



Contract Management on Salesforce

Spring 2020 Release Notes



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About Release Notes

Conga Release Notes contain the following information about Contract Management on Salesforce Spring 2020 Release.


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

- [What's New](#) in *Contract Management on Salesforce Spring 2020 User Guide* or
 - [What's New](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide* or
 - [What's New](#) in *Contract Management on Salesforce Spring 2020 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)
Conga Base Library (New)	1.0.38 1.38 <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Mandatory package to be installed in the Spring 2020 release. </div>
Conga Content Integration (New)	6.3.0012 6.12
Conga Contract Lifecycle Management (New)	11.0.0519 11.519
Conga DocuSign API (New) <i>(Required if you are using DocuSign)</i>	6.0.0092 6.92
Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i>	3.2.0038 3.38
Adobe Sign <i>(Required if you are using Adobe Sign)</i>	21 21.5
Conga CLM EchoSign Integration (New) <i>(Required if you are using Adobe Sign)</i>	8.0.0034 8.34



i Before installing or upgrading Conga managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Managed Packages Dependency Matrix](#).

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

Conga 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 Conga Contract Management, you must ensure the minimum system requirements.

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements.
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> • Google Chrome • Microsoft Edge <p>Conga recommends the latest stable version of the browser for the best performance.</p> <div style="border: 1px solid #f9c996; 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 #c9d9e9; padding: 5px; margin-top: 10px;"> <p> Conga 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.

- [Upload Signed Documents in Lightning](#)
- [Intelligent Import Admin Console for Lightning](#)
- [Import Large Files in Lightning](#)
- [Run Wizard in Lightning](#)
- [Lite User License](#)
- [Single Sign-on for Salesforce and Kira](#)

Upload Signed Documents in Lightning

You can upload the manually signed document to the agreement in DOC, DOCX, or PDF format.

Get Started

For details on how to upload signed documents in lightning, refer to [Uploading Signed Documents](#) in *Contract Management on Salesforce Spring 2020 User Guide*.

Intelligent Import Admin Console for Lightning

You can now configure intelligent import settings, map record types to projects, and synchronize provisions in the Salesforce Lightning mode.

Get Started

For details on the intelligent import admin console, refer to [Configuring Intelligent Import Settings, Mapping Record Types to Projects, and Synchronizing Provisions](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Import Large Files in Lightning

This feature allows you to intelligently import files of size more than 6 MB in the Salesforce Lightning mode.

Get Started

For details on importing large files in Lightning, refer to [Intelligently Importing Large Files in Lightning](#) in *Contract Management on Salesforce Spring 2020 User Guide*

Run Wizard in Lightning

You can now run the contract wizard in the Salesforce Lightning mode.

Get Started

For details on running wizards in Lightning, refer to [Contract Wizard in Lightning](#) in *Contract Management on Salesforce Spring 2020 User Guide*.

Lite User License

You can provide a limited number of logins to Contract Management to a set of users with the help of a Lite License.

Get Started

For details on Lite User License, refer to [Setting Up Lite User License](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Single Sign-on for Salesforce and Kira

You can set up single sign-on to authorize users to access Salesforce and Kira with one login.

Get Started

For details on single sign-on, refer to [Setting Up Salesforce and Kira Single Sign-on](#) in *Contract Management on Salesforce Spring 2020 User Guide*.

Enhancements

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

- [Updates to Installation](#)
- [Delete Documents from Kira](#)
- [Retrieve Highlighted Documents from Kira](#)
- [Update to Clause Status](#)
- [Conga User Experience Analysis](#)
- [New Comply System Properties](#)

Updates to Installation

From this release, you must install the Conga Base Library before installing or upgrading Contract Management.

Get Started

For details on installation and upgrading Contract Management, refer to [Installing Contract Management](#) and [Upgrading Contract Management](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Delete Documents from Kira

The DeleteDocumentFromKira property allows you to automatically delete processed documents from Kira.

Get Started

For details on how to delete documents from Kira, refer to [Configuring Intelligent Import Settings](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Retrieve Highlighted Documents from Kira

The retrieveHighlightedDocument property allows you to automatically retrieve highlighted documents from Kira.

Get Started

For details on how to delete documents from intelligent data extraction software, refer to [Configuring Intelligent Import Settings](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Update to Clause Status


After an agreement document is signed manually, all the clauses are marked as Final in the Agreement Clauses section.

Get Started

For details on how to upload signed documents in lightning, refer to [Finalizing an Agreement](#) in *Contract Management on Salesforce Spring 2020 User Guide*.

