

Apttus Merge Service

About the Merge Service Winter 2017 Patch 1 Release

Merge Service is being updated from 5.1 to 5.1.1 for the Winter 2017 Patch 1 release. By default, your production org references the GA version of Merge Service.

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.

Salesforce Instructions

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 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 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 URL listed above or another URL provided by Apttus and click **Save**.
4. Click **Save**.

Microsoft Dynamics Instructions

To change your Merge Service setting:

1. Log in to your Dynamics CRM org and click **Advanced Find**  in the primary toolbar.
2. Select the **Product Setting** entity from the **Look For** drop-down.
3. Build the query “Name Equals MergeServiceURL” and click **Results**.
4. Under Product Setting Values, click **MergeServiceURL**.
5. Change the **Value** to the URL listed above and click **Save**.

Apttus Intelligent Cloud Instructions

To change your Merge Service setting:

1. Log in to your Apttus Intelligent Cloud CRM org.
2. Go to the URL:
<https://<yourdomain>.apttuscloud.io/ui/common/entity/cm ProductSettingValue/list-view>
Enter your domain address in the <yourdomain> part of the above URL.
3. Click **Search Filters**.
4. In **Search Filters**, go to the Name field and type **mergeserviceurl** and click **Apply**.
5. In the **mergeserviceurl** field, change the value to the URL listed above.
6. Click the overflow icon ‘’ in the corner and click **Update**.
7. Click **Save** to set the Merge Service URL value.

Resolved Issues

The following table represents resolved issues in this release:

Case Number	Description	Apttus Internal ID
N/A	While generating an agreement document with clause conditions, the user received a Docgen error. This issue is now resolved.	MS-1028
N/A	When a user generated an agreement, and made some changes to the values of smart field and tried reconciling, the reconcile function did not work. Also, the Preview Reconciliation screen did not highlight the changes to the smart field and showed blank dialog box. This issue is now resolved.	MS-1027
218612	When generating a quote document, the information for a few fields was not populated in the generated quote. This issue is now resolved.	MS-1026
218656	When generating a quote that contained fields inserted as repeat table, the generated quote did not show the values of the repeat table fields. This issue is now resolved.	MS-1025
218791	When generating a quote document, the values of the currency fields were not populated in the generated quote. This issue is now resolved.	MS-1024
218677	When generating a quote document using a template containing repeat items in a field, some of the clauses stopped working and were not populated in the generated quote. This issue is now resolved.	MS-1023
218609	When a user tried generating a document after selecting a language other than English, they received a sequence error. This issue is now resolved.	MS-1022
218619	When a user tried generating a quote document, from a Quote/ Proposal, the List Price and Extended List Price field values were	MS-1021

	not populated in the generated document. This issue is now resolved.	
218635	When generating an agreement document using existing templates, the generated agreement had altered formatting and showed paragraphs indented either incorrectly. This issue is now resolved.	MS-1020
218492	When generating a quote document using new merge server instance, the user encountered a sequence error. This issue is now resolved.	MS-1019
218600	When generating a quote document with an existing template the user received an XML processing error. This issue is now resolved.	MS-1014

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