

# **APTTUS**

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## **X-Author for Excel October 2017 Release Notes**

30 October 2017

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# About Release Notes

Apttus Release Notes contain the following information about this release:

- [Installation Components](#): 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.
- [Feature Summary](#): 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](#)




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# Installation Components

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	Version	Product Edition
Salesforce Managed Packages	Apttus X-Author For Excel	4.40.1	Power Admin Enterprise Essentials Presto
	Apttus X-Author Designer for Excel	1.9	Power Admin Enterprise Essentials Presto
	Apttus X-Author for Excel Document Generation	1.0	Presto
	Apttus X-Author for Excel (Power Admin)	1.0	Power Admin
Microsoft Dynamics Managed Solution	XAuthorForExcelSolution_0_1	1.0	

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	Product	Version	Product Edition
<p>Microsoft Office Add-in (Supports Salesforce, Microsoft Dynamics and Apttus Intelligent Cloud™)</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  If you have a Microsoft Dynamics only version and want to upgrade, you must first uninstall the add-in.                 </div>	Apttus X-Author for Excel: Runtime Only (English) <b>(New)</b>	6.0.1102	Power Admin Enterprise Essentials Presto
	Apttus X-Author for Excel: Designer + Runtime Add-in (English) <b>(New)</b>	6.0.1102	Power Admin Enterprise Essentials Presto

# System Requirements and Supported Platforms

Apttus X-Author for Excel is an on-demand application that is accessed via Microsoft Excel. The following table lists the minimum requirements for installing and using X-Author for Excel.

<b>Requirement</b>	<b>Version</b>	<b>Microsoft Office Version</b>
Operating System	Windows 10	Office 2007, 2010, 2013, 2016
	Windows 8.1	Office 2007, 2010, 2013, 2016
	Windows 8	Office 2007, 2010, 2013, 2016
	Windows 7	Office 2007, 2010, 2013

# Feature Summary

With this release, Apttus adds support for Apttus Intelligent Cloud. This single Microsoft Office Add-in will now support all environments (Salesforce, Microsoft Dynamics, Apttus Intelligent Cloud).

The following table lists features and their availability on different environments.

<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>	<b>Supported in Apttus Intelligent Cloud</b>
Upgrade to Packages or Solutions	Yes	Yes	No
Licensing	Yes	No	No
Google Sheets	Yes	No	No
Presto	Yes	No	No
Edit in Excel	Yes	Yes	Yes
Upgrade installation of client	Yes	Yes	Yes
Appearance of X-Author for Excel Designer and Runtime Add-ins	Yes	Yes	Yes
Installation/Uninstallation of Client exe	Yes	Yes	Yes
Installation/Uninstallation of packages or solutions	Yes	Yes	No
Designer: Create new App	Yes	Yes	Yes

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Designer: Open Existing App	Yes	Yes	Yes
Designer: Change App Type	Yes	No	No
Designer: Quick App	Yes	Yes	Yes
Designer: Data Migration Wizard	Yes	Yes	Yes
Designer: Object selection dialog			
<ul style="list-style-type: none"> <li>For Salesforce: Salesforce Objects</li> </ul>	Yes	Not applicable	Not applicable
<ul style="list-style-type: none"> <li>For Microsoft Dynamics and Apttus Intelligent Cloud: Data Objects</li> </ul>	Not applicable	Yes	Yes
Designer: Display Map (Add /Update/Remove fields)	Yes	Yes	Yes
Designer: Display Map (Vertical Map)	Yes	Yes	Yes
Designer: Display Map (Horizontal Map)	Yes	Yes	Yes
Designer: Display Map (Options tab)	Yes	Yes	Yes
Designer: Matrix Map	Yes	Yes	No



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<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>	<b>Supported in Apttus Intelligent Cloud</b>
Designer: Save Map (Add Display Map Fields)	Yes	Yes	Yes
Designer: Save Map (Add Matrix Map Sections)	Yes	Yes	No
Designer: Save Map (Add Other Fields)	Yes	Yes	Yes
Designer: Save Map (Add Components)	Yes	No	No
Display Filters	Yes	Yes	Yes
Favorite Filter	Yes	Yes	Yes
Designer: Actions	Yes	Yes	Yes
Designer: Actions > Add Row action	Yes	Yes	Yes
Designer: Actions > Check-In action	Yes	Yes	No
Designer: Actions > Check-Out action	Yes	Yes	No
Designer: Actions > Clear action	Yes	Yes	Yes
Designer: Actions > Data Set action	Yes	No	No

