

APTTUS[®]

CPQ On Salesforce Spring 2018 Release Notes

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Links in this Document

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About Release Notes

Apttus Release Notes contain the following information about the CPQ Spring 2018 Release on the Salesforce Platform:

- [Packages](#) that are required to upgrade to this release
- [System Requirements and Supported Platforms](#) information about the requirements and recommendations that you must consider before you proceed with the installation
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features that are introduced in this release, with links to Get Started topics that help you set up and use the new feature or enhancement
- [Data Model Changes](#) from the previous major release
- [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)	8.0.0409 (8.409)
Apttus Configuration & Pricing (New)	10.6.1403 (10.1403) Spring 2018
Apttus Contract Management	9.0.0393.1 (9.393.1)
Apttus Contract-Configuration Integration (New) (Required if you are using CLM)	10.1.0103 (10.103)
Apttus CPQ API (New)	10.0.0080 (10.80)
Apttus CPQ Admin (New) (Required if you are using CPQ Admin Console)	5.8
Apttus CPQ Approvals Management (Required if you are using Approvals on CPQ objects)	6.5.0068 (6.68)
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 (New) (Required if you are using Proposal Management)	8.3.0166 (8.166)
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 (New)	8.1.0048 (8.48)
Apttus Quote/Proposal-Configuration Integration (New) (Required if you are using CPQ and Proposal Management)	10.2.0263 (10.263)

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	<p>Apttus supports the following browsers:</p> <ul style="list-style-type: none"> • Microsoft Edge • Mozilla Firefox • Google Chrome <p>Apttus recommends its customers to use “Edge” as the Microsoft browser of choice when using the angular versions of Apttus CPQ.</p> <p>Note: Internet Explorer is not supported.</p>
Microsoft Office	<ul style="list-style-type: none"> • Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number must be greater than 12.0.6520.4999) • Microsoft Word 2010 (32-bit & 64-bit) <p>Apttus recommends the latest Microsoft Office Suite for the best performance.</p>

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.

Feature Summary

This release introduces the following updates to CPQ:

ABO and Service CPQ Enhancements

Asset-Based Ordering (ABO) and Service CPQ modules contain the following new features introduced for this release:

 Spring 2018 Release onwards, Apttus CPQ supports only the Asset Grid UI.

Renewable Products

Apttus CPQ provides the ability to set aside the products that are renewable at the PLI level and control them at the cart or asset level. You can define a product as non-renewable at the PLI level and cascade it to the asset. If the asset is non-renewable, you must not pull the product into any renewal quote, such as auto or on-demand. If the asset is non-renewable, Apttus CPQ disables the renew action. If the flag is set to fixed, the product is renewable. If the flag is set to fixed, you can pull the product into auto and on-demand renewal quote. If the flag is set to evergreen, you must not pull the product into auto and on-demand renewal quote. If the flag is set to evergreen, you are not allowed to renew the product manually.

Get Started

For more information, see [Renewing an Asset](#) in the user guide.

ABO Support for Renewals on Services

During service renewal, you can update equipment items for the service. You can terminate the equipment line items or you can add them to additional services or extend coverage to the quote.

While renewing a service, on the cart grid you can see all related equipment in the Related Items pop-up; when you click Add or Remove, on the Installed Products page only services get selected. One current limitation of this feature is that even though the relationship between a service and an equipment item is established, you may not be able to add or remove related line items from the equipment.

Get Started

For more information, see [Service on Installed Products page](#) in the user guide.

Create Quotes from Opportunities that Inherit Related Line Items

You can create a draft quote with the selected service product and its related line items (asset line items) and then synchronize it with the opportunity. After clicking the synchronize with opportunity, you can also cascade the related equipment lines to the opportunity and forecast the service revenue in conjunction with the opportunity.

Similarly, you can create a renewal quote that carries over the related line items to the quote or cart.

Get Started

For more information, see [Creating Quote/Proposals from Opportunities](#) in the user guide.

UI Improvements for Asset-Based Ordering

You can apply column settings to the Installed Products page. You can change coloring, formatting, and styling of the angular and the asset grid pages. This helps you customize the look and feel of the Installed Products page for better readability.

You can see the **Search** bar adjacent to the installed products header area on the right corner on both Asset and Assets Grid pages.

You can see a floating menu for the Asset Grid page similar to the Cart Grid page.

You can see pagination at the top of the Asset Grid page, which helps proper page alignment. Also notice that left side search filter section get collapsed by default.

Get Started

For more information, see [Installed Products Page](#) in the user guide.

Support for Related Line Items at the Option Level

You can view the related lines associated with the component in the cart from an icon at the option level.

You can add or delete components using the **Add** or **Remove** buttons. This allows you to select and sell services at the component level and view the details in the cart.

Get Started

For more information, see [Service on Installed Products page](#) in the user guide.

Support for Account Hierarchy

You can view the account hierarchy on the Installed Products Asset Grid page for the selected accounts.

To display the accounts in the Asset Grid page, you must set the **Show Assets** custom settings and the accounts for which you want to view the hierarchy.

Get Started

For more information, see [Displaying Assets from the Account Hierarchy](#) in the user guide.

