

360 Contract Billing v2019.2 — Release Notes

New Features and Improvements in this Release

New Feature: Sites

Specify a physical or geographic location for a customer that is tracked for billing, support or warranty on sale transaction lines and contract lines.

A *Use Sites* checkbox on the *360 Contract Billing Preferences* page enables this feature.

Create new Site records from a Customer record, or from a sale transaction line itself.

A Site record has fields to specify *Customer, Contact, Country, Addressee, Address 1, Address 2, City, State, and Zip*.

When a *Site* is specified on a sale transaction line containing a contract item, that *Site* value is automatically transferred to the contract line when it is created, and then to the recurring invoice line so both you and the customer can match billed items with customer sites. The *Site* on a contract line is also automatically transferred to renewal transaction lines and rollover contract lines.

A *Related Sites* link on a sale transaction (under the *Related Records* subtab) or on a contract record (in the *Sites and Devices* field group) allows you to view Site records related to the sale transaction or to the contract lines of the contract.

New Feature: Devices

Enter device numbers for equipment or licenses typically associated with a recurring charge that may also require specific identifying information to be tracked for billing, support or warranty on sale transaction lines and contract lines.

A *Use Devices* checkbox on the *360 Contract Billing Preferences* page enables this feature.

Once new *Device #s* are entered on Purchase Order or Item Receipt lines, a scheduled script creates Device records.

Device #s can be specified on sale transaction lines that contain contract or non-contract items. When specified for a line containing a contract item, those *Device #* values are automatically transferred to the contract line when it is created, and then to the recurring invoice line so both you and the customer can match billed items with device numbers. The *Device #s* on a contract line are also automatically transferred to renewal transaction lines and rollover contract lines.

A *Related Devices* link on a sale transaction (under the *Related Records* subtab) or on contract and contract line records (in the *Sites and Devices* field group) allows you to view Device records related to the sale transaction or to the contract lines of the contract.

Similarly, a *Related Transactions* link on a Device record allows you to view transactions related to the device.

Billing Period Start and End Dates populated on Initial Invoice Lines

On initial invoice lines (created from an initial sales order) that bill contract items, the *Billing Period Start Date* and *Billing Period End Date* transaction line fields are now populated automatically with the dates representing the initial billing period. The *Billing Period Start Date* is populated with the line's *Start Date*, and the *Billing Period End Date* is populated with the day before the line's *First Recurring Bill Date*, or the line's *End Date* if the *First Recurring Bill Date* is empty.

If *Bill with First Recurring* is checked on an initial sales order and invoice line, then the *Billing Period Start Date* and *Billing Period End Date* fields are not populated since that period will be billed on the first recurring invoice.

360 Contract Billing v2019.2 — Release Notes

Update to 360CB Contract and Contract Line Forms for clients using 360CB Revenue Management

If you are using Advanced Revenue Management (ARM) and the 360CB Revenue Management plug-in, you can now view 360CB Revenue Element Source records associated with a Contract and Contract Line under the Contract and Contract Line forms' *Revenue Management* subtab. Having these associated Source records available on Contract and Contract Line records allows you to more easily locate related Revenue Element records through the Source record.

Bug Fixes in this Release

Total Contract Value and Gross Amount Billed to Date fields now emptied on Rollover Contract Lines

This fix resolves an issue in which, when a rollover contract line was automatically created for a contract line with an *End-of-Term Action* of "Rollover," the replaced contract line's *Total Contract Value* and *Gross Amount Billed to Date* were copied to the rollover contract line. Instead, the rollover line's *Total Contract Value* and *Gross Amount Billed to Date* fields are now emptied.

