

APTTUS[®]

Contract Management on Salesforce Winter 2019 Release Notes

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About Release Notes

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

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

- [What's New](#) in *Contract Management on Salesforce Winter 2019 User Guide* or
- [What's New](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide* or
- [What's New](#) in *Contract Management on Salesforce Winter 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)	10.2.0491 10.491
Apttus DocuSign API (New)	5.2.0088 5.88
Apttus Contract DocuSign Integration (New)	3.2.0038 3.38
Adobe Sign	21 21.5
Apttus EchoSign Integration (New)	7.2.0030 7.30

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.
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.

- [Ability to Send Agreement Documents for Microsoft Teams Review](#)
- [New Agreement Hierarchy View for Accounts](#)
- [New In-Effect View to Access In-Effect Agreement Details](#)
- [Support for Salesforce Lightning Console](#)
- [New Cloning Specifications](#)
- [Introduced Clause Versioning](#)

Ability to Send Agreement Documents for Microsoft Teams Review

You can send the agreement documents to Microsoft Teams for collaboration review. In Microsoft Teams, you can collaboratively edit and review an agreement document with all the team members and view live changes.

Get Started

For details on how to send an agreement document for Microsoft Teams review, refer to [Sending an Agreement Document for Microsoft Teams Review](#) in *Contract Management on Salesforce Winter 2019 User Guide* and [Configuring MS Teams Setting](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide*.

New Agreement Hierarchy View for Accounts

You can click the **Agreement Hierarchy** button on the Account Detail page to view the agreement hierarchy of an Account. The agreement hierarchy page displays a hierarchical list of agreements related to the current Account. The new APTS_AccountHierarchyFields 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 of an Account](#) in *Contract Management on Salesforce Winter 2019 User Guide* and APTS_AccountHierarchyFields, refer to [Admin Objects](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide*.

New In-Effect View to Access In-Effect Agreement Details

You can use the In-Effect View to gather key information and agreement data of the agreement that has been In-Effect at least once. In-Effect View is available for the agreements with Status Category as In Effect and Status as Activated. You can view the agreement data such as agreement details, clauses, and documents that are cumulatively effective and enforced by the latest in-effect agreement. The APTS_InEffectViewMetadataFields admin entry allows you to configure fields that must be displayed on the In-Effect View page in the Agreement Details In Effect section.

Get Started

For details on viewing In-Effect view, refer to [Accessing In-Effect View](#) in *Contract Management on Salesforce Winter 2019 User Guide* and `APTS_InEffectViewMetadataFields`, refer to [Admin Objects](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide*.

Support for Salesforce Lightning Console

You can access Contract Management from the Lightning Console. You can use the Lightning Console to Generate, Regenerate, Activate, Amend, Renew, Submit Request, Terminate, Expire, and Clone an agreement.

Get Started

For details on accessing Contract Management from Salesforce Lightning Console, refer to [Contract Management on Salesforce Lightning](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

New Cloning Specifications

You can create separate cloning specifications to specify the fields that need to be cloned when you clone, amend and renew an agreement.

After you upgrade to Winter 2019, you need to update `APTS_ComplyConfig_<RecordType>` to `APTS_ComplyConfig_<Action>_<RecordType>`. You can continue using the default `APTS_ComplyConfig` specification.

Get Started

For details on configuring cloning specifications, refer to [Configuring APTS_ComplyConfig](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Introduced Clause Versioning

You can view all the versions of a clause along with the modified text in the Master Agreement Clauses section. To access this feature you need to install Contract Management dependent packages—Apttus DocuSign API (v5.88), Apttus Contract DocuSign Integration (v3.38), and Apttus EchoSign Integration (v7.30).

Get Started

For details on clause versioning, refer to [Clause Versioning](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Enhancements

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

- [Updates to Basic Search Filters](#)
- [Updates to the Review Cycle Page](#)
- [Restriction for Activating an Agreement](#)
- [Updates to Agreement Clauses](#)
- [Updates to Emailing Multiple Agreement Documents](#)
- [Introduced the Executed Date Field](#)
- [Updates to Manage Package](#)

Updates to Basic Search Filters

You can use the new Basic Filters introduced in this release along with Record Type and Agreement Name to define multiple search criteria. Basic filters include Agreement Number, Agreement Name, Owner ID, Status, Status Category, Agreement Start Date, Agreement End Date, Account, and Record Type. The new APTS_DocumentSearchBasicFilter admin entry allows you to define basic search filters on the Agreement Search page.

Get Started

For details on how to search agreement documents, refer to [Searching Agreement Documents](#) in *Contract Management on Salesforce Winter 2019 User Guide* and APTS_DocumentSearchBasicFilter, refer to [Admin Objects](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide*.

Updates to the Review Cycle Page

You can view the name of the reviewer before the reviewer's email on the Review Cycle page. The Review Cycle Ended On field name is updated to Ended On on the review cycle panel.

When you track the review status from X-Author Contracts, the buttons on the Review Cycle page are disabled.