Coverage Status of Assets

This release introduces the Boolean field "Primary Service" on the Asset Line Item object; it is disabled by default. You can enable it to view the coverage status of your assets:

Installed Product (Asset Grid) page shows Service Product columns if Show Coverage for Primary Service is set to true and you have added all the columns to column settings. You need to mark the service as a Primary Service in the asset line item manually or by any custom setting. Apttus CPQ does not have the provision on the UI to mark the service as Primary.

Only one primary service is associated with an item of equipment. In the case of more than one primary service associated with the equipment, Apttus CPQ shows the coverage status data for the first available service. You can see the service along with its start and end dates alongside the equipment asset without any clicks.

For Primary Service,

Product shows proper name of the service product.

Start Date shows a start date of the service product.

End Date shows an end date of the service product.

Weighted Net Price shows the Net price of weightage that is distributed among equipment.

You can see the dynamically generated coverage status of the asset on the page.

You can also search your assets by using the coverage status on the Installed Products page.

 You need to enable the **Show Service Coverage** custom setting in order to view the coverage status columns on the Installed Products (Asset Grid) page.

Get Started

For more information, see [Service on Installed Products page](#) in the user guide.

Configuration of Service for a Component of the Bundle

On the **Installed Products** page, after selecting the asset and clicking **Relate**, Service CPQ displays a **Relate Component** pop up that contains a selectable list of options. After you relate the options to the selected asset or equipment, when you click **Next**, Apttus CPQ takes you to the **Service Catalog** page.

Get Started

For more information, see [Service on Installed Products page](#) in the user guide.

Enabled Match in Options Support for Related Asset Lines

When you relate a bundle (bundled asset), the eligibility rule (CSCR) is triggered at the option and bundle level and based on the eligible purchases for the option of a service, you can do the following:

- Sell services for a bundle or option
- Select the options for which you want to add a service coverage

When a service catalog launches after relating the assets to options, eligibility rules will check the "Match in Options" field for related lines or assets and accordingly disable or enable valid services.

Get Started

For more information, see [Service on Installed Products page](#) in the user guide.

Configuration Enhancements

Config module contains the following new features introduced for this release:

Min-Max Messaging

On the product configuration page, when you make a selection of options in the desired Option Group, Apttus CPQ displays min-max messages to show you how many options can be selected. For example, if you want to select X number of options where options can be X to X+n (n=1,2,3...), then you will see an appropriate message for selecting those options from the desired Option Group.

Get Started

For more information, see [Configuring a Product from the Catalog](#) in the user guide.

Inclusion Rule with Prompt

The Inclusion Prompt Rule allows you to specify the maximum products to be added to the cart. You must set minimum and maximum values in order to add products to the cart. Apttus CPQ disables all remaining option products that go beyond maximum value after the product selection is made. If you select less than maximum value, you have to manually close the prompt because the prompt closes automatically only when the maximum number is reached.

Get Started

For more information, see [Setting up an Inclusion Rule](#) in the admin guide.

Products Disabled or Hidden on Inclusion Prompts

Apttus CPQ disables or hides the excluded products on inclusion prompts to keep the validity of the cart intact.

When a product is disabled, Apttus CPQ shows an error message from the rule. However, for Warning type exclusion rule the product is not disabled in the prompt.

When you enable **Hide Disabled Options** setting under Config System Properties, then Apttus CPQ hides the product.

Get Started

For more information, see [Constraint Rules Scenarios](#) in the admin guide.

Indicator for Mandatory Fields

Apttus CPQ displays a red border on the left when attributes are set to mandatory in the UI.

This is useful in ensuring that all the mandatory fields are filled up before saving the page.

Get Started

For more information, see [Configuring a Product from the Catalog](#) in the user guide.

Horizontal Scroll for Option Groups Tab

The Product Configuration page provides a horizontal scrollbar when you have many option groups. You can see a single line of tabs for option groups and for menus with many option groups; you can also see the submenus with option groups being available for selection.

Get Started

For more information, see [Configuring a Product from the Catalog](#) in the user guide.

Added By and Added By Rule Information for Client-Side Constraint Rules (CSCR)

After product configuration, Apttus CPQ shows the "Added By" information on the cart at the line item level when it is added by a constraint rule or a user. When you execute a CSCR, the auto-included

products contain the Added By info on the line item record, which defines it as added by "Constraint Rule".

Apttus CPQ also displays the "Added By Rule info" information, which is used to trigger other rules and for reporting purposes.

Get Started

For more information, see [Client Side Constraint Rules \(CSCR\) Enhancements](#) in the admin guide.

Hyperlinks for Options Groups in the Summary Section

A summary section displays Option Group and child Option Groups with hyperlinks that take you to the corresponding section where the entire configuration is shown.

Get Started

For more information about this feature, see [Configuring Multi-level Bundles](#) in the admin guide.

Mandatory Products cannot be Marked as Optional

If you have added any items by auto-inclusion rules, you cannot make them optional.

When a product is added by the rule, the AddedByRuleInfo__c field on the line item is populated with a value.

Get Started

For more information about this feature, see [Configuring a Product from the Catalog](#) in the user guide.

Ability for Rule Messaging for Disabled Products

When an option is disabled by a constraint rule, if you hove over the option's checkbox Apttus CPQ displays the constraint rule message to make you aware why it is disabled.

Get Started

For more information about this feature, see [Configuring a Product from the Catalog](#) in the user guide.

