

APTTUS[®]

Rebate Management On Salesforce Spring 2018 Release Notes

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Table Of Contents

About Release Notes	3
Packages	4
System Requirements and Supported Platforms	5
Feature Summary	6
Enhancements to the Definition of a Rebate program.....	6
Support UoM For Rebate Calculation	6
Agreement Payout Frequency.....	6
Agreement Calculation and Close Period Actions	7
Data Model Changes	8
Resolved Issues	12
Known Issues	13
Apttus Copyright Disclaimer	14

About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#) that are required to upgrade to this release.
- [System Requirements and Supported Platforms](#) information pertaining to the requirements and recommendations that you must consider before you proceed with the installation
- [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.
- [Data Model Changes](#) from the previous 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 Rebate Management (New)	6.0.0118 (6.118)
Apttus Contract Management	9.0.0393.1 (9.393.1)
Apttus Configuration & Pricing	10.6.1403 (10.1403)
Apttus CPQ API (New)	10.0.0080 (10.80)
Apttus Contract-Configuration Integration	10.1.0103 (10.103)

System Requirements and Supported Platforms

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

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .
Browser	<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.</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 has to be greater than 12.0.6520.4999) • Microsoft Word 2010 (32 bit & 64 bit) <p>Apttus recommends usage of the latest Microsoft Office Suite for the best performance.</p>

Feature Summary

This release introduces the following updates to Rebate Management:

- [Enhancements to the Definition of a Rebate program](#)
- [Support UoM For Rebate Calculation](#)
- [Agreement Payout Frequency](#)
- [Agreement Calculation and Close Period Actions](#)

Enhancements to the Definition of a Rebate program

The definition of a rebate program in Apttus Rebate Management is enhanced to include volume/quantity purchased by all Children to the Rebate Calculation of Parent Account. Apttus Rebate Management enables a rebate administrator to:

- Define a rebate program for a Parent Account and include transactions or sales for all children of the Account to calculate rebates for the Parent Account.
- Define a rebate program for a Parent Account and include transactions or sales for all children of the Account except when a child member has its own rebate agreement in order to calculate rebates for the Parent Account correctly.

For more information, see [Defining a Rebate Program](#).

Support UoM For Rebate Calculation

You can define a Unit of Measure (UoM) for a rebate. The rebate is calculated for the period for which it is configured. The application converts the UoM for the order based on the primary unit of measure that is defined in rebates and then calculates the benefit. The UoM defined in the Rebate takes precedence over the UoM defined for the product in the Order and the pricing is calculated accordingly.

For more information, see [Use Case: Defining a Unit of Measure for a Rebate](#).

Agreement Payout Frequency

New fields are introduced in the Rebate Agreement, used to capture the calculation window. These fields are expected to be populated in order to control when calculation occurs. It is used to establish the calculation window. Payout Frequency in the Rebate Program is used to separate calculation from the actual payment determined by customers independently.

New fields added to the Agreement to capture the current calculation window:

- Incentive Period Start Date
- Incentive Period End Date
- Period Status

For more information, see [Calculations on a Rebate Agreement](#).

Agreement Calculation and Close Period Actions

Two new buttons are added to Rebate Agreements.

- Rebate Calc – Click this button to generate or re-generate benefits for payment schedules on an ad-hoc basis. Batch jobs can still be created and scheduled
- Close Rebate Period – Click this button to close the rebate period related to the rebate agreement program. A batch job can also be created to close multiple program periods through a supported API.

For more information, see [Calculations on a Rebate Agreement](#).

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	Field	Description	State	Feature	System / User
External Order Rollup Data			New	Enhancements to the definition of a rebate program	System
	Group By Values	The group by field values	New		System
	Is Committed	Indicates whether the order rollup data is already committed to the rollup data	New		System
	Order Summary	ID of the associated external summary order	New		System
	Period End Date	The rollup period end date	New		System
	Period Start Date	The rollup period start date	New		System
	Rollup Business Object	The API name of the business object for the rollup	New		System
	Rollup Field	The rollup field	New		System
	Rollup Uom	The rollup unit of measure for the product	New		System
	Rollup Value	The rollup value	New		System

Object	Field	Description	State	Feature	System / User
	Search Filter (CPQ)	ID of the associated rollup	New		System
	Sold To	The ID of the sold to account			System
Incentive (Managed)			Old	Support UoM For Rebate Calculation	
	Benefit Uom	The benefit unit of measure for the product	New		User
	Include Orders For Account Hierarchy ?	Indicates whether orders for the account hierarchy should be included for rebate processing	New		User
	Exclude Children With Active Programs ?	Indicates whether orders from child accounts with activate rebate agreements should excluded from rebate processing. Only applicable when including orders from account hierarchy.	New		User
Rollup Data (Managed)			Old	Support UoM For Rebate Calculation	
	Rollup Uom	The rollup unit of measure for the product	New		System
Order Rollup Data (Managed)			Old	Support UoM For Rebate Calculation	
	Rollup Uom	The rollup unit of measure for the product	New		System

Object	Field	Description	State	Feature	System / User
External Order Summary (Managed)			Old		User
	Agreement	ID of the associated agreement	New		System
Agreement (Managed)			Old	Agreement Payout Frequency	User
	Incentive Period Status	The status of the incentive processing window	New		User
	Incentive Period Start Date	The period start date of the current window for incentive processing. The window is determined by the payout calculation frequency of the associated incentives.	New		User
	Incentive Period End Date	The period end date of the current window for incentive processing. The window is determined by the payout calculation frequency of the associated incentives.	New		User
Rebate System Properties			Old	Agreement Calculation and Close Period Actions	System

Object	Field	Description	State	Feature	System / User
	Input Business Object	<p>The Api name of the business object which provides the input orders for rebate calculation.</p> <p>Valid values are:</p> <p>=====</p> <p>Apttus_Config2__OrderLineItem__c</p> <p>Apttus_Config2__ExternalOrderSummaryItem__c</p>	New		System
	Rebate Calc Batch Size	The batch size for the rebate calculation job	New		System
	RebateRecordTypes	Enter the list of rebate record types. Each record type should be separated by a new line.	New		System
Batch Job (CPQ)			Old	Enhancements to the Definition of a Rebate program	System
	Status (Ready)	Picklist Value for the field Status	New		System

Resolved Issues

The following table lists issue that is resolved in the Rebate Management Spring 2018 Release.

Case Number	Description	Apttus Internal ID
00195129	When Rebate was calculated on the Agreement Payout Schedule, the Incentive Adjustment Amount in External Order Adjustment Item is correct but the Benefit Amount in Incentive Payout Schedule was incorrect. The issue is resolved.	REBATE-124

Known Issues

There are no known issues in the Rebate Management Spring 2018 Release.

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