Contract Management on Salesforce

Summer 2020 Release Notes

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About Release Notes

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

> For more information on new features, enhancements, and document improvements refer to
> - What's New in *Contract Management on Salesforce Summer 2020 User Guide* or
> - What's New in *Contract Management on Salesforce Summer 2020 Administrator Guide* or
> - What's New in *Contract Management on Salesforce Summer 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)**	1.1.93 | 1.93 ⓘ Mandatory package to be installed in the Summer 2020 release.
Conga Content Integration **(New)**	6.3.0012 | 6.12
Conga Contract Lifecycle Management **(New)**	11.1.0547 | 11.547
Conga DocuSign API **(New)** (*Required if you are using DocuSign*)	6.0.0093 | 6.93
Conga CLM DocuSign Integration **(New)** (*Required if you are using DocuSign*)	4.1.0040 | 4.40
Adobe Sign **(New)** (*Required if you are using Adobe Sign*)	22.11 | 22.11
Conga CLM EchoSign Integration **(New)** (*Required if you are using Adobe Sign*)	8.44 | 8.1.0044

ⓘ 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 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	Conga supports the following browsers: • Google Chrome • Microsoft Edge Conga recommends the latest stable version of the browser for the best performance. ⚠ Internet Explorer is not supported.
Microsoft Office	• 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 ⓘ Conga recommends the latest Microsoft Office Suite for the best performance.

New Features

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

- - Ability to Collaborate Online
  - Ability to Merge Documents in Salesforce Lightning
  - Ability to Identify Document Type for Version Aware Agreement
  - Ability to Import Supporting Documents

Ability to Collaborate Online

Online Contract Collaboration (OCC) allows you to review and redline agreement documents within Contract Management without the need for any dedicated software. You must enable the comply system property—Enable Online Contract Collaboration. The following features are available for online contract collaboration:

- Redline agreement document
- Differentiate edits by each negotiator/collaborator
- Add, reply, and resolve comments
- Access Smart Data and view smart and read-only data
- Identify modified and new smart data
- Access Clause Library and insert clauses
- Sync the changes in a document to the corresponding agreement record by publishing the document
- Interoperate with X-Author Contracts and X-Author for Contracts 2.0

Get Started

For details on the online contract collaboration, refer to Online Contract Collaboration in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Merge Documents in Salesforce Lightning

You can combine the latest versions of different agreement documents along with the documents uploaded to the version aware agreement in Salesforce Lightning. You can combine the documents in different formats (DOCX, DOC, and PDF formats) into one DOCX or PDF document. You can also configure the Merge Documents protection level for merged documents.

Get Started

For details on merging documents, refer to Merging Documents in Lightning in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Identify Document Type for Version Aware Agreement

For version aware agreements, the document type field is introduced to identify the type of document. The following document types are introduced for different agreement documents:

Document	Document Type
Generated, regenerated, created offline, and imported offline documents	Agreement Document
Generated supporting documents and documents added in Wizard	Supporting Document
Signed and uploaded executed documents	Executed Document
Intermediate Signed Documents (EchoSign)	Intermediate Document
Other documents	Others
Documents in amended, renewed, or cloned agreements	Documents inherit Document Type from the original agreements

In version aware agreements, you can view the Document Type column when you Send for Review, Send for MS Team Review, Send for Parallel Review, Send for Signature, and Send for eSignature (EchoSign).

After you upgrade to the Summer 2020 release, all the existing documents in version aware agreements will have Document Type as Agreement Document.

Get Started

For details on merging documents, refer to Generating an Agreement, Creating an Offline Agreement, Importing an Offline Agreement, Storing an Executed Agreement, and Uploading Signed Documents in Lightning in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Import Supporting Documents

You can use the Import Supporting Document button to import supporting documents in a version aware agreement.

Get Started

For details on how to import supporting documents using intelligent import, refer to
 Importing Supporting Document in *Contract Management on Salesforce Summer 2020 User Guide.*

Enhancements

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

-
    - Ability to Ending Parallel Review without Document
    - Ability to Notify a Reviewer on Review Cancellation
    - Enhancement to Parallel Review
    - Ability to View Number of Pages and the Language of the Document on Document Viewer
    - Enhancement to Intelligent Import
    - Support for Mapping Project and Record Type to Provisions
    - Ability to Test IDE Connection
    - Ability to Navigate to the Clause while Reviewing Intelligently Imported Document
    - Ability to Edit Email Templates for Intelligent Processing
    - Ability to Upload Signed Documents using Intelligent Import
    - Ability to Configure the Availability of the Upload Signed Document Button
    - Ability Configure Columns in the Template Selection Page in Lightning
    - Ability to Add Help Text for Template Selection
    - Ability to Add Custom Button API Names in Salesforce Lightning
    - Document Version Support for Signed Documents
    - Conga User Experience Analysis

Ability to Ending Parallel Review without Document

You can end a parallel review without uploading a reviewed document.

