APTTUS®

X-Author Contracts for Cloud on Salesforce Spring 2018 MR Release

Notes

17 July 2018

Table of Contents

About Release Notes

Apttus Release Notes contain the following information about this release:

- **Packages**: This table consists of packages that are required to upgrade to this release.
- **System Requirements and Supported Platforms**: Information pertaining to the requirements and recommendations you must consider before you proceed with the installation of X-Author Contracts for Cloud.
- **Feature Summary**: Provides high-level descriptions of new features and enhancements to existing features, with links to Get Started topics to help you set up and use the new feature or enhancement.
- **Resolved Issues**
- **Known Issues**

ⓘ This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

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 per feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version
Apttus X-Author for Contracts Cloud **(New)**	1801.5
Apttus Contract Management **(New)**	9.2.0406

System Requirements and Supported Platforms

Your computer must meet the minimum requirements listed below to use X-Author Contracts for Cloud.

> ⚠ Microsoft Office 365 Online or Cloud applications do not support plugins.

System Requirement	Minimum Supported Version
Mac OS	El Capitan version 10.11.3
Microsoft Office	Microsoft Word 2016 version 15.41.0 and later

> ⓘ New features and technologies are continuously deployed in new releases by Apttus X-Author Contracts and they are supported by Apttus where the associated Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its own support for any Office version, subsequent new Apttus releases will no longer be developed, tested, or committed to support the application, on that version.

Feature Summary

The following features are new to X-Author Contracts for Cloud in this release:

- Managing Templates

Managing Templates

You can connect to Apttus Contract Management and open or create agreement document templates. You can take the following actions on agreement templates:

- **Creating Templates:** A template is the standard frame or blueprint of an agreement or clause. The template document can be used to create new agreements or new clauses. X-Author Contracts has feature for creating templates, which can later be used for creating an agreement, a clause or a supporting document can be used to create new agreements or new clauses.
- **Opening Templates:** You can open an agreement template from Contract Management and make changes to it.
- **Checking in Templates:** You can check in agreement templates to Contract Management to create new templates or update the existing one.
- **Inserting Clauses in a Template:** You can create reusable blocks of modular text- called clauses, that can be used across multiple agreements. After creation, clauses can be inserted in the agreement template from the Playbook and conditional logic can be used to control how they are inserted in the agreement. Clauses can be simple or "smart." If a clause needs to be left open for editing during negotiation then you can mark it as "smart." Smart clauses can be edited by both the parties involved in the negotiation and can be reconciled.
- **Inserting Fields in a Template:** Using Insert Fields you can insert merge fields in your template. Merge fields represent the contractual terms and metadata from your Agreement record in Apttus Contract Management that make it into the generated contract document. As a template administrator, you can build your template to include fields, either as static text or as content-control bounded "smart" fields that can be changed and reconciled to the Agreement record during the negotiation process.
- **Cloning Templates:** You can use an existing template record to clone a template and create a new template.
- **Marking Clauses:** You can mark a clause to make it smart. When you mark a clause, it acquires a content control border and smartness property. When you don't want to add a clause to the playbook but still want it to be smart in the context of an agreement document, you can Mark that clause.

Get Started

For details on how to use and manage templates, refer to Managing Templates in X-Author Contracts for Cloud on Salesforce Spring 2018 MR User Guide.

Resolved Issues

The following table represents the resolved issues in this release.

Case Number	Description	Apttus Internal ID
N/A	When you clicked on 'More' menu and tried to insert a clause in an agreement, nothing happened. This issue is now resolved.	XAJS-2138
N/A	When you downloaded an agreement document and opened it in X-Author Contracts, it did not get automatically locked as expected and hence you could not edit it. This issue is now resolved.	XAJS-2111, XAJS-2100, and XAJS-1549
N/A	When you opened a document in X-Author Contracts using Microsoft Word version 16.x, the document did not get locked and you saw an error. This issue is now resolved.	XAJS-1844

The following table lists the known issues resolved from the previous release.

Apttus Internal ID	Description
XAJS-1090	When you redlined the text in a document and then checked it in as final with "Create PDF" selected, the final PDF output still showed redlines. This issue is now resolved.
XAJS-1223	If you clicked List Agreements tab, you saw PDF documents for download. This issue is now resolved. You will now see, only Word documents under the List Agreements tab.

Known Issues

The following table lists the known issues.

Apttus Internal ID	Issue
XAJS-2222	When you open an agreement and click the Doc Fields tab, you see an error.
XAJS-2215	When you insert a clause containing a lookup field, in an agreement document, you see an error.
XAJS-1333	When attempting to log in, if the user profile does not have a phone number, you see an object reference error.

Apttus Copyright Disclaimer