

APTTUS[®]

Billing Management on Salesforce Winter 2019 Release Notes

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About Release Notes

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

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

- [What's New](#) in *Billing Management on Salesforce Winter 2019 User Guide* or
- [What's New](#) in *Billing Management on Salesforce Winter 2019 Administrator Guide* or
- [What's New](#) in *Billing Management on Salesforce Winter 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)	5.3.199 5.199
Apttus Quote/Proposal-Configuration Integration (New)	11.2.310 11.310
Apttus Configuration & Pricing (New)	11.2.1673 11.1673
Apttus CPQ API	1.0.0080 10.80
Apttus Quote/Proposal-Asset Integration	6.5.0014 6.14
Apttus Proposal Management (New)	9.1.0197 9.197
Apttus Contract Management	9.1.0397 9.397
Apttus Contract-Configuration Integration (New)	11.2.0122 11.122
Apttus Quote/Proposal-Contract Integration (New)	7.0.0031 7.31

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 #ffc107; 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.

- [Billing Plans on the Cart](#)
- [Selecting Credit Memo Attachment Template and Email Template when Creating Direct Credit Memo](#)
- [Create Ad Hoc Invoices](#)
- [Revamped UI for Billing Plan Template](#)
- [Forecast Billing Schedules for Smart Cart](#)
- [Late Fees](#)
- [Changing Billing Frequency from Standard Frequency to Custom Billing Frequency](#)
- [Billing Schedules for Merged Assets](#)
- [Bundle Fee Amount Distribution for Co-Terminating Options](#)

Billing Plans on the Cart

You can directly create a billing plan to customize your billing arrangements from the cart page.

Get Started

For more information, refer to [Billing Plans from Cart](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Selecting Credit Memo Attachment Template and Email Template when Creating Direct Credit Memo

You can now select a credit memo document template and credit memo email template when creating a direct credit memo from the invoice.

Get Started

For more information, refer to [Creating Credit Memos from an Invoice](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Create Ad Hoc Invoices

With Apttus Billing Management you can create ad-hoc invoices. Ad-hoc invoices are useful when you want to invoice your customer for extra charges that are not linked to a billing schedule.

Get Started

For more information, refer to [Ad-hoc Invoices](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Revamped UI for Billing Plan Template

Billing Plan Template UI is enhanced with Salesforce Lightning components to provide a more user-friendly experience. You can create, edit and clone billing plan templates in the new UI.

Get Started

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

Forecast Billing Schedules for Smart Cart

With `forecastBilling` API, you can generate forecast billing schedules for Smart Cart. `forecastBilling` API submits an asynchronous batch job that generates forecast billing schedules for a large number of product line items.

Get Started

For more information, refer to [Forecasting Billing Schedules for Smart Cart](#) in *Billing Management on Salesforce Winter 2019 API Reference Guide*.

Late Fees

You can charge your customers a late fee if the invoice amount is not paid by the due date.

Get Started

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

Changing Billing Frequency from Standard Frequency to Custom Billing Frequency

While performing an ABO action, you can now change the billing frequency from a standard billing frequency to a custom billing frequency defined by a billing plan.

Get Started

For more information, refer to [Changing Standard Billing Frequency to Custom Billing Frequency](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Billing Schedules for Merged Assets

You can now merge two assets and bill your customers for a single merged asset.

Get Started

For more information, refer to [Billing Schedules for Merged Assets](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Bundle Fee Amount Distribution for Co-Terminating Options

For a bundle product, the Fee Amount is now calculated based on the Start Date and the Billing Frequency of the option products. This feature is available only for Bundles that have the same End Date for all the option products.

Get Started

For more information, refer to [Billing Schedules for Bundle Products](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Enhancements

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

- [Deprecated: Same Day Cancellation Billing System Property](#)
- [Wallet Enhancement: Rating Usage Inputs with Negative Quantity](#)
- [Delayed Usage: Description of Billing Schedules](#)
- [Billing Plan: Manual Asset Renewal Flow](#)

Deprecated: Same Day Cancellation Billing System Property

Same Day Cancellation system property is deprecated from Billing System Properties. This setting is moved to CPQ Config System Properties.

Get Started

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

Wallet Enhancement: Rating Usage Inputs with Negative Quantity

If you rate a usage input with a negative quantity, the rate amount is added back to your Wallet asset.

Get Started

For more information, refer to [Wallets for Usage Inputs](#) in *Billing Management on Salesforce Winter 2019 User Guide*.

Delayed Usage: Description of Billing Schedules

Billing Schedules created to capture delayed usage, now have a description copied from the existing billing schedules.

Get Started

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

Billing Plan: Manual Asset Renewal Flow

If you renew an asset using a billing plan, Billing Plan UI auto-populates all the billing plan details based on the existing billing plan.

Get Started

For more information, refer to [Billing Plans for Renewed Assets](#) in *Billing Management on Salesforce Winter 2019 User 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
Invoice			User	Changed
	Attachment Template ID	The optional Name of the Template to use when creating an attachment file for the Invoice.		New
	Email Template ID	The optional Name of the Email Template to use when creating the Email used to deliver the Invoice attachment file.		New
Invoice Line Item			System	Changed
	Product	ID of the corresponding product or service.		New
	Tax Code	ID of the Tax Code associated with the product or service. Only applicable for taxable items.		New
Credit Memo			User	Changed
	Credit Memo Attachment Template	The optional Name of the Template to use when creating an attachment file for the Credit Memo.		New
	Credit Memo Email Template	The optional Name of the Email Template to use when creating the Email used to deliver the Credit Memo attachment file.		New
Credit Memo Line Item			User	Changed
	Product	ID of the corresponding product or service.		New
	Tax Code	ID of the Tax Code associated with the product or service. Only applicable for taxable items.		New

Object	Field	Description	System/ User	New/ Changed
	Ship To	ID of the ship to account		New
	Sold To	ID of the sold to account		New
	Location	ID of the associated account location		
Late Fee		Object to capture late fees	User	New
	Name	Name of the late fee		
	Late Fee Type	Type of late fee		
	Late Fee Value	Value of the late fee. Can be amount or percentage		
Account			User	Changed
	Late Fee	Lookup of the late fee to apply		
Related A/R Transaction			System	Changed
	Source Late Fee Id	ID of the corresponding Late Fee		

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
CAS-17964-POY5C5	BIL-2417	Apttus Billing Management incorrectly calculated the Ready for Invoice Date of the renewed asset line items. This issue was observed when the asset was billed using a billing plan.
N/A	BIL-2559	You could not terminate a wallet with billing schedule status as Pending Billing.

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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