

APTTUS[®]

X-Author Contracts on Salesforce Spring 2018 Release Notes

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

Product	Latest Certified Version
X-Author Contracts (New)	9.1.0519
Apttus Contract Management (New)	9.0.0393.1 (9.393.1)

System Requirements and Supported Platforms

Apttus X-Author Contracts is a Microsoft Word Add-In that is accessed via Microsoft Word application on your Windows machine. For the X-Author Contracts Add-In to work, the Apttus Contract Management package must be installed in your Salesforce Org. This is required so that the various dialog boxes available in X-Author Contracts can display the correct fields. Once this is done by your system administrator, you will be able to install the X-Author Contracts Add-In and begin using it.

Your computer must meet the minimum requirements listed below to use X-Author Contracts. Apart from Microsoft Word, the other components listed will be automatically installed during the X-Author Contracts Add-In installation process if they are missing.



- You cannot use a Mac OS X operating system with X-Author Contracts; however, it can be used with a Mac running a Windows Virtual Machine in a Citrix environment.
- Microsoft's Office 365 Online or Cloud applications do not support plugins; therefore, the Apttus X-Author Contracts can only be used in a Windows desktop environment.

Supported Component	Supported Version
Windows OS	<p><i>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 OS and/or Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its own support for any OS and/or Office version, subsequent new Apttus releases will no longer be developed, tested, or committed to support the application on any Microsoft OS and/or Office version which is no longer supported by Microsoft.</i></p> <p>Windows 10 Windows 8 & 8.1 Windows 7</p> <p>*X-Author supports both the 32-bit & 64-bit versions of the above Operating Systems.</p>
Microsoft Office	<p>Microsoft Word 2016 or Office 2016 Microsoft Word 2013 or Office 2013 Microsoft Word 2010 or Office 2010 Microsoft Word 2007 with Service Pack 3 and hotfix 976477</p> <p>*Where applicable, X-Author supports 32-bit and 64-bit versions of the above applications.</p> <p>**The above versions assume you are using Professional or Enterprise versions of Office. Home & Student or other limited versions of Office are not supported and may or may not prove to be compatible with X-Author Contracts.</p>

Supported Component	Supported Version
Microsoft .NET	Microsoft .NET Framework 4.5 or higher
Microsoft VSTO	Microsoft Visual Studio 2010 Tools for Office Runtime
Microsoft Office PIA	Microsoft Office 2010 Primary Interop Assemblies
Salesforce	Unlimited, Enterprise, and Developer Product Editions

Feature Summary

The following features are new to X-Author Contracts in this release.

- [Update Fields](#)
- [Comparing Agreement Documents from Two Different Agreement Records](#)
- [Enhancement to Redlining During Contract Negotiation](#)
- [Enhancement to Reconciliation](#)
- [Enhancement to Clauses Inserted as Bookmarks](#)
- [Language Translation \(Deprecated\)](#)

Update Fields

Update fields are a new type of field which have content control border like smart fields but are non-editable in a generated agreement document. You can update the value of an Update field in an agreement document only using **Update from Salesforce**. Update Fields overcome the limitation that not all fields can be made smart like, the text area fields, and the lookup fields.

Get Started

For details on how to work with Update Fields, refer to [Making Fields Updatable](#) in *X-Author Contracts on Salesforce User Guide*.

Comparing Agreement Documents from Two Different Agreement Records

You can now compare two agreement documents from different agreement records in X-Author Contracts. Using this feature you can go to look up and select the documents from different agreement records, right from the Compare screen of X-Author Contracts. You can use this feature to compare two agreement records, say, last year's agreement record and new agreement record and only show the changes between the two, thus making the renewal process faster.

Get Started

For more information on comparing two agreement documents from two different agreement records, refer to [Comparing Agreement Documents](#) section in *X-Author Contracts on Salesforce User Guide*.

Enhancement to Redlining During Contract Negotiation

The redlining functionality is enhanced to show an inserted clause in an agreement document as redlined during negotiation. To view the inserted clause in the agreement as redlined, you have to set the agreement protection value to Insert Clauses and Track Changes. After checking in the agreement, the newly inserted clause shows up as redlined in the document. Thus, you don't miss a new clause during negotiation and reconciliation.

Get Started

For details on how redlining enhancement highlights an inserted clause, refer to [Inserting Clauses](#) in *X-Author Contracts on Salesforce User Guide*.

Enhancement to Reconciliation

Reconciliation is enhanced to support inline track changes comments. If you have set the value of **Show Markup** setting to *Balloons > Show All Revisions Inline*, you can still validate the field values in your agreement and perform reconciliation. X-Author Contracts changes the inline comments to balloon comments during check-in and once the reconciliation is finished, it reverts the comments to inline. This enhancement overcomes Microsoft Word's limitation to keep the track changes as balloon comments only, to perform reconciliation.

