Conga CPQ for Salesforce June '23

Release Notes

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In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CPQ June '23 release. For documentation updates, see What's New in CPQ Documentation.

> This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

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Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked (**New**) are new for this release.

> You can register your org for the Conga Upgrade Program. Conga Upgrade Program is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it also ensures all the Conga published managed packages are on the latest versions for your registered orgs. For more information, see Registering for Conga Upgrade Program.

Package	Latest Certified Version Name	Latest Certified Version Number
Conga Approvals **(New)** (Required if you are using Approvals)	14.1.371	14.371
Conga Base Library **(New)** (Required if you are using Conga Configuration & Pricing)	4.1.245	4.245
Conga Billing **(New)** (Required if you are using Conga Billing)	9.1.345	9.345
Conga CLM Configuration Integration **(New)** (Required if you are using CLM)	15.1.0181	15.181
Conga Configuration & Pricing **(New)**	15.1.2090	15.2090
Conga Contract Lifecycle Management **(New)**	14.1.709	14.709
Conga CPQ Api	15.0.0131	15.131

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga CPQ Approvals (Required if you are using Approvals on CPQ objects)	13.2.25	13.25
Conga CPQ Maximizer	8.0.0029	8.29
Conga CPQ Setup **(New)** (Required if you are using CPQ Admin Console)	15.1.137	15.137
Conga Deal Maximizer Setup **(New)** (Required if you are using Deal Maximizer)	8.0.0053	8.53
Conga Deal Maximizer	7.0.0007	7.7
Conga DocuSign Api **(New)**	8.1.142	8.142.7
Conga Order Management	1.0.0000	1.0
Conga Promotions (Required if you are using Promotions)	1.0.0000	1.0
Conga Quote Approvals **(New)**	7.1.10	7.10
Conga Quote Asset Integration **(New)**	6.5.0015	6.15
Conga Quote CLM Integration **(New)**	12.1.0084	12.84
Conga Quote Configuration Integration **(New)** (Required if you are using CPQ and Proposal Management)	15.1.0400	15.400
Conga Quote DocuSign Integration **(New)**	4.1.23	4.23

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga Quote Echosign Integration (You must install the latest Adobe Sign package to use this package)	3.1.17	3.17
Conga Quote Management **(New)** (Required if you are using Proposal Management)	13.1.0266	13.266

For more information on installing Conga managed packages, refer to Installing CPQ Packages. For more information on upgrading Conga managed packages, refer to Upgrading CPQ.

Salesforce is starting the process of moving away from Workflow Rules and transitioning to Flow. Hence, Conga recommends that you temporarily migrate all Conga Managed workflows in CPQ to Flows. For more information, see Migrating a Workflow Rule to Flow.

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System Requirements and Supported Platforms

For information pertaining to the requirements and recommendations you must consider before you proceed with the installation of the Conga product, see System Requirements and Supported Platforms Matrix.

Upgrade Notes

For more information on the prerequisites and post-upgrade tasks, see Upgrading CPQ.

Before you upgrade the CPQ packages in your org to June '23 release, please note the following points:

- If the CPQ package in your org is on any of the following releases, you must upgrade it to the Winter '20 patch (Winter20.02.26) before upgrading it to June '23 release:

Release	Package
Spring '20 or earlier release	Packages older than **12.0.1719 | 12.1719**
Summer '20 patch older than Summer20.02.26	Packages older than **12.1.1787.99 | 12.1787.99**
Winter '20 patch older than Winter20.02.26	Packages older than **12.2.1839.48 | 12.1839.48**

- If the CPQ package in your org is on any of the following releases, you can directly upgrade it to June '23 release:

Release	Package
Latest Summer '20 patch (Summer20.02.26 or later)	**12.0.1719 | 12.1719** or later
Latest Winter '20 patch (Winter20.02.26 or later)	**12.2.1839.48 | 12.1839.48** or later
Spring '21 and any Spring '21 patches	**13.0.1882 | 13.1882** or later
Summer '21 and any Summer '21 patches	**13.1.1921 | 13.1921** or later
December '21 and any December '21 patches	**13.2.1969 | 13.1969** or later

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Release	Package
May '22 and any May '22 patches	**14.0.1995 | 14.1995** or later
September '22 and any September '22 patches	**14.1.2038 | 14.2038** or later
February '23 and any February '23 patches	**15.0.2061 | 15.2061** or later
June '23 and any June '23 patches	**15.1.2090 | 15.2090** or later

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New Features

The following features are new to CPQ in this release.