Increased Threshold for Bundle Maintenance Job

You can run Bundle Maintenance Job without failure when Apttus CPQ has a large number of options validated with the following scenarios:

- 10,000 options groups for the entire system

- 10,000 options in a given option group
- 2,000 option groups for a given bundle with an average of 3 to 5 options each group

Get Started

For more information about this feature, see [Configuring a Product from the Catalog](#) in the user guide.

Incremental Update for Criteria Maintenance Job

The Criteria Maintenance Jobs are incremental rather than being rebuilt so that existing records are not impacted.

When you execute the constraint field maintenance job, Apttus CPQ generates new constraint field records as an insert operation. When you execute the pricing fields maintenance job, Apttus CPQ generates new pricing fields records as an insert operation. When you execute the expression maintenance job, Apttus CPQ generates new expression records as an insert operation.

Existing records remain as is. Apttus CPQ does not have downtime for quotes with existing records.

Get Started

For more information about this feature, see [Running a Criteria Maintenance Job](#) in the admin guide.

Client Side Constraint Rules Enhancements

Disabled Products Based on Product Option Group Min/Max on Inclusion Prompt

When you set the maximum number of options for an option group, the remaining options on the prompt get disabled regardless of the Min/Max criteria.

When a product is disabled by Option Group Min/Max rule, you can hover over the error message:

Error message on hover over is provides generic min/max option group: "This option has been disabled due to "xyz option group" has reached its maximum limit of selectable options."

Parity for Action Criteria in Inclusion Rules

Using the expression builder, you can edit the expression field of an action from the Inclusion Rule. For example, you can update the Adjusted Price as 100 percent for an Auto-included Line Item. You can also update the line item field based on the rollup field that you have defined.

Get Started

For more information about this feature, see [Client Side Constraint Rules \(CSCR\) Enhancements](#) in the admin guide.

Pricing Enhancements

The Pricing module contains the following new features for this release:

Enabled Group Adjustment Spread

Group Adjustments are adjustments applied at the Bundle or Total level. These adjustments are allocated to the members of the group such as options in the case of bundles and are applied on top of any line level adjustment applied to the member. With this new feature, the group adjustments will replace existing line level adjustment. The benefit of such a process is two-fold:

- The sales rep can prevent any further manual adjustment from applying on the line by using the Allocate Group Adjustment Flag
- The sales rep can override the manual adjustment of any line item even after applying a group adjustment.

You can apply group adjustments to multiple line items, where the base price is not zero and the product is not set to optional. To use this functionality, you must enable the custom setting > Config System Properties > System Properties > Enable Adjustment Spread and also set the Max Adjustment Lines to 1 or 0.

When applying a group adjustment, there should be at least one member line item that can be allocated an adjustment and that line item should have a non-zero price. Enable Auto Reprice will switch the Adjustment spread logic to be client side and allow the administrator to set Minimum and Maximum Net Adjustment % thresholds.

Get Started

For more information, see [Manually Adjusting Options Pricing for a Bundle](#) in the admin guide.

Conversion of Group Adjustments

Group Adjustment Spread combines the ease of applying a group adjustment with the flexibility of a line level adjustment. You can update the adjustment type and amount on a bundle or summary group line, and on when the bundle is repriced, the group adjustment gets replaced by line level adjustments on the options or standalone products.

Example 1:

When the bundle has three ramps with Start Date and End Date:

Start Date	End Date
1-Jan-2017	31-Dec-2017
1-Jan-2018	31-Dec-2018
1-Jan-2019	31-Dec-2019

Then suppose there are options with ramp lines with the same dates. In that scenario, if you apply an adjustment to one of the ramp lines, only the corresponding ramp line gets adjusted and the other ramp lines remain the same. If a bundle does not have ramps but the options have ramps, then the case adjustment spreads to all the ramp lines.

Example 2:

If a bundle has a total price of \$600, price override of \$300, and one of the options has three ramp lines with extended prices of \$100 each, then each of the options gets a price override of \$50 (assuming all the options of the bundle are eligible and the corresponding option has flat rollup method).

- i You can use the Group Adjustment Spread functionality even if the bundles have sub-bundles.
 - Group Adjustment Spread functionality works for Discount Amount, Markup Amount and Price Override as well for the conversion of amount-based bundle adjustments to option adjustments.
 - You can use the Group Adjustment Spread functionality to quickly apply adjustments, even if you have optional cart line items.
 - You can use the Group Adjustment Spread functionality to apply a percentage-based price adjustment to options within a bundle to derive an ideal price for a quote.

Get Started

For more information, see [Manually Adjusting Options Pricing for a Bundle](#) in the admin guide.

Enforced Min/Max Net % at the Line Item Adjustment Level

You can prevent the sales reps from applying any line level adjustments to one or more items in the cart because these items are sold at the price that Apttus CPQ calculates. You can apply discounts up to 10% maximum. Even if you try to give a greater discount, Apttus CPQ sets it to 10% maximum.

If you have enabled the Enable Adjustment Spread custom setting and disabled the Allow Manual Adjustment on a line item, then Apttus CPQ sets the Allocate Group Adjustment as read-only for that line item. Note that the sales reps cannot use **Mass Update** to update the **Allocate Group Adjustment** flag.

This feature is based on the client-side pricing framework, so you must set Enable Auto Reprice to True.

After configuring the Min Net % and Max Net % on a price list item, you cannot apply the manual price adjustment outside of the Min/Max Net % range.

