APTTUS®

Order Management on Salesforce Summer 2018 Release Notes

10 September 2018

Table of Contents

About Release Notes 3
Packages 4
System Requirements and Supported Platforms 5
Feature Summary 6
Managing CPO Validation and Enrichment Rules 6
Get Started 6
Mitigating Data Validation Issues 6
Get Started 6
Create Sales Order from Customer Purchase Order 6
Get Started 7
Order Fulfillment Line Lifecycle 7
Capture and Process Customer Purchase Orders 7
Create Partial Orders from Customer Price Agreement (Quote/Contract) 7
Intelligent Order Assistant (Max for Order Management) 8
Workflows achieved using SOAP APIs 8
Data Model Changes 9
Resolved Issues 12
Known Issues 13
Apttus Copyright Disclaimer 14

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)	9.0.0004 (9.4)
Apttus Configuration & Pricing **(New)**	10.7.1463 (10.1463) Summer 2018
Apttus Contract Management **(New)**	9.2.0410 (9.410)
Apttus Contract-Configuration Integration (Required if you are using CLM) **(New)**	10.2.0111 (10.111)
Apttus CPQ API **(New)**	10.1.0086 (10.86)
Apttus CPQ Admin (Required if you are using CPQ Admin Console) **(New)**	5.9
Apttus CPQ Approvals Management (Required if you are using Approvals on CPQ objects) **(New)**	9.0.0000 (9.0)
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)	8.5.0176 (8.176)
Apttus Quote/Proposal Approvals Management **(New)**	6.5.0004 (6.4)
Apttus Quote/Proposal-Asset Integration	6.5.0014 (6.14)
Apttus Quote/Proposal-Contract Integration **(New)**	8.1.0052 (8.52)
Apttus Quote/Proposal-Configuration Integration (Required if you are using CPQ and Proposal Management) **(New)**	10.3.0273 (10.273)

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System Requirements and Supported Platforms

Apttus supports the following browsers:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox

Note: Internet Explorer is not supported.

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Feature Summary

This release introduces the following updates to Order Management:

-
  - Managing CPO Validation and Enrichment Rules
  - Mitigating Data Validation Issues
  - Create Sales Order from Customer Purchase Order
  - Order Fulfillment Line Lifecycle
  - Capture and Process Customer Purchase Orders
  - Create Partial Orders from Customer Price Agreement (Quote/Contract)
  - Intelligent Order Assistant (Max for Order Management)
  - Workflows achieved using SOAP APIs

Managing CPO Validation and Enrichment Rules

User can configure the Data Validation and Enrichment Ruleset at the object level for Customer PO.

Get Started

For more information, refer to Managing CPO Validation and Enrichment Rules in the user guide.

Mitigating Data Validation Issues

User can view the data validation messages based on the data validation rules that are set while configuring a ruleset.

Get Started

For more information, refer to Mitigating Data Validation Issues in the user guide.

Create Sales Order from Customer Purchase Order

User can create one or multiple sales order from a customer purchase order so that the order can be delivered against the customer purchase request. This action is applicable only of the Customer PO is in "Accepted" or "Partially Processed" status.

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Get Started

For more information, refer to Managing Customer PO in the user guide.

Order Fulfillment Line Lifecycle

Order Fulfillment Line Lifecycle covers all the stages from the time a quote or order is created to the time when the services and goods are delivered and billed. **Fulfillment in Progress** flag helps to track all the intermediate steps of Order Fulfillment Line Lifecycle. If the value of Fulfillment in Progress is false, then the Fulfilled Quantity is rolled up from the Order Fulfillment Line Item to the Order Line Item, and the tracking is stopped.

Get Started

For more information, refer to Order Fulfillment Line Item Lifecycle in the user guide.

Capture and Process Customer Purchase Orders

Capture and Process Customer Purchase Orders feature allows the user with an ability to capture and process Customer Purchase Orders received from external B2B Systems. The capability involves:

- Capturing data from original purchase order obtained from external system for Apttus Order Processing.
- Accepting/Confirming customer purchase order so that the PO can be validated.

Get Started

For more information, refer to Creating Customer Purchase Orders in the user guide.

Create Partial Orders from Customer Price Agreement (Quote/Contract)

Create Partial Orders from Customer Price Agreement feature allows the user to create partial orders from Quote/Contract (with Intent=Price Agreement i.e. when contract price list is generated from Quote/Agreement). The user can:

- Select one or more line items and subset of quantity
- Select items from one or multiple quotes or contracts
- Track committed quantity and ordered quantity
- Track compliance

Get Started

For more information, refer to Creating Partial orders from Customer Price Agreement (Quote/Contract) in the user guide.

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Intelligent Order Assistant (Max for Order Management)

Intelligent Order Assistant is conversational interface developed using Apttus MAX bot technology. It is available embedded within web applications as well as on mobile devices through channels Slack, Skype etc. This page allows the user to perform various order management functions including:

- View Orders
- View Order Details

There are standard conversational flows available which can be modified at the project level.

Get Started

For more information, refer to Order Management Intelligent Order Assistant Summer 2018 Integration Guide.

Workflows achieved using SOAP APIs

- **Fetching Price Agreements**
  This API fetches price agreements based on the proposals or agreements.
- **Fetching Price Agreement Items**
  This API fetches price agreement items for a specified price agreement type.

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

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Data Model Changes

The following table lists the data model changes from the Spring 2018 release to Sumer 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
Proposal Line Item				
	Ordered Quantity	The total quantity for which sales orders have been created against the quote/ proposal line item when the order is accepted.	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO
	Fulfilled Quantity	The total quantity fulfilled for the order line items created against the quote/proposal line item.	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO

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Object	Fields	Description	State	Feature
	Fulfillment Status	The order fulfillment line status	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO
Proposal				
	Intent	The intent associated with the quote/ proposal.	New	Generating the Contract Price List
Agreement Line Item	Ordered Quantity	The total quantity for which sales orders have been created against the agreement line item when the order is accepted.	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO
	Fulfilled Quantity	The total quantity fulfilled for the order line items created against the agreement line item.	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO

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Object	Fields	Description	State	Feature
	Fulfillment Status	The order fulfillment line status.	New	Create Partial Order Using PriceAgreement Page & Create Orders From Customer PO
Agreement	Intent	The intent associated with the quote/ proposal.	New	Generating the Contract Price List

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Resolved Issues

There are no resolved issues in this release.

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Known Issues

There are no known issues in this release.

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