

APTTUS[®]

Billing Management On Salesforce Spring 2018 Release Notes

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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.
- [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. The packages marked as **(New)** are new packages for this release and must be installed to upgrade to this version.

Package	Latest Certified Version (Name Number)
Apttus Billing Management (New)	4.6.0120 4.120
Apttus Quote/Proposal-Configuration Integration (New)	10.1.0254 10.254
Apttus Configuration & Pricing (New)	10.5.1372.20 10.1372.20
Apttus CPQ API	9.4.0067 9.67
Apttus Quote/Proposal-Asset Integration	6.5.0014 6.14
Apttus Proposal Management (New)	8.3.0160 8.160
Apttus Contract Management (New)	8.9.0392 8.392

System Requirements and Supported Platforms

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

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .
Browser	<ul style="list-style-type: none">• Google Chrome• Microsoft Edge• Mozilla Firefox• Apple Safari on Mac OS X <p>Note: Internet Explorer is not supported.</p>

Feature Summary

This release introduces the following features and enhancements:

- [Wallet Manager](#)
- [Dunning Policy](#)
- [Availability of Previous versions of invoices and credit memo documents for email delivery](#)
- [Enhancement to the Invoice Run Batch Job](#)
- [Enhancements to Billing Plans](#)
- [Enhancements to the Billing Console UI](#)
- [Enhancements to Direct Credit Memo Creation Functionality](#)
- [Change in Billing System Property: Billing Org-Wide Email Address](#)

Wallet Manager

Apttus Billing Management introduces the wallet manager, which allows you to manage funds in wallets through a single click. You can perform the following actions through the wallet manager:

- Add funds
- Remove funds
- Terminate the Wallet
- Renew the Wallet

Get Started

For details on configuring the wallet manager, refer to [Wallet Manager Configurations](#).

For details on using the wallet manager, refer to [Wallet Manager](#).

Dunning Policy

Dunning Policy is a formalized notification process to follow up on delayed payments. The policy enables you to send multiple email reminders to your customers when they have missed the invoice due date. You can also set different email templates for different reminders.

Get Started

For more details on dunning policy, refer to [Dunning Policy](#).

Availability of Previous versions of invoices and credit memo documents for email delivery

You can select any version of invoice or credit memo document when using the Manual Send Invoice Email and Send Credit Memo Email functionality.

Get Started

For more details, refer to [Sending Credit Memo Email](#) or [Sending an Invoice Email](#).

Enhancement to the Invoice Run Batch Job

Invoice Run now runs for an indefinite time if you do not specify the **Schedule Run To** date while creating a scheduled Invoice Run batch job.

Get Started

For more details on invoice run, refer to [Scheduling Options](#).

Enhancements to Billing Plans

Apttus Billing Management introduces the following enhancements to Billing Plans:

- Billing Plan UI is updated to make it more user-friendly.
- Full Term Payment Method
- Billing plans for Asset-Based Ordering.
- Billing plans for changes in quote line items.
- Custom field for calculating the amount and percentage value to 10 decimal places.

Get Started

For more details on billing plans, refer to [Billing Plans](#).

Enhancements to the Billing Console UI

The Billing Console UI is revamped to make it more user-friendly. It is also enhanced to include links for Dunning Policy and Dunning Policy Email Templates.

Get Started

For more details on billing console, refer to [Navigating Apttus Billing Management](#).

Enhancements to Direct Credit Memo Creation Functionality

Billing Management introduces the following enhancements to the Direct Credit Memo functionality:

- Approving a Credit Memo updates the Total Due Amount of the invoice.
- Approving a Credit Memo creates a Destination A/R Related Transaction entry.
- Configurable display fields on Create Credit Memo page.
- Ability to exclude a credit memo from the invoice.

Get Started

For more details on the direct credit memo functionality, refer to [Generating Credit Memos from Invoice](#).

Change in Billing System Property: Billing Org-Wide Email Address

To set an org-wide email address for all your billing emails, register the Email Id instead of the Display Name in **Billing System Properties** → **Billing Org-Wide Email Address**.

Get Started

For more details on Billing System Properties, refer to [Billing System Properties](#).

