

**APTTUS**

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**X-Author for Excel Summer 2017  
Release Notes**

11 August 2017

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## Release Notes

Apttus Release Notes contain the following information about this release:

- [Installation Components](#): that are required to upgrade to this release.
- [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](#).


# 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 Microsoft Dynamics Managed Solution	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
	XAuthorForExcelSolution_0_1	1.0	

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	Product	Version	Product Edition
Microsoft Office Add-in (Supports Salesforce and Microsoft Dynamics CRM)	Apttus X-Author for Excel: Runtime Only (English) <b>(New)</b>	5.2.0811	Power Admin Enterprise Essentials Presto
	Apttus X-Author for Excel: Designer + Runtime Add-in (English) <b>(New)</b>	5.2.0811	Power Admin Enterprise Essentials Presto
Microsoft Office Versions	2016 2013 2010		
Supported Operating System	Windows 10 Windows 8.1 Windows 8 Windows 7		

 If you have a Microsoft Dynamics only version, you must uninstall the add-in before upgrading to 5.2.0811 or later.

# Minimum Supported Versions

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

# Feature Summary

With this release, Apttus provides one single Microsoft Office Add-in for all environments (Salesforce, Microsoft Dynamics).

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>
Upgrade to Packages or Solutions	Yes	Yes
Licensing	Yes	No
Google Sheets	Yes	No
Presto	Yes	No
Edit in Excel	Yes	Yes
Upgrade installation of client	Yes	Yes
Appearance of X-Author for Excel Designer and Runtime Add-ins	Yes	Yes
Removal of Designer tab	Yes	No
Installation/Uninstallation of Client exe	Yes	Yes
Installation/Uninstallation of packages or solutions	Yes	Yes
Designer: Create new App	Yes	Yes

<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>
Designer: Open Existing App	Yes	Yes
Designer: Change App Type	Yes	No
Designer: Quick App	Yes	Yes
Designer: Data Migration Wizard	Yes	Yes
Designer: Objects	Yes	Yes
Designer: Display Map (Add/Update/Remove fields)	Yes	Yes
Designer: Display Map (Vertical Map)	Yes	Yes
Designer: Display Map (Horizontal Map)	Yes	Yes
Designer: Display Map (Options tab)	Yes	Yes
Designer: Matrix Map	Yes	Yes
Designer: Save Map (Add Display Map Fields)	Yes	Yes
Designer: Save Map (Add Matrix Map Sections)	Yes	Yes
Designer: Save Map (Add Other Fields)	Yes	Yes
Designer: Save Map (Add Components)	Yes	No
Display Filters	Yes	Yes



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<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>
Favorite Filter	Yes	Yes
Designer: Actions	Yes	Yes
Designer: Actions > Add Row action	Yes	Yes
Designer: Actions > Check-In action	Yes	Yes
Designer: Actions > Check-Out action	Yes	Yes
Designer: Actions > Clear action	Yes	Yes
Designer: Actions > Data Set action	Yes	No
Designer: Actions > Delete action	Yes	Yes
Designer: Actions > Display action	Yes	Yes
Designer: Actions > Macro action	Yes	Yes
Designer: Actions > Paste action	Yes	Yes
Designer: Actions > Paste Source Data action	Yes	Yes
Designer: Actions > Query action	Yes	Yes
Designer: Actions > Salesforce Method action	Yes	Not applicable
Designer: Actions > Save action	Yes	Yes
Designer: Actions > Save Attachment action	Yes	Yes
Designer: Actions > Search and Select action	Yes	Yes

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics
Designer: Actions > Switch Connection action	Yes	No
Designer: Action Flow	Yes	Yes
Designer: Action Flow > Display Apttus CPQ Action	Yes	Not applicable
Designer: User Menu (Groups & Buttons)	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.
Designer: App Settings	Yes	Yes
Designer: App Access	Yes	No
Designer: Migrate (Import / Export / <a href="#">Validate App</a> )	Yes	Yes
Designer: Sync App Feature	Yes	Yes
Designer: CPQ Data Migration App	Yes	Yes
Designer: Preview	Yes	Yes
Designer: Support (General Settings / Change Source)	Yes	Yes
Runtime: Open Existing Apps	Yes	Yes

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<b>Functional Features</b>	<b>Supported in Salesforce</b>	<b>Supported in Microsoft Dynamics</b>
Runtime: App Search	Yes	Yes
Runtime: Execute Apps - Render Data from Salesforce	Yes	Yes
Runtime: Execute Apps - Save Data to Salesforce	Yes	Yes
Runtime: Execute Apps - Appearance of buttons	Yes	Yes
Runtime: Execute Apps - Offline Mode	Yes	Yes
Runtime Save: Highlighting unsaved records which have errors	Yes	Yes
Runtime: Performance (Rendering Records for List App)	Yes	Yes
Runtime: Performance (Updating Records for List App)	Yes	Yes
Runtime: Performance (Deleting Records for List App)	Yes	Yes
Runtime: Support (General Settings / Change Source)	Yes	Yes
UX/UI/Internationalization	Yes	Yes

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics
<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

## Resolved Issues

There are no resolved issues in this release.

# Known Issues

The following table represents known issues on release dated: August 11, 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.

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