You can give percentage-based discounts for configuring a quote with a desired price by using the group adjustment spread when you have Min/Max Net % associated with the line items.

Get Started

For more information, see [Manually Adjusting Options Pricing for a Bundle](#) in the admin guide.

Related Pricing Setup in the New Admin UI

You can set up related pricing using a line Item field and a charge type, which in turn can be used across many products.

For related pricing:

You select a line item field and a charge type while creating a related price list item.

You can use only one line item field per definition of Related Price List Item.

You can use different line item fields in different related price list items.

For managing related pricing, go to **CPQ Admin > Pricing > Manage Price Lists > PRICELIST ITEMS > Select Advanced Settings**. Then select the **Price Method** as **Related Price**.

For details, refer to [Pricing tab](#).

Get Started

For more information, see [Related Pricing](#) in the admin guide.

Ability to Apply Unit Level Discount Amount

In the multi-adjustment pop-up, when you apply **% Discount**, Apttus CPQ applies the **Discount Amount** to the **Base Price** after multiplying it with **Quantity** and **Selling Term** of the bundle product.

You must select the custom setting **Enable Base Price Adjustment** in the **System Properties > Price Settings** in order to reprice the adjustment line item.

Get Started

For more information on the use case, see [Bucket Adjustments](#) in the user guide.

For more information on custom settings, see [System Properties](#) in the admin guide.

Quoting and New Admin UI Enhancements

Quoting and New Admin modules contain the following new features introduced for this release:

Support Price Ramp on the Cart Grid UI

In line with Angular Cart, the Cart Grid UI shows a Price Ramp icon. When you click, it opens an Auto Ramp wizard if you have enabled auto-cascade ramp setting on the PLI; otherwise, you can also create a price ramp manually.

Get Started

For more information about this feature, see [Enabling Price Ramps](#) in the admin guide.

Enabled Proposal Email Editing

Apttus CPQ provides the edit capability for all text email templates in the proposal document generation email pop up.

Get Started

For more information about the custom setting, see [Proposal System Properties](#) in the admin guide.

Cart Grid UI Improvements

Three Columns in the Left Section of the Cart Grid

The left side of cart grid is limited to three line items fields.

When you create a new cart view and try to drag the fourth field into the third section, it moves that field to the middle section.

When you create a new cart view as an admin, you can see the same behavior as a general user creating a cart view.

Get Started

For more information about this feature, see [Viewing the Cart in Grid View](#) in the user guide.

Manage Visibility Rules in the New Admin UI

To configure product filtering rules, you can define new visibility rules.

For creating visibility rules, go to **CPQ Admin > Catalog > Manage Visibility Rules > New Visibility Rule**. For details, refer to [Catalog tab](#).

Get Started

For more information about visibility rules, see [Product Visibility](#) in the admin guide.

Multiple Adjustments Using Favorite Configuration

When saving favorite configurations with multiple adjustments, you can see the first adjustment applied to the favorite configuration. Now you can also save multiple adjustments for a given favorite and apply as required.

Get Started

For more information about this feature, see [Favorite Configurations on the Cart](#) in the user guide.

Base Price for Currency Code

Apttus CPQ uses the Base Price field of Line Item to determine what Currency Code is displayed in the Angular UI.

If you do not want Base Cost to be seen by specific users for various reasons but Base Price to be made available to all users. Hence, Apttus CPQ uses Base Price rather than Base Cost to determine the Currency Code to be used.

Get Started

For more information about this feature, see [Analyse Quote](#) in the user guide.

Data Model Changes

The following table lists the data model changes from the Winter 2017 release to Spring 2018 release.

Note

The System/User indicates whether the field is used by the System only (System), or if the field may be used for integration updates (User). The below given all fields are consumed by Users and updated by System.

Object	Fields	Description	State	Feature
Customer PO Sales Order Relation History		Captures the historical relationship between customer purchase orders and their associated sales orders as purchase orders get amended over time.	New	Customer Purchase Order
	Order	ID of the associated sales order	New	
	Purchase Order	ID of the associated purchase order	New	
Data Enrichment Rule		Represents a single data enrichment rule in a validation/enrichment ruleset	New	Enrichment Rules
	Description	The description for the rule	New	
	Message	The help text message for the target object field	New	
	Required?	Flag to indicate whether the value is required in the target object field	New	
	Ruleset	ID of the associated rule set	New	
	Source Object Field	API name of the source object field which holds the value that will get set on the target object field	New	
	Target Object Field	API name of the target object field for which value needs to be set	New	

Object	Fields	Description	State	Feature
Data Validation/ Enrichment Ruleset		Represents a set of data validation and enrichment rules to validate and default values into objects	New	Data Validation and Enrichment
	Active	Indicates whether the ruleset is active	New	
	Description	The description of the rule set	New	
	Message	The help text message for the source object match criteria	New	
	Sequence	The sequence in which the rules will get executed	New	
	Source And Target Match Criteria	Criteria that will be used to match source and target data	New	
	Source Data Object	Data object using which target data will be validated or enriched	New	
	Target Object Filter Criteria	Filter criteria to get to the list of the data objects that need to be validated/enriched	New	
	Target Object Parent	Related parent object when the child object also needs to be validated and enriched	New	
	Target Object To Validate	Data object that needs to be validated and enriched	New	
Data Validation Rule		Represents a single data validation rule in a validation/ enrichment ruleset	New	Validation Rules
	Description	The description for the rule	New	
	Error Type	The type of issue that will be logged in case validation fails. The error will mean that issue needs to be resolved before next process step	New	
	Match Operator	The operator used to match the value in the target object field against the value in the source object field	New	

