



## X-Author Contracts on Salesforce Winter 2018 Patch 4 Release

### Notes

04/30/2019

# Table of Contents

About Release Notes.....	3
Packages .....	4
System Requirements and Supported Platforms.....	5
New Features.....	7
Enhancements .....	8
Data Model Changes .....	9
Resolved Issues .....	10
Known Issues.....	11
Apttus Copyright Disclaimer .....	14

## About Release Notes

Apttus Release Notes contain the following information about X-Author Contracts Winter 2018 Patch 4 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

**i** 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 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 <b>(New)</b>	9.2.0410   9.2.0410
X-Author Outlook	2.1.1120   2.1120
Apttus Contract Management	9.3.432   9.432



## 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 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.

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 &amp; 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="641 730 1456 840" style="border: 1px solid #f9e79f; padding: 5px; margin: 10px 0;"> <p> Apttus no longer supports Microsoft Word 2007 with X-Author Contracts.</p> </div> <div data-bbox="641 850 1456 959" style="border: 1px solid #d9e1f2; padding: 5px; margin: 10px 0;"> <p> Apttus recommends using the latest Microsoft Office Suite for best performance.</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

There are no new features in this release.

## Enhancements

There are no new enhancements in this release.



## 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
CAS-11760-W3P2P5	XA-2934 and XA-2931	When you inserted a clause containing a repeat table in an agreement document, X-Author stopped working.

## Known Issues

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

Apttus Internal ID	Issue
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-2869	Reconciliation of Date field is not working as designed. If you enter dates in dd/MM/yyyy format on date field, upon reconciliation the day and month part gets interchanged.
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 <b>Preview Reconcile</b> , you can see the deleted field on the reconciliation page.
XA-2782	<b>Update From Salesforce</b> does not work for an agreement document that has text area fields with multiple lines.
XA-2769	When you launch Microsoft Word and click <b>Connect</b> in X-Author Contracts, you see a script error. You can, however, click <b>Yes</b> and continue with log in.
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, XA-2955 (CAS-10385- V8P1X3)	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 <b>Update Current Version</b> 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 <b>Check-out &gt; Currently opened document</b> 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.

Apttus Internal ID	Issue
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 <b>Needs Publishing</b> 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, <b>Refresh</b> 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 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 <b>Check Out &gt; Currently opened document</b> , 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 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 the Microsoft Word <b>Review</b> tab and click <b>Accept All Changes</b> , 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>

Apttus Internal ID	Issue
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 <b>Show Changes</b> , 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.

## Apttus Copyright Disclaimer

Copyright © 2019 Apttus Corporation (“Apttus”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Apttus. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Apttus makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this document may contain descriptions of software modules 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.

**U.S. GOVERNMENT END USERS:** Apttus software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Apttus and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus and X-Author are registered trademarks of Apttus and/or its affiliates.

The documentation and/or software may provide links to Web sites and access to content, products, and services from third parties. Apttus is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Apttus is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Apttus is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

For additional resources and support, please visit <https://community.apttus.com>.

DOC ID: XACSFWIN18P4RN20190430