Get Started

For details on the review cycle, refer to [Sending an Agreement Document for Parallel Review](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Restriction for Activating an Agreement

You cannot activate an agreement if review cycles are in-progress.

Get Started

For details on activating an agreement, refer to [Activating an Agreement](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Updates to Agreement Clauses

The following table describes the changes to agreement clauses in Winter 2019 in comparison with previous releases:

Release	User Action	Clause Action in Contract Management
Prior to Winter 2019	Check-out a document from X-Author Contracts	<i>Original</i>
	Check-in a document from X-Author Contracts	<i>Final</i>
Winter 2019	Generate or regenerate an agreement in Contract Management	<i>Original</i>
	Fully signed agreement in Contract Management (in version aware agreements) Check-in a document from X-Author Contracts (in non-version aware agreements)	Final

Get Started

For details on agreement actions, refer to [Generating an Agreement](#), [Reviewing an Agreement Created by Intelligent Import](#), and [Finalizing an Agreement](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Updates to Emailing Multiple Agreement Documents

The recommended maximum file size to email agreements is 300 MB and the recommended maximum number of files to email agreements is 100.

Get Started

For details on emailing multiple agreement documents, refer to [Emailing Multiple Agreement Documents](#) in *Contract Management on Salesforce Winter 2019 User Guide*.

Introduced the Executed Date Field

The Executed Date field is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all the recipients. A user can manually enter the date when the document has wet signatures or when the signed document is uploaded manually.

Get Started

For details on agreement fields, refer to [Agreement Fields](#) in *Contract Management on Salesforce Winter 2019 Administrator Guide*.

Updates to Manage Package

Contract Management managed packages are not dependent on the Content Directory.

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
APTS_Agreement__c			Changed
	ExecutedDate__c	The agreement signed date.	New
Agreement_Clause__c			Changed
	Comments__c	Deprecated	Changed
	Comments2__c	Indicates comments	New
	VersionId__c	Indicates Associated Document Version ID	New
	ContentId__c	The ID of the associated content	New
Locale__c			New
	DefaultCurrencyPrecision__c	Currency precision for Currency fields	New
	DefaultDateTimeFormat__c	Format for date-time fields	New
	DefaultDateFormat__c	Format for date fields	New
	DefaultNumberPrecision__c	Number precision for Number fields	New
	DefaultTimeFormat__c	Format for time fields	New
	LocaleCode__c	Code of the locale name	New
	LocaleName__c	Name of the locale	New
	UniqueLocaleName__c	Unique locale name	New
MSTeamsDetail__c			New
	ChannelId__c	Unique channel Id	New

Object	Field	Description	New/ Changed
	ChannelName__c	Name of the Channel created for the review cycle	New
	Description__c	Description of the MS team	New
	DownloadURL__c	Download URL of the uploaded document	New
	Exception__c	Error messages from MS Teams	New
	GroupId__c	Unique Group Id	New
	GroupName__c	Name of the Group created for the review cycle	New
	MSTeamsStatus__c	Review cycle status	New
	MSTeamsStatusType__c	Review cycle status type	New
	ReviewCycleId__c	Unique review cycle Id	New
	ReviewDetail__c	Additional job details	New
	TeamId__c	Unique Team Id	New
	UploadURL__c	Upload URL of MS teams	New
ReviewCycle__c			Changed
	ReviewCycleType__c	Review Cycle Type	New
Reviewer__c			Changed
	MemberId__c	Member id of MS Teams	New

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
NA	CLM-2850	If a Wizard step had input control with a lookup filter then cursor focus changed to the first component every time when a user entered values for any component of step.
CAS-18373-S5P6X1	CLM-5243	In Lightning on the agreement generate page, the text was not wrapping in the Guidance column. Resolution: Guidance field text is truncated and the complete text is visible on hovering over the text.
CAS-17286-Z9H8Y1	CLM-5242	When a user renewed or amended agreements, the user had to refresh the page as the screen became unresponsive.
CAS-17928-P0T6M7	CLM-5197	While sending an agreement for signatures in Lightning, PDF view was not working.
CAS-18328-B9Y7H9	CLM-5144	During the parallel review, a reviewer was unable to check in the reviewed document as the email had an image in the signature.
CAS-17229-Q1T7M8	CLM-5087	While submitting a request, the logged-in user and default user mail id provided for APTS_DefaultEmailContactName admin entry did not receive the email.
CAS-14819-H6Y4W4	CLM-5004	A user got an error on clicking the Check-in button in X-Author Templates.
CAS-11130-T0D7M8	CLM-3506	While configuring Hide This Control for a field in the Wizard, the hide or show function was not working while wizard loads for the first time.
NA	CLM-4728	When a user clicked the Submit Request button on the iOS device, the next page appeared in Classic UI.

Known Issues

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

Apttus Internal ID	Issue
CLM-5486	<p>When you view Agreement Hierarchy for an Account, the Account Owner field incorrectly displays Internal Id.</p> <p>Workaround: You can configure <i>APTS_AccountHierarchyFields</i> admin setting and add <i>Owner.Name:Account Owner</i> as value to display the owner name for the Account Owner field.</p>
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.
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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