



Billing Management on Salesforce

Summer 2020 Release Notes



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About Release Notes

Apttus Release Notes contain the following information about Billing Management Summer 2020 Release on Salesforce.

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


- [What's New](#) in *Billing Management on Salesforce Summer 2020 User Guide* or
 - [What's New](#) in *Billing Management on Salesforce Summer 2020 Administrator Guide* or
 - [What's New](#) in *Billing Management on Salesforce Summer 2020 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)
Conga Base Library (New)	11.93 1.93
Conga Billing (New)	6.2.238 6.238
Conga CLM Configuration Integration (New)	12.1.0132 12.132
Conga Configuration & Pricing (New)	12.1.1787 12.1787
Conga Contract Lifecycle Management (New)	11.1.0543 11.543
Conga CPQ Api	10.0.0080 10.80
Conga Quote Asset Integration	6.5.0014 6.14
Conga Quote CLM Integration (New)	9.1.0062 9.62
Conga Quote Configuration Integration (New)	12.1.0328 12.328
Conga Quote Management (New)	10.1.0221 10.221

 Before installing or upgrading Apttus managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Packages Dependency Matrix](#).

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">• Google Chrome <p>Apttus recommends the latest stable version of the browser for the best performance.</p> <div style="border: 1px solid #f1c40f; padding: 5px; margin-top: 10px;"><p> Internet Explorer is not supported.</p></div>

New Features

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

- [Processing Large Number of Invoices and Credit Memos](#)
- [API to Create Direct Credit Memos Asynchronously](#)
- [API to retrieve Session Key](#)
- [Updated UI for Direct Credit Memo](#)
- [Ability to Specify Batch Size for the Evergreen Refresh Job](#)

Processing Large Number of Invoices and Credit Memos

With this release, you can now process invoices with a large number of invoice line items. You can select a large number of invoices from the Invoice List page to process them. You can approve, cancel, and move multiple invoices back to draft. You can also generate credit memos for large invoices. Apttus Billing Management submits a batch job to process all the invoices. You can also generate invoice documents for a large number of invoice lines.

Get Started

For more information, refer to [Invoice Life Cycle](#) in *Billing Management on Salesforce Summer 2020 User Guide*.

API to Create Direct Credit Memos Asynchronously

With this release, Apttus Billing Management introduces `createDirectCreditMemosAysnc` API. With this API, you can create credit memos for invoices with a large number of invoice line items.

Get Started

For more information, refer to [Creating Direct Credit Memos Asynchronously](#) in *Billing Management on Salesforce Summer 2020 API Reference Guide*.

API to retrieve Session Key

With `docGenAPIUserKey()` API, you can retrieve the session key. The session key is generated for the user credentials stored in the Merge Server API Credentials. You can use the session key in Merge Service `generateDoc` API to generate large invoice documents.

Get Started

For more information, refer to [Retrieving Session Key](#) in *Billing Management on Salesforce Summer 2020 API Reference Guide*.

Updated UI for Direct Credit Memo

Apttus Billing Management introduces a revamped UI for creating Direct Credit Memos. The new UI is built using Salesforce Lightning Web components. Using the new UI, you also have the ability to provide full credit on an invoice.

Get Started

For more information, refer to [Creating Credit Memos From Invoice](#) in *Billing Management on Salesforce Summer 2020 User Guide*.

Ability to Specify Batch Size for the Evergreen Refresh Job

With this release, a new custom setting - Evergreen Refresh Batch Size - is introduced that you can use to specify the number of evergreen asset line items to process in one batch.

Get Started

For more information, refer to [Billing System Properties](#) in *Billing Management on Salesforce Summer 2020 Administrator Guide*.

Enhancements

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

- [Billing System Property: Invoice Generation Batch Size](#)
- [Provide Full Credit with createDirectCreditMemos API](#)
- [Deprecated: Fields on Billing Preference](#)
- [Deprecated: Combine with First Period Proration Treatment](#)

Billing System Property: Invoice Generation Batch Size

The system property, **Invoice Generation Batch Size** now considers the batch size as the number of billing schedules to process in one batch. Earlier, it considered the number of accounts to process in one batch. Based on the Invoice Generation Batch Size, the Invoice Run batch job creates invoices and credit memos.

Get Started

For more information, refer to [Billing System Properties](#) in *Billing Management on Salesforce Summer 2020 Administrator Guide*.

Provide Full Credit with createDirectCreditMemos API

createDirectCreditMemos API is enhanced with a new parameter, **isFullCredit**, using which you can provide full credit while creating direct credit memos. You can now set the entire available credit amount of all the invoice line items as the credit amount.

Get Started

For more information, refer to [Creating Direct Credit Memos](#).

Deprecated: Fields on Billing Preference

In this release, the following fields on the Billing Preference object are deprecated:

- Preference Level
- Billing Interval
- Billing Day of Month
- Additional Invoice CC Address
- Allow Preference Override?
- Allow Payment Term Override?
- Order Line Item
- Asset Line Item
- Cart Line Item
- Account
- Location
- Order

Deprecated: Combine with First Period Proration Treatment

In this release, the proration treatment, Combine with the First Period is deprecated. Now, Apttus Billing Management only supports **Separate Period** as a proration treatment.

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
Invoice				Changed
	Key	Key used for grouping line items in an invoice run result.	System	New
Credit Memo				Changed
	Key	Key used for grouping line items in an invoice run result.	System	New
Billing Preference			User	Changed
	Account	ID of the associated account		Deprecated
	Additional Invoice CC Address	A comma-separated list of additional email addresses to copy the invoice to.		Deprecated
	Allow Payment Term Override?	Indicates whether payment term may be overridden at lower levels		Deprecated
	Allow Preference Override?	Indicates whether preference may be overridden at lower levels		Deprecated
	Asset Line Item	ID of the associated asset line item		Deprecated

Object	Field	Description	System/ User	New/ Changed
	Billing Day of Month	The billing day of the month. Specific Day of Month, Account Creation Day, First Order Day, End of Month, etc.		Deprecated
	Billing Interval	The billing interval		Deprecated
	Cart Line Item	ID of the associated cart line item		Deprecated
	Location	ID of the associated location		Deprecated
	Order	ID of the associated order		Deprecated
	Order Line Item	ID of the associated order line item		Deprecated
	Preference Level	The level associated with the billing preference		Deprecated

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
00098677	BIL-3065	For a large number of evergreen assets, Apttus Billing Management gave CPQ Time Out error. Resolution: A new system property, Evergreen Refresh Batch Size is introduced to specify the number of evergreen assets to process in one batch. For more information, refer to Billing System Properties .
00100895	BIL-3135	Apttus Billing Management generated incorrect billing schedules if you performed asset-based action to change asset configuration. This issue was observed for evergreen bundle assets.
00102774	BIL-3168	Apttus Billing Management gave an error while creating Credit Memos using the Schedule Invoice Run feature.
00104025	BIL-3194	You could not rate usage inputs for evergreen usage products. This issue was observed if the Asset End Date was lower than today's date and billing schedules were already generated for the usage input date.

Known Issues

The following table list the known issue in this release.

Apttus Internal ID	Description
BIL-2945	Billing Plan on Cart feature is not available using the Asset Manager Flow.

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