operation and Queue Filtering Enhancements](#)
- [Favorite Configuration API](#)
- [Loyalty Management](#)
- [Lookup Field Setting Enhancements](#)
- [Cart Line Item Enhancements for Handling Dates](#)

## Cart Locking for Concurrent Access

Cart locking helps prevent data loss while a sales rep is working on a configuration. When a sales rep is working on a configuration (in edit mode), any other user who tries to access the cart at the same time will get redirected to a read-only view of the cart. The user in read-only mode can gain edit access only after the sales rep saves or finalizes or abandons the cart.

### Get Started

For details, refer to [Enabling Cart Locking for Concurrent Access](#) page in the admin guide.

## Release Notes

For details, refer to [Cart Locking for Concurrent Access](#) page in the user guide.

# Optional Line Items for Configuration

You can now display your bundle, standalone and option products as non-mandatory (optional) products on the configuration and cart pages. With this functionality, sales reps can give a choice to their customers via the proposal if they want to mark the line item as not required, but can recommend these as part of the configuration. The sales reps can present these line items separately in a proposal document or keep them as a part of the configuration. An important aspect is that you can choose to price these line items separately or as part of the bundle (applicable for option line items). This helps the sales reps to have a distinguished view of the mandatory and optional line items in the cart before finalization, thereby providing efficient upsell opportunity.

To enable optional line items for your cart, you must select **Enable Optional Items** checkbox available at **All Tabs > Config Settings > System Properties > Cart Related Settings**.

Also, two new fields, **Is Optional** and **Is Optional Rollup Line** are introduced which you must add for **Display Type = Cart Line Item** for your flow name under **Display Column Settings**.

Option (Subbundle Optional Test Group)	Optional	Color	Product Description	Qty	Price
2854 Bundle A	<input checked="" type="checkbox"/>			1	\$140.20
Option (Optional OG Test 1)	Optional	Color	Product Description	Qty	Price
2731 Option 1	<input checked="" type="checkbox"/>			1	\$150.00
Option (Optional OG Sub Group 1)	Optional	Color	Product Description	Qty	Price
2731 Option 2	<input checked="" type="checkbox"/>			1	\$321.00

## Get Started

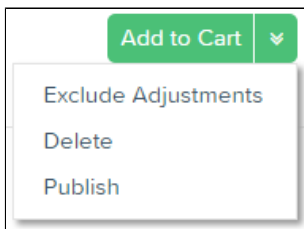
For details, refer to [System Properties](#) in the admin guide.

For details on how the optional line items appear on the config and cart pages, refer to [Configuring products](#) in the user guide.

## Improved Usability and Customization for Favorite Configurations

The favorite configuration feature has been enhanced with the following customizations:

- The columns on the **Save As My Favorite** dialog box are controlled through a custom setting named **Save as Favorite Dialog Columns**.
- You can easily disable any UI elements related to Favorite Configurations on catalog, configuration and cart pages with a custom setting named **Disable Favorites**.
- The action buttons against each favorite configuration record on the catalog page have been clubbed into a drop-down list with **Add to Cart** on top.



### Get Started

For details, refer to [Configuring the Favorite Configurations](#) page in the admin guide.

For details, refer to [Favorite Configurations](#) page in the user guide.

## Smart Search Powered by Azure

The enhanced Smart Search uses Azure platform in the back end for quicker search results. A system administrator can use different product fields to enhance the type-ahead for smart search of products on the catalog page. The smart search works in conjunction with new filter type (slider). Different field types such as *Date*, *Datetime*, *Number* and *Currency* are supported with the slider.

### Get Started

For details on the setup of Smart Search, refer to [Smart Search](#) in the admin guide.

## Usability Enhancements for Analyze Quote Page (Cost and Profitability)

The Analyze Quote page for Cost and Profitability functionality has been enhanced with the following key pointers:

- Customize the fields in the Analyze Quote table in the waterfall section with column settings.
- Edit the fields individually rather than editing at the column level.
- Blue background color to display the section you are viewing in the Product list section.
- When the user updates or edits optional fields on the Analyze Quote page and clicks **Reprice**, the edited optional line items are updated.

### Get Started

For details on configuring the fields for Analyze Quote page, refer to [Configuring Analyze Quote page](#) in the admin guide.

