

APTTUS[®]

Contract Management on Salesforce Winter 2018 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Contract Management on Salesforce Winter 2018 Release.

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

- [What's New](#) in *Contract Management on Salesforce Winter 2018 User Guide* or
- [What's New](#) in *Contract Management on Salesforce Winter 2018 Administrator Guide* or
- [What's New](#) in *Contract Management on Salesforce Winter 2018 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)	9.3.0432 9.432
Apttus DocuSign API	4.0.0078 4.78
Apttus Contract DocuSign Integration	2.0.0029 2.29
Apttus Echosign Integration	6.21
Adobe Sign	20.9


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>

System Requirements	
Item	Requirement
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 #ccc; padding: 5px; margin-top: 10px;"><p> Apttus recommends the latest Microsoft Office Suite for the best performance.</p></div>

New Features

The following feature is new to Contract Management in this release.

- [Intelligent Data Extraction for Importing Offline Agreements](#)

Intelligent Data Extraction for Importing Offline Agreements

Contract Management along with an intelligent data extraction software enables you to intelligently import a third-party paper. The third-party paper is scanned by the optical character recognition method and converts the document to a searchable PDF.

The Intelligent Data Extraction feature in Contract Management allows you to:

- Create an offline agreement
- Import an offline document
- Review an agreement created by intelligent import
- Store an executed agreement

Get Started

For more information, refer to [Managing Offline Agreements](#) the *Contract Management Administrator Guide* and [Working with Offline Agreements](#) in the *Contract Management User Guide*.

Enhancements

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

- [Ability to Configure Clone Specifications Based on Record Types](#)
- [Ability to Define Naming Convention for Different Record Types](#)

Ability to Configure Clone Specifications Based on Record Types

You can now configure separate clone specifications for each record type.

Get Started

For details on how to configure clone specifications based on record type, refer to [Configuring APTS_ComplyConfig](#) in *Contract Management on Salesforce Winter 2018 Administrator Guide*.

Ability to Define Naming Convention for Different Record Types


You can define a naming convention for the generated files based on the record types.

Get Started

For details on how to define the naming convention for different record types, refer to [Defining Naming Convention for Different Record Types](#) in *Contract Management on Salesforce Winter 2018 Administrator Guide*.

Data Model Changes

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

 Intelligent data extraction is referred to as IDE in this section.

Object	Fields	Descriptions	New/ Changed
IDESetting			New
	Name	Name of the IDE provider	New
	Logo URL	Logo URL of the IDE provider that appears during intelligent import	New
	Active	Indicates that IDE is enabled	New
	Token	Token provided by the IDE provider	New
	URL	URL to connect to the IDE software	New
	Setting	Additional settings can be added in JSON format for IDE	New
IDEMapProjectRecordType			New
	Id	Unique ID	New
	Name	Name of the project and record type mapping	New
	Description	Description for the mapping	New
	Record Type Name	Contract Management record type name	New
	ProjectId	ProjectId of the IDE provider	New
IDEProvision			New
	Id	Unique ID	New
	Name	Name of the provision	New
	Description	Description for the provision	New
	IDE Name	Name of the IDE provider	New
	Field Number	Field Number in IDE provider	New
	Active	Indicates that IDE Provision is enabled	New

Object	Fields	Descriptions	New/Changed
IDEMapProvisionRecordType			New
	Id	Unique ID	New
	Name	Name of the provision and record type mapping	New
	Description	Description of the mapping	New
	Record Type Name	Contract Management record type name	New
	IDE Provision	IDE Provision Id of the IDE provider	New
IDEMapClauseProvision			New
	Id	Unique ID	New
	Name	Name of the clause and provision mapping	New
	Description	Description of the mapping	New
	Template Reference	Reference number provided in a template	New
	IDE Provision Record Type	IDE Provision Record Type ID of the IDE provider	New
IDEMapFieldProvision			New
	Id	Unique ID	New
	Name	Name of the field and provision mapping	New
	Description	Description of the mapping	New
	Base Object	API name of the agreement object	New
	Meta Data Field	API name of the field	New
	IDE Provision Record Type	IDE Provision Record Type ID of the IDE provider	New
IDEJob			New
	Id	Unique ID	New
	Name	Name of the job	New

Object	Fields	Descriptions	New/Changed
	AgreementId	Agreement ID	New
	JobDetail	Job ID in JSON format, document ID and extracted URL received from IDE provider	New
	Job Type	Job type	New
	Job Status	Job status	New
	Mutex	Mutex variable	New
	Attachment	Attachment or file ID	New
	Analysed Attachment	Analyzed Attachment or file ID	New
	Extracted JSON	Actual extracted JSON	New
	Review URL	Review URL of the IDE provider	New
	Attachment Name	Attachment or file name	New
	Exception	Stores error coming from IDE provider, if any	New
	SourceUseCase	1. Create Offline Agreement 2. Save and Stored Execute Agreement 3. Import Offline Document	New
	IsUnzipRequire	Flag to indicate if unzip is pending or not	New
IDEJobFieldExtraction			New
	Id	Unique ID	New
	Name	Name	New
	IdeJob	IDE Job ID	New
	Extracted Value	Extracted value for a field	New
	Field Number	Field Number	New
	Page Number	Page number	New
	Meta Data Field	Meta data field details (e.g. APTS_Agreement__c.Name)	New
	Refined Value	Use for refactoring algorithm	New
	Word Wild Card Value	Use for refactoring algorithm	New

Object	Fields	Descriptions	New/Changed
	Pattern Similarity	Use for refactoring algorithm	New
	Text Similarity	Use for refactoring algorithm	New
	Length Difference	Use for refactoring algorithm	New
	FieldHeader	Header text of the field	New
IDEJobClauseExtraction			New
	Id	Unique ID	New
	Name	Name	New
	IdeJob	IDE Jobs ID	New
	Extracted Value	Extracted value for a field	New
	Field Number	Field Number	New
	Page Number	Page number	New
	Clause	APTS_Template__c.Id	New
	Refined Value	Use for refactoring algorithm	New
	Word Wild Card Value	Use for refactoring algorithm	New
	Pattern Similarity	Use for refactoring algorithm	New
	Text Similarity	Use for refactoring algorithm	New
	Length Difference	Use for refactoring algorithm	New
	ClauseHeader	Header text of the clause	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
NA	CLM-3376	On clicking New Agreement and setting record type, based on the user permission, neither the Agreement Detail page was not displayed nor the error message was displayed.
NA	CLM-2999	In Salesforce Lightning, deleting or adding an Agreement Term Exception was not displaying the added or deleted record.
CAS-07406-T5P6Z4	CLM-3366	In Salesforce Lightning, creating a new child agreement was not navigating to the child agreement page but was staying on parent agreement.
00205587	CLM-2498	On clicking Submit Request in an agreement, the Read timed out error was displayed.

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

Apttus Internal ID	Description
CLM-3334	Selecting the Fill in form fields protection level was generating read-only documents with non-editable fields.

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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