Prorated Final Billing of Replaced Contract Line and Prorated First Billing of Rollover Contract Line now equal a Normal Billing Period Amount

This fix resolves an issue in which the prorated final billing of a replaced contract line and the prorated first billing of the rollover contract line that replaced it would sometimes not equal a normal billing period amount. Now, if the rollover contract line's *Billing Frequency* is the same as that of the contract line it replaces, and the replaced contract line's *Total Contract Value* and *Gross Amount Billed to Date* are populated, the rollover contract line will no longer be independently prorated. Instead, it will be calculated using the final billing period amount of the replaced contract line and the normal *Contract Rate* of the contract lines, so that the customer is billed their normal billing period amount.

This fix applies to both rollover and rollover-until-renewal contract lines.

Invoicing Map/Reduce Script Final Billing Amount Variance issue fixed

This fix resolves an issue in which a contract line's final invoice was sometimes not created because the billed amount varied significantly from the amount expected.

Continue to the next pages for upgrade recommendations and instructions, as well as known issues. We recommend that you carefully review not only these release notes, but those for previous versions if you are not upgrading from the most recent version.

Admin and user documentation for 360 Contract Billing is available online. To obtain access, please send an email request to support@360cloudsolutions.com or to your primary contact at 360 Cloud Solutions.

360 Contract Billing v2019.2 — Release Notes

Upgrade Recommendations and Instructions

When upgrading from 360 Contract Billing v2019.1 to 2019.2, please follow the recommendations below. If upgrading from a previous version, it is likely that additional steps are necessary to accommodate those incremental versions. For additional help, please email support@360cloudsolutions.com. This will automatically create a case in our system and the team will reach out directly.

If you have any questions regarding how to prepare to use these new features, please send an email to support@360cloudsolutions.com or to your primary contact at 360 Cloud Solutions.

Enabling the Sites and/or Devices features

To enable the new Sites and/or Devices feature:

1. Go to 360 Contract Billing → Setup → 360 Contract Billing Preferences.
2. Click the **Edit** button.
3. In the *Sites & Devices* field group:
 - To enable the Sites feature, check the **Use Sites** checkbox.
 - To enable the Devices feature, check the **Use Devices** checkbox.
4. Click the **Save** button.

Setting up Custom Forms

Make the following modifications to preferred forms and any other forms your organization uses. Refer to 360CB forms for recommended field positioning on each form.

Purchase Order, Item Receipt, Opportunity, Estimate (Quote), Sales Order, Invoice, Item Fulfillment and Return Authorization forms

- If you are using the Sites feature
 - Show the **Related Sites** transaction body field. (The 360CB transaction forms show this field on the *Related Records* subtab. Since the Item Fulfillment record type does not have a *Related Records* subtab, it is shown on the *Custom* subtab.)
 - Show the **Site** transaction list field on the *Items* sublist.
- If you are using the Devices feature
 - Show the **Related Devices** transaction body field. (The 360CB transaction forms show this field on the *Related Records* subtab. Since the Item Receipt and Item Fulfillment record types do not have a *Related Records* subtab, it is shown on the *Custom* subtab.)
 - Show the **Device #** transaction line field on the *Items* sublist.
 - Show the **All Devices Created** transaction line field on the *Items* sublist **only on** Purchase Order and Item Receipt forms.

Contract form

- If you are using the Sites feature
 - Show the **Related Sites** field. (The 360CB Contract Form shows this field in the *Sites and Devices* field group.)
- If you are using the Devices feature
 - Show the **Related Devices** field. (The 360CB Contract Form shows this field in the *Sites and Devices* field group.)

360 Contract Billing v2019.2 — Release Notes

Contract Line form

- If you are using the Sites feature
 - Show the **Site** field. (The 360CB Contract Line Form shows this field in the *Sites and Devices* field group.)
- If you are using the Devices feature
 - Show the **Device #** field. (The 360CB Contract Line Form shows this field in the *Sites and Devices* field group.)
 - Show the **Related Devices** field. (The 360CB Contract Line Form shows this field in the *Sites and Devices* field group.)

Scheduling the script to create new Device records

If you are using the Devices feature, schedule the 360CB MR Create Devices script deployment. This script will create Device records entered on Purchase Order and Item Receipt lines, and will then automatically check the *All Devices Checkbox* on any lines for which all Device records have been created.

