



# Merge Service on Salesforce Summer 2020 Release Notes



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# About Release Notes

Apttus Release Notes contain the following information about Merge Service Summer 2020 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 <b>(New)</b>	5.9.0.724

# 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 production 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

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 issues 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.

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

Apttus Internal ID	Description
MS-1412	When Conditional Segment in X-Author Contracts for Cloud templates had Less Than and Not Equal To operator for the date field, the field-level validation failed.
MS-1477	A decline in performance was observed while generating a proposal containing more than 40,000 line items.

## Known Issues

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

Apttus Internal ID	Description
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.

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# Merge Service on Salesforce Summer 2020 Patch 1 Release Notes

## About Release Notes

Apttus Release Notes contain the following information about Merge Service Summer 2020 Patch 1 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 <b>(New)</b>	5.9.1.807

## 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 production 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**.

**i** 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.

### Updates to createWordPackage

When RetainInputHeaderFooter is set to True, the remaining parameters (CumulativePageNumber and AddAutoHeaderFooter) are not evaluated. When CumulativePageNumber is set to True, the combined document has cumulative page numbers. When AddAutoHeaderFooter is set to True, then the header and footer are inserted according to the input provided. The following table provides a combination of inputs and their results.

Scenario	RetainInputHeaderFooter	CumulativePageNumber	AddAutoHeaderFooter	Result
Documents with header and footer	True	True	False	<ul style="list-style-type: none"> <li>The existing header and footer of the documents are retained.</li> <li>The default footer is not added as the RetainInputHeaderFooter parameter is set to True.</li> </ul>
Documents without header and footer	True	True	False	<ul style="list-style-type: none"> <li>The default footer is not added as the RetainInputHeaderFooter parameter is set to True.</li> </ul>



Scenario	RetainInputHeaderFooter	CumulativePageNumber	AddAutoHeaderFooter	Result
Documents with header and footer	False	True	False	<ul style="list-style-type: none"> <li>• The existing header and footer of the documents are removed.</li> <li>• The default footer is inserted and the footer has cumulative page numbers.</li> </ul>
Documents without header and footer	False	True	False	<ul style="list-style-type: none"> <li>• The default footer is inserted and the footer has cumulative page numbers.</li> </ul>
Documents with header and footer	True	False	False	<ul style="list-style-type: none"> <li>• The existing header and footer of the documents are retained.</li> <li>• The default footer is not added as the RetainInputHeaderFooter parameter is set to True.</li> </ul>
Documents without header and footer	True	False	False	<ul style="list-style-type: none"> <li>• The existing header and footer of the documents are retained.</li> <li>• The default footer is not added as the RetainInputHeaderFooter parameter is set to True.</li> </ul>

Scenario	RetainInputHeaderFooter	CumulativePageNumber	AddAutoHeaderFooter	Result
Documents with header and footer	False	False	True	<ul style="list-style-type: none"> <li>• The existing header and footer of the documents are removed.</li> <li>• The header and footer are inserted with the default page number format.</li> </ul>
Documents without header and footer	False	False	True	<ul style="list-style-type: none"> <li>• The existing header and footer of the documents are removed.</li> <li>• The header and footer are inserted with the default page number format.</li> </ul>

## Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
00104977	MS-1601	A user encountered an error after executing the enableAuthoring API.
00105052	MS-1600	A user encountered an error after clicking the Generate button.
00105016	MS-1599	A user encountered an error after clicking the Generate button when the template had header and footer.

Case Number	Apttus Internal ID	Description
00103426	MS-1594	A user was unable to change or remove the default header and footer while using the createWordPackage API. For more information, see <a href="#">Updates to createWordPackage</a> .

## Known Issues

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

Apttus Internal ID	Description
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 RetainInputHeaderFooter is set to True or False and CumulativePageNumber is set to True or False, the number of pages increases in the created word package document output.
MS-1539	When CumulativePageNumber is set to False and RetainInputHeaderFooter is set to True, a wrong page number is displayed on the last page of the document and before the starting page of the new document.

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# Merge Service on Salesforce Summer 2020 Patch 4 Release Notes

## About Release Notes

Apttus Release Notes contain the following information about Merge Service Summer 2020 Patch 4 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 <b>(New)</b>	5.9.2.928

## 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 production 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

There are no new features introduced in this release.

## Enhancements

There are no new enhancements in this release.

## Resolved Issues

The following table lists the issue resolved in this release.

Case Number	Apttus Internal ID	Description
00105396	MS-1614	A user was unable to generate a document using a template that had a dynamic segment referencing the clause template that contained custom bullets within the repeat section.

## Known Issues

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

Apttus Internal ID	Description
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.

Apttus Internal ID	Description
MS-1540	When RetainInputHeaderFooter is set to True or False and CumulativePageNumber is set to True or False, the number of pages increases in the created word package document output.
MS-1539	When CumulativePageNumber is set to False and RetainInputHeaderFooter is set to True, a wrong page number is displayed on the last page of the document and before the starting page of the new document.

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