CobbleStone Software - Release Notes

Contract Insight Version 22.5.2 Rev 250926

Table of contents

Release Notes > Patch 22.5.2 (Rev 250926)

Patch Overview-Version 22.5.2 (Rev 250926)

Release Version Information

The high-level information regarding this version is detailed below:

Release Version Number	**Client Release Date**	**Release Type** ***(from prior release)***
22.5.2 (Rev 250926)	10 October 2025	Patch

Click here to download a PDF of the Release Notes

For CobbleStone Software version 22.5.2 (Rev 250926), New Feature(s), Enhancement(s), and/or Resolution(s) were added to the following areas:

- Core System: Contract Insight
- Module: Document Collaboration & E-Signature
- Module: E-Sourcing/Procurement Management
- Module: Vendor/Client Collaboration Gateway
- Connector: External E-Sign Integrations
- VISDOM+
- Aggregated Data Feed Services
- CobbleStone Helper Applications

Patch 22.5.2 - Core System: Contract Insight

The Core System provides Contract Insight's core components and functionality for full lifecycle management of your organization's contracts and committals.

CORE SYSTEM
NEW FEATURES

NEW FEATURE: VISDOM Basic Now Powered by Mistral AI

Reference #: 250926.1222.14965

We've enhanced VISDOM Basic to use Mistral AI by default, eliminating the need for additional configuration. This update ensures that clients can begin using VISDOM immediately—without setup—while still benefiting from powerful AI capabilities.

What's New:

- VISDOM Basic now runs on Mistral AI, streamlining access to intelligent features without requiring configuration of VISDOM.
- All core VISDOM functions are supported in both VISDOM+ (OpenAI) and VISDOM Basic (Mistral) modes.
- VISDOM Basic now uses an updated drag and drop screen to add records into the system. Users can expect a much cleaner look and feel to the drag and drop process.

Key Features Available in VISDOM Basic:

- Transfer Text: Summarize, rewrite, and translate content from fields or the Clause Library.
- Chatbot Assistance: Ask the chatbot to generate clauses or provide guidance using Mistral-powered responses.
- History Page: Review past interactions and outputs.
- Web Search Agent: Perform online searches directly from the chatbot (limited to 10 free searches per client per month).

Enhanced Reporting:

- The VISDOM Usage Dashboard now tracks Mistral usage separately from OpenAI.

- In VISDOM Basic mode:
    - Usage stats reflect only Mistral activity.
    - Web search usage is tracked with a clear monthly limit display (e.g., “6 out of 10 searches used”).

NEW FEATURE: VISDOM Field Automation Framework

Reference #: 250926.1278.14714

We’ve introduced a powerful new enhancement to VISDOM that simplifies data entry by reducing the need for manual setup and training.

What’s New:

Field Automation Framework

VISDOM now includes an intelligent automation engine that can auto-fill fields and provide smart recommendations—making contract creation and record management faster and easier.

Key Features:

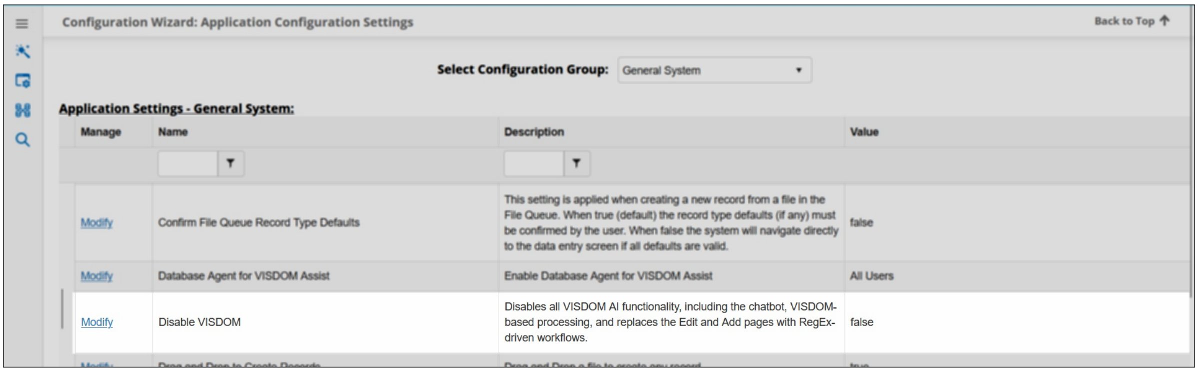
- **Auto-Filling Engine:**
  Automatically suggests and populates field values based on the document text extraction.
- **Conditional Logic Support**:
  Smart suggestions adapt based on field relationships (e.g., “If Field A = X, then suggest Y for Field B”).
- **Fallback Logic:**
  If no AI-generated suggestions are available, the system defaults to pre-configured algorithms to ensure continuity.

