

Apttus Merge Service

About the Merge Service Winter 2017 Pre-Release

Merge Service is being updated from 5.0 to 5.1. Merge Service is being offered as a pre-release version before GA. Changes could still occur between the beginning of pre-release and the GA release of Merge Service.

By default, your production org references the GA version of Merge Service. You can change the Merge Service reference being used, via two system settings, in your sandbox or production org to use the Pre-Release (5.1) version

The following URLs can be used to switch to the pre-release version of Merge Service:

- Merge Web Service Endpoint: <https://mwstest.apttus.net/cgi-bin/MergeServer/Bin/MMCGI.exe>
- Remote Site: <https://mwstest.apttus.net>

To return the URLs to the GA version of Merge Service use:

- Merge Web Service Endpoint: <https://mergeweb.apttus.net/cgi-bin/MergeServer/Bin/MMCGI.exe>
- Remote Site: <https://mergeweb.apttus.net>

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/cmn_ProductSettingValue/list-view
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 kebob icon in the corner and click **Update**.
7. Click **Save** to set the Merge Service URL value.

Note: 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

Support for Publishing Documents and Storing on BLOB Storage on Dynamics AIC

Merge Service has been updated to provide support for publishing documents on the AIC Dynamics platform. The Merge Service framework allows storing the published documents on BLOB storage.

Support for Document Generation with Asynchronous Calls

Merge Service has been enhanced to support asynchronous calls in CLM for Dynamics, for documents which take longer than two minutes to generate. This enhancement ensures that the document generation process runs in the background, while the user can perform other functions in the application.

Resolved Issues

The following table represents resolved issues in this release:

Case Number	Description	Apttus Internal ID
215789	When generating an agreement document, some of the conditional fields failed to work. This issue is now resolved.	MS-949
215769	While generating templates, any field listed under a conditional expression was not displayed in the template, regardless of condition being met or not. This issue is now resolved.	MS-948
215745	When generating agreement documents, some of the merge fields were not populated properly. This issue is now resolved.	MS-947
214450	When the user generated an invoice using the latest merge server endpoint URL (version 5.0), some of the currency symbols were not displayed in the generated document. This issue is now resolved.	MS-936
214698	In a proposal document, the values of the proposal's date fields were not populated in the repeat sections and the also the value of the Project Number field was populated only partially. This issue is now resolved.	MS-929

214603	When generating a proposal document, the values of the price fields of some products were not populated in the generated proposal. This issue is now resolved.	MS-926
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