Enhancement to Clauses Inserted as Bookmarks

When you insert a clause as a bookmark in an agreement document, it will create an entry for that clause in the Agreement Clauses related list in Contract Management on Salesforce.

Language Translation (Deprecated)

The Spring 2018 release of X-Author Contracts is ending the support for language translation in X-Author Contracts. From X-Author Contracts version 9.1.0430 and later, you will no longer be able to use **Translate** feature for your templates or agreements. Going forward, for translation services, please use Microsoft Word's built-in **Translate** feature.

Resolved Issues

The following table represents resolved issues in this release:

Case Number	Description	Apttus Internal ID
00212717	When you inserted a clause as bookmark in an agreement document, the inserted clauses were not shown on Reconcile Smart Clauses screen and also the related clause entry was not made on Agreement Clauses related list in Contract Management. This issue is now resolved.	XA-2413

Known Issues

The following table represents known issues:

Apttus Internal ID	Issue
XA-2628	If you have enabled the new Salesforce Files system in your Contract Management org, the Update Current Version option will not be available from X-Author Contracts.
XA-2580	For a template with template versioning enabled, the search result in Playbook shows clauses which do not match the agreement type of the template.
XA-2574	For a versioning enabled template the Check-out feature gives different versioning output for the cloned template. When you check out a cloned template by going to Check-out > Currently opened document the template takes the version of the parent template, but if you check out a template using the Check-out search, X-Author Contracts creates the template from version 1.000.
XA-2570	For template versioning enabled orgs when you insert the main and inline clause in a template and check it in after performing Refresh Clause, the Needs Publishing checkbox is not cleared for the header clause record.
XA-2568	For a versioning enabled org when you change the clause content and check it in, X-Author does not display a message about the affected dependent clauses or templates.
XA-2565	For versioning enabled migrated template, Refresh document action doesn't update the new nested clause content in a template document. This occurs when you change a nested clause contained in a template document and check in the template document without first publishing the clause.
XA-2564	When you change a clause in a migrated template document with versioning enabled and check in the template, X-Author Contracts does not display any acknowledgment message.
XA-2561	X-Author does not reflect changes in migrated templates, when templates are migrated using X-Author Migration Manager from the source org to the destination org and the destination org already contains those template records.
XA-2560	The template versioning does not increment template document version value when checking in an existing template after making changes to it. This occurs when a template is migrated from the source org to the destination org which already contains that template record.
XA-2559	When you open a recently migrated template document in X-Author Contracts and click Check Out > Currently opened document , you receive an exception error and are logged out of X-Author Contracts. This occurs when you migrate a template from a template versioning enabled org to a new org, download the attachment from the template record and open it in X-Author Contracts.

Apttus Internal ID	Issue
XA-2509	When you compare two agreement documents containing date fields - both in text and in table cells - and then accept or reject changes in the document, the date picker in some of the date fields are lost.
XA-2508	When you accept all changes after comparing two agreement documents, some of the smart date fields lose their smartness property. This issue occurs when you have two agreement documents with smart date fields inserted in Microsoft Word table cells. After comparing the two documents when you navigate to Microsoft Word Review tab and click Accept All Changes , some of the date fields lose their smartness property. This is a known limitation of the product.
XA-2506	<p>When you merge two versions of a document containing smart Date fields, after comparing them and then try to Accept or Reject the changes in the document, you receive an error. This is due to a known limitation of Microsoft Word.</p> <p>As a workaround to this problem, Apttus recommends that you should avoid using Merge documents feature when your documents contain Smart Date fields. You can instead choose the X-Author Contracts Compare feature.</p>
XA-2463	In the Mark Clause menu Search Box, if you use special character-single quote(') in the search string, X-Author Contracts doesn't return clause or clause list in the search result.
XA-2417	When you check in a template with a clause containing the last element as a table object/smart field in a clause, the template crashes. To avoid this issue, add a whitespace just after the table and before the new line.
XA-2327	When you perform reconciliation on checking in an agreement document containing a clause with multiple instances of a currency type smart field with different currency formats, X-Author Contracts updates all the instances of the smart currency field in the clause to a single currency format.
XA-2316	Performing Refresh/ Publish action in a template shifts the header/ footer clause content to the main clause content.
XA-2307	When you perform Update from Salesforce action on a generated agreement document which does not have values for the first column of the repeating table, X-Author Contracts shows a blank screen.
XA-2260	After changing the content of a marked clause and viewing it in control panel by clicking Show Changes , X-Author Contracts removes one character from the clause in the changes screen.
XA-1932	When you attempt to check in a merged document where the original document was non-version-aware, X-Author Contracts displays an error stating that the document is already checked out. The currently recommended workaround is to append the document name at check-in to prevent this error.
XA-1931	After checking in a combined document, X-Author ribbon menu items get disabled for the original document. Checking out the original document enables the menu items.

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