## Hiding Empty Option Groups during Configuration

The enhanced configuration page hides an option group tab (in the main section) and the option hierarchy on the right side of the configuration page in the following cases:

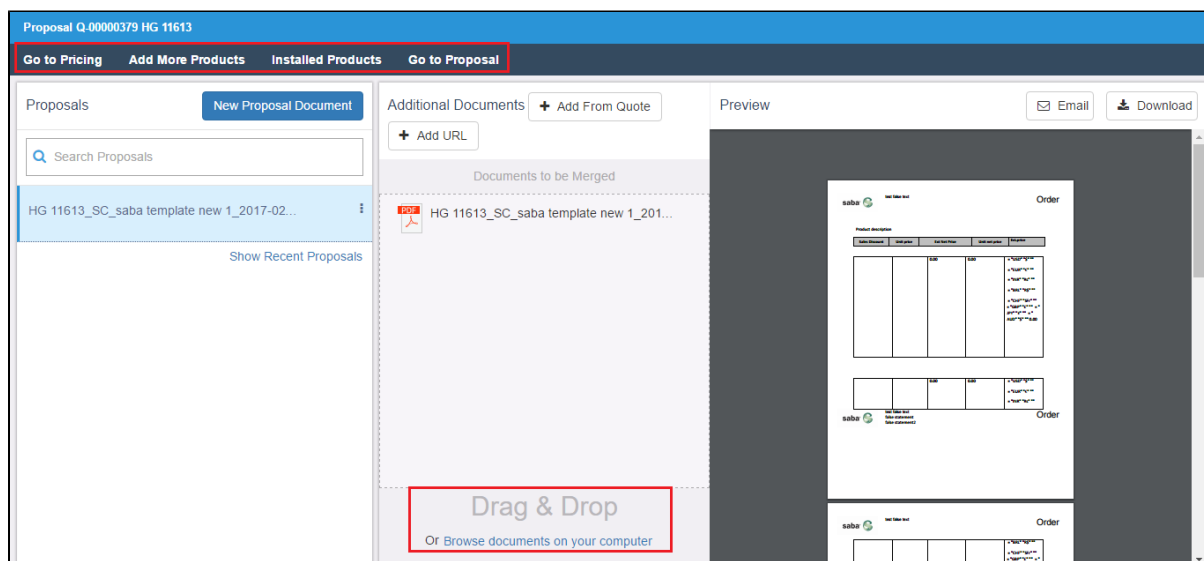
- If an option group does not contain any option products.
- If option products for this option group are fetched from an another price list.

### Get Started

For details on configuring a product, refer to [Configuring products](#) in the user guide.

## Invoking Proposal Document Generation Wizard from the Cart

The Proposal Document Generation Wizard has been enhanced with an improved accessibility of the wizard from the cart using a new button called **Send Proposal**. Earlier, the wizard could be invoked from the Quote header page only. There are also minor improvements, such as hiding additional proposal documents, attaching proposal documents from local storage and merging them with existing ones.



### Get Started

For details, refer to [Proposal Document Generation](#) page in the user guide.

## Support for SF1

All the existing pages for the catalog, configuration, cart and proposal document generation are now supported on SF1 mobile app. This gives the sales representative an end-to-end configuration flow on SF1. Note that the mobile experience is optimal only on iPad and tablet screen size.

## Asset-Based Ordering Enhancements

### Filtering assets on the Installed Products page

You can now filter assets corresponding to a particular Quote/Proposal by selecting the Quote /Proposal filter field. After applying this filter, you will see only those assets which are associated with the selected Quote/Proposal. Additionally, on the Installed Products page if you add a filter field and a lookup to only fetch the agreements associated with the OrderId, only those agreements associated with the OrderId will appear.

### Get Started

For details, refer to [Asset Visibility on the Installed Products page](#) and [Lookup Field Settings](#).

### Renewing a Single Ramp Asset

You can now renew a single ramp asset and derive its value from the previous ramp line item. To renew just one ramp and derive its price accurately navigate to **Custom Settings > Installed Products Settings > Manage** and enable **Renew One Ramp**. This setting enables you to renew only one ramp line item based on the new term in order of renewal term in the asset line item, default renewal term specified in the **Installed Product Settings** and **Selling Term** defined in the asset line item.

### Get Started

For details, refer to [Installed Products Settings](#).

