



Merge Service on Salesforce Summer 2020 Pre-Release Notes

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About Release Notes

Apttus Release Notes contain the following information about Merge Service Summer 2020 Pre-Release on Salesforce.

- **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

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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)	5.9.0.716

Merge Service Release Configuration

By default, your production org references the GA version of Merge Service. If you had previously configured Merge Service for GA, you will need to change some settings to use the pre-release 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://mwstest.apptus.net/cgi-bin/mergeserver/bin/mmcgi.exe>
- **Remote Site:** <https://mwstest.apptus.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

There are no new features introduced in this release.

Enhancements

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

Apttus User Experience Analysis

With this release, in order to better understand and analyze feature usage and the user experience, Apttus is adding a user experience analysis component to its solution with the assistance of Pendo. The analytics component allows Apttus 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.

Resolved Issues

The following table lists the issue resolved in this release.

Case Number	Apttus Internal ID	Description
NA	MS-1585	During the parallel review, the currency fields did not appear in the Control Panel, Preview Reconcile page, and Reconciliation check-in popup of X-Author Contracts.
00100490	MS-1575	A user was unable to view the table borders on implementing the Document Assembly Rules (DAR).
00099893	MS-1570	If a template containing a conditional repeat table with smart fields was used to generate a document and the conditions were not met, the API name was visible on hovering over the repeat table.
00101225	MS-1568	When a user tried to add a clause containing hyperlink in an agreement template containing the content of tables using Dynamic Document Assembly Rule, the user encountered an error.
00103471	MS-1595	After generating a document in PDF format using different Merge Service versions, a user observed a discrepancy in formatting and segments in the generated documents.

Known Issues

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

Apttus Internal ID	Issue
MS-1504	A user cannot Preview Generated Documents from the Notes and Attachments tab.
MS-1555	A user cannot merge offline documents using mergeDocsToPDF2 API.
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-1477	A decline in performance is observed while generating a proposal containing more than 40,000 line items.
MS-1474	A user observed incorrect number precision is added for Switzerland (fr-CH) locale.
MS-1465	<p>When a user uploads an XML document as a File after switching to Salesforce Lightning, the user is unable to generate a document for a proposal after adding proposal line items.</p> <p>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.</p>

Apttus Internal ID	Issue
MS-1345	<p>Revised document changes are not available on the final merged document when you perform the following tasks:</p> <ol style="list-style-type: none"><li data-bbox="663 409 979 439">1. Generate an agreement.<li data-bbox="663 456 1401 486">2. Change a few values in Contract Management on Salesforce.<li data-bbox="663 504 1378 566">3. Regenerate the agreement with the same template used for generating the agreement.<li data-bbox="663 584 1299 613">4. Go to X-Author Contracts for Cloud > Compare tab.<li data-bbox="663 631 1347 694">5. Merge the generated document version and regenerated document version.
MS-1318	<p>The Reference field does not display a currency symbol according to the reference object while generating an agreement.</p>

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