APTTUS®

Merge Service on Salesforce Spring 2020 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Merge Service Spring 2020 Release on Salesforce. All implementations will need to have the Comply System properties, however, unless you have installed the Apttus Proposals Management package you do not need Proposal System properties.

- Packages: Lists packages that are required to upgrade to this release of the product
- 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
- 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
Apttus Merge Service (**New**)	5.8.0.319

Merge Service Release Configuration

By default, your production org references the GA version of Merge Service. If you had previously configured Merge Service for pre-release, you will need to change some settings to use the GA version of Merge Service. All Merge Service implementations need to have the Comply System properties. You need to configure Proposal System properties if you have installed the Apttus Proposals Management package.

Use the following URLs to upgrade to the pre-release version of Merge Service:

- **Merge Webservice Endpoint**: https://mergews.apttus.net/cgi-bin/MergeServer/Bin/mmcgi.exe
- **Remote Site**: https://mergews.apttus.net

The following configurations allow you to change your Merge Service or remote site settings:

To change your Merge Service setting

- **For Comply System Properties**

1. Go to **Setup** > **App Setup** > **Develop** > **Custom Settings**.
2. Click **Manage** for **Comply System Properties.**
3. Click **System Properties** and the **Merge Webservice Endpoint** setting is displayed.
4. Change the setting to the merge webservice endpoint URL listed above or another URL provided by Apttus and click **Save.**

- **For Proposal System Properties**

1. Go to **Setup** > **App Setup** > **Develop** > **Custom Settings**
2. Click **Manage** for **Proposal System Properties.**
3. Click **System Properties** and the **Merge Service Endpoint** setting is displayed.
4. Change the setting to the merge webservice endpoint URL listed above or another URL provided by Apttus and click **Save.**

To change your Remote Site setting

1. Go to **Setup** > **Security Controls** > **Remote Site Settings.**
2. Click **Edit** for **ApttusMergeServer**.
3. Change the **Remote Site URL** to the remote site URL listed above or another URL provided by Apttus and click **Save**.
4. Click **Save**.

> ⓘ If you would like to be engaged in our Pre-Release program for Merge Service, please reach out to your assigned CSM for details.

New Features

The following feature is new to Merge Service in this release.

Ability to Retain Header and Footer of the Merged Documents

When you use the CreateWordPackage API to merge different documents, you can retain the original header and footer of the merged documents. You can provide RetainInputHeaderFooter, CumulativePageNumber, and AutoInsertHeadeerFooter inputs based on your requirement. The following table provides a combination of inputs and their results.

RetainInput HeaderFooter	Cumulative PageNumber	AutoInsert HeaderFooter	Result
True	True	False	Final document retains the existing header and footer of the merged documents and page numbers are cumulative.
True	False	False	Final document does not retain the existing header and footer of the merged documents and page numbers are not cumulative.
False	True	False	Final document does not retain the existing header and footer of the merged documents and page numbers are cumulative.
False	False	True	Final document has the header and footer and page numbers are cumulative as per the predefined format in Comply System Properties.

Enhancements

The following enhancement is new to Merge Service in this release.

Regenerate with Redlines

From this release, regeneration of the document with redlines is handled by X-Author Contracts. You need to install the latest version of X-Author Contracts.

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
CAS-18613-B6B1S7	MS-1478	A user got an exception on trying to regenerate a document through X-Author Contracts.
00097471	MS-1517	When a user used Merge API to merge two documents that had the rich text field (rendered as type - image or HTML), the user encountered an error.
00097338	MS-1518	An error occurred on ending review when different versions of Microsoft Word documents were combined using CombineDocuments API.

Known Issues

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

Apttus Internal ID	Issue
MS-1540	When RetainHeaderFooter = True or False and CumulativePageNumber = True or False, the number of pages increases in the created word package document output.
MS-1539	When CumulativePageNumber = False and RetainInputHeaderFooter = True, a wrong page number is displayed on the last page of the document and before the starting page of the new document.
MS-1381	When a user generates an agreement document with special characters in the agreement line items, the special characters are replaced with its ASCII equivalent.
MS-1412	When Conditional Segment in X-Author Contracts for Cloud templates has Less Than and Not Equal To operator for the date field, the field-level validation fails.
MS-1385	When the Parallel Review setting is enabled and Version Aware is disabled, a user was able to edit the documents sent for review with protection.
MS-1475	When Conditional Segment in X-Author Contracts for Cloud starts with an operator, the condition fails.
MS-1482	When a user inserts Doc Assembly Ruleset, the user gets an error that one of the input documents has invalid items.
MS-1477	A decline in performance is observed while generating a proposal containing more than 40,000 line items.
MS-1476	On sending a request to combine documents through CreateWordPackage API, a user guide returns 500 error response.
MS-1474	A user observed incorrect number precision is added for Switzerland (fr-CH) locale.
MS-1465	When a user uploads an XML document as a File after switching to Salesforce Lightning, the user is unable to generate document for a proposal after adding proposal line items. **Workaround**: Attachments that are uploaded as Files are supported when the Salesforce API version as part of the SOAP URL sent in the request to MergeService is greater than or equal to 31.0.

Apttus Internal ID	Issue
MS-1345	Revised document changes are not available on the final merged document when you perform the following tasks: 1. Generate an agreement. 2. Change a few values in Contract Management on Salesforce. 3. Regenerate the agreement with the same template used for generating the agreement. 4. Go to **X-Author Contracts for Cloud** > **Compare tab**. 5. Merge the generated document version and regenerated document version.
MS-1318	The Reference field does not display a currency symbol according to the reference object while generating an agreement.

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