

APTTUS[®]

Billing Management on Salesforce Winter 2018 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Billing Management Winter 2018 Release on Salesforce.

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

- [What's New](#) in *Billing Management on Salesforce Winter 2018 User Guide* or
- [What's New](#) in *Billing Management on Salesforce Winter 2018 Administrator Guide* or
- [What's New](#) in *Billing Management on Salesforce Winter 2018 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)	4.8.140 4.140
Apttus Quote/Proposal-Configuration Integration (New)	10.4.0275 10.275
Apttus Configuration & Pricing (New)	10.8.1478 10.1478
Apttus CPQ API	1.0.0080 10.80
Apttus Quote/Proposal-Asset Integration	6.5.0014 6.14
Apttus Proposal Management	8.4.167 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.

- [Splitting an Invoice](#)
- [Auto-Applying Credit Memos to Invoices](#)
- [API to Create Billing Plans](#)
- [Legal Entity based Billing](#)

Splitting an Invoice

You can split a single invoice into multiple invoices. Splitting an invoice functionality is useful when you want to distribute a large payment into multiple installments.

Get Started

For details on how to split an invoice, refer to [Splitting an Invoice](#).

Auto-Applying Credit Memos to Invoices

If you perform any Asset-Based Operations, generated credit memos are auto-applied to the unpaid or partially paid invoices.

Get Started

For more details, refer to [Auto Apply Credit Memo](#).

API to Create Billing Plans

Apttus Billing Management introduces `createBillingPlan` API. Using this API, you can create a billing plan and billing plan line items for a given proposal. You can also use this API to create milestones for billing plan type as Milestone.

Get Started

For more details on createBillingPlan API, refer to [Creating Billing Plans](#).

Legal Entity based Billing

Apttus Billing Management supports legal entity based billing. You can define a document template for each legal entity. You can generate all the invoices and credit memo documents for a legal entity using the template specified in the legal entity. Apttus Billing Management also supports custom invoice numbering based on the legal entity.

Get Started

For details on setting up legal entity based templates, refer to [Legal Entity based Template Configuration](#).

For details on custom invoice numbering based on the legal entity, refer to [Legal Entity based Custom Numbering](#).

Enhancements

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

- [Billing Preference: Ready for Invoice Date Offset](#)
- [Revamped UI for Invoice Run](#)
- [Billing Plan: Non-Mandatory Payment Term](#)
- [UI Enhancement for Invoice: Change Invoice Status back to Draft](#)

Billing Preference: Ready for Invoice Date Offset

Billing Preference is enhanced to capture Ready for Invoice Date Offset. With this field, you can specify the number of days by which you want to extend the ready for invoice date. You can now invoice your customers mid-billing cycle.

Get Started

For more details, refer to [Billing Preferences](#).

Revamped UI for Invoice Run

Invoice Run UI is enhanced with an Angular UI to provide a more user-friendly experience.

Get Started

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

Billing Plan: Non-Mandatory Payment Term

Payment Term field on the billing plan is now non-mandatory. If You do not specify a payment term while creating a billing plan, the payment term specified on the quote is auto-populated on the billing plan line items.

Get Started

For more details on Billing Plans, refer to [Creating a Billing Plan](#).

UI Enhancement for Invoice: Change Invoice Status back to Draft

Invoice Detail UI is now enhanced with a dedicated button to change invoice status back to draft. By changing an invoice status to draft, you can reinitiate the invoice life cycle.

Get Started

For details on changing an invoice status back to draft, refer to [Invoice Life Cycle](#).