<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>	<b>Supported in Apttus Intelligent Cloud</b>
Designer: Actions > Delete action	Yes	Yes	No
Designer: Actions > Display action	Yes	Yes	Yes
Designer: Actions > Macro action	Yes	Yes	Yes
Designer: Actions > Paste action	Yes	Yes	Yes
Designer: Actions > Paste Source Data action	Yes	Yes	Yes
Designer: Actions > Query action	Yes	Yes	Yes
Designer: Actions > Salesforce Method action	Yes	Not applicable	Not applicable
Designer: Actions > Save action	Yes	Yes	Yes
Designer: Actions > Save Attachment action	Yes	Yes	No
Designer: Actions > Search and Select action	Yes	Yes	Yes
Designer: Actions > Switch Connection action	Yes	No	No
Designer: Action Flow	Yes	Yes	Yes

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<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>	<b>Supported in Apttus Intelligent Cloud</b>
Designer: Action Flow > Display Apttus CPQ Action	Yes	Not applicable	Not applicable
Designer: User Menu (Groups & Buttons)	Yes	Yes	Yes
Designer: User Menu > Add Columns & Display Chatters	Yes	Chatter is not applicable for Microsoft Dynamics. Add Columns menu is supported as part of matrix map.	Chatter is not applicable for Apttus Intelligent Cloud. Add Columns menu is supported as part of matrix map.
Designer: App Settings	Yes	Yes	Yes
Designer: App Access	Yes	No	No
Designer: Migrate (Import / Export)	Yes	Yes	Yes
Designer: Sync App Feature	Yes	Yes	Yes
Designer: Data Migration App	Yes	Yes	Yes
Designer: Preview	Yes	Yes	Yes
Designer: Support (General Settings / Change Source)	Yes	Yes	Yes

<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>	<b>Supported in Apttus Intelligent Cloud</b>
Runtime Only: Removal of Designer tab	Yes	Yes	Yes
Runtime: Open Existing Apps	Yes	Yes	Yes
Runtime: App Search	Yes	Yes	Yes
Runtime: Execute Apps - Render Data from CRM	Yes	Yes	Yes
Runtime: Execute Apps - Save Data to CRM	Yes	Yes	Yes
Runtime: Execute Apps - Appearance of buttons	Yes	Yes	Yes
Runtime: Execute Apps - Offline Mode	Yes	Yes	Yes
Runtime Save: Highlighting unsaved records which have errors	Yes	Yes	Yes
Runtime: Performance (Rendering Records for List App)	Yes	Yes	Yes
Runtime: Performance (Updating Records for List App)	Yes	Yes	Yes
Runtime: Performance (Deleting Records for List App)	Yes	Yes	Yes

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Runtime: Support (General Settings / Change Source)	Yes	Yes	Yes
UX/UI/Internationalization	Yes	Yes	Yes
<p>Lookup field with multiple entity support</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Customer Id field on Account, Opportunity, Contact, Invoice, Contract and Case</li> <li>• Regarding ObjectId: All Activity Entities (Task, Phone Call, Appointment, Email, Fax, Service Activity, Letter)</li> <li>• Connection From and Connection To: Connection Entity</li> </ul>	Not applicable	Yes	No

## Resolved Issues

The following table represents resolved issues for the release dated: October 26, 2017

Case Number	Description	Apttus Internal ID
214682	<p>While updating data in offline mode and trying to connect later, a new record is created instead of updating existing record.</p> <p>This issue is now resolved. Updating data in offline mode and later connecting to Salesforce updates the records correctly.</p>	AB-3073
214541	<p>While updating data in offline mode and trying to connect later, a record is not updated.</p> <p>This issue is now resolved. Updating data in offline mode and later connecting to Salesforce updates the records correctly.</p>	AB-3081
	<p>Objects records were not getting completely rendered in X-Author for Excel. There was a mismatch of records while comparing the org and X-Author for Excel.</p> <p>This issue is now resolved. All records are rendering as expected.</p>	AB-3093

# Known Issues

The following table represents known issues on release dated: October 26, 2017.

<b>Apttus Internal ID</b>	<b>Description</b>
AB-2976	The Datetime field filter is not working in Microsoft Dynamics.
AB-2999	'OR' condition in filters is not working in Microsoft Dynamics. Workaround: Define filter logic within brackets. Example: (1 OR 2), ((1 AND 2) OR 3), ((1 OR 2) AND 3)
AB-3006	Save map with static by dynamic or dynamic by static matrix components cannot be saved.
AB-3054	Highlighting unsaved records is not cleared, after rendering records in Apttus Intelligent Cloud environment.
AB-3068	Show Query Filters in Display action is not working for Apttus Intelligent Cloud.

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