Get Started

For details on how to end a parallel review without uploading a document, refer to Sending an Agreement Document for Parallel Review in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Notify a Reviewer on Review Cancellation

An email is sent to the reviewers in a parallel review when the review is canceled.

Get Started

For details on how a reviewer is notified, refer to Sending an Agreement Document for Parallel Review in *Contract Management on Salesforce Summer 2020 User Guide*.

Enhancement to Parallel Review

You can only send documents with DOCX format for parallel review. If you send documents for parallel review with any other file format (PDF, PNG, DOC, etc.,), the documents will not go through the normal review.

Get Started

For details on parallel review restrictions, refer to Sending an Agreement Document for Parallel Review in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to View Number of Pages and the Language of the Document on Document Viewer

When you review a document created by intelligent import, you can view the number of pages in the document and language of the document on the Document Viewer toolbar.

Get Started

For details on how to review a document created by intelligent import, refer to Reviewing an Agreement Created by Intelligent Import in *Contract Management on Salesforce Summer 2020 User Guide*.

Enhancement to Intelligent Import

When you complete the review of an offline document (created or imported):

- All the clauses in the document are updated to *Inserted* in the Agreement Clauses section
- The Agreement Status Category is updated to *In Authoring*
- The Agreement Status is updated to *Author Contract*.

When you complete the review of an executed document (uploaded as a signed document):

- All the clauses in the document are updated to *Final* in the Agreement Clauses section
- The Agreement Status Category is updated to *In Filling*.
- The Agreement Status is updated to blank.

Get Started

For details on intelligent import, refer to Reviewing an Agreement Created by Intelligent Import in *Contract Management on Salesforce Summer 2020 User Guide*.

Support for Mapping Project and Record Type to Provisions

You can map project and record type to clauses and fields to provisions in Lightning.

Get Started

For details on how to mapping project and record type to provisions, refer to Mapping Clauses and Fields to Provisions in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability to Test IDE Connection

You can verify the accuracy of the IDE details that you have provided.

Get Started

For details on how to test IDE connection, refer to Configuring Intelligent Import Settings in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability to Navigate to the Clause while Reviewing Intelligently Imported Document

When you select a clause in the Clauses tab while reviewing an intelligently imported document, you are navigated to the clause location in the document.

Get Started

For details on reviewing the intelligently imported document, refer to Reviewing an Agreement Created by Intelligent Import in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Edit Email Templates for Intelligent Processing

You can edit the following email templates that are available in Contract Management to notify a user about intelligent import processing:

- Intelligent Discovery Processing Error Notification
- Intelligent Discovery Processing Status Update

Get Started

For details on editing email templates for intelligent processing, refer to Prerequisites in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability to Upload Signed Documents using Intelligent Import

When you have configured Intelligent Import Settings in your org and enable the *Intelligent Import for Signed Document* comply system property, you can use Intelligent import to upload signed documents.

Get Started

For details on how to upload signed documents using intelligent import, refer to Uploading Signed Documents in *Contract Management on Salesforce Summer 2020 User Guide*.

Ability to Configure the Availability of the Upload Signed Document Button

You can make the Upload Signed Document buttons available for different Statuses and Status Categories of agreements according to your requirement.

Get Started

For details on how to configure the availability of the Upload Signed Document button, refer to Configuring the Availability of the Upload Signed Document Button in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability Configure Columns in the Template Selection Page in Lightning

In the Template Selection page, you can configure the template attributes that must be displayed as columns in the template selection section available when you preview documents, generate documents, regenerate documents, and generate supporting documents. By default, Name, Guidance, Category, and SubCategory template attributes are available on the Template Selection page.

Get Started

For details on how to configure columns in the Template Selection page in Lightning, refer to Configuring Columns in the Template Selection Page in Lightning in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability to Add Help Text for Template Selection

You can use the *APTS_TemplateSelectionGuidance* Admin Entry to add help text in the Template Selection page to guide users to select appropriate templates when users preview documents, generate documents, regenerate documents, and generate supporting documents.

Get Started

For details on the Admin Entry, refer to Admin Entries in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Ability to Add Custom Button API Names in Salesforce Lightning

You can use the *APTS_CustomLinksforActionPanel Admin Entry* to customize the action panel in Salesforce Lightning by adding custom buttons with API names.

Get Started

For details on the Admin Entry, refer to Admin Entries in *Contract Management on Salesforce Summer 2020 Administrator Guide*.

