

**APTTUS<sup>®</sup>**

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**Billing Management on Salesforce Summer 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 <b>(New)</b>	4.7.0129   4.129
Apttus Quote/Proposal-Configuration Integration <b>(New)</b>	10.2.0263   10.263
Apttus Configuration & Pricing <b>(New)</b>	10.7.1463   10.1463
Apttus CPQ API <b>(New)</b>	1.0.0080   10.80
Apttus Quote/Proposal-Asset Integration	6.5.0014   6.14
Apttus Proposal Management <b>(New)</b>	8.4.167   8.167
Apttus Contract Management <b>(New)</b>	9.1.0397   9.397

## 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 <a href="https://www.salesforce.com">Salesforce.com</a> requirements. See <a href="#">Salesforce PDF</a> .
Browser	<ul style="list-style-type: none"><li>• Google Chrome™</li><li>• Microsoft Edge™</li><li>• Mozilla Firefox™</li><li>• Apple Safari on Mac OS X™</li></ul> <p>Note: Internet Explorer is not supported.</p>

## Feature Summary

This release introduces the following features and enhancements:

- [Forecast billing schedules on the proposal](#)
- [Credit and Rebill Invoices](#)
- [Processing Delayed Usage](#)
- [Support Added for Salesforce Files](#)
- [Proration Period Treatment - Combine with the First Period](#)
- [Early Termination Rule: No Credit on Cancellation](#)
- [Payments functionality](#)
- [Dunning Policy for Partially Paid Invoices](#)
- [Enhancement to Invoice Run - Override Credit Memo Template](#)
- [Enhancement to Credit Memo - Auto-approve option for manual credit memos](#)
- [Enhancement to createInvoice API](#)
- [Enhancement to Email Invoice Attachment Callback Class](#)
- [Performance Enhancement to Invoice Run Batch job](#)

### Forecast billing schedules on the proposal

With Apttus Billing Management, you can generate and display forecast billing schedules for a quote/proposal before accepting the proposal. When you make any changes to the product configuration during the negotiation cycle or perform any asset-based operations, the forecast billing schedules are updated to reflect the change.

#### Get Started

For details on Forecast billing schedules on the proposal, refer to [Forecast Billing Schedules on the Proposal](#).

For details on retrieveForecastedBillingSchedules API, refer to [Forecasting Billing Schedules](#).

### Credit and Rebill Invoices

With credit and rebill functionality, you can credit the entire invoice and rebill it again. This is useful when you want to make changes to an invoice without canceling it.

#### Get Started

For details on credit and rebill functionality, refer to [Credit and Rebill](#).

For details on the related API, refer to [Creating Credit Rebill API](#).

## Processing Delayed Usage

Apttus Billing Management introduces Delayed Usage functionality using which you can process usage inputs for already invoiced billing schedules.

### Get Started

For more details, refer to [Usage Schedules](#).

## Support Added for Salesforce Files

Apttus Billing Management now supports Salesforce Files for invoice and credit memo documents. To leverage the file functionality instead of notes and attachments, the system administrator needs to enable files from the comply system properties.

### Get Started

For more details on enabling files, refer to [Contact Management on Salesforce Administrator Guide](#).

## Proration Period Treatment - Combine with the First Period

With Proration Period Treatment, **Combine with the first period**, you can invoice the first partial billing schedule with the next complete billing schedule.

### Get Started

For more information on Combine with the First Period proration treatment, refer to [Understanding Proration](#).

## Early Termination Rule: No Credit on Cancellation

If your customers terminate the asset mid-contract, you now have the option of not canceling the pending billing schedules and still, charge for them. With Early Termination Rule set to No Credit on Cancellation, the pending billing schedules are not canceled and no credit is provided for them.

### Get Started

For more information on early termination fee, refer to [No Credit on Cancellation](#).

## Payments functionality

Payment functionality allows you to capture the payment received and to apply it to a future invoice.

### Get Started

For more information on Payment functionality, refer to [Payments](#).

## Dunning Policy for Partially Paid Invoices

Dunning Policy is now applicable for partially paid invoices. You can send a payment reminder email for unpaid and partially paid invoices.

### Get Started

For more information on Dunning Policy, refer to [Dunning Policy](#).

## Enhancement to Invoice Run - Override Credit Memo Template

Invoice Run functionality lets you override the default credit memo template when creating credit memos.

### Get Started

For more information on Invoice Run, refer to [Invoice Run](#).

## Enhancement to Credit Memo - Auto-approve option for manual credit memos

When creating a credit memo from the invoice, Apttus Billing Management provides you with an option to auto-approve them.

### Get Started

For more information on credit memos, refer to [Credit Memo](#).

## Enhancement to createInvoice API

creditInvoice API is enhanced to include credit memo creation options while generating an invoice.

### Get Started

For more information on createInvoice API, refer to [Creating Invoices](#).

## Enhancement to Email Invoice Attachment Callback Class

Email Invoice Attachment Callback Class is now enhanced to include email content as well. You can set the default email message in your callback class.

### Get Started

For more information on email invoice attachment callback class, refer to [Email Invoice Attachment Callback Class](#).



## Performance Enhancement to Invoice Run Batch job

Invoice Run Batch job used to scan every account in your Salesforce org if you did not specify any filters on the invoice run. Invoice Run batch job now only scans the accounts that have Ready for Invoice Date less than or equal to the Process Due date.

### Get Started

For more information on invoice run batch job, refer to [Invoice run](#).