This enhancement delivers a more intuitive and modern experience, helping clients get started with VISDOM faster.

NEW FEATURE: Disable VISDOM

Reference #: 250926.1222.9335

A new setting has been added to the General System Configuration group that allows administrators to disable all VISDOM functionality. When enabled, this setting removes access to VISDOM features and disconnects VISDOM Web Services. The configuration can be found by going to: **Application Configuration > Config Settings > General System > General**



To restore VISDOM functionality, the setting can be reverted and the Web Services reauthorized.

CORE SYSTEM ENHANCEMENTS

ENHANCEMENT: New Configuration: Scheduler Email Format for Enhanced Reports

Reference #: 250926.1092.15297

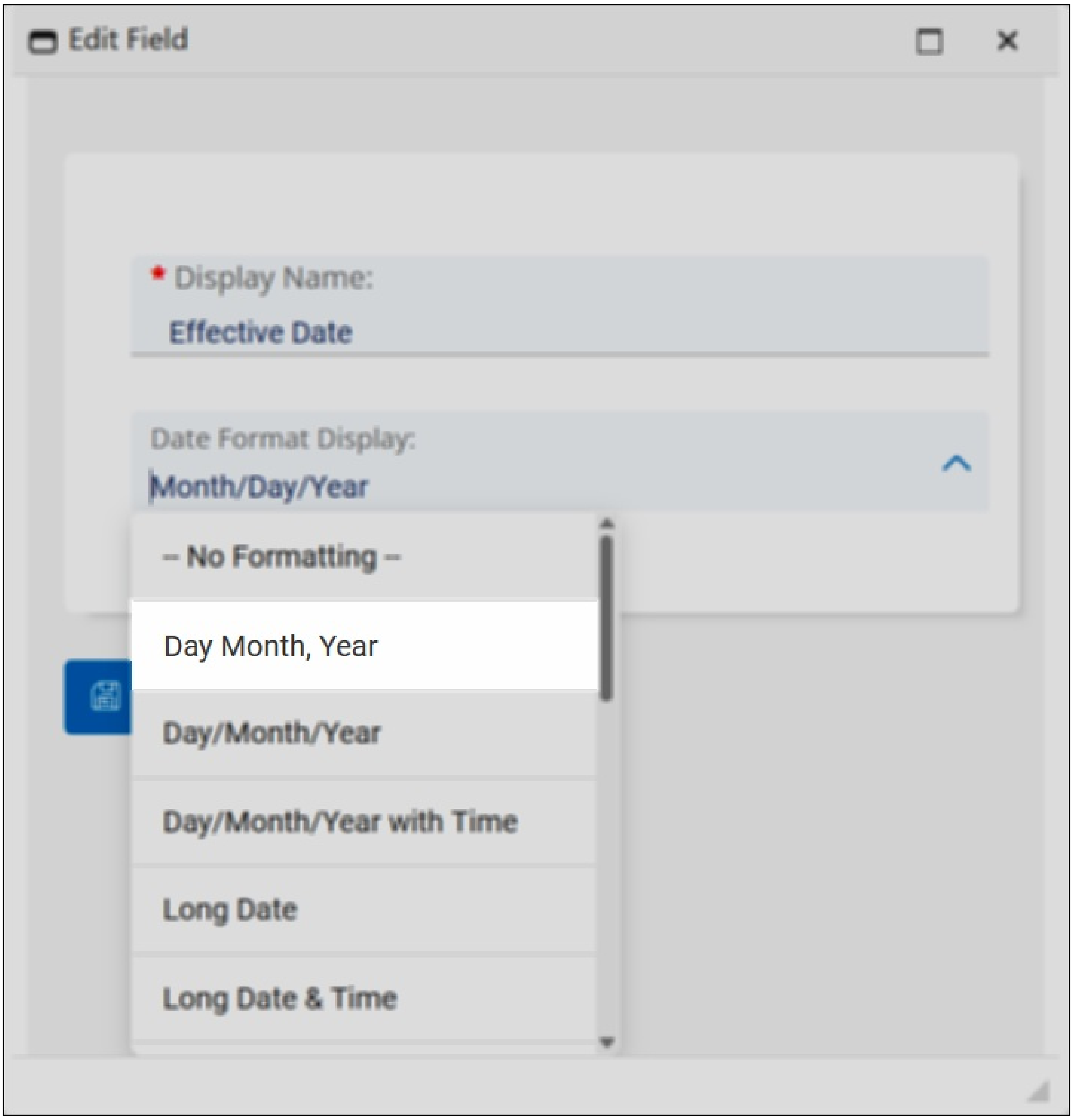
A new configuration setting has been added to control how enhanced reports are sent via the scheduler. Previously, clients attempted to use the existing **"Use Ad-Hoc Legacy Report Export All"** setting to achieve this, but it did not apply to scheduled emails.

