

APTTUS[®]

Order Management On Salesforce Spring 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 that you must consider before you proceed with the installation
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features that are introduced in this release, with links to Get Started topics that 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. These are the *minimum* required versions; later versions are also supported. The packages marked as **(New)** are new packages for this release and must be installed to upgrade to this version.

Product	Latest Certified Version
Apttus Approvals Management (Required if you are using Approvals)	8.0.0409 (8.409)
Apttus Configuration & Pricing (New)	10.6.1403 (10.1403) Spring 2018
Apttus Contract Management	9.0.0393.1 (9.393.1)
Apttus Contract-Configuration Integration (New) (Required if you are using CLM)	10.1.0103 (10.103)
Apttus CPQ API (New)	10.0.0080 (10.80)
Apttus CPQ Admin (New) (Required if you are using CPQ Admin Console)	5.8
Apttus CPQ Approvals Management (Required if you are using Approvals on CPQ objects)	6.5.0068 (6.68)
Apttus Order Management	1.0.0000 (1.0)
Apttus Promotion Management (Required if you are using Promotions)	1.0.0000 (1.0)
Apttus Proposal Management (New) (Required if you are using Proposal Management)	8.3.0166 (8.166)
Apttus Quote/Proposal Approvals Management	6.5.0004 (6.4)
Apttus Quote/Proposal-Asset Integration	6.5.0014 (6.14)
Apttus Quote/Proposal-Contract Integration (New)	8.1.0048 (8.48)
Apttus Quote/Proposal-Configuration Integration (New) (Required if you are using CPQ and Proposal Management)	10.2.0263 (10.263)

System Requirements and Supported Platforms

Apttus supports the following browsers:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox

Note: Internet Explorer is not supported.

Feature Summary

This release introduces the following updates to Order Management:

- [Customer Purchase Order \(PO\)](#)
- [Orders from Customer PO](#)
- [Partial Order Creation from Quotes or Agreements](#)
- [Workflows achieved using SOAP APIs](#)

Customer Purchase Order (PO)

This functionality provides you an ability to capture customer purchase orders, validate, or match against quotes or contracts, view validation issues and fix them. You can cancel or amend in-processing customer POs to add line items, change line items, cancel line items, and track change history.

The following table describes the feature enhancements:

Function	Description
Capture Customer Purchase Orders	<ul style="list-style-type: none"> • Capture raw purchase orders from customers • Add PDF or Email as attachments to Customer POs
Manage Validation / Enrichment Rules	<ul style="list-style-type: none"> • Create and manage rules to validate, match, and enrich PO • Add PO items against customer's existing contracts, Quotes, and other master data
Validate PO against Quotes/ Contracts	<ul style="list-style-type: none"> • Validate or enrich PO and PO items against customer's existing contracts, Quotes, or other master data
PO Exception or Issue Logs	<ul style="list-style-type: none"> • Capture errors or issues identified during data validation and enrichment of customer PO and PO Items
View PO header and line item validation issues	<ul style="list-style-type: none"> • View data validation issues for the header and line items
Fix data validation and match issues	<ul style="list-style-type: none"> • Allow users to fix data validation or matching issues • Maintain version history of changes for audit trail
Create or Generate Sales Orders	<ul style="list-style-type: none"> • Convert PO to single sales order • Auto convert PO to multiple sales orders based on split criteria • Create partial orders from a PO

Function	Description
Amend or Cancel Inflight Customer PO	<ul style="list-style-type: none"> Amend in-flight PO to add a line, change lines, cancel lines Cancel in-flight PO
Track orders and fulfillment against PO	<ul style="list-style-type: none"> Track ordered quantity by PO items Track fulfilled quantity by PO items

Get Started

For more information, refer to [Customer Purchase Orders](#) in the user guide.

Orders from Customer PO


This functionality gives you an ability to track ordered and fulfilled quantity at the PO line item level. You can generate one or more sales orders from the customer purchase orders either through UI or APIs.

Get Started

For more information, refer to [Customer Purchase Orders](#) in the user guide.

For more information about the APIs, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide*.

Partial Order Creation from Quotes or Agreements

 This feature enhancement is available only through APIs for Spring 2018 Release.

This functionality lets you generate partial orders from quotes or contracts using negotiated pricing. You can also track the committed and ordered quantity at the agreement or quote line item level.

Get Started

For more information about the APIs, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide*.

Workflows achieved using SOAP APIs

For more information about the APIs, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide*.

