

Apttus Merge Service

About the Merge Service Winter 2017 Release

Merge Service is being updated from 5.0 to 5.1 in Winter 2017 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>.apptuscloud.io/ui/common/entity/cmn_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 kebob icon in the corner and click **Update**.
7. Click **Save** to set the Merge Service URL value.

New Features

Removing Comments from the Agreement Document

The Winter 2017 release introduces an update to Merge Service for removing user added comments in the word document before converting it into final PDF format.

A flag, removeComment, is introduced in Merge Service API convertWordDocForAgreement2.

If the value of the flag is set to True in the request received from Contract Management, comments will be removed from the document. This ensures that any comments added during the negotiations are not transferred to the final PDF of the document. For this API to perform its intended operation, be sure to install Contract Management v8.392.

Enhancement to Merge Service API for Preserving Redlines in the PDF Document

The Winter 2017 release introduces an enhancement to the Merge Service API mergeDocsToPDF2. This enhancement allows users to choose whether they want to preserve redlines in the final PDF output of the document. For this API to perform its intended operation, be sure to install Contract Management v8.392.

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

The Winter 2017 release introduces an update to the Merge Service 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

The Winter 2017 release introduces an enhancement to the Merge Service 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
218270	When generating a proposal document, user received an error and failed to generate the document if the proposal template used, had dynamic tables with conditional segments. This issue is now resolved.	MS-1003
	When generating an agreement document, if the document's protection level is set to Insert Comments and Track Changes Only, the generated document opens in Compatibility Mode in Microsoft Word, instead of Standard Mode. This issue is now resolved.	MS-952

215789	While 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	While generating 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
213205	When generating agreement document which has comments as well as redlines, the resultant PDF contained such comments and redlines. This issue is now resolved.	MS-924

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