Copy Bill To and Ship To Accounts from Assets to Renewal Quotes and Renewal Agreements

When **Renewal Execution Mode** = **Auto**, renewal quotes and renewal agreements now inherit the **Bill To** and **Ship To** account values from the parent quotes and parent agreements.

For more information, see Renewing Assets in Auto Renewal Mode and Renewing Assets in Auto Renewal Mode in the Contract Flow.

Display Error Messages from Constraint Rules as Hyperlinks on Configuration Page or Cart Page

For constraint rules where **Action Type** = **Exclusion** and **Product Scope** = **Product**, CPQ now displays validation error messages from constraint rule actions as hyperlinks on the Configuration page or Cart page.

For more information, see Creating Constraint Rule Actions.

Control Lines Items Sent in the Custom Revalidation Request Object

CPQ introduces a new admin setting APTS_CustomRevalidationLinesThreshold to control line items sent in the custom revalidation request object. This setting allows you to handle revalidation with callback when the cart has a large number of line items for revalidation.

For more information, see Configuring Admin Settings.

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Enhancements

The following section describes the existing features that are changed (or are no longer supported) in this release.

Updated Pages Used as Default in Flow Settings

The default pages available for you to define a user interface flow for CPQ are now updated.

For more information, see Config Flow.

Validate Min and Max Price at Price List Item in CPQ Admin

While creating a price list item, after entering minimum price (**Min Price/Net Adj %**) and maximum price (**Max Price/Net Adj %**) both, when you click **Save**, CPQ validates whether the maximum price is greater than the minimum price. If this validation passes, CPQ allows you to save the details. Otherwise, CPQ displays an error message "Max Price/Net Adj % cannot be less than Min Price/Net Adj %".

For more information, see Creating Price List Items.

Removed Non-Supported Values from the Adjustment Applies To Field of a Price Rule

The non-supported picklist values are no longer visible on the **Adjustment Applies To** drop-down while defining a price rule. This field displays only "Base Price" and "Base Extended Price" options now.

For more information, see Creating Price Rules.

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Removed Non-Supported Values from the Min/Max Price Applies To field of a Price List Item

The non-supported picklist value of "Base Extended Price" is no longer visible on the **Min/Max Price Applies To** drop-down while defining a price list item. This field displays only "Base Price" and "Extended Price" options now.

However, the administrator must manually remove the "Base Extended Price" value from **Setup** > **Create** > **Objects** > **Price List Items** (object) > **Min/Max Price Applies To** (field).

For more information, see Creating Price List Items.

Use Attributes from PAV Extension for Defaulting Price and Quantity

In the CPQ Admin UI, administrators can now use attributes from the out-of-the-box product attribute value (PAV) extension objects for defaulting price and quantity. When the administrators select "Product Attribute" from the **Default Quantity From** or **Default Price From** drop-down, they can select any field defined on the PAV extension objects from the:

- **Default Quantity Field** drop-down for defaulting quantity
- **Default Price Field** drop-down for defaulting price

> CPQ does not support custom PAV extension objects.

For more information, see Applying the Default Pricing to Products.

Display Adjustments Applied on PLIs with Negative Pricing on the Cart

If a price list item has negative pricing and the sales representative applies an adjustment at the line-item level or summary level on the cart, CPQ displays the actual adjustment applied on the product with negative pricing on the **Adjustment** column. Earlier, CPQ displayed the adjustment applied on the product with negative pricing on the **Adjustment** column as 0.00.

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For example, the cart has the following products:

Product	Net Price	Base Price
P1	(USD 100.00)	(USD 100.00) **Note:** The PLI of this product has negative pricing.
P2	USD 250.00	USD 250.00

If the sales representative applies 10% discount on both products, CPQ displays the updated price details as follows:

Product	Net Price	Base Price	Adjustment
P1	(USD 110.00)	(USD 110.00)	-10.00
P2	USD 225.00	USD 250.00	-10.00

For more information, see Pricing Products and Use Case: Applying Adjustments on Products with Negative Pricing.

Prevent Users from Finalizing a Cart If Bundle Configuration Does Not Honor Min Options for an Option Group

CPQ can now prevent sales representatives from finalizing the cart if the bundle configuration does not honor the **Min Options** configured for an option group of that bundle. This feature is useful when:

- **Min Options** is defined for an option group.
- The option group is hidden because the options under it do not have any active price list items.
- Sales Representative finalizes the cart when there are no active products in an option group to fulfil the minimum number of options.

CPQ introduces an admin setting APTS_ExecuteMinMaxRulesOnInactiveOptions to execute this feature. When this admin setting is set to True, CPQ displays an error message that

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configuration is pending for the bundle that has the option group (where options have inactive PLIs). Thus, CPQ prevents Sales Representatives from finalizing such carts.