Object	Fields	Description	State	Feature
	Message	The message that will be displayed to the user in case of error or warning	New	
	Ruleset	ID of the associated rule set	New	
	Source Object Field	API name of the source object field against which the target object field will be validated	New	
	Target Object Field	API name of the target object field for which value needs to be validated	New	
External Order Rollup Data		Represents the dynamic rollup data for use in criteria	New	Rollup
	Group By Values	The group by field values	New	
	Is Committed	Indicates whether the order rollup data is already committed to the rollup data	New	
	Order Summary	ID of the associated external summary order	New	
	Period End Date	The rollup period end date	New	
	Period Start Date	The rollup period start date	New	
	Rollup Business Object	The API name of the business object for the rollup	New	
	Rollup Field	The rollup field	New	
	Rollup Uom	The rollup unit of measure for the product	New	
	Rollup Value	The rollup value	New	
	Search Filter (CPQ)	ID of the associated rollup	New	
	Sold To	The ID of the sold to account	New	

Object	Fields	Description	State	Feature
Legal Entity		Represents a legal entity	New	Legal Entity
	Company Code	The company code	New	
	Entity Name	The descriptive name of the legal entity	New	
	Is Default	This flag should be checked in order to use a default legal entity for any exception scenarios where the legal entity is missing.	New	
	Legal Entity Address Line 1	The Legal Entity Address Line 1	New	
	Legal Entity Address Line 2	The Legal Entity Address Line 2	New	
	Legal Entity Address Line 3	The Legal Entity Address Line 3	New	
	Legal Entity Address Line 4	The Legal Entity Address Line 4	New	
	Legal Entity City	The Legal Entity City	New	
	Legal Entity Country Code	The Legal Entity Country Code	New	
	Legal Entity Postal Code	The Legal Entity Postal Code	New	
	Legal Entity State	The Legal Entity State	New	
	Phone Number	The Legal Entity Phone Number	New	
	Tax ID	The Tax ID for the Legal Entity	New	

Object	Fields	Description	State	Feature
	VAT Enabled?	Indicates whether VAT is enabled for the legal entity	New	
	VAT ID	The VAT ID for the Legal Entity	New	
	Website	The Legal Entity Website Address	New	
Related Opportunity Line Item Coll		Holds a collection of one or more related opportunity line items	New	Related Opportunity Line Item
	Opportunity	ID of the associated opportunity	New	
Related Opportunity Line Item		Holds the relationships between opportunity line items	New	
	Application Type	The application type	New	
	Line Item Coll	ID of the associated line item collection	New	
	Opportunity	ID of the associated opportunity	New	
	Related Asset Line Item	ID of the related asset line item	New	
	Relation Type	The relation type	New	
	Weightage Amount	The weightage amount	New	
	Weightage Percent	The effective weightage percent	New	
	Weightage Type	The weightage type	New	
	Weighted Net Price	The weighted net price	New	

Resolved Issues

The following table lists issues that are resolved in the CPQ Spring 2018 Release on the Salesforce Platform.

Case Number	Description	Apttus Internal ID
CPQ 10.1403		
00209495	<p>The value in the Selling Term field on the Installed Products page did not honor the configuration defined in the Display Column Settings.</p> <p>This issue is now resolved. The value in the Selling Term field is in accordance with the configuration of Display Column Settings.</p>	ASSETS-1437
NA	<p>Apttus CPQ deleted the asset usage price tiers after an asset was terminated.</p> <p>This issue is now resolved. Apttus CPQ does not delete the asset usage price tiers after asset termination.</p>	ASSETS-1813
00219624	<p>You tried to adjust the column width on Purchased Products and Related Purchases pages of Service CPQ; however, Apttus CPQ did not allow you to change page styling and formatting.</p> <p>This issue is now resolved. You can apply column settings to the Installed Products page. You can change coloring, formatting, and styling of the angular and the asset grid pages. This helps you customize the look and feel of the Installed Products page for better readability.</p>	ASSETS-2058
00219425	<p>When you tried to change or terminate the existing assets with fractional quantity less than 1, Apttus CPQ displayed an error, even though Apttus supports fractional quantity for creating new orders and renewing existing assets.</p> <p>This issue is now resolved. Apttus does not display any error while you change or terminate the existing assets with a fractional quantity less than 1.</p>	ASSETS-2059
NA	<p>On the Installed Products page, when you navigated to a different page using pagination and performed a search operation, Apttus CPQ did not go back to the first page to display search results.</p> <p>This issue is now resolved. Apttus CPQ resets to page 1 on search even after pagination.</p>	ASSETS-2141