Data Model Changes

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

Object	Fields	Descriptions	System/ User	New/ Changed
Billing Preference				Changed
	Ready for Invoice Date Offset	This field is used to offset the ready for invoice date by days	User	New
Invoice Run				Changed
	Auto Apply Credit Memo	Option to control whether or not Credit Memos are automatically applied to Invoices generated by the Invoice Run.	User	New
Invoice Run Result				Changed
	Total Invoices Credited	The number of Invoices automatically paid down with Credit Memos.	System	New
	Total Credit Memos Applied	The number of Credit Memos automatically applied to unpaid Invoices.	System	New
Invoice				Changed
	Source Invoice	This field is used to link split invoice to source invoice.	System	New
Invoice Line Item				Changed
	Source Invoice Line Item	This field is used to link split invoice line item to source invoice line item.	System	New
Legal Entity Custom Numbering Entry		Stores information on the next sequence number per Legal Entity that is used for Invoice and Credit Memo custom numbering		New
	Custom Number Creation Option	Options to control when the custom number will be created. Create custom number when status is Draft or when the Status is Approved.	User	New

Object	Fields	Descriptions	System/ User	New/ Changed
	Field Based Prefix	The field-based prefix to append to the static prefix when generating a Custom Number. Each fetched field value will be separated with the specified field separator.	User	New
	Field Based Suffix	The field-based suffix to append after generated customCustom Number. Each fetched field value will be separated with the specified field separator.	User	New
	Field Separator	The separator to place after each field fetched for the field based prefix and/or the field based suffix.	User	New
	Initial Sequence Number	The initial number for custom numbering sequence.	User	New
	Legal Entity	Select the Legal Entity for which the next number is being defined.	User	New
	Next Sequence Number	The next number for this custom numbering sequence. It is initialized to the Initial Sequence Number.	User	New
	Numbering Type	Select the object or class of objects to apply the custom numbering settings to.	User	New
	Number of Leading Zeros	The number of leading zeros preceding the sequence number.	User	New
	Static Prefix	Prefix to prepend when generating a Custom Number. It precedes the optional field based prefix.	User	New
	Static Suffix	Suffix to append when generating a Custom Number. It follows the optional field based suffix.	User	New
Legal Entity Template Setting Entry		It is a child object to the Legal Entity. It stores invoice and credit memo document and email templates associated with each Legal Entity.	User	New
	Delivery Type	Indicates the type of delivery method to use when delivering Billing documents to the Legal Entity.	User	New
	Document Template Name	Name of the Document Template to use for PDF generation.	User	New

Object	Fields	Descriptions	System/ User	New/ Changed
	Document Type	The type of the attachment object this setting pertains.	User	New
	Email Template Name	Name of the Email Template to use for Email delivery.	User	New
	Legal Entity	Select the Legal Entity for which these Template Settings pertain to.	User	New
Credit Memo				Changed
	Legal Entity	The Id of the optional Legal Entity.	System	New
	Credit Memo Number	Captures the custom credit memo number.	System	New
Billing Schedule				Changed
	Legal Entity	The Id of the optional Legal Entity.	System	New
Invoice				Changed
	Legal Entity	The Id of the optional Legal Entity.	System	New
Payment				Changed
	Legal Entity	The Id of the optional Legal Entity.	System	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
00220005	BIL-1539	You could not invoice your customers mid-billing cycle. A new field, Ready for Invoice Date Offset is introduced in Billing Preference object. This field provides flexibility in creating a custom Ready for Invoice Date. Refer to Billing Preferences for more details.
00220007	BIL-1709	Email Credit Memo Attachment callback class required you to set the billing contacts manually on the account.
N/A	BIL-1710	Billing Management generated the Billing Plan Line Items and Milestone Line Items with the default currency code instead of the currency code specified on the Quote.
CAS-03464-W6K7N3	BIL-1756	If you perform an Asset Based Operation by changing the Billing Rule, billing schedules were not updated to reflect the change,
N/A	BIL-1854	Forecast Billing Schedules were generated even for Products with Disable Asset Integration set to true.
N/A	BIL-1862	If you performed any Asset-based operations without changing the price of the Asset, Apttus Billing Management created a redundant billing schedule for the last billing period.
CAS-06008-D8L1K3	BIL-1868	You could generate manual credit memos for Informational Billing Schedules.
N/A	BIL-1905	You could not perform an Asset-Based Operation to change Billing Frequency from Single Period to Quarterly.
N/A	BIL-1907	If you performed multiple asset-based operations including changes to the billing frequency, the last billing schedule was generated with a negative fee amount.

Known Issues

There are no known issues in this release.

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