

APTTUS

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

08 December 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	4.4 0.1	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

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	Product	Version	Product Edition
Microsoft Dynamics Managed Solution	XAuthorForExcelSolution_0_1	1.0	
<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>	<p>Apttus X-Author for Excel: Runtime Only (English) (New)</p>	6.0 .12 07	<p>Power Admin Enterprise Essentials Presto</p>
	<p>Apttus X-Author for Excel: Designer + Runtime Add-in (English) (New)</p>	6.0 .12 07	<p>Power Admin Enterprise Essentials Presto</p>

System Requirements and Supported Platforms

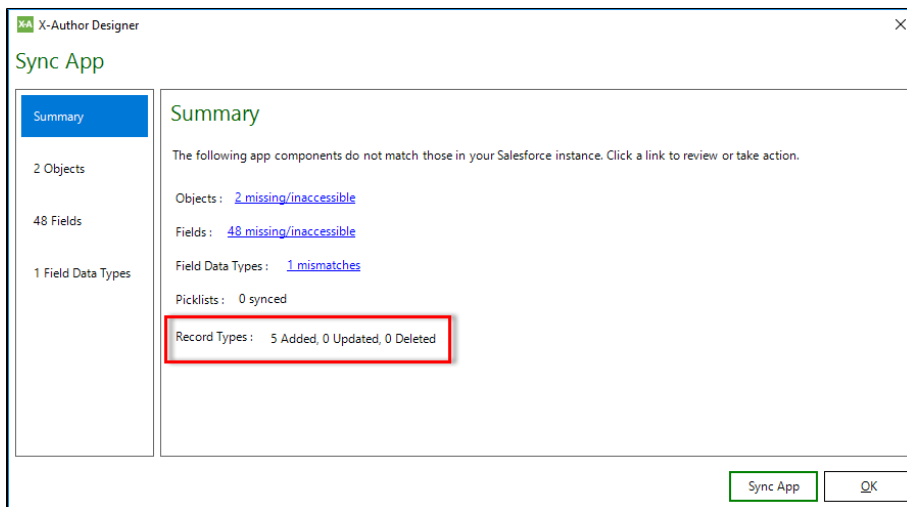
Apttus X-Author for Excel is an on-demand application that is accessed via Microsoft Excel. The following table lists the minimum requirements for installing and using X-Author for Excel.

Requirement	Version	Microsoft Office Version
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

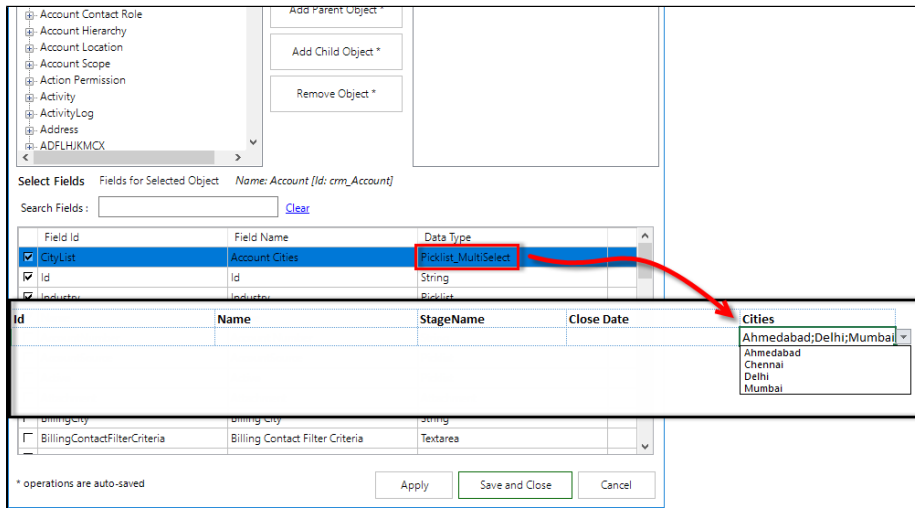
Record Type Support in App Sync

Using Sync App, you can now view record type data mismatches between your app and environment. After syncing, the record type count is displayed in the Summary Section as Added, Updated or Deleted. Adding, updating or removing record type picklist options, the changes are reflected.



Multiselect Picklist Datatype in Apttus Intelligent Cloud

Multiselect picklist datatype has been added in Apttus Intelligent Cloud. You can select more than one value in all Multiselect picklist fields. These values are displayed in a single cell separated by a semicolon, thus saving multiple values selected for a cell.



