




February '24 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 February '24 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.

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.

i 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. 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)	15.0.388	15.388
Conga Base Library (New) (Required if you are using Conga Configuration & Pricing)	5.0.255	5.255
Conga Billing (New) (Required if you are using Conga Billing)	10.0.396	10.396
Conga CLM Configuration Integration (New) (Required if you are using CLM)	16.0.0187	16.187
Conga Configuration & Pricing (New)	16.0.2122	16.2122
Conga Contract Lifecycle Management (New)	15.0.740	15.740
Conga CPQ Api (New)	16.0.0136	16.136

Package	Latest Certified Version Name	Latest Certified Version Number
Conga CPQ (RLS) (New) (Required if you are using Conga RLS Flow to create quotes)	1.2.60	1.60
Conga CPQ Approvals (Required if you are using Approvals on CPQ objects)	13.2.25	13.25
Conga CPQ Maximizer (New)	10.0.0034	10.34
Conga CPQ Setup (New) (Required if you are using CPQ Admin Console)	16.0.145	16.145
Conga Deal Maximizer Setup (Required if you are using Deal Maximizer)	8.0.0053	8.53
Conga Deal Maximizer	7.0.0007	7.7
Conga DocuSign Api	8.1.142.7	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	7.1.10	7.10
Conga Quote Asset Integration	6.5.0015	6.15
Conga Quote CLM Integration	12.2.0085	12.85
Conga Quote Configuration Integration (New) (Required if you are using CPQ and Proposal Management)	16.0.0407	16.407

Package	Latest Certified Version Name	Latest Certified Version Number
Conga Quote DocuSign Integration	4.1.23	4.23
Conga Quote Echosign Integration (You must install the latest Adobe Sign package to use this package)	3.1.17	3.17
Conga Quote Management (Required if you are using Proposal Management)	13.2.0267	13.267

 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](#).

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](#).

New Features

The following features are new to CPQ in this release.

Customizing the Sorting Order of Assets with APTS_ABOActionCallbackClass

The new admin setting, APTS_ABOActionCallbackClass lets you customize the sorting order of asset records in the InstalledProducts page. This allows sorting based on specified fields in the Apex class, enabling better visibility and organization of bundled assets.

For more information, see [Configuring Admin Settings](#).

Custom Field Options with Field Set Settings

Salesforce restricts adding custom fields beyond the limit of the text area in custom settings. In this release, a new setting Field Set Settings is introduced for viewing cart total custom fields to allow administrators to add more fields in custom settings.

For more information, see [Configuring Field Set Settings](#).

New features in Turbo Integration

- Auto-Cascade Quantity flag support for price ramps and their bundle-options.
- Disable Sub-Bundle Expansions: Sales reps can hide option line items of a sub-bundle. This feature enables you to hide the sub-bundle line items when expanding the specific sub-bundle. For more information, see [Configuring Bundle Expansion on Cart Page](#).
- Price Ramp Overlap: Sales reps can set up overlapping start and end dates for ramp lines. This helps to provide accurate quotes to customers for specific timeframes, ensuring the right quantity and price information. For more information, see [Creating Price Ramps for a Product](#).
- Price Escalator: Salesforce administrator can automatically adjust prices during the creation of ramps by sales users. It prevents errors and unnecessary approval requests.

- **Creating Price Ramps for Options:** Sales reps can create price ramps for options that are associated with bundles. For more information, see [Creating Price Ramps for a Product](#).
- **Creating Price Ramps with Custom Frequencies:** Sales reps can create price ramps with custom frequencies. For example, you can create price ramps based on the start date and end dates. For more information, see [Creating Price Ramps for a Product](#).
- **Enabling Price Ramps with Related Pricing:** Sales reps can create a ramp line item with a pricing method "Related Pricing". For more information, see [Creating Price Ramps for a Product](#).

Conga Upgrade Assistant

Conga Upgrade Assistant is an upgrade management tool to help administrators upgrade Conga packages. It helps to upgrade the major releases, patch releases, and hotfixes. It consists of the following features.

Installed Packages: This feature shows users details of all installed packages in their org, helping them to manage each package's access permissions and auto-upgrades.

Instant Upgrade: Users can use this tab to monitor upgrade job records, including past upgrades to the latest General Availability (GA) packages, and to upgrade specific package releases.

Schedule Upgrade: Users can now schedule upgrade jobs for their org, ensuring timely Salesforce environment upgrades.

For more information, see [Conga Upgrade Assistant](#).

Enhancements

The following enhancements are new to CPQ in this release.

Customizing Option and Bundle Start Dates with APTS_DisableRollupOptionStartDate

APTS_DisableRollupOptionStartDate offers flexibility in option and bundle start dates. Administrators can set the property to TRUE, preserving bundle start dates and delinking them from option start dates. This feature requires setting Auto Cascade Selling Term to FALSE at the option level. When set to FALSE, the default behavior with Auto Cascade Selling Term as TRUE at the option level is retained.

For more information, see [Configuring Admin Settings](#).

Splitting the Cart API

Sales representatives can split the cart that is created using creating a cart from the quote API. Earlier, the split cart API only worked on manually created carts. The split API splits the line items in the cart into groups in a Smart Cart flow. When the method is executed, the task pending flag is set to true on the cart passed as the parameter. After the line items are split into groups, the flag is set to false.

For more information, see [Creating a Cart from a Quote](#) and [Splitting a Smart Cart](#).

Asynchronous Collaboration Merge Request

The enhancement for Async Collaboration Merge is for the sales representative when dealing with more than five products asynchronously. This involves merging collaboration requests in the background, triggering an asynchronous merge. Users are informed through a prompt to close the cart, and upon completion, an email notification is sent.

The enhancement of the Notification Feed for Merge Collaboration Request allows to streamline the notification process during merges. Instead of sending a notification for each line item, the enhancement modifies the logic to issue a single notification at the end of the merge.

For more information, see [Configuring Real-Time Cart Notifications and Assigning the Configuration to the Collaborator or Queue](#).

Data Model Changes

The following objects and fields are introduced to or changed in the system or data model in this release.

Object	Fields	Description	System/ User	New/ Changed
OrderSystemProperties			System	Changed
	Agmt Item Edit Fields For Partial Order	Enter the list of editable field API names from the agreement line item object when creating partial orders. Each field must be separated by a comma or a new line.	User	New
	Quote Item Edit Fields For Partial Order	Enter the list of editable field API names from the proposal line item object when creating partial orders. Each field must be separated by a comma or a new line.	User	New
PaymentTerm		Represents a payment term associated with a quote, order, or agreement.	System	Changed
	Offset 2 Type	Indicates the parameter that must be used to compute the second offset.	User	New
	Offset 2 Value	Indicates the number (value) to be added to Offset 2 Type to get the desired due date of the invoice.	User	New

Fixed Issues

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

Case Number	Conga Internal ID	Description
00863370	CPQ-71929	When you collaborate on more than 5 lines in the cart, you get an error. <code>Error: Too Many SQL</code>
00855235	CPQ-70752	When creating a cart through the Create Cart API, the Split Cart functionality is not working as expected.
00844202	CPQ-68576	When deleting a cart line item before Save/Reprice, the system should retain custom field values, similar to the behavior of OOTB fields. For more information, see Viewing the Cart in Grid View .

Known Issues

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

Conga Internal ID	Description
CPQ-5402 2	Turbo Integrations: Attribute-based pricing is not working for Numeric Expressions.

DOC ID: CPQFEB24RNREV20240318

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