For more information, see Configuring Admin Settings and Finalizing the Shopping Cart.

Enhanced Logic to Define Precedence for Defaulting the Quantity of Option Products

The default quantity of an option product defined by the bundle structure takes precedence now over the default quantity defined at the price list item of that option product. The administrators can define the default quantity of an option product at the price list item level and at the bundle structure level. Also, the Sales Representatives can enter a quantity for the option product on the Configuration page. In such a scenario, the precedence for calculating the default quantity is as follows:

1. Transactional input provided by the Sales Representative on the in Configuration page
2. Default quantity defined at the bundle structure level
3. Default quantity defined at the price list item level

For more information, see Applying the Default Pricing to Products, Associating Options to a Bundle, and Configuring Products from the Catalog.

Create a Collaboration Request for Auto-Included Products

CPQ displays the collaboration icon ( ) next to an auto-included standalone or bundle line items if the *APTS_EnableCollabForAutoIncludedLines* is set to True. If you initiate a collaboration request for the parent product, CPQ automatically adds auto-included products as part of the collaboration. You can also create a collaboration request for auto-included products independent of the parent product.

For more information, see Configuring Admin Settings, Assigning the Configuration to the Collaborator or Queue, and Use Case: Quote Collaboration for Products Auto-Included by Constraint Rules.

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Mandatory Validation to Consider Cancelled Options While Changing or Renewing Assets

CPQ performs a mandatory validation now to consider cancelled option line items while changing or renewing assets. If you deselect the required options on the Configuration page, CPQ displays an error message and selects the options back after the pricing calculation is complete. Thus CPQ ensures that you cannot finalize the cart without the mandatory options.

For more information, see Changing Configurable Bundle Assets and Use Case: Renewing Bundle Assets.

Renew Bundle Assets without Adding Asset Net Price of Cancelled Options

While renewing a bundle asset (both ramped lines and non-ramped lines), if the Sales Representative deselects an option, CPQ does not add the asset net price of the option to the rollup line of the bundle. CPQ displays that option as Cancelled on the cart with the asset start date and end date.

For more information, see Renewing Assets Manually and Use Case: Renew Bundle Assets without Adding Net Price of Cancelled Options.

Apply Price Escalator on New Ramp Lines During ABO Operations

CPQ now applies Price Escalator on new ramp lines created during ABO operations regardless of the **Default Asset Pricing Indicator?** setting (true or false). A new ramp line always gets its value from the PLI and it honors the price escalator defined for its period. If price escalator is not defined for the particular new ramp period, it will fetch the value of the PLI of the product.

For more information, see Config System Properties, Configuring Price Escalators, Config Asset Pricing Default, Overriding the Default Asset Pricing for Line Statuses Based on ABO Actions, Pricing

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Assets, Creating Price Ramps on the Cart Page, and Use Case: Applying Price Escalator on New Ramp Lines During ABO Operations.

Support for Price Ramps

When the TurboEngines is enabled, you can perform Create, Update, and Delete price ramps for the standalone products, bundles, and options. You can also apply the auto price ramps on the cart line items.

To use this feature, you must enable the price ramps in the price list item associated with the line item. For more information, see Enabling Price Ramps.

Support for Auto Ramp Creation

When the TurboEngines is enabled, you can also apply the auto price ramps on the cart line items. This feature allows you to auto-generate ramp line creation based on general information, like Start Date, End Date, and Term. For more information, see Enabling Auto Ramp Creation.

Enhancement to the Custom Selling Term Calculation

CPQ now calculates the custom selling term as intended. Earlier, the custom selling terms were overridden by OOB selling terms as a result, the wrong calculation is displayed on the cart.

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Data Model Changes

There are no data model changes in this release.

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Fixed Issues

The following table list the issues fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00818488	CPQ-60357	When you try to renew a ramped asset and add a new ramp line to it, CPQ does not create a ramp line. Instead CPQ extends only the start and end dates on the primary line item.
NA	CPQ-56732	In Turbo mode, there is a price mismatch between a product on the classic quote and the same product on the Turbo quote.

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Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CPQ-57410	Do not use any special characters such as '<' (less than sign) and '>' (greater than sign) in the product attribute value name. If you use such characters, CPQ displays blank values in certain cases on the UI because picklist entries are getting rendered as HTML. **Workaround:** Use '&lt' instead of '<' and '&gt' instead of '>'. You can also use other brackets.
CPQ-54022	Turbo Integrations: Attribute-based pricing is not working for Numeric Expression.

DOC ID: CPQJUN23RNREVA20230626

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