### Filtering assets for Opportunity-based renewal Quotes

For On-demand Opportunity-based renewal quotes, you can implement a callback to filter assets to be displayed in the renewal Quote/Proposal. For this, you need to implement the methods- *getAssetFilterExpr* and *getConfigProperties* in the *Apttus\_Config2.IAssetRenewalCustomCallback*.

### Get Started

For details, refer to [Opportunity Renewal - OnDemand](#) .



## Package Visualforce pages and Controllers required for Opportunity-based renewal Quotes

Whenever you have to create an On-demand renewal quote, you have to reference the Visualforce page on a button on the Quote/Proposal record.

### Get Started

For details, refer to [Opportunity Renewal - OnDemand](#).

## Updating Assets for Opportunity-based renewal Quotes

When you select the **Sync Assets to Quote** flag on a proposal, whenever an asset is changed or updated, the asset line item in the Opportunity-based renewal quote is also updated.



- Asset-based Orders sync does not support Swap and Cancellation actions.
- Blocking the Asset Based Order Synchronization should always be done on the renewal quote.
- Opting out of a renewal opportunity does not pull the line out from the auto renewal quote.

## Release Notes

Quote/Proposal  
Q-00000844

< Back to List: Proposals

Proposal Location | Orders | Asset Line Items | Order Line Items | Asset Line Item History | DocuSign Def  
Activity History | Notes & Attachments

Quote/Proposal Detail Edit Delete Clone Clone (with Line Items)

Proposal ID Q-00000844

ABO Type  Renewal

Is System Generated

Location

Sync Asset Changes To Quote

Proposal Name Renew:-Q-00000842-12/4/2017

Opportunity Renew:-Q-00000842-12/4/2017

Primary

Discount %

Description

Total Quote Amount

Sales Tax %

Sales Tax Amount JPY 0.000 (USD 0.00)

Shipping & Handling

Net Amount JPY 0.000 (USD 0.00)

Grand Total JPY 0.000 (USD 0.00)

Amount JPY 0.000 (USD 0.00)

SP Date

SP Number

HG Configure (ASSETS) Configure Products

Turning off the flag on the renewal quote will stop the ABO sync from happening

## Get Started

For details, refer to [Setup and Configuration](#).

## Application Management Settings and User Interface Enhancements

Custom settings and system-wide application settings have been enhanced to allow for easier configuration of different areas of the CPQ application.

- **Launch from new Admin UI:** Settings can simply be modified by navigating to a new section in the New CPQ Admin user interface, allowing a logical grouping of the settings.
- **Logical grouping of settings:** All settings related to pricing can be grouped together and items related to the Configuration Engine can be grouped together.
- **Admin configurable settings:** You can also create your own group settings for customer specific settings that are not part of the standard Apttus CPQ settings.

## Get Started

For details, refer to [Application Settings Management](#) in the admin guide.

## Quote Collaboration - Merge Operation and Queue Filtering Enhancements

The merge operation has been enhanced to create individual records for different operations containing the same products. For example, a parent cart has a product and that product is in the merged collaboration record with the Collaborator. Originally collaborated line item should get merged as per the transfer price map and merge field set. The child cart now has one line item containing the product. If the Quote Collaborator adds the same line item and performs a merge operation, the line item would be overridden during the merge operation. From this release onwards, after the merge operation, if two line items have the same product, and the collaborator performs a merge operation, the line items are saved as individual records.



For Cost and Profitability, if the collaborator and the Sales User are from different business units and the collaborator sends a price which becomes one of the cost elements of the Sales Users cart and this price is negotiated, you must use multi-tier as the collaboration type. In Peer-to-peer collaboration, the only difference is that the merge copies over entire line items rather than merging field values based on transfer price map and merge field set.

Also, based on your location of line items on the cart, the list of queues/users is displayed for assigning the collaboration requests. This is helpful to the sales rep when your line items have different queue assignments and each line item has a separate location configured for it.

## Get Started

For details, refer to [Merging the configurations](#) in the user guide.

## Favorite Configuration API

You can now create Favorite configurations dynamically using the *saveFavoriteConfiguration* API.

## Get Started

For details, refer to [FavoriteConfiguration Web service](#).

## Loyalty Management

### Note

Note that Loyalty management features require licensing, separate from CPQ. Please contact your CSM for the licensing.

