

APTTUS[®]

Contract Management on Salesforce Summer 2019 Release Notes

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Table of Contents

About Release Notes.....	3
Packages	4
System Requirements and Supported Platforms.....	5
New Features.....	6
View Agreement Hierarchy.....	6
Searching Agreement Documents.....	6
Send Agreement Documents for Parallel Review	6
Enhancements	8
Copy Agreement Notes	8
Data Model Changes	9
Resolved Issues	12
Known Issues.....	13
Apttus Copyright Disclaimer	14


About Release Notes

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

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

- [What's New](#) in *Contract Management on Salesforce Summer 2019 User Guide* or
- [What's New](#) in *Contract Management on Salesforce Summer 2019 Administrator Guide* or
- [What's New](#) in *Contract Management on Salesforce Summer 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)	10.1.0465 10.465
ApttusDocuSign API (New)	4.0.85 4.85
Apttus Contract DocuSign Integration	2.0.0032 2.32
Adobe Sign	21 21.5
Apttus EchoSign Integration	6.0.24 6.24

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 #17a2b8; 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.

- [View Agreement Hierarchy](#)
- [Searching Agreement Documents](#)
- [Send Agreement Documents for Parallel Review](#)

View Agreement Hierarchy

You can click the **Agreement Hierarchy** button on the Agreement Detail page to view the agreement hierarchy of an agreement. The agreement hierarchy page displays a hierarchical list of agreements related to the current agreement record. Hierarchical relationships to the current agreement include:

- Parent agreements
- Child agreements
- Related agreements
- Amended and renewed agreements

The new APTS_AgreementHierarchyFields admin entry allows you to add fields that must be displayed on the Agreement Hierarchy page.

Get Started

For details on viewing agreement hierarchy, refer to [Viewing Agreement Hierarchy](#) in *Contract Management on Salesforce Summer 2019 User Guide* and APTS_AgreementHierarchyFields, refer to [Admin Objects](#) in *Contract Management on Salesforce Summer 2019 Administrator Guide*.

Searching Agreement Documents

In the Agreement Document Search tab, you can use keywords, text, or agreement field names (Record Type and Agreement Name) to search agreement documents.

Get Started

For details on how to search agreement documents, refer to [Searching Agreement Documents](#) in *Contract Management on Salesforce Summer 2019 User Guide*.

Send Agreement Documents for Parallel Review

This feature allows multiple users to review the document in collaboration when you enable "Parallel Review" and "Enable Document Versioning" Comply System Properties. You can track the progress of the review cycle in the Document Versions section on the Agreement Detail page. You can also add additional reviewers to the review cycle. You can configure an email service to allow a reviewer to end a document review by Email.

Get Started

For details on how to send an agreement document for parallel review, refer to [Sending an Agreement Document for Parallel Review](#) in *Contract Management on Salesforce Summer 2019 User Guide* and [Configuring Email Service for Ending Review by Email](#) in *Contract Management on Salesforce Summer 2019 Administrator Guide*.

Enhancements

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

- [Copy Agreement Notes](#)

Copy Agreement Notes

When you clone, amend, or renew an agreement, the notes of the parent agreement are copied to the new agreement.

Get Started

For details on how to copy notes, refer to [Managing Agreement Lifecycle Post-Activation](#) in *Contract Management on Salesforce Summer 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	Field	Data Type	Description	New/ Changed
ReviewCycle__c				New
	ID	ID	Unique ID	New
	EmailBody__c	Text(255)	Email body	New
	EmailSubject__c	Long Text(32768)	Email subject	New
	Comment__c	Long Text(32768)	Comment	New
	EndedCancelledBy__c	Lookup(User)	Canceled or Ended by user name	New
	EndedCancelledOn__c	Date/Time	Canceled or ended review date	New
	OriginalDocumentVersionDetail__c	Master-Detail(Document Version Detail)	Original document	New
	FinalDocumentVersionDetail__c	Lookup(Document Version Detail)	Final document	New
	ProtectionLevel__c	Text(255)	Protection level	New
	ProtectionType__c	Text(255)	Protection type	New
	ReviewStatus__c	Text(255)	Review status	New
	SupportingDocuments__c	Text(255)	Supporting documents IDs	New
	TemplateId__c	Text(20)	Email template ID	New
	InitiatedBy__c	Lookup(User)	Review initiator	New
Reviewer__c				New
	ID	Long Text(32768)	ID	New
	Comment__c	Lookup(User)	Comment by reviewer	New
	EndedCancelledBy__c	Lookup(User)	Name of the user who ended the review	New

Object	Field	Data Type	Description	New/ Changed
	EndedCancelledOn__c	Date/Time	Review end date	New
	EndReviewDocumentVersion__c	Lookup (Document Version Detail)	Version created after check in	New
	Mode__c	Picklist	Check-in mode	New
	RecipientType__c	Picklist	Recipient type	New
	ReviewCycle__c	Master Detail(Review Cycle)	Review cycle	New
	ReviewerEmail__c	Email	Reviewer email	New
	ReviewStatus__c	Picklist	Review status	New
	UserorContactId__c	Text(20)	User ID	New
APTS_Agreement				New
	AgreementHierarchy	Formula Button	Launch agreement hierarchy	New
	UploadReviewedDocument	Formula Button	Complete review of document	New
	AgreementHierarchyFields	Field Set	Display fields on the Agreement Hierarchy page	New
DocumentVersion__c				New
	PendingReviews__c	Roll-Up Summary (COUNT Review Cycle)	Pending reviews	New
	PendingReviews__c	Roll-Up Summary (MAX Document Version Detail)	Pending reviews	New
	LatestReviewCycleStatus__c	Text(255)	Latest review cycle status	New
DocumentVersion__c				New

Object	Field	Data Type	Description	New/ Changed
	ReviewStatus__c	Formula (Text)	Review status	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
N/A	CLM-4767	When Template Versioning was enabled, the Custom Properties section was missing during template check-in.
N/A	CLM-3971	A user got an error while activating an agreement if the files selected for deletion were owned by another user.
CAS-10914-B3Y4S7	CLM-3811	A user was unable to view the clause list as per the record type selected for the template in the X-Author Contracts Playbook.
CAS-09778-Y1W7X9	CLM-3628	A user got an Apex error while creating an agreement when Document Content Search was disabled.

Known Issues

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

Apttus Internal ID	Issue
CLM-4133	Salesforce limitation: Global Search with the email address does not return RTF type files.
CLM-4431	Salesforce limitation: Unable to perform Document Search when the content contains full stop in the sentence.
CLM-4741	Document Search and User Filter are unavailable on the Salesforce Lightning Document Finder page component.
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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