

**APTTUS<sup>®</sup>**

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**Contract Management on Salesforce Spring 2018 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](#): From the previous major release.
- [Resolved Issues](#)
- [Known Issues](#)

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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
Apttus Contract Management <b>(New)</b>	9.397 <div data-bbox="448 663 1456 806" style="border: 1px solid #ccc; padding: 5px;"><p> <b>Note</b> To support <b>File</b> type, if users check in and check out documents from <b>XAC</b> then they must use XAC V9.1.0430 and above versions.</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 <a href="#">Salesforce.com</a> requirements. See <a href="#">Salesforce PDF</a> .
Browser	<p>Apttus Contract Management supports the most recent stable versions of the following browsers:</p> <ul style="list-style-type: none"> <li>• Google Chrome™</li> <li>• Mozilla Firefox™</li> <li>• Microsoft Edge™</li> <li>• Apple Safari™</li> </ul> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> <b>Note</b> Internet Explorer is not supported.</p> </div>
Microsoft Office	<ul style="list-style-type: none"> <li>• Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number must be greater than 12.0.6520.4999)</li> <li>• Microsoft Word 2010 (32 bit &amp; 64 bit) or Office 2010 (32 bit &amp; 64 bit)</li> <li>• Microsoft Word 2013 (32 bit &amp; 64 bit) or Office 2013 (32 bit &amp; 64 bit)</li> </ul>

## Feature Summary

The following features are new in this release:

- [Support for Salesforce Files](#)
- [Support for Platform Encryption \(Shield\)](#)
- [Attachments To Files Migration](#)

### Support for Salesforce Files

Support for Salesforce files enables all Apttus agreement **Actions** ability to leverage files instead of attachments. **Document Finder** also leverages this support and displays all the file type documents.

**Note**  
To enable **File Type**, an Administrator user must select the **Enable File** check box in the Custom Settings.

#### Get Started

For more information about agreement actions, please refer to the [Agreement Actions](#) section in the Contract Management Spring 2018 User Guide.

### Support for Platform Encryption (Shield)

All standard Salesforce fields can now be encrypted.

### Attachments To Files Migration

**Attachments to Files Migration** feature enables users to convert all the documents which are available as **Attachments** format to the **File** format. You can either convert a single Attachment or bulk Attachments type to the File type.

**Note**  
Ensure **Enable File** setting is selected after migration process is completed.

#### Get Started

For more information about **Attachments to Files Migration** feature, please refer to the [Attachments To Files Migration](#) section in the Contract Management Spring 2018 Administrator Guide.

## Data Model Changes

The following table lists the data model changes from the Winter 2017 release to the Spring 2018 release.

**Note**

The System/User column in the following table indicates whether the field is used by the System Administrator only (System), or if the field may be used for integration updates (User).

Object	Fields	Description	State	Feature	System/ User
Document Version Detail		Represents the version details of a document	Existing		
	File Type	Represents Type of Attachment or File	New	File Implementation	System Administrator
	ContentVersion	Represents Content Document Version ID in case File	New	File Implementation	System Administrator
Comply System Properties		Lists all comply system properties	Existing		
	Enable File	Default Value is False	New	File Implementation	System Administrator

## Resolved Issues

The following table represents the resolved issues in this release:

Case Number	Description	Apttus Internal ID
00202165	<p>In the <b>Salesforce Lightning</b>, when a user uploaded a document using <b>Upload File</b> button in the <b>Notes &amp; Attachment</b> section, the uploaded document stored as a Salesforce File as an attachment. When the Agreement was activated using the Apttus activation process, an error message displayed that there is no Attachment to the record.</p> <p>This issue is resolved. Now, with the File Support, this issues does not occur.</p>	CLM-2313
00212860	<p>In the <b>Salesforce Lightning</b>, when a user uploaded files, these files were unable to recognize when sent through AdobeSign, as attachments.</p> <p>This issue is resolved. Now, with the File support, this issues does not occur.</p>	CLM-2685
00219860	<p>The email template name mentioned in the <b>APTS_EmailTemplateForReview</b> admin entry did not default on the <b>Email Template</b> page for the <b>Send for Review</b> action.</p> <p>This issue is resolved. Now, the mentioned email template has defaulted on the <b>Email template</b> page.</p>	CLM-2875



## Known Issues

The following table represents known issues:

Apttus Internal ID	Description
CLM-2849	In the <b>Salesforce Lightning</b> , when a user creates an agreement and cancels the draft Agreement by clicking the <b>Cancel Request</b> or <b>Cancel Agreement</b> , the user is navigated to the <b>Cancel Agreement</b> page and the <b>Continue</b> button is not disabled after a single click.
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-2695	When creating a new agreement in Salesforce Lightning Experience mode, after selecting the record type and account type when the user clicks <b>Next</b> , the user is directly taken to the view only mode of Agreement Record page instead of the Edit Agreement page.
CLM-2690	In Salesforce One app, clicking the lookup option doesn't open a new pop-up window.
CLM-2689	In Salesforce Lightning mode, when creating a new agreement from the Accounts page, the Account field of the agreement record remains blank, instead of showing the name of the Account from which the agreement is being created.
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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