## Loyalty Program Setup

Loyalty Program setup allows Marketing managers to manage point accrual rules including eligible period management, loyalty tier definitions, and tier upgrade rules and downgrade rules.

## Loyalty APIs

New APIs are available to manage the following functions in Loyalty:

- Register - this API creates an enrollment record in the system.
- Unregister - this API removes the specified enrollment record in the system.
- Adjust Points - this API allows events that are not associated with orders to generate points for the specified enrollment record.
- Compute Points for Specific Order - this API takes an order id and calculates the points for all enrollments the order is associated with.
- Compute Points for Specific Order and Specific Enrollment - this API takes an order id and an enrollment id and computes the points for the enrollment record.
- Compute Points for Specific Enrollment - this API takes an enrollment id and processes all qualified orders and computes the points for the enrollment record.

## Loyalty Calculation

With this release, order processing and order cancellation are supported. The loyalty engine processes active orders to accrue points for eligible enrollment records, which could result in the enrollment tier level upgrade. The loyalty engine also processes canceled orders to deduct points from the enrollment records, which could result in the enrollment tier level downgrade.

## Lookup Field Setting Enhancements

In the Display Column Fields of the Lookup Setting, if you specify additional field values other than *Name* such as *Ownership* or *Type*. When you search for an object using the lookup field, the additional display columns show up in the search result pop-up.

Edit	
Name	KK Account <span>i</span>
Lookup Display Columns	Ownership, Region__c, TaxID__c
Lookup Field Name	KK_Account__c
Junction Field Name	
Junction Default Flag	
Filter Criteria	
Object Name	Apttus_Config2__ProductAttributeValue__c
Junction Object Name	

Account Type	Ownership
Customer	
Customer	Private
Prospect	Public

## Get Started

For details, refer to [Lookup Field Settings](#).

## Cart Line Item Enhancements for Handling Dates

When a line item of **Charge Type** = *One Time* or a proposal that is *Evergreen* is created, you can choose to hide the dates of the line item or in the proposal. Similarly, if the Line Item has **Auto Renewal** marked as *true*, you can choose to hide the dates on those line items.

Scenario	Flags checked	Result
If <b>Price Type</b> is <i>One Time</i> on Line Item	Hide Dates For One Time (If Checked)	Hide <b>Start Date</b> and <b>End Date</b> on Line Item.
	Hide Dates For One Time (If Not Checked)	<b>Start Date</b> and <b>End Date</b> are visible.
If <b>Price Type</b> is <i>Recurring</i> or <i>Usage</i>	Hide Evergreen End Date (If Checked) and <code>AutoRenewalType = Evergreen</code> on Line Item	<b>End Date</b> is hidden.
	Hide Evergreen End Date (If Unchecked) and <code>AutoRenewalType = Evergreen</code> on Line Item	<b>End Date</b> should behave the same way it behaves for recurring.

### Get Started

For details, refer to [Config System Properties](#).

## Resolved Issues

The following table represents resolved issues on release dated: March 06, 2017.

Case Number	Description	Apttus Internal ID
<b>CPQ 10.1215</b>		
205211	<p>The Search Filter Fields for Assets on the Installed Products page were not functional and did not give expected filter results.</p> <p>This issue is now resolved. Search Filter Fields like Account, Asset Name, and other custom picklist fields provide filtered results on the Installed Products.</p>	ASSETS-1225
	<p>While finalizing a renewal Quote, the changes are synced to the cart even though the Sync Asset Changes To Quote check box is unchecked.</p> <p>This issue is resolved. Now, when you finalize a renewal Quote, the changes are not synced to the cart when the <b>Sync Asset Changes To Quote</b> is unchecked. Ensure to check the <b>Sync Asset Changes To Quote</b> check box unless not required.</p>	ASSETS-1314
203948	<p>For a custom formula field on Line Item object, the system did not update the value when you change the <b>Adjustment Amount</b> and <b>Adjustment Type</b> fields on the cart when you clicked <b>Reprice</b>. You had to refresh the cart to see the updated value.</p> <p>This issue is now resolved. Any change in the <b>Adjustment Amount</b> and <b>Adjustment Type</b> fields on the cart and clicking <b>Reprice</b> updates the value in the custom formula field also.</p>	CPQ-9932
204069	<p>The smart search did not support deactivated price list items. Deactivated price list items did not hide corresponding products from the search result.</p>	CPQ-9979