With this new setting enabled, scheduled emails will now send enhanced reports in the same format as standard report exports—making them easier to read and consistent with manual exports.

ENHANCEMENT: Date Format Option Added to Document Templates

Reference #: 250926.345.7726

Clients can now choose an alternate format for date fields in Document Templates. In addition to the existing options, a new format is available:
Day Month Year (e.g., *17 December 2024*).



This gives users more flexibility when customizing how dates appear in merged documents.

ENHANCEMENT: New Option to Create Contract and Add to Hierarchy

Reference #: 250926.1286.7622

We've added a new feature to streamline contract creation for clients who prefer using hierarchies over linked records.

Previously, users could only select **"Create New Contract and Link"** from the side action menu. Now, a new option —**"Create New Contract and Add to Hierarchy"**—is available.

With this enhancement:

- Users can initiate contract creation directly from the hierarchy workflow.
- Selecting this option takes users to the **Link Record to Hierarchy** page, where they can choose the desired relationship.
- After selecting the hierarchy, users are guided to the **Add Contract** page to complete the record.
- Once saved, the contract is automatically added to the selected hierarchy.

This update simplifies the process and reduces steps for clients who rely heavily on hierarchical contract structures.

ENHANCEMENT: VISDOM Chatbot Phase 2: Ask Database-related Questions Using Natural Language

Reference #: 250926.1086.4088

Users can now ask database-related questions using everyday language. The chatbot will respond to questions that can be answered based on existing data.

Examples of supported queries:

- How many contracts are expiring this month?
- What contracts were signed in 2024?
- How many contracts are currently in the system?
- What contracts are my sales team on track to close this quarter?
- What is our highest value consulting agreement signed in 2023?

Additional Notes:

- Supports both out of the box and user-defined fields
- Query access is permission-based

CORE SYSTEM RESOLUTIONS

RESOLUTION: Data Import Manager - License Type and System Admin Field Alignment

Reference #: 250926.1157.14346

We've resolved an issue in the Data Import Manager related to employee license assignment:

- Employees imported without a license will now automatically be assigned an **Admin license**, ensuring they have appropriate access.
- If an employee is flagged as **SysAdmin**, they will be assigned the **Admin license by default**, regardless of any other license type selected during import.
- To maintain system integrity, **SysAdmin rights can now only be granted to users with an Admin license**. This prevents unintended elevation of access for non-Admin roles.

RESOLUTION: Translate Dropdown Positioning

Reference #: 250926.1222.18340

We've resolved an issue where the Translate dropdown menu in the header would shift position when users scrolled the page. The dropdown now remains anchored to the Translate button in the header, providing a stable and consistent user experience. This fix improves usability and ensures smoother interaction with language settings.

RESOLUTION: Product Service Code Field Availability in Reporting

Reference #: 250926.1288.18610

We've resolved an issue where users were unable to select the Product Service Code field when configuring reports using the Vendor Product Service Code as the primary tab. The Product Service Code field, along with its linked fields, is now fully selectable and available for use in report configurations.

RESOLUTION: Contract Amount Formatting in Notification Templates

Reference #: 250926.1291.18743

We've resolved an issue where the Contract Amount value displayed differently in Notification Templates compared to the Core Site. The Contract Amount now displays in a consistent format across both the Core Site and Notification Templates, ensuring clarity and alignment in financial communications.

RESOLUTION: Language Field Update via Data Importer Tool

Reference #: 250926.1250.15533

We've resolved an issue where updating the **Language** field for employees using the **Data Importer Tool** could cause the employee record to become inaccessible. This fix ensures that language updates can now be performed in bulk without impacting access to employee records.