## Data Model Changes

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

Object	Fields	Description	State	Feature
Forecasted Billing Schedule		An object to store the forecast billing schedules	New	Forecast billing schedules
	Billing Day of the Month	The Billing Day of Month that was used when the Billing Schedule was generated.	New	
	Billing Rule	The Billing Rule specified on the corresponding Order Line Item.	New	
	Bill To	ID of the corresponding Bill to Account.	New	
	Charge Type	The charge type associated with the Product or Service.	New	
	Description	The Schedule description.	New	
	Fee Amount	The fee for the corresponding billing period.	New	
	Hide Invoice Display	Indicates whether or not the Schedule will be present of the corresponding Invoice.	New	
	Invoiced Schedule	The Id of the invoiced and superseded Billing Schedule that is the source of the credit.	New	
	Is Superseded	Will initially be false and gets set to true when the Billing Schedule is superseded when a Cancellation or an Amendment is applied to corresponding Asset Line Item.	New	
	Line Item	ID of the associated Line Item.	New	
	Location Id	ID of the corresponding Account Location.	New	
	Payment Term	Id of the associated Payment Term.	New	
	Period End Date	The billing period end date.	New	
	Period Start Date	The billing period start date.	New	

Object	Fields	Description	State	Feature
	Price Type	The price type of the Product of Service.	New	
	Product Configuration	ID of the associated Product Configuration.	New	
	Product Name	The name of the associated product.	New	
	Quote/Proposal	ID of the associated Quote/Proposal.	New	
	Ready For Invoice Date	The date when the corresponding Order is ready for generating an Invoice.	New	
	Ship To	ID of the ship-to Account.	New	
	Status	The Schedule status.	New	
Billing Preference			Existing	
	Early Termination Rule	Option to enable early termination fees. This option is valid only for asset terminations.	New	No Credit on Cancellation
Invoice Run			Existing	
	Credit Memo Override Template	An optional name of the Template to use when rendering a Credit Memo.	New	No credit on Cancellation

## Resolved Issues

The following table represents issues resolved in this release.

Case Number	Description	Aptus Internal ID
00216365	<p>If you generated an invoice using the invoice run functionality and had specified an invoice template in the <b>Invoice Override Template</b>, regenerating the invoice selected the invoice template specified on the account or account location instead of the template specified in Invoice Override Template field.</p> <p>This issue is now resolved.</p>	BIL-1405
00216981	<p>If your customer terminated your services mid-contract, you could not charge him an early termination fee and the remaining billing schedules were canceled.</p> <p>This issue is now resolved. Refer to <a href="#">No Credit on Cancellation</a> for more details.</p>	BIL-1443
00217367	<p>When performing Asset Renewals, if you changed the billing frequency, billing schedules were not aligned to the billing frequency and prorated billing schedules were created.</p> <p>This issue is now resolved. To align the billing schedules with the changes in the billing frequency, select <b>No Proration on Renewal</b> in <a href="#">Billing System Properties</a>.</p>	BIL-1453/ BIL-1659
CAS-00865-N2K3R2	<p>When you performed asset termination, the configuration was displayed in a frozen manner.</p> <p>This issue is now resolved.</p>	BIL-1505
00219060	<p>You could not process usage after the end date of the proposal or once the billing schedules were invoiced.</p> <p>This issue is now resolved. Refer to <a href="#">Delayed Usage</a> for more details.</p>	BIL-1507
00220007	<p>Email Invoice Attachment callback class required you to set the billing contacts manually on the account.</p> <p>This issue is now resolved.</p>	BIL-1541
	<p>You could not override the default credit memo template name when generating credit memos through the invoice run.</p> <p>This issue is now resolved.</p>	BIL-1592

Case Number	Description	Apttus Internal ID
	<p>When creating credit memos from the invoice, there was no provision to auto-approve the credit memos.</p> <p>This issue is now resolved.</p>	BIL-1593
	<p>If you did not provide any filters on the invoice run, the invoice run batch job took a long time to process.</p> <p>This issue is now resolved. Invoice Run batch job now only scans the accounts that have Ready for Invoice Date less than or equal to the Process Due date.</p>	BIL-1649
	<p>Implementation teams could not access the constructors in EmailInvoiceAttachementInput and EmailCreditMemoAttachmentInput callback class as they were not exposed.</p> <p>This issue is now resolved.</p>	BIL-1651
	<p>While creating a billing plan, if you had set <b>Bundle Invoice Level</b> as <i>Bundle</i> for the bundle product and <b>Bundle Invoice Level</b> as <i>Bundle</i> for the option products, the option products were not linked to the Billing Plan.</p> <p>This issue is now resolved. Apttus Billing Management associates the Billing Plan with the bundle product and all the option products that have <b>Bundle Invoice Level</b> as <i>Bundle</i>. This resolution is only supported for Billing Plans with Billing Method as Percentage.</p>	BIL-1706
	<p>For bundle configuration, if you had assigned payment term to the bundle product, the payment term also got associated with the option product. While invoking an invoice run, Apttus Billing Management created an extra invoice.</p> <p>This issue is now resolved.</p>	BIL-1707
	<p>Manual invoice email functionality gave an error if you did not set any billing contacts at the account or account location. It did not check the billing contacts set in the Email Invoice Attachment Callback Class.</p> <p>This issue is now resolved.</p>	BIL-1733
CAS-05394-H9K6R1	<p>You could not provide credit memo creation options while generating invoices using the createInvoice API.</p> <p>This issue is now resolved. Refer to <a href="#">Creating Invoices</a> for more details.</p>	BIL-1787
CAS-05537-M7P3M3	<p>createInvoice API displayed an error if you used it in combination with the Invoice Filter callback class.</p> <p>This issue is now resolved.</p>	BIL-1791

## Known Issues

There are no known issues in this release.

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