



X-Author Contracts on Salesforce Summer 2019 Release Notes

Doc Rev A

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About Release Notes

Apttus Release Notes contain the following information about X-Author Contracts Summer 2019 Release on Salesforce.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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

Product	Latest Certified Version <i>Version Name / Version Number</i>
X-Author Contracts (New)	10.0.0725.1902 10.0.0725.1902
Apttus Contract Management	10.1.0463 10.463

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.



- 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.
- 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 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.

The following table lists the minimum requirements for installing and using X-Author Contracts.

System Requirement	Minimum Supported Version
Windows OS	Windows 10 Windows 8 & 8.1 Windows 7 *X-Author supports both the 32-bit & 64-bit versions of the above Operating Systems.

System Requirement	Minimum Supported Version
Microsoft Office	<p>Desktop version of Office 365</p> <p>Microsoft Word 2016 or Office 2016</p> <p>Microsoft Word 2013 or Office 2013</p> <p>Microsoft Word 2010 or Office 2010</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> <div data-bbox="386 705 1456 783" style="border: 1px solid #f96; padding: 5px;"> <p> Apttus no longer supports Microsoft Word 2007 with X-Author Contracts.</p> </div> <div data-bbox="386 793 1456 947" style="border: 1px solid #add8e6; padding: 5px;"> <p> • Apttus recommends using the latest Microsoft Office Suite for best performance.</p> <p>• For some Playbook features to work, you must install Microsoft Word OS Build 17134.228 update. This update is a part of Windows 1803 build.</p> </div>
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

Upgrade Notes

For more information on the prerequisites and post-upgrade tasks, see [Installing X-Author Contracts](#) in X-Author Contracts User Guide.

New Features

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

- [Parallel Review](#)
- [Swapping Clauses](#)
- [Restricting Agreement Check-ins](#)
- [Read-only Clauses](#)
- [Unlocking Read-only Clauses](#)

Parallel Review

You can now send your agreement document to multiple people for review, simultaneously. Using the parallel review, you do not have to wait for every reviewer to finish reviewing before the review process progresses to the next stage. Multiple reviewers can simultaneously review and check-in the document, thus saving time. After each reviewer checks in the agreement document, the review comments are merged with the previous version of the document.

Get Started

For details about parallel review refer to [Parallel Review](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Swapping Clauses

Swap clause allows you to replace an existing smart clause in the agreement document with another clause's content from the Playbook. The **Swap** button in the Playbook facilitates easy replacement of clause content and eliminates the need to mark the existing clause for deletion and then insert a new clause. This feature saves time and makes the negotiation process smoother by reducing the number of steps needed to swap a clause.

Get Started

For details about swapping clauses in an agreement document, refer to [Swapping Clauses](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Restricting Agreement Check-ins

You can now restrict checking in an agreement document based on agreement status and agreement status categories. You can define the restricted Agreement Status and Agreement Status Category in a new custom setting, **Restrict Checkin of Documents**.

Get Started

For details on how to restrict check-in of agreements, refer to [Checking in an agreement document](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Read-only Clauses

You can now make clauses read-only to prevent users from editing the clause content. When you enable Read-Only attribute for a clause in a template, that clause becomes uneditable in the generated document.

Get Started

For details on how to make clauses read-only, refer to [Read-only Clauses](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Unlocking Read-only Clauses

You can now grant certain users edit access to a read-only clause using `UnlockReadOnlyClause` permission. This feature gives you more control on clause access and you can speed up the review or negotiation process.

Get Started

For details on how to unlock read-only clauses, refer to [Unlocking Read-only Clauses](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Enhancements

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

- [Update from Salesforce](#)
- [Enable Formatting for Versioned Templates](#)
- [Reconciliation](#)

Update from Salesforce

Update from Salesforce can now update the empty table cell values. If you generate an agreement when there are no agreement line items, the repeat-table in the generated agreement document is empty. You can now update those empty table values using Update from Salesforce.

Get Started

For more details on Update from Salesforce enhancement, refer to [Update from Salesforce](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Enable Formatting for Versioned Templates

You can now specify the content format for fields and clauses of a versioned template while creating a new template or checking in an existing template. Earlier, formatting options were only available for non-versioned templates. Now, you can choose to enable formatting and specify Date format, Currency format, and Number and Currency precision for versioning enabled template.

Get Started

For more details on how to enable formatting for versioned templates, refer to [Creating New Template Versions](#) and [Checking In Template Versions](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Reconciliation

The reconciliation feature has a few UI enhancements to provide better user experience to the users. The reconciliation flow has updated guidance text, label names, and an updated flow to minimize clicks needed to finish reconciliation.