Relational Fields support in Delete Action filters

You can now select relational fields from the Delete action filter for a selected object.

Release Notes

X-Author Designer

Delete Action

Action Name :

Save Map:

Object:

Filters

	Object and Field	Value Type	Operator	Value	
1	<input type="text" value="Account"/>	<input type="text" value="Static"/>	<input type="text" value="equals"/>	<input type="text"/>	<input type="text" value="✗"/>
2	<input type="text" value="Opportunity.Account"/>	<input type="text" value="Static"/>	<input type="text" value="equals"/>	<input type="text"/>	<input type="text" value="✗"/>


[Add Row](#) [Clear All](#) [Add Filter Logic](#)

Warning : Delete Action will delete all records retrieved for Opportunity if there are no filters defined

Prompt confirmation message before deleting record(s)

Progress Indicator for Delete Action

Previously, when deleting large number of records the system froze during the process and became active after completion of the process. A progress indicator has been implemented thus showing you the progress of the deletion process.

Stage	Opportunity ID						
Prospecting	0060H00000kcV9wQAE						
Prospecting	0060H00000kcV9xQAE						
Prospecting	0060H00000kcV9yQAE						
Prospecting	0060H00000kcV9zQAE						
Prospecting		 Performing " DELETE " operation on Salesforce. Processing 400 of 1646 ...					
Prospecting							
Prospecting							
Prospecting	UUUUUUUUUUUkCVA3QAM						
Prospecting	0060H00000kcVA4QAM						
Prospecting	0060H00000kcVA5QAM						
Prospecting	0060H00000kcVA6QAM						
Prospecting	0060H00000kcVA7QAM						
Prospecting	0060H00000kcVA8QAM						

Features and Their Availability in Different Environments

With this release, Apttus provides additional features for Apttus Intelligent Cloud. The following table lists all the features and their availability on different environments.

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Upgrade to Packages or Solutions	Yes	Yes	No
Licensing	Yes	No	No

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
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	No	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"> For Salesforce: Salesforce Objects 	Yes	Not applicable	Not applicable
<ul style="list-style-type: none"> For Microsoft Dynamics and Apttus Intelligent Cloud: Data Objects 	Not applicable	Yes	Yes
Designer: Display Map (Add/Update/Remove fields)	Yes	Yes	Yes

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
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
Designer: Save Map (Add Display Map Fields)	Yes	Yes	Yes
Designer: Save Map (Add Matrix Map Sections)	Yes	Yes	Not applicable
Designer: Save Map (Add Other Fields)	Yes	Yes	Yes
Designer: Save Map (Add Components)	Yes	No	No

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
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

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Designer: Actions > Delete action	Yes	Yes	Yes
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

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Designer: Actions > Save Attachment action	Yes	Yes	Yes
Designer: Actions > Search and Select action	Yes	Yes	Yes
Designer: Actions > Switch Connection action	Yes	No	No
Designer: Action Flow	Yes	Yes	Yes
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.

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
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
Runtime Only: Removal of Designer tab	Yes	Yes	Yes

Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
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

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Functional Features	Supported in Salesforce	Supported in Microsoft Dynamics	Supported in Apttus Intelligent Cloud
Runtime: Performance (Updating Records for List App)	Yes	Yes	Yes
Runtime: Performance (Deleting Records for List App)	Yes	Yes	Yes
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"> • Customer Id field on Account, Opportunity, Contact, Invoice, Contract and Case • Regarding ObjectId: All Activity Entities (Task, Phone Call, Appointment, Email, Fax, Service Activity, Letter) • Connection From and Connection To: Connection Entity 	Not applicable	Yes	No

Resolved Issues

The following table represents resolved issues for the release dated: December 8, 2017.

Case Number	Description	Apttus Internal ID
	After updating existing records, attempting to save new records displayed record mismatch error. The issue is now resolved.	AB-3086
	LookupName Validation was failing and displayed an Object reference error in Salesforce environment. This issue is now resolved. LookupName validation works as designed.	AB-3100

Known Issues

The following table represents known issues on release dated: December 8, 2017.

Apttus Internal ID	Description
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.
AB-3090	Selecting the Disable Rich Text editing checkbox renders the value of Rich text in the cell. Clearing the Disable Rich Text editing checkbox and clicking the Rich Text field displays Loading of Rich text task pane but does not get loaded.

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