

APTTUS[®]

Contract Management on Salesforce Spring 2018 MR Release Notes

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About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#): Lists the 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.
- [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.
- [Data Model Changes](#): Lists the changes to the data model.
- [Resolved Issues](#): Lists issues resolved in this release.
- [Known Issues](#): Lists known issues in the product and workarounds if applicable.

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Packages

The following package and dependent package are required to upgrade to this release to utilize all the new features of this release. This is the *minimum* required version; later versions are also supported. Separate pre-requisites per feature can be found in the respective guides. The package marked **(New)** is the new package in this release.

Product	Latest Certified Version
Aptus Contract Management (New)	9.406 <div data-bbox="695 663 1456 961" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>To support the File type of document generated, if users check in and check out documents from X-Author Contracts, they must use X-Author Contracts V9.1.0430 and above versions.</p> <p>The template of <i>Pre FX2</i> format does not support the File type of document generated regardless of the X-Author Contracts version.</p> </div>

System Requirements and Supported Platforms

Apttus Contract Management is a web-based, on-demand application that is accessed via a standard web browser through the Internet. Before you install and start using Apttus Contract Management, you must ensure the minimum system requirements.

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .
Browser	<p>Apttus Contract Management supports the most recent stable versions of the following browsers:</p> <ul style="list-style-type: none"> • Google Chrome™ • Mozilla Firefox™ • Microsoft Edge™ • Apple Safari™ <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Note Internet Explorer is not supported.</p> </div>
Microsoft Office	<ul style="list-style-type: none"> • Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number must be greater than 12.0.6520.4999) • Microsoft Word 2010 (32 bit & 64 bit) or Office 2010 (32 bit & 64 bit) • Microsoft Word 2013 (32 bit & 64 bit) or Office 2013 (32 bit & 64 bit)

Feature Summary

The following features are new to Apttus Contract Management on Salesforce, in this release:

- [New AgreementHierarchy and AccountHierarchy Schedulable Classes](#)
- [Ability to Add Custom Action Buttons to the Agreement Actions Panel in Salesforce Lightning](#)
- [Filter for the Additional To Field in Send for Review](#)
- [Ability to Launch Community Portals](#)
- [Ability to Enable Work Orders](#)

New AgreementHierarchy and AccountHierarchy Schedulable Classes

In this release, Contract Management enables you to schedule jobs using the Apex Scheduler to refresh agreement and account data in the background. You need not click **Refresh Data** on the Agreement Explorer to refresh agreement data.

Get Started

For more information, see [Scheduling a Job to Refresh Agreement Data in the Background](#) in the *Contract Management on Salesforce User Guide*.

Ability to Add Custom Action Buttons to the Agreement Actions Panel in Salesforce Lightning

In this release, Contract Management enables you to add custom action buttons to the Apttus Agreement Actions panel in Salesforce Lightning.

Get Started

For more information, see [Contract Management on Salesforce Lightning](#) in the *Contract Management on Salesforce User Guide*.

Filter for the Additional To Field in Send for Review

In this release, Contract Management enables you to launch the custom Email Address Lookup pop-up for the Send for Review functionality. On this page, you can quickly search and select contacts for the **Additional To**, **Cc**, and **Bcc** fields, if there is a large number of contacts (for example, more than one million).

Get Started

For more information, see [Sending an Agreement Document for Review](#) and [To Send an Agreement for Manual Signature](#) in the *Contract Management on Salesforce User Guide*.

Ability to Launch Community Portals

Contract Management enables you to launch community portals and perform all operations that you perform in internal environments.

Get Started

For more information, see [Logging on to Contract Management](#) in the *Contract Management on Salesforce User Guide*.

Ability to Enable Work Orders

Contract Management allows you to enable the Work Order custom object to generate an agreement document.

Get Started


For more information, see [Generating on a Custom Object](#) in the *Contract Management on Salesforce Administrator Guide*.

Data Model Changes

This release does not entail changes to the data model.

Resolved Issues

The following table represents the resolved issues in this release:

Case Number	Description	Apttus Internal ID
NA	Document generation did not work for the Work Order custom object in X-Author Contracts. This issue is now resolved.	CLM-3190
CAS-03336-Q1K9P6	You could not view agreements under the Document Versions related list because the the column only had "-" in it and no link to open the agreement. This issue is now resolved.	CLM-3129
CAS-03058-Z8S1N7	The agreement flow did not identify that the logged-in user is a community portal user and redirected to the Salesforce internal URL. <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;">  Agreement flow for community portals is not yet available in the Salesforce Lightning mode. </div> This issue is now resolved.	CLM-3085
NA	You could not add custom agreement action buttons on the LightningAgreementActions page. This issue is now resolved.	CLM-3084
CAS-02689-L1C3P6	When you created an agreement from Opportunity, after filling necessary fields and saving the agreement, a blank page was displayed instead of redirecting to Opportunity. This issue is now resolved.	CLM-3029
NA	You could not create an agreement from Opportunity in Salesforce Lightning. This issue is now resolved.	CLM-2966
00220127	In Wizard Designer, if any step name had the apostrophe (') character, Contract Management saved the step correctly; but when you opened Wizard Designer again for any modifications, an error message was displayed. You could not edit the step or add any step rule. This issue is now resolved.	CLM-2910

Case Number	Description	Apttus Internal ID
00219820	<p>The Send for Review functionality did not send the email to recipients in the Additional To field when you did not enter a recipient in the To field (when the To field is blank).</p> <p>This issue is now resolved.</p>	CLM-2873
00219051	<p>In Salesforce Lightning, when you created an agreement and canceled the draft Agreement by clicking Cancel Request or Cancel Agreement, you were navigated to the Cancel Agreement page and the Continue button was not disabled after a single click.</p> <p>The issue is now resolved.</p>	CLM-2849
00216801	<p>In X-Authour for Contracts, the Select button did not respond when you tried to open the contracts related to a particular user by entering the user name in the lookup.</p> <p>The issue is now resolved.</p>	CLM-2785

Known Issues

The following table represents known issues:

Apttus Internal ID	Description
CLM-3212	The Work Order custom object is not enabled for a template object of the <i>Pre FX2</i> format.
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	In Salesforce One app, when a user clicks on the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In Salesforce One app, clicking the lookup option does not open a new pop-up window.
CLM-2440	After an agreement document is sent for review, the activity history does not record details for any of the attachments.
CLM-2416	Entries on the Master Agreement Clauses listing are showing an incorrect timestamp
CLM-2319	When a user uses the type-ahead search feature in the Wizard Component Library, the resultant text is sometimes deleted as it is being typed.

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