Release Notes

Case Number	Description	Apttus Internal ID
	<p>This issue is now resolved. With the new Azure search, a product is not visible on the catalog page if:</p> <ul style="list-style-type: none"> <li>• Product is deactivated or expired</li> <li>• PLI is deactivated or expired</li> </ul>	
204604	<p>When you add a product using the black colored <b>Add to Cart</b> button (placed on the list of products), the system did not run the constraint rule to disable other products in the catalog.</p> <p>This issue is now resolved. Adding a product by using either of the <b>Add to Cart</b> button, the constraint rule is executed correctly.</p>	CPQ-10289
204137	<p>In a bundle to option group association, reordering child option groups under a bundle and creating a new option group did not retain the order of the previously created child option groups.</p> <p>This issue is now resolved in the new Admin UI Console. When you create a new option group and associate it with a bundle, the system retains the order of the previously created child option groups.</p>	CPQ-10367
	<p>In a scenario where an option product was auto-included by selecting an attribute value and <b>Max Options</b> set to 1 for an option group, the system auto-included the option product and displayed an error.</p> <p>This issue is now resolved. For the above scenario, the system auto-includes the option product and overrides the manual option product selection to honor the <b>Max Options</b> setting of the option group.</p>	CPQ-10444
205310	<p>For a cart containing a huge number of products, the pagination on the mini cart was not functional. This behavior was observed for the classic UI.</p> <p>This issue is now resolved. The pagination works correctly on the mini cart containing a huge number of products.</p>	CPQ-10517



Case Number	Description	Apttus Internal ID
205287	<p>After applying changes in the line item, the constraint rule validation message was displayed on the cart only after clicked <b>Reprice</b> twice.</p> <p>This issue is now resolved. The constraint rule validation message is displayed on the cart immediately after clicking <b>Reprice</b>.</p>	CPQ-10772
206092	<p>After you have saved a favorite configuration containing products auto-included through constraint rules, when you reuse this favorite configuration in a new quote, the auto-included products were not added automatically. Only the products added manually were included in the new quote.</p> <p>This issue is now resolved. The auto-inclusion constraint rule works correctly when you reuse favorite configuration records in different quotes.</p>	CPQ-10856
206257	<p>For a sub-bundle product containing default option, after you saved the updated value of the attributes of defaulted option product, the system threw <i>Id not specified in Update call</i> error.</p> <p>This issue is now resolved. The system saves the updated value of attributes under an option product of a sub-bundle and does not give any error.</p>	CPQ-10863
206326	<p>For a nested bundle, changing an attribute value did not auto include option products specified in the constraint rule inclusion criteria until you clicked <b>Validate</b> button.</p> <p>This issue is now resolved. The system includes option products automatically when you change an attribute value for a nested bundle on the configuration page.</p>	CPQ-10900
206338	<p>In a multi-tier collaboration, when a Sales Rep merged the cart with newly added product from a collaborator, the collaborated product was merged without any transfer price. The collaborated product did not contain price list as well.</p>	CPQ-10932

Release Notes

Case Number	Description	Apttus Internal ID
	<p>This issue is now resolved. The merged cart shows the correct transfer price of a collaborated product.</p>	
207727	<p>In a Quote Collaboration scenario with different currencies set at the org and Price List level, the Cost Line Item currency did not cascade from Line Item to Cost Line Item (in the child cart) and displayed the org currency and not the Price List currency.</p> <p>This issue is now resolved. The Cost Line Items show the appropriate currency iso code associated with the child cart Price List.</p>	CPQ-11031
207727	<p>In a Quote Collaboration scenario with different currencies set at the org and Price List level, the Cost Line Item currency on the Analyze Quote page and Quote Collaboration pop-up of the child cart (when navigated from Parent cart Analyze Quote) showed currency of the parent cart instead of child cart.</p> <p>This issue is now resolved. The Cost Line Item shows the correct child cart currency on the Analyze Quote page and Quote Collaboration pop-up.</p>	CPQ-11078 / CPQ-11079
207790	<p>For an existing product in the cart, when you add values for <b>Adjustment Type</b> and <b>Adjustment Amount</b> and reorder the product, the values entered in the <b>Adjustment Type</b> and <b>Adjustment Amount</b> fields were reset to blank.</p> <p>This issue is now resolved. Adding manual adjustments to a product and reordering the product retains the adjustments on the cart.</p>	CPQ-11112
207905	<p>Constraint rule validation message for product attribute value was not displayed on the attribute/option configuration page. Instead, the message was displayed on the cart.</p> <p>This issue is now resolved. A correct constraint rule validation message is displayed on the configuration page on product attribute selection.</p>	CPQ-11113