Data Model Changes

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

Note

The System/User column in the following table indicates whether the field is used by the System only (System), or if the field may be used for integration updates (User).

Object	Fields	Description	State	Feature	System/ User
Account			Existing	Dunning	
	Dunning Policy Id	Look-up to the Dunning Policy	New		User
	Exclude from Dunning	Check this flag to disable dunning for this account	New		User
Account Location			Existing	Dunning	
	Dunning Policy Id	Look-up to the Dunning Policy	New		User
	Exclude from Dunning	Check this flag to disable dunning for this account	New		User
Dunning Policy		Information about the Dunning Policy	New	Dunning	
	Name	Name of the Dunning Policy	New		User
	Active	Flag to indicate whether the dunning Policy is activated or not	New		User
	Default	Flag to indicate whether the Dunning Policy is default or not	New		User
	Number of Reminders	The number of email reminders to send	New		User
Dunning Policy Line Items		Information on the Dunning Policy Line Item	New	Dunning	
	Name	Name of the Dunning Policy Line Item	New		User

Object	Fields	Description	State	Feature	System/User
	Interval Value	Value of the Interval	New		User
	Interval Type	Type of the interval	New		User
	Baseline	Date for sending the first interval	New		User
	EmailTemplate	API name of the Email Template	New		User
	AttachInvoicePDF	Flag to indicate whether to attach the invoice PDF in the remainder email or not	New		User
	Dunning Policy	Look up to the Dunning Policy	New		User
	Active	Flag to indicate whether the dunning policy line item is active or not	New		User
Dunning Reminder Log		Log of the remainder emails	New	Dunning	
	Id	ID of the Dunning Remainder Log	New		System
	Invoice	Invoice number for which the reminder is sent out	New		System
	Reminder Sequence	Sequence of the reminder	New		System
	Reminder Date	Date on which the reminder was sent	New		System
	Dunning Policy Line Item	Look up to the Dunning Policy Line Item	New		System

Resolved Issues

The following table represents issue resolved in this release.

Case Number	Description	Aptus Internal ID
Billing v4.120		
00219780 / CAS-01296-J9J2S9	<p>The Create Credit Memo functionality, available on the Invoice Page, auto-created a PDF for credit memos.</p> <p>This issue is now resolved. The Create Credit Memo functionality does not create a PDF document for the credit memo unless specified in the Billing System Properties.</p>	BIL-1533/ BIL-1604
N/A	<p>If you canceled an invoice with Status as <i>Draft Obsolete</i>, the status of the related billing schedule was updated from Superseded to Pending Billing.</p> <p>This issue is now resolved. Cancellation of an invoice with Status as <i>Draft Obsolete</i> does not update the status of the related billing schedule.</p>	BIL-1589
0022022	<p>If you changed the billing frequency of an asset and then performed an asset change using the quote flow, billing schedules were generated incorrectly.</p> <p>This issue is now resolved. Billing Schedules are now generated correctly if you perform an asset change after modifying the billing frequency.</p>	BIL-1542
00219827	<p>Billing Management did not recognize the email address registered based on the display name in the Org-Wide Email Address setting under Billing System Properties. Hence, emails were sent using the email address of the user who initiated the email.</p> <p>This issue is now resolved. Billing System Property → Org-Wide Email Address is changed. The user needs to register the email ID in Billing System Property. For more details, refer to Billing System Properties</p>	BIL-1537
N/A	<p>If you did not specify the Schedule Run To date while scheduling the invoice run, invoice run batch job stopped running at the end of the year.</p> <p>This issue is now resolved. The Invoice Run batch job runs for an indefinite duration if you do not specify the Schedule Run To date.</p>	BIL-1508
N/A	<p>Billing Plan gave the error, Select at least one Line Item to Create Billing Plan, even if a proposal line item was selected.</p> <p>This issue is now resolved. Billing Plan does not show any error when you select a single proposal line item.</p>	BIL-1463

Case Number	Description	Apttus Internal ID
N/A	Bundle and Option products were billed twice if they were billed together using a billing plan. This issue is now resolved. Bundle and Option products are now billed based on the Bundle Invoice Level flag set at the product level.	BIL-1462

Known Issues

There are no known issues in this release.

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