

APTTUS[®]

Contract Management on Salesforce Spring 2019 Release Notes

Rev A

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About Release Notes

Apttus Release Notes contain the following information about Contract Management on Salesforce Spring 2019 Release.

For more information on new features, enhancements, and document improvements refer to

- [What's New](#) in *Contract Management on Salesforce Spring 2019 User Guide* or
- [What's New](#) in *Contract Management on Salesforce Spring 2019 Administrator Guide* or
- [What's New](#) in *Contract Management on Salesforce Spring 2019 SOAP API Guide*

- [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

 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 (Name Number)
Apttus Contract Management (New)	10.0.0444 10.444
ApttusDocuSign API (New)	4.0.82 4.82
Apttus Contract DocuSign Integration	2.0.0029 2.29
Adobe Sign	20.9
Apttus EchoSign Integration	6.0.0021 6.0.0021

Note

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 later versions. The template of *Pre FX2* format does not support the File type of document generated regardless of the X-Author Contracts version.

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 supports the following browsers:</p> <ul style="list-style-type: none"> • Google Chrome • Microsoft Edge <p>Apttus recommends the latest stable version of the browser for the best performance.</p> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> 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 Office 2019, 2016, 2013, and desktop version of Office 365 <div style="border: 1px solid #4285f4; padding: 5px; margin-top: 10px;"> <p> Apttus recommends the latest Microsoft Office Suite for the best performance.</p> </div>

New Features

The following features are new to Contract Management in this release.

- [Send Highlighted or Unhighlighted Documents for Review](#)
- [Email Multiple Agreement Documents](#)
- [Update Record Type While Amending an Agreement](#)
- [Introduced the OCR Quality field on the Document Viewer](#)
- [Introduced Review Offline Document Status Popup](#)
- [Ability to Add Clause When Reviewing an Offline Document](#)

Send Highlighted or Unhighlighted Documents for Review

You can select the highlighted and unhighlighted documents, processed by the optical character recognition software, from the Document Version Details while sending for review, signatures, or esignatures.

Get Started

For details on highlighted and unhighlighted documents, refer to [Reviewing an Agreement Created by Intelligent Import](#) in *Contract Management on Salesforce Spring 2019 User Guide*.

Email Multiple Agreement Documents

You can send a downloadable link for downloading multiple documents of multiple agreements through email, to selected contacts or to a user group without downloading the agreement documents and sending them through email individually.

Get Started

For details on how to send multiple agreement documents through email, refer to [Emailing Multiple Agreement Documents](#) and [Scheduling Expiration Date for Email Downloadable Link](#) in *Contract Management on Salesforce Spring 2019 Administrator Guide*.

Update Record Type While Amending an Agreement

The APTS_RecordTypeUpdateOnAmend property enables you to update the record type while amending an agreement.

Get Started

For details on admin objects, refer to [Admin Objects](#) in *Contract Management on Salesforce Spring 2019 Administrator Guide*.

Introduced the OCR Quality field on the Document Viewer

You can view the optical character recognition quality of the document at the top of the document viewer.

Get Started

For details on the OCR Quality field, refer to [Reviewing an Agreement Created by Intelligent Import](#) in *Contract Management on Salesforce Spring 2019 User Guide*.

Introduced Review Offline Document Status Popup

You can now view the current status of the offline document extraction in the Review Offline Document Status popup if the document is still being processed.

Get Started

For details on reviewing an offline document, refer to [Reviewing an Agreement Created by Intelligent Import](#) in *Contract Management on Salesforce Spring 2019 User Guide*.

Ability to Add Clause When Reviewing an Offline Document

You can select text in the document viewer while reviewing an offline document and add a clause.

Get Started

For details on how to add a clause while reviewing an offline document, refer to [Reviewing an Agreement Created by Intelligent Import](#) in *Contract Management on Salesforce Spring 2019 User Guide*.

Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

- [No Restrictions on File Format for Uploading Documents](#)
- [Validate Email Ids and Contacts](#)
- [Clause Status for the Executed Documents](#)
- [OOTB Custom Links for IDE Settings](#)

No Restrictions on File Format for Uploading Documents

You can upload offline documents in any file format.

Get Started

For details on working with offline agreements, refer to [Working with Offline Agreements](#) in *Contract Management on Salesforce Spring 2019 Administrator Guide*.

Validate Email Ids and Contacts

Setting the `APTS_EnableValidationForEmailWithoutUserContact` property to true displays an error message when the email IDs or contacts specified in the **To** or **Additional To** fields are invalid while sending a document for signatures or review.

Get Started

For details on admin objects, refer to [Admin Objects](#) in *Contract Management on Salesforce Spring 2019 Administrator Guide*.

Clause Status for the Executed Documents

In the Agreement Clauses section, the clause status is set to Final instead of Inserted for the executed documents.

Get Started

For details on the executed documents, refer to [Storing an Executed Agreement](#) *Contract Management on Salesforce Spring 2019 User Guide*.

OOTB Custom Links for IDE Settings

You can access the intelligent import settings links by navigating to the Intelligent Import Settings tab and clicking the Intelligent Import Data Mapping tab. You do not have to add custom links or tabs for IDE settings for the following objects.

- IDEMapProjectRecordType
- IDEProvision
- IDEMapProvisionRecordType
- DEMapClauseProvision
- IDEMapFieldProvision

Get Started

For details on configuring IDE settings, refer to [Managing Offline Agreements](#) in *Contract Management on Salesforce Spring 2019 User Guide*.

Data Model Changes

The following objects and fields are introduced to or changed in the system or data model in this release.

Object	Fields	Descriptions	New/ Changed
ComplySystemProperties__c			Changed
	AllowRegenerateFromXAC__c	Controls the Regenerate button visibility on the X-Author Contracts	New
IDEJob__c			Changed
	ScanQuality__c	Scans the quality of the document imported using intelligent import	New
IDEJob__c			Changed
	AnalysedHighlightedAttachmentId__c	Analyzes Highlighted Attachment or file Id received from IDE	New
IDEJob__c			Changed
	IsUnzipRequireHighlighted__c	Indicates if unzip is required	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
NA	CLM-3232	Creating an agreement in the Lightning mode displayed pages in the Classic mode.
CAS-10540-J7Z4Q6	CLM-3496/ CLM-3501	In the Wizard, the dependent required fields were not marked as required.
CAS-09473-D3W5B8	CLM-3473	In X-Author for Contracts, the columns in the Checkout window were not sortable.
CAS-09875-C8Q9H4	CLM-3472	The Next button was not visible on the wizard if a multi-picklist was selected.
CAS-09871-D0P7F3	CLM-3471	Generating a document from Contact was displaying an error.
CAS-08498-J2Z7K5	CLM-3394	In X-Author for Contracts, the pop-ups did not have help text even though the template objects had help text values.
CAS-05683-K1M1B8	CLM-3336	Clicking the action buttons in Lightning mode was navigating to Classic mode pages.
CAS-04596-J4N4T7	CLM-3272	The Agreement Explorer reports were incorrectly filtered when there were more than 1000 records.
NA	CLM-3497	When "Add a Namespace prefix to pageReference.state properties and query parameters" Salesforce critical update was activated in the Lightning mode, clicking the Amend or Renew buttons displayed an error.

Known Issues

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

Apttus Internal ID	Issue
CLM-3395	After signing an offline agreement using DocuSign, the Status Category and Status fields are not updated.
XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware file or attachment type document.
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 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 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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