

APTTUS[®]

Billing Management on Salesforce Summer 2019 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Billing Management Summer 2019 Release on Salesforce.

For more information on new features, enhancements, and document improvements refer to

- [What's New](#) in *Billing Management on Salesforce Summer 2019 User Guide* or
- [What's New](#) in *Billing Management on Salesforce Summer 2019 Administrator Guide* or
- [What's New](#) in *Billing Management on Salesforce Summer 2019 API Reference Guide*

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version (Name Number)
Apttus Billing Management (New)	5.2.176 5.176
Apttus Quote/Proposal-Configuration Integration (New)	11.1.0290 11.290
Apttus Configuration & Pricing (New)	11.1.1563 11.1563
Apttus CPQ API	1.0.0080 10.80
Apttus Quote/Proposal-Asset Integration	6.5.0014 6.14
Apttus Proposal Management	8.4.0167 8.167
Apttus Contract Management	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 Requirement	Minimum Supported Version
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .
Browser	<p>Apttus supports the following browsers:</p> <ul style="list-style-type: none">• Microsoft Edge• Google Chrome <p>Apttus recommends the latest stable version of the browser for the best performance.</p> <div style="border: 1px solid #f0e68c; padding: 5px;"><p> Internet Explorer is not supported.</p></div>

New Features

The following features are new to Apttus Billing Management on Salesforce in this release.

- [Billing Schedule Forecasts for Evergreen and Usage-based Products](#)
- [Ability to calculate Billing Amount based on Contract Term](#)
- [Revamped UI for Invoice Run](#)
- [API to Create Direct Memos](#)
- [Billing Metrics](#)
- [Minimum Usage Charge](#)
- [Revamped UI for Creating Billing Plans](#)
- [Ability to Change Ready for Invoice Date based on the Order Line Item Start Date](#)
- [Rating Usage Inputs based on Custom Price Fields](#)

Billing Schedule Forecasts for Evergreen and Usage-based Products

You can now forecast billing schedules for evergreen and usage-based products. Forecast for evergreen products considers **Average Customer Life** and forecast for usage-based products considers the **Estimated Usage** units. You can view the forecast billing schedules and forecast billing summaries for evergreen and usage-based products.

Get Started

For more information, refer to [Forecast Billing Schedules for Usage and Evergreen Products](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Ability to calculate Billing Amount based on Contract Term

With Apttus Billing Management, you can now calculate the billing amount based on your contract term. You can now perform the change action on an asset and apply it on the contract term instead of the asset term.

Get Started

For more information, refer to [Calculating Billing Amount based on the Contract Term](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Revamped UI for Invoice Run

Invoice Run UI and Invoice Run Detail UI is enhanced with Salesforce Lightning components to provide a more user-friendly experience. You can create, edit and clone invoice run in the revamped UI.

Get Started

For more information, refer to [Invoice Run](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

API to Create Direct Memos

You can now create direct credit memos using createDirectCreditMemos API.

Get Started

For more information, refer to [Creating Direct Credit Memos](#) in *Billing Management on Salesforce Summer 2019 API Reference Guide*.

Billing Metrics

Billing Metrics functionality allows you to preview asset-based modifications without actually performing them.

Get Started

For more information, refer to [Billing Metrics](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Minimum Usage Charge

For usage-based products, you can charge your customers a minimum fee if there is no or insufficient usage consumption.

Get Started

For more information, refer to [Minimum Fee for Usage-based Products](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Revamped UI for Creating Billing Plans

Billing Plan UI is enhanced with Salesforce Lightning components to provide a more user-friendly experience.

Get Started

For more information, refer to [Creating a Billing Plan](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Ability to Change Ready for Invoice Date based on the Order Line Item Start Date

Using Billing Plan Templates, you can now set the Ready for Invoice Date on the billing schedules based on the changes in the order line item start date.

Get Started

For more information, refer to [Creating a Billing Plan Template](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Rating Usage Inputs based on Custom Price Fields

Apttus Billing Management provides you the flexibility to rate the usage input and calculate the rated amount based on List Price, Net Price or any other custom price field.

Get Started

For more information, refer to [Usage Input](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

- [Ability to Generate Forecast Billing Schedules for Selected Quote Line Items](#)
- [Ability to Hide Create New Template Link from Billing Plan](#)

Ability to Generate Forecast Billing Schedules for Selected Quote Line Items

You can now generate forecast billing schedules and summaries for selected quote line items only.

Get Started

For more information, refer to [Forecast Billing Schedules and Billing Summaries on the Proposal](#) in *Billing Management on Salesforce Summer 2019 User Guide*.

Ability to Hide Create New Template Link from Billing Plan

Apttus Billing Management introduces a new Custom Setting, **Hide Bill Plan Template on Bill Plan**. You can enable this setting to prevent sales representatives from inadvertently creating new templates from the billing plan page.

Get Started

For more information, refer to [Billing System Properties](#) in *Billing Management on Salesforce Summer 2019 Administrator Guide*.

Data Model Changes

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

Object	Field	Description	System/ User	New/ Changed
Forecasted Line Item Options				New
	Options Number	Id of the corresponding Forecasted Billing Options object.	User	
	Forecasted Billing Options	Id of the corresponding Forecasted Billing Options object.	User	
	Quote/Proposal	Id of the corresponding Quote/Proposal.	User	
	Configuration	Id of the corresponding Product Configuration.	User	
	Line Item	Id of the corresponding Line Item.	User	
	Estimated Usage	The Quantity to apply when calculating usage for the various Billing Periods.	User	
	Uplift %	The percentage to apply when uplifting (increasing) the amount per billing period of an Evergreen asset.	User	
	Uplift After	The number of Billing Periods that must elapse before uplifting (increasing) the forecasted rate.	User	
	Average Life	For an evergreen Line Item, this is the number of Billing Schedules to forecast.	User	

Object	Field	Description	System/ User	New/ Changed
Usage Schedule				Changed
	Fee Amount	The running total of the usage charges for a given billing period.	System	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
N/A	BIL-20188	You could not terminate an asset after changing the billing frequency from Single Period to Quarterly.
CAS-13101-C8D1B4	BIL-2178	In a multicurrency Org, Credit and Rebill functionality generated credit memos with the incorrect amount. The related billing schedule also remained in Status Invoiced instead of Pending Billing.
N/A	BIL-2179	You could not terminate a usage-based asset after processing a negative quantity of usage input.
N/A	BIL-2169	If you performed change ABO operation on one of the options of a bundle asset, the billing schedules of all the options in a bundle were altered. This issue was only observed after you upgraded to Spring 2019 release.
N/A	BIL-2382	Scheduled Invoice Run batch job took a long time to process invoices. This issue was observed because scheduled invoice run batch job processed all the accounts in your Salesforce Org. This issue is now resolved. Scheduled Invoice Run batch job now only processes the accounts with Ready for Invoice Date less than or equal to the Process Due date.

Known Issues

There are no known issues in this release.

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