1. Go to Customization → Scripting → Script Deployments.
2. Expand the *Filters* panel and select a **Type** of “Map/Reduce.” (All other filters should be set to “- All -.”)
3. Locate the *360CB MR Create Devices* script in the list and click the **Edit** link to the left of its name.
4. On the Script Deployment page for *360CB MR Create Devices*, set **Status** to “Scheduled.”
5. In the *Schedule* subtab, select **Daily Event**.
6. Make sure **Repeat every ____ day(s)** is selected and enter “1” in the field so the script is scheduled every 1 day.
7. Make sure **Start Date** is set to today’s date or any earlier date.
8. Set **Start Time** to “1:00 am.”
9. Set **Repeat** to “Every 15 minutes.”
10. Click the **No End Date** checkbox. The **End By** field should be emptied automatically.
11. Click the **Save** button.

Site and Device fields transferred to recurring invoice lines only via the 360CB MR Create Invoices script

Site and **Device #** field values on contract lines are transferred to recurring invoice lines **only** via the newer *360CB MR Create Invoices* map/reduce script. They are **not** transferred by the older *360CB SC Create Invoices* scheduled script. Therefore, if you are using the Sites or Devices features, you **must** use the *360CB MR Create Invoices* map/reduce script to bill contracts and create recurring invoices.

More information regarding Sites and Devices

For more information regarding Sites and Devices, see the **Admin and user documentation** for 360 Contract Billing online. To obtain access, please send an email request to support@360cloudsolutions.com or to your primary contact at 360 Cloud Solutions.

360 Contract Billing v2019.2 — Release Notes

Known Issues

Related Transactions link on a Device record will not show Item Fulfillments

The *Related Transactions* link on a Device record will not reliably show Item Fulfillments on which the *Device #* appears. If you need to determine if an Item Fulfillment transaction contains a certain *Device #*, you can determine that by looking for the Sales Order from which the Item Fulfillment was created in the Device record's *Related Transactions* list.

Changing Bill Days in Advance does not update already-populated Rollover Creation Date values

When changing a contract's *Bill Days in Advance*, only contract lines due to roll over and with an empty *Rollover Creation Date* are updated. Contract lines for which *Rollover Creation Date* is already populated will not be. If the *Bill Days in Advance* is increased, previous *Rollover Creation Date* values may not create a rollover contract line in time for its first billing.

First Recurring Bill Date issue

When creating a transaction such a sales order, if an existing *Contract* is selected **after** a contract item has been selected on a transaction line, the line's *First Recurring Bill Date* may not be calculated correctly. This issue can be avoided by selecting an existing *Contract* (or checking *Start New Contract*) **before** adding any contract items. In fact, entering the data in that sequence is a recommended best practice.

Rate may not be Prorated correctly when changing from Start New Contract to specifying an existing Contract

Under certain conditions, a contract item's *Rate* on a transaction line may not be prorated as expected. If a change from *Start New Contract* to selecting an existing *Contract* results in a change in *Billing Day*, the rate on an already-committed transaction line may not be recalculated. Until this issue is resolved, always specify the *Contract* or check *Start New Contract* before adding any contract items.

If using the 360CB Revenue Management feature

In-Contract Actions that replace existing contract lines

360CB Revenue Management does not currently support adjusting revenue recognition plans when a contract line is replaced or canceled before its end date.

Contract Line Adjustments

360CB Revenue Management does not currently support adjusting revenue recognition plans when a discount or markup is applied to the recurring billing of contract line through a Contract Line Adjustment.

Contract Credits

360CB Revenue Management does not currently support adjusting revenue recognition plans when a Contract Credit is applied to a recurring invoice.

Returned contract items

360CB Revenue Management does not currently support adjusting revenue recognition plans when the partial or full quantity of a contract line is returned using a Return Authorization or Item Receipt.