Data Model Changes

The following table lists the data model changes from the Winter 2017 release to Spring 2018 release.

Note

The System or User indicates whether the field is used by the System only (System) or if the field may be used for integration updates (User). The below given all fields are consumed by Users and updated by System.

Object	Fields	Description	State	Feature
Customer PO Sales Order Relation History		Captures the historical relationship between customer purchase orders and their associated sales orders as purchase orders get amended over time.	New	Customer Purchase Order
	Order	ID of the associated sales order	New	
	Purchase Order	ID of the associated purchase order	New	
Customer Purchase Order		Represents a Purchase Order associated with an account	Existing	
	Validation Errors ?	Indicates whether there are validation errors associated with the purchase order	New	
	Number Of Warnings	The number of warnings associated with the purchase order	New	
	Number Of Errors	The number of errors associated with the purchase order	New	
Customer PO Item		Represents a product or service item in a purchase order	Existing	
	Validation Errors ?	Indicates whether there are validation errors associated with the purchase order	New	
	Number Of Warnings	The number of warnings associated with the purchase order	New	
	Number Of Errors	The number of errors associated with the purchase order	New	

Object	Fields	Description	State	Feature
	Change Status	The po item change status	New	
	Fulfillment Status	The item fulfillment status	New	
	Fulfilled Quantity	The quantity fulfilled for the item	New	
Customer PO Issue Log		Represents an issue found when validating purchase order data	New	
Order		Represents an order associated with an account	Existing	Order
	Purchase Order	ID of the associated purchase order	New	
	PO Number	The purchase order number	Existing	
	PO Date	The purchase order date	Existing	
Order Line Item		Represents a product or service line item associated with an order	Existing	
	Purchase Order	ID of the associated purchase order	New	
	Purchase Order Item	ID Of the associated purchase order item	New	
Quote/ Proposal			Existing	Quote
	Intent	The intent associated with the quote/ proposal. It contains the following picklist values: <ul style="list-style-type: none"> • Order • Price Agreement • Contract 	New	
Price List Item		Represents a product entry in a price list.	Existing	PLI
	Sales Order Quantity	The Total quantity for which sales orders have already been created against the contract price list Item	New	

Object	Fields	Description	State	Feature
	Committed Quantity	The Quantity from Quote/Contract line items that was committed during price negotiation	New	
Agreement		Represents an agreement in the system	Existing	Agreement
	Intent	The intent associated with the agreement. It contains the following picklist values: <ul style="list-style-type: none"> • Order • Price Agreement • Contract 	New	
Data Enrichment Rule		Represents a single data enrichment rule in a validation/enrichment ruleset	New	Enrichment Rules
	Description	The description of the rule	New	
	Message	The help text message for the target object field	New	
	Required?	Flag to indicate whether the value is required in the target object field	New	
	Ruleset	ID of the associated rule set	New	
	Source Object Field	API name of the source object field which holds the value that will get set on the target object field	New	
	Target Object Field	API name of the target object field for which value needs to be set	New	
Data Validation/ Enrichment Ruleset		Represents a set of data validation and enrichment rules to validate and default values into objects	New	Data Validation and Enrichment
	Active	Indicates whether the ruleset is active	New	
	Description	The description of the rule set	New	
	Message	The help text message for the source object match criteria	New	

Object	Fields	Description	State	Feature
	Sequence	The sequence in which the rules will get executed	New	
	Source And Target Match Criteria	Criteria that will be used to match source and target data	New	
	Source Data Object	Data object using which target data will be validated or enriched	New	
	Target Object Filter Criteria	Filter criteria to get to the list of the data objects that need to be validated/enriched	New	
	Target Object Parent	Related parent object when the child object also needs to be validated and enriched	New	
	Target Object To Validate	Data object that needs to be validated and enriched	New	
Data Validation Rule		Represents a single data validation rule in a validation/enrichment ruleset	New	Validation Rules
	Description	The description of the rule	New	
	Error Type	The type of issue that will be logged in case validation fails. An error will mean that issue needs to be resolved before next process step	New	
	Match Operator	The operator used to match the value in the target object field against the value in the source object field	New	
	Message	The message that will be displayed to the user in case of error or warning	New	
	Ruleset	ID of the associated rule set	New	
	Source Object Field	API name of the source object field against which the target object field will be validated	New	
	Target Object Field	API name of the target object field for which value needs to be validated	New	

Resolved Issues

There are no resolved issues in this release.

Known Issues

There are no known issues in this release.

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