Conga User Experience Analysis

With this release, in order to better understand and analyze feature usage and the user experience, Conga is adding a user experience analysis component to its solution with the assistance of Pendo. The analytics component allows Conga to tailor improvements and new features to help meet your business requirements and improve the user experience. No action is required on your part and there will be no impact to any existing product features, system functionality, or configured workflows. No personally identifiable information (PII), nor any other proprietary, confidential, or sensitive data will be collected by the analytics component.

 During Conga Base Library installation, if you see an “Approve Third-Party Access” prompt, this refers to the Conga User Experience Analysis component. Click **Continue** to proceed with the installation. For more information, see [Installing Contract Management](#).

New Comply System Properties

The following Comply System Properties are introduced in this release:

- CLM Lite License Profile(s)
- CLM Lite License Admin Email
- Email Lite Monitoring Report to Conga?
- Inactivate Non-Compliant Lite User
- Ancestor Selection For Import Offline

- Asynchronous Checkin Recipient
- Auto Enable Asynchronous Checkin
- XAJIS End Point

Get Started

For details on Comply System Properties, refer to [Comply System Properties](#) in *Contract Management on Salesforce Spring 2020 Administrator Guide*.

Data Model Changes

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

Object	Field	Description	New/ Changed
DocumentVersionDetail__c			Changed
	Is Sent For Manual Signature	Indicates the document is sent for manual signature.	New
IDESetting__c			Changed
	Quick Study URL	Launches Kira Quick Study.	New
LiteUserException__c.			New
	Allowed Login Count	The number of logins allowed per user.	New
	LiteUserException Name	Name of the Lite user exception.	New
	Login Count for Given Period	The number of Lite user logins within a given period.	New
	Login Count in the Last 12 Months	The number of Lite user logins in the last 12 months.	New
	Period Start Date	The start date of the login count period.	New
	Period End Date	The end date of the login count period.	New
	Profile	The Lite user profile.	New
	User	The user name of the Lite user.	New
LiteUserSetting__c			New
	Allowed Login Count	The number of logins allowed per Lite user.	New

Object	Field	Description	New/ Changed
	Last Report Run Time	The time at which the last report was generated.	New
	Lite License Conga Admin Email	The email address of the Conga Admin.	New
LiteUserSummary__c			New
	Has Exceeded Allowed Login?	Indicates if the Lite user has exceeded the allowed number of logins.	New
	Lite User Summary Name	The name of the Lite user summary.	New
	Login Count for Given Period	The number of Lite user logins within a given period.	New
	Login Count in the Last 12 Months	The number of Lite user logins in the last 12 months.	New
	Profile	The Lite user profile.	New
	Total login count Till Date	The number of Lite user logins till date.	New
	User	The user name of the Lite user.	New

Resolved Issues

The following table lists the issues resolved in this release.


Case Number	Conga Internal ID	Description
00098428	CLM-5864	<p>A user required information regarding the impact of Data Recovery and apex:flash feature retirement by Salesforce on Contract Management.</p> <p>Resolution: The Data Recovery feature by Salesforce is now payable and you need to upgrade your org if you need to recover physically or permanently deleted data. There is no impact of Apex:flash feature retirement on Contract Management.</p>
00097263	CLM-5739	<p>When a user cloned an agreement, the objects that were not defined in the APTS_ComplyConfig were cloned.</p>
00095949	CLM-5615	<p>When the wizard design had a submit rule to open the record detail page, a user encountered an error on submitting the wizard.</p>
CAS-20146-P2V9N1	CLM-5410	<p>A user encountered an error when the file name that had more than 80 characters was attached in a wizard.</p> <p>Resolution: The character limit of the document name is enhanced to 256 characters.</p>
CAS-18851-D0B9K0	CLM-5348	<p>The agreement validation rule did not appear in the Lightning mode after clicking the Cancel Request button.</p>

The following table lists the known issue resolved from the previous release.

Conga Internal ID	Description
CLM-5486	<p>When a user viewed Agreement Hierarchy for an Account, the Account Owner field incorrectly displayed Internal Id.</p>

Known Issues

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

Cong a Intern al ID	Issue
CLM-5 988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5 917	If Set This Control Value rule is set on an input field, you cannot modify the input in the wizard.
CLM-5 898	The help icon () for checkboxes and multi-select picklist is displayed below the field name.
CLM-5 976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5 367	The console app tab remains open on canceling sending for signatures and review.
CLM-5 207	The console app displays the Generate button even after the user has generated the document.
XA-271 8	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-3 212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.
CLM-3 211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2 730	In the 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-2 690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

Cong a Intern al ID	Issue
CLM-2 440	After an agreement document is sent for review, the activity history does not record details for any of the attachments.
CLM-2 416	Entries on the Master Agreement Clauses listing are showing an incorrect timestamp.
CLM-2 319	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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