Document Version Support for Signed Documents

The following conditions apply when you send documents for signatures:

- When you send documents in version aware agreements for manual signatures:
    - You must select at least one latest document version and you can also select documents from Files or Notes and Attachments.
    - The uploaded fully signed documents are available as the major version with name as UploadSignedDocument in the Document Version related list.
- When you send documents in version aware agreements for eSignatures using EchoSign (Adobe Sign):
    - You can send generated, regenerated, supporting, imported offline, created offline, or manually uploaded documents.
    - You can select any document from Files or Notes and Attachments. You can also select the latest document version from the Document Version related list.
    - The fully signed single or multiple documents from EchoSign are available In Contract Management as the major version with name as Executed Document in the Document Version related list.
    - The intermediate signed documents from EchoSign are available in Contract Management as a major document version with name as Intermediate Signed Document in the Document Version related list. In version aware agreement, the Document Type of the document is updated to Intermediate Document.

Get Started

For details on signed documents Contract Management, refer to Finalizing an Agreement and Uploading Signed Documents in *Contract Management on Salesforce Summer 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. Select the **Yes, grant access to these third-party web sites** checkbox and click **Continue** to proceed with the installation. For more information, see Installing Contract Management.

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	System/ User	New/ Changed
APTS_AGREEMENT__C				Changed
	ImportSupporting Document__c	Button for Import Supporting Document	User	New
	Store_Executed_A greement	Stores executed agreement	User	New
APTS_Template__c				Changed
	TemplateListColu mnFieldSet	This field set allows you to configure the template attributes that must be displayed as columns in the template selection section available when you preview documents, generate documents, regenerate documents, and generate supporting documents	User	New
ComplySyste mProperties__ c				Changed
	IntelligentImportF orSignedDocumen t__c	Allows you to process signed documents using intelligent import	User	New
	EnableOnlineCon tractCollaborati on__c	Indicates whether Online Contract Collaboration is enabled	User	New
DocumentLoc kSubscription_ _c				New
	AgreementId__c	Agreement ID	User	New

Object	Field	Description	System/User	New/Changed
	DocumentVersionId__c	Associated Document Version	User	New
	UserId__c	Associated User ID	User	New
DocumentVersionDetail__c				Changed
	DocumentAction__c	Allows you to view and edit a document online	User	New
DocumentVersion__c				Changed
	DocumentType__c	Document type represents the type of document in agreement lifecycle	User	New
IDEJob__c				Changed
	Language__c	This field displays the Language of the imported document imported	User	New
	NumberOfPages__c	This field displays the number of pages in the imported document	User	New
IDEProvision__c				Changed
	BaseObject__c	The base object for which the field must be mapped	User	New
	MetaDataFieldId__c	Id of the MetaData field	User	New
	ProvisionType__c	Type of provision	User	New
	TemplateReferenceId__c	Template Reference Id	User	New

Object	Field	Description	System/ User	New/ Changed
OCCHTMLContent__c				New
	WordContentId__c	Stores Docx file Id	User	New
	HTMLContentId__c	Stores HTML file Id	User	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Conga Internal ID	Description
103841	CLM-6426	When there were more than two hundred thousand users in an org, a user was unable to create an agreement record.
103803	CLM-6415	On running a wizard in Salesforce Lightning, the correct picklist values were not displayed as per the record type of the wizard.
101447	CLM-6255	When a user cloned, amended, or renewed an agreement in Salesforce Lightning, the cloned, amended, and renewed agreements had duplicate attachments.
101774	CLM-6228	When a user created a wizard with an Input Rule that had criteria based on the picklist field, the visibility rule did not work.
NA	CLM-6226	When a wizard input had comma separated picklist values, the comma-separated values were displayed different values.
NA	CLM-6225	A user observed Salesforce validation rule error messages were displayed on submitting the wizard.
100893	CLM-6199	The IDE job was sending an email to the user who has scheduled the instead of the user who had submitted the request.
101376	CLM-6185	A user encountered an error when a wizard input rule was based on the lookup field.
NA	CLM-6169	A user observed multiple lines for the same field value on reviewing a document created by intelligent import.
99668	CLM-6073	A user encountered an error in French while creating an agreement record.
49046	CLM-4826	A user observed Salesforce Classic user interface on creating a child agreement in Salesforce Lightning.
59999	CLM-3856	A user encountered an error on clicking the View Agreement Hierarchy button.

Known Issues

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

Conga Internal ID	Description
CLM-6314	In the Console app, after creating an agreement, you are navigated to the Agreement List page instead of the Agreement Detail page.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
CLM-5359	When you choose any value instead of the first value in the wizard lookup field in Salesforce Classic, the value resets to the first value.
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5917	If **Set This Control Value** rule is set on an input field, you cannot modify the input in the wizard.
CLM-5898	The help icon (ⓘ) for checkboxes and multi-select picklist is displayed below the field name.
CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
CLM-5207	The console app displays the Generate button even after the user has generated the document.
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.

Conga Internal ID	Description
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	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-2690	In the 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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For additional resources and support, please visit https://community.conga.com.

DOC ID: CMSFSUM20RN20200804