Case Number	Description	Apttus Internal ID
207872	<p>For Quote Collaboration feature, after a collaborator added a new product to the child cart, the sales representative merged the cart. The merged product did not have any collaboration link (collaboration request ID) with the child cart.</p> <p>This issue is now resolved. After a sales representative merges a new product (added by the collaborator) in the parent cart, a collaboration request ID is populated in the Line Item record of this product.</p>	CPQ-11153
208153	<p>On Internet Explorer when you tried to preview the generated document, the email popup was hidden.</p> <p>This issue is now resolved. You can preview and email the generated document without any UI issues.</p>	CPQ-11160
208166	<p>For the Proposal Document Generation feature, clicking <b>Select Template</b> under the Proposals tab gave an error if there is a custom URL used for this action.</p> <p>This issue is now resolved. Using a custom URL for Proposal Document Generation does not give any error.</p>	CPQ-11214
208173	<p>For a product containing lookup fields in the new admin console, the system did not allow you to chose any value from the lookup dialog box.</p> <p>This issue is now resolved. The lookup dialog box on the product detail page in the new admin console allows you to choose the appropriate values.</p>	CPQ-11220
197961	<p>For a generated proposal document that is presented to a user, the status of the Quote/Proposal did not change to <i>Presented</i> and the <b>Accept</b> button was not available.</p> <p>This issue is now resolved. Now on the proposal doc gen email pop-up, there is a checkbox to Mark proposal as presented.</p>	CPQ-11227

Release Notes

Case Number	Description	Apttus Internal ID
208215	<p>A newly created private favorite configuration record was not visible in the Favorites category on the catalog page for the same quote.</p> <p>This issue is now resolved. The newly created favorite configuration record is visible under the Favorites category on the catalog page.</p>	CPQ-11239
	<p>For the Proposal Document Generation feature, clicking <b>Select Template</b> under the Proposals tab did not open the pop-up dialog box for choosing a template.</p> <p>This issue is now resolved. You can choose a template for Proposal Document Generation without any error.</p>	CPQ-11242
208378	<p>In the custom setting when the Pricing Profile is set as <i>External</i> or as <i>Advanced</i>, you could not reprice the cart.</p> <p>This issue is now resolved. You can reprice a cart when Pricing Profile is set as <i>External</i>.</p>	CPQ-11318
206238	<p>A red asterisk symbol indicating mandatory configuration was not displayed over the option group tab on the configuration page.</p> <p>This issue is now resolved. For every mandatory configuration of options, a red asterisk is displayed on the respective option group tab.</p>	CPQ-11373
208517	<p>In a Quote Collaboration scenario with different currencies set at the org and Price List level, when you merge the collaborator's changes with the parent cart, the Line Item currency changes to an another currency, which is not the same as Effective Price List currency.</p> <p>This issue is now resolved. The merged changes in the parent cart retain the Price List currency.</p>	CPQ-11441
208530	<p>The primary contact name shows up as an email address with a semicolon when you generate the document and click the <b>Send Email</b> button.</p>	CPQ-11456

Case Number	Description	Apttus Internal ID
	This issue is now resolved. The email address of the primary contact is copied to the email address field when you click the <b>Send Email</b> button.	
208585	When you clone a bundle using the CPQ Admin Console, the Categories are also duplicated in the Category Hierarchy.  This issue is now resolved.	CPQ-11474
208607	For an auto-inclusion constraint rule, when you change/deselect an attribute value, the auto-included option product did not get deselected.  This issue is now resolved. If you change/deselect an attribute value, the corresponding option product also gets deselected as configured in the constraint rule.	CPQ-11479
208615	For Quote Collaboration feature, after a collaborator added a new product with attributes and the sales representative merged the request, the product attributes were not copied in the merged cart. This behavior was observed in a multi-tier setup.  This issue is now resolved. The product attributes are copied correctly in the merged cart.	CPQ-11489
208654	The custom picklist field under editable column section on the Analyze Quote page did not display any values for selection.  This issue is now resolved. You can view and choose the desired values in the picklist fields on the Analyze Quote page.	CPQ-11500
208633	For a validation constraint rule using <b>Net Price</b> in the field criteria section for constraint rule condition, the error message was displayed on the cart only after you click <b>Reprice</b> twice.  This issue is now resolved. The constraint rule validation message is displayed on the cart immediately after clicking <b>Reprice</b> .	CPQ-11519