Case Number	Description	Apttus Internal ID
NA	<p>Apttus CPQ did not perform search the first time the Enter key was pressed in the Search Installed Products field. You needed to press the Enter key twice after clearing the value from Search Installed Products field on the Installed Product page</p> <p>This issue is now resolved. The search results are displayed in single Enter.</p>	ASSETS-2142
NA	<p>Apttus CPQ showed inconsistent behavior for the pagination on the Installed Products page.</p> <p>This issue is now resolved. You can navigate to a different page with the help of page numbers seamlessly.</p>	ASSETS-2143
NA	<p>When you cleared options post-amendment, Apttus CPQ showed error at the time of activating an order.</p> <p>This issue is now resolved. Apttus CPQ does not show any error and order is also activated properly.</p>	ASSETS-2158
NA	<p>When you tried to update the existing active ramps for your assets, Apttus CPQ displayed errors about overlapping dates with the ramps that were deleted earlier.</p> <p>This issue is now resolved. You do not get the error that "Ramp dates must not overlap" for the already cancelled ramp line items and you can update the existing active ramps for your assets on the Installed Products page.</p>	ASSETS-2167
00210063	<p>When you enabled the custom setting "Disable Add Another", you could still add another product using the Add to Cart global button on the Catalog page.</p> <p>This issue is now resolved. If Disable Add Another is enabled (set to True), you cannot add another product to the cart.</p>	CPQ-12673
00211925	<p>Account Location picklist in cart did not display all locations for the Account.</p> <p>This issue is now resolved. By default, the Location value in the picklist in the cart is set in the cart, and also displays all the locations for the Account.</p>	CPQ-12898
NA	<p>The lookup fields were not rendered in the line items on the cart for a quote when the lookup field Settings with filter criteria was based on field-to-field mapping.</p> <p>This issue is now resolved. The lookup fields are displayed on the cart. For instance, the Location on the cart line item defaults to the selected Location from the Catalog page.</p>	CPQ-12939

Case Number	Description	Apttus Internal ID
00210800	<p>For a lookup field, when you have set filter criteria in the Lookup Field Settings and there is a pricing callback to set the value of lookup field, the value was not set correctly on the cart.</p> <p>This issue is now resolved. The system sets the correct value for a lookup field on the cart by considering both, the pricing callback and the filter criteria in Lookup Field Settings.</p>	CPQ-13026
00213428	<p>You could not assign Project and cascade it to the secondary line item in the nG UI.</p> <p>This issue is now resolved. In nG UI the Lookup filter works correctly.</p>	CPQ-13699
00214182	<p>When you clicked the Validate button on the Attributes page, Apttus CPQ did not summarize pricing.</p> <p>This issue is now resolved. The Validate button is working properly.</p>	CPQ-14197
NA	<p>Apttus CPQ did not remove the option product from the Angular Cart, which had expired PLI. This happened when the bundle product was in the expanded state on the cart and you clicked Revalidate.</p> <p>This issue is now resolved. From Angular Cart, the option product is getting removed post revalidation.</p>	CPQ-14401
00215403	<p>Product Attribute Rule (PAR) that you set for Adjustment Type picklist stopped working for line items on the Cart Grid.</p> <p>This issue is now resolved. PAR is working correctly if it is created with "Allow" action on the line item for Adjustment Type picklist, then in Cart Grid you can view and select only allowed values given in the value expression.</p>	CPQ-14465
00215570	<p>Apttus CPQ showed inconsistent behavior when you navigate between product hierarchy on the catalog page.</p> <p>This issue is now resolved. Category to Sub-category and Sub-category to Category navigation is working properly. Whenever you click left arrow from the hierarchy, it navigates back to Product Catalog page as well.</p>	CPQ-14515
00215283	<p>After the upgrade, the Rollup functionality was not working correctly.</p> <p>This issue is now resolved. The value in Attribute matches correctly with the expected rollup value.</p>	CPQ-14526
00215983 / 00216710	<p>In Chrome browser, you selected an unapproved quote and configured products. When you selected Calculate NCM button in the cart, Apttus CPQ showed a VisualForce error on the cart page.</p> <p>This issue is now resolved. You do not see a VisualForce error in the Chrome browser.</p>	CPQ-14669 / CPQ-14886

Case Number	Description	Apttus Internal ID
00212547	Apttus CPQ did not match the line item currency with the product configuration, which in turn caused issues with cart totals. This issue is now resolved. For example, if a quote is created with derived price list and a favorite is added to cart, then line item of that quote shows the currency of the derived price list as expected.	CPQ-14782
00216591	Numeric Expression on the attribute to fetch rollup value was not working. This issue is now resolved. Rollup values are fetched correctly.	CPQ-14830
00215493	Apttus CPQ created two records in the Activity History when you generate a quote and its value in Admin Entry:APTS_AsyncMergeCall set to True. This issue is now resolved. Generated proposal/quote does not get recorded twice in the Activity History section.	CPQ-15041
00216889	Apttus CPQ did not calculate the selling term properly when repricing a quote. This issue is now resolved. The selling term is calculated correctly without any issues with the end dates.	CPQ-15130
00217248	The product attribute rule "Allow" action type was not working on the new Cart Grid. This issue is now resolved. In the new Cart Grid, only Allow value of Product Attribute Rule is shown for Product in the line item picklist.	CPQ-15191
00217335	The Is Optional checkbox for optional products was unchecked during product configuration. This issue is now resolved. The Is Optional checkbox is checked for the optional products on the configuration and cart pages.	CPQ-15343
NA	Admin Cart view displayed the Charge Type field in the product column under the Field drop-down list by default. This issue is now resolved. The Charge Type field is removed from the list.	CPQ-15490
00214395	In the proposal document generation wizard, you tried to merge two PDFs and one MS Word file. However, the Word file .docx disappeared post drag and drop. This issue is now resolved. Post drag and drop, the MS Word file remains available for merging and you can successfully merge two PDFs with it.	CPQ-15498

