



APTTUS[®]

Intelligent Workflow Approvals on Salesforce Summer 2018

Release Notes

Doc Rev A

12/14/2018

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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
- [System Requirements and Supported Platforms](#) information pertaining to the requirements and recommendations you must consider before you proceed with the installation
- [Upgrade Information](#) that is required to upgrade to this 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
- [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 (New) | 9.0.0011 (9.11) |
| Apttus CPQ Approvals Management (Required if you are using CPQ) | 9.0.0000 (9.0) |
| Apttus Contract Management (Required if you are using CPQ and Agreement Approvals) | 8.5.0354 (8.354) |
| Apttus Proposal Management (Required if you are using CPQ Approvals) | 8.1.0128 (8.128) |
| Apttus Configuration & Pricing (Required if you are using CPQ Approvals) | 10.0.1215 (10.1215) |
| Apttus Quote/Proposal Configuration Integration (Required if you are using CPQ and Proposal management) | 9.6.0182 (9.182) |
| Apttus Contract-Configuration Integration (Required if you are using CLM) | 6.5.0062 (6.62) |
| Apttus Quote/Proposal Approvals Management (Required if you are using Proposal Management) | 6.5.0003 (6.3) |
| Apttus Custom Approvals Management (Required if you are using Apttus Objects or other Salesforce Standard/ Custom Objects) | 1.0 |

System Requirements and Supported Platforms

Before you install and start using Intelligent Workflow Approvals on Salesforce Platform, you must ensure the minimum requirements as mentioned below:

| 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"> • Google Chrome™ • Microsoft Edge™ - Apttus recommends its customers to use “Edge” as the Microsoft browser of choice. <div style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;"> <p> Internet Explorer is not supported.</p> </div> |
| 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) • Apttus recommends usage of the latest Microsoft Office Suite for the best performance. |

Upgrade Information

Before you upgrade, it is important that you know about all of the changes that have occurred between your existing release and the release you are upgrading to. To be sure you have all the information you need, refer the release notes for all intermediate releases. Go to [Intelligent Workflow Approvals](#) and click to expand the Show All Releases section.

Feature Summary

This release introduces the following updates to Intelligent Workflow Approvals on Salesforce Platform:

- [Support for Limiting a Certain User or Group of Users to be Added as an Adhoc or Additional Approver and Custom Query Callbacks for Reassigning and Adding Approver on the My Approvals Page](#)

Support for Limiting a Certain User or Group of Users to be Added as an Adhoc or Additional Approver and Custom Query Callbacks for Reassigning and Adding Approver on the My Approvals Page

As an Approvals admin, you can determine certain predefined subset of users, groups, queues or roles to be added as adhoc or additional users to the list of approvals for in-flight approval requests. Currently, when allowing the adhoc or additional approver, there is no restriction as to which user can be added to the list of existing approvers. Support has also been added for custom callback code to filter query for users, roles and queues for reassigning and adding an Approver on the My Approvals page.

For more details, see [Custom Query Callback for Reassigning and Adding Approver](#).

Data Model Changes

There are no data model changes in this release.

Resolved Issues

The following table represents resolved issues on the IWA Salesforce Summer 2018 release.

| Case Number | Description | Apttus Internal ID |
|------------------|--|--------------------|
| CAS-02186-N3Z6X5 | <p>Adding an adhoc approver step simultaneously triggered multiple steps in the approval flow. This was due to the <i>Substep Depends On</i> field not getting updated.</p> <p>This issue is resolved. The steps trigger as per the sequence in the approval flow.</p> | AWA-1774 |
| CAS-02491-J2K0W1 | <p>The field label for Opportunity Amount was not displayed on the OpportunityApprovalSummary visualforce page.</p> <p>This issue is resolved. The field label for Opportunity Amount is now displayed in alignment with the other fields.</p> | AWA-1788 |
| NA | <p>When creating the custom approval configuration custom setting, the name of the setting was limited to 40 characters. Therefore, administrators could not create custom approvals on the approval configuration custom setting that includes the name of the Incentive Payout Schedule Object and the namespace prefix, for example, Apttus_Config2_IncentivePayoutSchedule_c exceeds 40 characters.</p> <p>This issue is resolved. Administrators can now create custom approval settings with name set to the API name of the object without the namespace prefix. For example, IncentivePayoutSchedule_c and ProductConfiguration_c.</p> | AWA-1810 |

| Case Number | Description | Apttus Internal ID |
|------------------|--|--------------------|
| CAS-03674-F3T4C2 | <p>After post package upgrade, there issues related to moving the old approval records to approval history. This also occurred modifying or deleting the old approval process in the system.</p> <p>This issue is resolved. Two new fields are introduced to the approval request object to prevent this exception from occurring when querying on large numbers of approval requests. These new external ID fields, ObjectRefld__c and ChildObjectRefld__c are indexed copies of the Object_Id__c and ChildObjectId__c fields. In case you are using a custom code to query the Approval Request object that uses the Object_Id__c or ChildObjectId__c in the where clause, you must replace it with the new indexed fields ObjectRefld__c and ChildObjectRefld__c.</p> | AWA-1816 |
| CAS-04078-Y6T2F7 | <p>Amount was not displayed correctly in approval emails.</p> <p>This issue is resolved. The currency field has been fixed to display the amount correctly in approval emails.</p> | AWA-1818 |
| NA | <p>When Partner Community Users submit quote for approval, "Site under construction" error was displayed. This error was displayed even when all the approval processes were Deactivated.</p> <p>This issue is resolved. The quote is successfully submitted for approval by a Partner Community User.</p> | AWA-1819 |
| NA | <p>After adding an Adhoc Approver, the sub-sequence of the following steps were displayed as decimal numbers on the My Approvals Page.</p> <p>This issue is resolved. All subsequent steps are now displayed without decimals after adding an Adhoc Approver.</p> | AWA-1834 |
| NA | <p>Approvals were not getting sorted on the Approval Submission page as defined in the Approval Rule definition. They appeared in a random sequence.</p> <p>This issue is resolved. Approvals are displayed as defined in the Approval Rule definition.</p> | AWA-1838 |

Known Issues

The following table represents known issues on the IWA Salesforce Platform Summer 2018 release.

| Apttus Internal ID | Description |
|--------------------|---|
| AWA-1368 | When the same user is assigned as a Backup Admin to an approver and as a parallel Ad hoc approver, the approval request is shown in both the My Approvals tab as well as in the Take Ownership tab. |
| AWA-1603 | All Delegate approvers are displayed for requests assigned to Queue and Roles. |
| AWA-1605 | Approval Request page is distorted when multiple Delegate IDs are stored in the Delegate Approvers Field. |
| AWA-1651 | When you approve 41 requests simultaneously from the My Approvals page, the approval request takes time and the page hangs. |

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DOC ID: IWASFSUM18RNREVA20181214