Data Model Changes

This release does not have any data model changes for X-Author Contracts.

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
N/A	XA-3154	Update from Salesforce was not working if there was a smart field in the repeat-table whose value was empty in the associated agreement record.
N/A	XA-3147	Generate agreement action failed when the agreement record contained more than 150 agreement line items.
CAS-14382-L2S9F7	XA-3132	You were unable to check in an offline agreement document.
00209016	XA-3065	You were unable to perform Review > Accept All on a merged document if the document had smart date fields with modified values.
00218354	XA-2956	When you used @mention to share the agreement document from X-Author Chatter, the linking and subsequently the sharing did not work.
CAS-09977-M9J9D8	XA-2909	Agreement document's filename was not updated after check-in.
N/A	XA-2888	Update from Salesforce did not work if the table in your agreement document did not have values when the agreement was initially generated.
CAS-09968-Z4L1N6	XA-2896	When you clicked Refresh Clause in X-Author Templates, the clauses inserted in that session were deleted from the template.

The following table lists the issues resolved from the previous releases.

Apttus Internal ID	Description
XA-2506 (Case Number: 00209016)	When you merged two versions of a document containing smart Date fields, after comparing them and then tried to Accept or Reject the changes in the document, you encountered an error.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Apttus Internal ID	Issue
XA-3236	When you check in an agreement document without changing the value of any smart field, the message prompt does not appear.
XA-3183	If you're using Microsoft Word Version 1808, action buttons on the X-Author Contracts ribbon are active before establishing the connection.
XA-3146	When you check-in a template with a new locale value, the values of the fields under Enable Formatting are not updated according to the locale.
XA-3119	When you review a modified clause in a merged document, you have to accept and reject changes individually. This is a Microsoft Word limitation
XA-3116	<p>When you merge two agreement documents and then accept or reject the changes from the Revisions pane, the cursor keeps jumping to the top of the page. This is a Microsoft Word limitation.</p> <p>Workaround: Instead of using the Revisions pane to accept and reject changes, individually accept or reject each change by right-clicking the change and selecting the Accept Change/ Reject Change action.</p>
XA-3115	If you switch users when making changes on different versions of an agreement document and then merge those two revisions, the revision pane shows the changes logged against only one user. This is because of a Microsoft Word limitation. The revisions panel displays the name of the logged-in system user or Microsoft Office user.
XA-3114	Comparing two documents with smart fields of type date produces an error. This is a COM exception that occurs because Microsoft Word doesn't allow you to create Content Control elements at certain places in the document.
XA-2917	When you check in an agreement document and release the document lock, the regenerate button disappears from the X-Author Contracts toolbar.
XA-2775	Due to a Microsoft Word limitation, inserting a nested clause in an agreement document with protection set to <i>Insert Comments and Track Changes</i> , shows incomplete redlining of the nested clause.
XA-2768	Deleting a row in a repeat-table and then performing Update from Salesforce, fails to update the values of all the remaining rows under the deleted row.
XA-2869	Reconciliation of Date field is not working as designed. If you enter dates in dd/MM/yyyy format on the date field, after reconciliation the day and month part gets interchanged.

Apttus Internal ID	Issue
XA-2856	IDE highlighting on PDF is done by IDE itself, and X-Author Contracts highlights based on approximation by various algorithm process. As IDE uses OCR to extract field and clauses, such difference exists.
XA-2793	When you delete an Updatable or ReadOnly field and then click Preview Reconcile , you can see the deleted field on the reconciliation page.
XA-2782	Update From Salesforce does not work for an agreement document that has text area fields with multiple lines.
XA-2769	When you launch Microsoft Word and click Connect in X-Author Contracts, you see a script error. You can, however, click Yes and continue with login.
XA-2743	When you delete a smart field which occurs multiple times in the document, the smart fields are not correctly re-indexed in the Control Panel.
XAO-87	If you have enabled the Salesforce Files system in your Contract Management Org and you launch X-Author Outlook, connect to your org and click Send for Review, you see an error.
XA-2635	If you have file system enabled in Salesforce, you cannot update the current version during check-in from X-Author Contracts.
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 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 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.

Apttus Internal ID	Issue
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 the 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.
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 is 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 the 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-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 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 the control panel by clicking Show Changes , X-Author Contracts removes one character from the clause in the changes screen.

Apttus Internal ID	Issue
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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