RESOLUTION: **Email Recipients Display When Replying to One-Off Emails**

Reference #: 250926.1259.16289

We've addressed an issue where replying to one-off contract emails caused the sender's own email address to appear in the "To" field, while other recipients seemed to disappear. Although those recipients were still receiving the emails, the visual change created confusion. This has now been corrected, and replies will clearly show all intended recipients as expected.

RESOLUTION: **Mergeable Clause Formatting**

Reference #: 250926.1157.16811

An issue was identified where Mergeable Clauses did not retain their formatting when merged into a document, even when the "Keep Clause Formatting" option was selected.

This has now been resolved:

- Mergeable Clauses will correctly retain their formatting when merged, as expected.
- The "Keep Clause Formatting" setting now functions reliably, ensuring consistent document presentation.

RESOLUTION: **Top Down Content Style Display Issue**

Reference #: 250926.386.17031

An issue was identified with the Layout Theme & Style functionality where the Top Down setting for the Details Screen caused text to appear with inconsistent spacing and formatting. This has now been resolved. The Top Down theme displays content as expected, with clean and consistent layout styling.

RESOLUTION: **Mergeable Fields in Excel Document Templates**

Reference #: 250926.1092.17258

We've addressed an issue where **Mergeable Fields were not populating** correctly in document templates that used Excel (.xlsx) files.

- A fix has been applied to ensure that **Mergeable Fields now populate as expected** in all supported Excel templates.
- This update restores full functionality for clients using Excel-based templates in their document workflows.

RESOLUTION: Record Edit Permission Handling When Replying to Emails

Reference #: 250926.1259.17447

An issue was identified where the SendGrid API configuration page did not properly respect user permissions when replying to emails.

Specifically, users with Record Edit permissions were not being correctly recognized, which could prevent replies from being inserted into the associated record.
This has been resolved, and the system now accurately evaluates user permissions, ensuring that replies are properly processed and recorded when permission requirements are met.

RESOLUTION: Entity Management

Reference #: 250926.1288.17621

We've addressed a usability issue where users could select Entities within the Department setup but were unable to manage them directly. The Entities page is now accessible under the Master Reference Data section, allowing users to view and manage Entities as needed.

RESOLUTION: Font Consistency in Merged Document Templates

Reference #: 250926.1157.17670

We've resolved an issue where **merged placeholder fields** in document templates were not retaining the correct font formatting. Mergeable field placeholders now **merge into documents using the font set in the placeholder**, ensuring consistent styling and presentation. This fix improves the visual accuracy of generated documents and helps maintain formatting standards across templates.

RESOLUTION: Saved Link Deletion

Reference #: 250926.1287.17893

We've resolved an issue that was preventing users from deleting links saved under My > Links. Previously, the delete button was not appearing when a saved link was present, making it impossible to remove the link. This has now been corrected.

With this update, the delete button and header text will appear whenever a saved link is present. If no saved links exist, the delete option will remain hidden as expected.

RESOLUTION: Attachments Visibility in Files and Attachments Table

Reference #: 250926.1286.17932

We've resolved an issue where **attachments were occasionally not displaying** correctly in the Files & Attachments table after logging out from a separate folder. The system now reliably shows the **correct attachments in each folder** when users log out and log back into a record. This fix ensures consistent visibility of attachments across sessions, improving user confidence and workflow continuity.

RESOLUTION: Contract Linking Search Fix

Reference #: 250926.1288.18768

We've resolved an issue that was preventing users from linking contract records using certain search criteria. Previously, attempting to search by Contract ID or Contract Title resulted in an error, while searching by Contract Type worked as expected. With this update users can now successfully search and link contracts using Contract ID, Contract Title, or Contract Type.

RESOLUTION: Checkbox Default Value Display

Reference #: 250926.1286.18964

We've resolved an issue where default values for checkbox fields were not correctly populating during Record Add or within the Find/Search Grids. The default value functionality has been strengthened to ensure checkbox fields now display as expected in both areas.

RESOLUTION: Missing Reporting Option for Request Tasks

Reference #: 250926.337.19750

We've resolved an issue where the "Request Tasks Summary (DB View)" option was missing from ad-hoc reporting. This view, similar to the existing one for Contract Tasks, allows users to generate broader reports on Request Tasks and their related details. With this fix, the reporting experience is now consistent across both Contracts and Requests.

Patch 22.5.2 - Module: Document Collaboration & E-Signature

Optional Add-On Module for the collaboration of documents between internal and external users/participants. This module utilizes E-Approval (Electronic Approval) and/or E-Signature (Electronic Signature) processing to support full online negotiation via a secure online portal.

