

APTTUS[®]

Merge Service on Salesforce Summer 2019 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Merge Service Summer 2019 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)	5.6.0.717

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 release version of Merge Service:

- **Merge Webservice Endpoint:** <https://mergewebservices.apttus.net/cgi-bin/MergeServer/Bin/mmcgi.exe>
- **Remote Site:** <https://mergewebservices.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 features are new to Merge Service in this release.

- [Generating Metadata](#)
- [Emailing Multiple Agreement Documents](#)
- [Providing Metadata](#)
- [Sending Multiple Documents for Review](#)
- [Prefixing Currency Symbol for Currency Related Fields](#)

Generating Metadata

Merge Service provides column information (Table, RowHeader, or FieldHeader) for each table in metadata irrespective of the table position and the unavailability of data in Contract Management. This allows X- Author for Contracts to use column information to sync agreement documents.

Emailing Multiple Agreement Documents

Merge Service supports emailing multiple agreement documents with document protection to more than one reviewer.

Get Started

For details on how to send multiple agreement documents through email, refer to [Emailing Multiple Agreement Documents](#) in *Contract Management on Salesforce Summer 2019 User Guide* and [Scheduling Expiration Date for Email Downloadable Link](#) in *Contract Management on Salesforce Summer 2019 Administrator Guide*.

Providing Metadata

Merge Service provides the Agreement ID, Review Cycle ID, and Reviewer's Email ID metadata response to Contract Management for an agreement document in the review.

Sending Multiple Documents for Review

Merge Service supports sending multiple documents for review in one email.

Get Started

For details on how to send multiple agreement documents for review, refer to [Sending an Agreement Document for Parallel Review](#) in *Contract Management on Salesforce Summer 2019 User Guide*.

Prefixing Currency Symbol for Currency Related Fields

Merge Service supports the capability to not prefix currency symbol in the multicurrency enabled org according to the **APTS_DoNotPrefixCurrency** admin entry value in Contract Management and Enable Formatting value in X-Author for Contracts. The following table helps you understand in which conditions the currency symbol is appended before the currency-related fields in the generated document:

Note

In the following table, N/A refers to not applicable. The **APTS_DoNotPrefixCurrency** admin entry value is only considered when the multicurrency for the org is enabled and the Enable Formatting Value is set to false.

Multicurrency for the Org	Enable Formatting Value in X-Author for Contracts	APTS_DoNotPrefixCurrency Admin Entry Value in Contract Management	Is the currency symbol appended?
Disabled	True	N/A	Yes
Disabled	False	N/A	No
Enabled	False	True	No
Enabled	False	False or not set	Yes
Enabled	True	N/A	Yes

Get Started

For details on the **APTS_DoNotPrefixCurrency** product setting, refer to [Admin Objects](#) in *Contract Management on Salesforce Summer 2019 Administrator Guide*. For more details on how to enable formatting, refer to [Creating New Template Versions](#) and [Checking In Template Versions](#) in *X-Author Contracts on Salesforce Summer 2019 User Guide*.

Enhancements

There are no enhancements in this release.

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
CAS-12299-Z0Y7J5	MS-1290	When a user generated an agreement document with special characters in the agreement line items, the user received an error message.
N/A	MS-1331	The document generation was taking more than 20 minutes when a document had more than 1000 agreement line items and the repeat table contained smart fields. Resolution info: Document generation with 1000 agreement line items takes less than a minute.
N/A	MS-1350	While checking in the agreement document for the first time, a user was unable to update the current version of the agreement document.
CAS-15922-C5B2W3	MS-1383	While generating a template, a user got an object reference error.
CAS-15804-H8S4S3	MS-1382	While generating a pricing quote with Standard, Upsell Cross Sell, or Renewal quote record types, a user was getting an object reference error.
CAS-15956-K0D9R0	MS-1380	While generating a document, a user got an "Image data is not valid" error.
CAS-15939-Q2V7Q1	MS-1379	After generating a proposal document, the output document displayed random HTML tags in the document.
CAS-15865-T6V0F4	MS-1378	While generating a template, a user got the "Sequence contains no elements" error.
N/A	MS-1371	While generating a document, a user got an "Admin object permission is missing" error.
CAS-15985-X5N6X0	MS-1384	While generating a document, a user got an object reference error.

Known Issues

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

Apttus Internal ID	Issue
MS-1381	When a user generated an agreement document with special characters in the agreement line items, the special characters in the document are replaced with ASCII characters.
MS-1345	Revised document changes are not available on the final merged document when you perform the following tasks: <ol style="list-style-type: none"> 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 currency symbol according to the reference object while generating an agreement.

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