Case Number	Description	Apttus Internal ID
NA	<p>Attributes that you specified as 'Primary' in Attribute Group definition did not show up in either cart or Cart Grid view.</p> <p>This issue is now resolved. In ng-Cart, primary attributes are shown under the product name; however, in the Cart grid, primary attributes are shown in the product pop-up, which opens on clicking the product name on the Cart Grid.</p>	CPQ-15499
00219653	<p>Apttus CPQ did not create any record in Line Item Rollup related list for the product configuration.</p> <p>This issue is now resolved. You can view the sum of the number of selected options for the product configuration.</p>	CPQ-33138
00218869	<p>Apttus CPQ did not execute the constraint rules based on the Attribute values in some cases.</p> <p>This issue is now resolved. The constraint rules are working properly.</p>	CPQ-33162
00218972	<p>When you hid a product attribute from a user by applying an attribute rule, Apttus CPQ still displayed it under the Summary section of Product Attributes.</p> <p>This issue is now resolved. Attribute group name is not displaying under the Summary section of Product Attributes, when a product attribute is hidden from a user.</p>	CPQ-32803
00218978	<p>When you added option products to an Option Group in the CPQ Admin Console, you received an error.</p> <p>This issue is now resolved. You do not get any error while adding the products to option groups in CPQ Admin Console.</p>	CPQ-32872
00219299	<p>In the cart page, you provided a discount that triggered approvals. However, when you clicked the preview approvals icon, the following error appeared:</p> <p><i>"The name can only contain underscores and alphanumeric characters. It must begin with a letter and be unique, and must not include spaces, end with an underscore, or contain two consecutive underscores".</i></p> <p>This issue is now resolved. No more error messages occur while previewing approvals.</p>	CPQ-32966
00218953	<p>When you configured products, the browser console displayed an error while loading the cart page.</p> <p>This issue is now resolved. Apttus CPQ does not show any errors and the cart page loads properly in the browser console during product configuration.</p>	CPQ-32975

Case Number	Description	Apttus Internal ID
00219592	<p>When you tried to apply % discount on a bundle product in the cart through the multi-adjustment pop-up, it got applied on the Extended Price instead of Base Price.</p> <p>This issue is now resolved.</p> <p>In the multi-adjustment pop-up, when you apply % Discount, Apttus CPQ applies the Discount Amount to the Base Price after multiplying it with Quantity and Selling Term of the bundle product. You must select the custom setting Enable Base Price Adjustment in the System Properties > Price Settings in order to reprice the adjustment line item.</p> <p>For more information about the feature, see Feature Summary > Pricing Enhancements > Ability to Apply Unit Level Discount Amount.</p>	CPQ-33062
00213137	<p>The Apttus CPQ console became unresponsive during attempts to add more than 4 or 5 products to the cart and configure them.</p> <p>This issue is now resolved. You can successfully add and configure 4 or 5 products in a bundle.</p>	CPQ-33210
00219663	<p>Lookup field filter was not working properly on the attribute page when you tried to apply filter criteria on the lookup field.</p> <p>This issue is now resolved. You can select a lookup field; for example, Account Location from the product attribute page.</p>	CPQ-33235
NA	<p>Apttu CPQ showed errors on the cart with more than 200 line items.</p> <p>This issue is now resolved. No error is thrown when the cart contains more than 200 line items.</p>	CPQ-33299
NA	<p>Using Client-Side Constraint Rules, when you tried to copy the first line item of a product that auto-included another product, Apttus CPQ showed an error.</p> <p>This issue is now resolved. In the cart, you can copy the first products from the cart line item without any error.</p>	CPQ-33401 / CPQ-33400 / CPQ-33399
00219702	<p>Apttus CPQ did not execute the constraint rules for a cloned bundle.</p> <p>This issue is now resolved. Constraint rules are executing for a cloned bundle.</p>	CPQ-33417
NA	<p>You observed issues with Selling UoM field.</p> <p>These issues are now resolved. You can see Unit of Measure based pricing happening in the Cart and correctly pass Selling UoM field across Quote or Agreements.</p>	CPQ-33463

Case Number	Description	Apttus Internal ID
NA	<p>During a bundle product configuration, when you updated the quantity for options within a bundle, the pricing for bundle and options was neither calculated correctly nor displayed in the Summary section. Even after you clicked Validate or Go to Pricing, the prices were not populated at all on the Cart page until you clicked Reprice.</p> <p>This issue is now resolved. Apttus CPQ calculates and displays the pricing for bundle and options correctly.</p>	CPQ-33539
NA	<p>Apttus CPQ showed the following error: Remoting response size exceeded maximum of 15 MB, in the Google Chrome browser. This was due to the amount of data that was returned due to Product Attribute Rule configuration and the number of options in the bundles.</p> <p>This issue is now resolved. Apttus CPQ does not throw any error during product configuration.</p>	CPQ-33541
NA	<p>When you removed the products from the cart that were auto-included, it impacted pricing during product re-configuration.</p> <p>This issue is now resolved. You can remove and add products to cart without any issues with pricing.</p>	CPQ-33565
NA	<p>Apttus CPQ added the product in the cart that was not Active or not on the price list when inclusion constraint rule was executed.</p> <p>This issue is now resolved. Inactive products and products that are not on the price list are excluded if you execute the inclusion constraint rule.</p>	CPQ-33621
NA	<p>Apttus CPQ showed errors and constraint rules stopped working when you did mass deletion for condition and action products in the cart.</p> <p>This issue is now resolved. Apttus CPQ does not show any errors and constraint rules work properly for mass deletion.</p>	CPQ-33628
NA	<p>Field expression syntax did not match between old console and new admin console.</p> <p>This issue is now resolved. They match in both consoles.</p>	CPQ-33731

The following issues have been resolved from the previous release.