Release Notes

Case Number	Description	Apttus Internal ID
208747	In the Publish Favorite pop-up, the price list field was blank and you were not able to search or select a price list.  This issue is now resolved.	CPQ-11543
209358	In a quote collaboration, when a Sales Rep merged the cart with newly added product from the collaborator, the cost line item records were not created for a collaborated product.  This issue is now resolved. After the merge operation, the system creates cost line items for the collaborated product.	CPQ-11978

The following issues have been resolved from the previous release.

Apttus Internal ID	Description
ASSETS-1080	When you try to <b>Terminate</b> or Remove (using <b>Change</b> ) options from a Bundle asset, the Net Price erroneously gets doubled and the Delta Price is shown as a positive amount instead of a negative amount.
ASSETS-1169	When the products with Auto Renewal flag set to true are added to the cart, the respective checkboxes for column <b>Auto Renewal</b> are set to false automatically.
ASSETS-1213	When the workflow rule for Asset Pricing is <i>Active</i> for a one-time charge type with no bundle-level PLI, the roll-up lines disappear from the cart.
ASSETS-1214	When the workflow rule for Asset Pricing is <i>Active</i> , the recurring roll-up line items are shown as <i>Existing</i> instead of <i>Amended</i> on performing the <b>Change</b> operation.

## Known Issues

The following table represents known issues on release dated: March 06, 2017.

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-938	The Delta Price and Quantity for an amended asset is incorrect. Delta Price and Delta Quantity is not supported in the previous and current release.
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-1217	Deselection of an option with a roll up (no bundle level Price List Item for the corresponding charge type) does not cancel the underlying roll up asset.
ASSETS-1226	The warning message <i>Carousel Default Icon"!Error: No content domain found. Cannot display icon images</i> hinders the completion of <b>Terminate</b> and <b>Renew</b> actions. You must provide a value for the <b>Carousel Default Icon (Config Settings &gt; Catalog Page Settings)</b> for most ABO actions to work.
ASSETS-1276	Ramp Renew single line fetches the default attribute values along with other stored values on re-configuring renewal quote.

Release Notes

Apttus Internal ID	Description
ASSETS-1283	Cancelled recurring lines show both net price and delta price as negative.
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-1319	Cancelling an asset with the cancellation date as start date calculates an incorrect net price.
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.
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 canceled line is generated and no delta price is computed.
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 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> <p>Note: "Date time" attribute type is not supported in this release.</p>



Apttus Internal ID	Description
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-7642	In a scenario with a constraint rule of sub-bundle to sub-bundle inclusion with <b>Action Intent = Prompt</b> , the system displays the prompt window multiple times and does not add the sub-bundle product.
CPQ-8674	When you apply adjustments to the Line Items in the Summary section and not click <b>Reprice</b> on the Cart, the system 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 system throws an error while merging this document with 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-10518	While creating a Price Ruleset, <b>Application Method</b> field is enabled by default, irrespective of value in <b>Application Level</b> field.
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>

Release Notes

Apttus Internal ID	Description
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-11829	For an optional option line item, if the price of another option line item is related to this optional option line item, any change in the price of optional option line item affects the price of the related option line item. The price mentioned at the PLI level should have been retained.
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-12010	With <b>Related Price Scope</b> set as <i>Cart</i> , the system does not calculate the correct price for an option whose price is related to another option within the same bundle. For such scenarios, Apttus recommends you to use <b>Related Price Scope</b> as <b>Bundle</b> and clone the bundle in the cart.
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, when you remove bundle B, the price of bundle A does not revert back to the original price.
CPQ-12014	With <b>Related Price Scope</b> set as <i>Cart</i> , for a scenario where the price of an option is related to an option product residing under another sub-bundle, the system does not calculate the correct price of option product.

**Apttus Copyright Disclaimer**

Copyright © 2017 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://apptusportal.force.com/community>.

## Release Notes