Apttus Internal ID	Description
ASSETS-1643	For Change: Configuration action on a standalone product, incorrect Net Price is calculated for canceled ramp lines on the cart.
ASSETS-1753	Post Change: Config action, upgraded one-time lines should accept changes made on the cart though "enable one time change"=false. Upgraded lines are new lines.
CPQ-14054	Apttus CPQ applies wrong promotion adjustments to the Base Extended and Extended price of the product.
CPQ-15353	When you create multiple records for Related Price Line Item (To) related list on a PLI, an error is displayed with zero price on the cart. Also, the corresponding entries are not entered in Custom Settings > Config Related Pricing Group Fields .
CPQ-15470	If you clone a proposal with large data, then Apttus CPQ throws the following error: <i>Apex heap size too large: 16385451 Error is in expression '{!onLoad}' in page apttus_qpconfig:proposalclone: External entry point</i>
CPQ-15502	If the same promotion is applied at the cart and line item level, when you remove a promotion at the cart level, the corresponding line level promotion is not removed.

Known Issues

The following table represents known issues on the CPQ Spring 2018 Release on the Salesforce Platform.

Apttus Internal ID	Description
ASSETS-1 603	When you perform Renew action for a bundle product and deselect an option, incorrect Net Price for option and incorrect rollup price bundle is calculated on the cart.
ASSETS-1 636	After you have renewed an asset with a one-time primary line when you perform Change: Config action, an incorrect Delta Price and Net Price is calculated on the cart.
ASSETS-1 641	During Terminate action, the system retains originally discounted price for an option product, although the option price got changed on Change action.
ASSETS-1 647	Renewal Quote should drop lines post Change: Config instead of updating on existing Renewal quote as "Changed Config" asset is no longer eligible for further Renew.
ASSETS-1 711	Change post renewal on option ramp with "renew one line" shows 2 option lines instead of 1 which was originally renewed.
ASSETS-1 724	Config asset pricing criteria are not functioning when single ramp renewed line (renew one ramp = true).
ASSETS-1 769	Asset Pricing does not work properly for Asset without attributes when asset pricing criteria have some attribute API defined for other assets.
CPQ-727 2	You are able to apply the same coupon for more than once in order to give incentives.
CPQ-118 29	If the option group is single select and requires the selection (min:1, max:1) , then you cannot make it optional from the configuration page but can make it optional from the cart. You can notice the same behavior when option is required by default.
CPQ-123 36	Rollup data get auto-generated when incentives are saved for the first time. You can make additional changes directly on the roll-up record. These subsequent changes should not be overwritten when the incentives are saved again.
CPQ-137 30	Promotion is getting applied for inactive coupons.

Apttus Internal ID	Description
CPQ-144 43	If option End Date is less than bundle End Date, on reprice bundle End Date changes and becomes equal to option End Date.
CPQ-151 70	When you add ramp with a price escalator, the added price ramp lines take up the base price of previous ramp line rather than latest one.
CPQ-152 98	After you apply a promotion to the product on the cart, the Incentive Code is missing on the cart line item.
CPQ-153 64	When you remove multiple records for Related Price Line Item (To) related list on a PLI, the corresponding entries are not removed from Custom Settings > Config Related Pricing Group Fields .
CPQ-155 21	When you use the CSR flow with Asset Manager button in an account record to view the Installed Products page, the service catalog is displaying zero products under the Relate tab.
CPQ-185 87	For the custom setting Related Price Scope set to Cart, adding a bundle containing two options with related pricing calculates an incorrect price for the related option products. This was observed when you add the same bundle twice to the cart.
CPQ-336 07	If you manually select mandatory options after deselecting them, Apttus CPQ displays optional checkbox. Ideally, Apttus CPQ hides optional checkboxes for mandatory options.
CPQ-337 10	With Allow Manual Adjustment set to False, Apttus CPQ did not allow you to apply adjustment through "multiple adjustment" pop-up.
CPQ-340 41	All the cart columns are not correctly visible on the cart grid when you use Internet Explorer 11. Note that IE 11 is not supported in this release.
CPQ-342 90	<p>When you click Multiple Adjustments pop-up, but without doing anything you just close the pop-up, then reprice action becomes active. Now if you click Finalize before clicking Reprice, Apttus CPQ shows a price pending error.</p> <p>Workaround: Click Reprice to get rid of price pending error before clicking Finalize.</p>
CPQ-343 56	When you enable the Auto Reprice for the cart comprising standalone as well as bundle product, Apttus CPQ shows incorrect values unless you reprice the cart line items.
CPQ-343 72	For Group Adjustment Spread, net price of bundle product with option checkbox is selected, turns to 0 when you apply discount.
CPQ-343 74	For Group Adjustment Spread, the adjustment is getting removed from the standalone product when repriced.

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