DOCUMENT COLLABORATION & E-SIGNATURE ENHANCEMENTS

ENHANCEMENT: **E-Approval Process Enhancements**

Reference #: 250926.345.2118

We've made usability improvements to the E-Approval workflow to help ensure approvals are completed smoothly and without confusion:

- **Completion Reminder for Manual Approvals**: When the **Simple Approval** setting is turned off, participants must manually complete the approval process after clicking "Approve." To prevent missed steps, a new **popup message** now appears, clearly instructing users to click the **"Complete Approval"** button before exiting the portal.
- **Upload Option Disabled After Approval**: Once a document is approved, the dropdown option to upload a new record to the approval process will be disabled. This ensures the approval flow remains finalized and avoids unintended changes.

These updates are designed to improve clarity and reduce the chance of incomplete approvals. No changes have been made to workflows using **Simple Approvals**, which continue to auto-complete upon approval.

ENHANCEMENT: **Improved Transition from E-Approval to E-Signature**

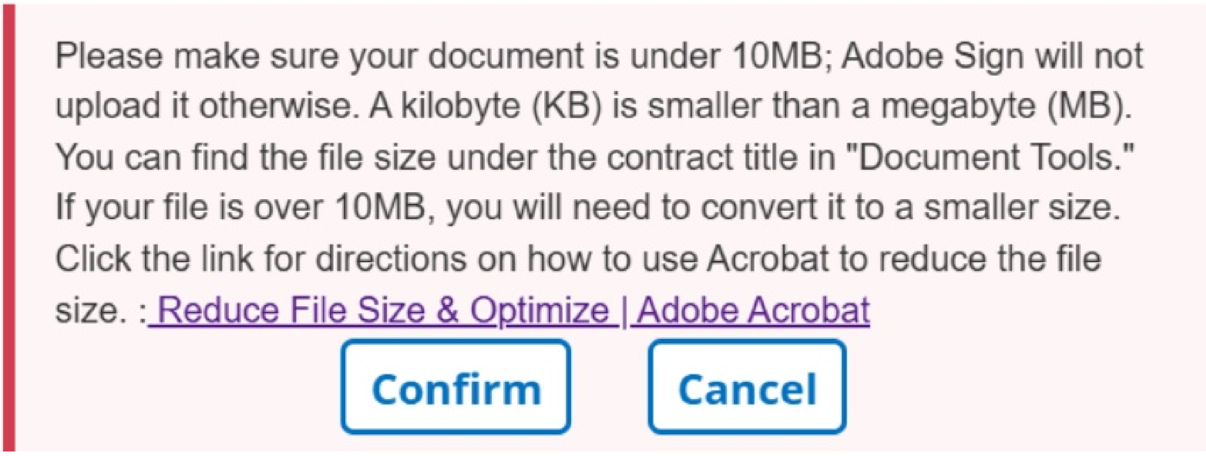
Reference #: 250926.345.18671

We've streamlined the workflow between E-Approval and E-Signature processes. Now, once an E-Approval is completed on the E-Approval Dashboard, users will see a prompt allowing them to immediately begin the E-Signature process—saving time and reducing extra steps.

ENHANCEMENT: New E-Signature Option from Attachments Toolbox

Reference #: 250926.1092.19573

To help ensure a smooth signing experience, we've added a new file size warning message when users initiate an E-Signature process from the **Files/Attachments Toolbox** using the **Adobe Acrobat Sign** option.



The message appears before the signing process begins and alerts users to Adobe's **10MB file size limit** for uploads. It also includes a link to Adobe's official guide for reducing file size, helping users avoid upload issues. Other signing options will be temporarily disabled while the warning is visible.

ENHANCEMENT: Default Signature Option Update

Reference #: 250926.345.7732

When signing a document in IntelliSign, the default option has been updated to use the user's saved signature instead of a typed name. This change helps prevent layout issues—especially for users with longer names—where typed signatures may extend beyond the page.

ENHANCEMENT: Expanded Record Status Updates for All Template Types

Reference #: 250926.1092.16680

Previously, the **"On Complete Set Status"** setting was only available for Contracts and Requests when configuring Document Template Approval and Signature Processes.

Users can now configure Document Templates across all 6 record areas to change the record's status when an Approval group or Signature group are complete, improving flexibility and consistency across the platform.

With this update:

- The status update option is now available across all template types, not just Contracts and Requests.
- The system will automatically reference the correct status field based on the template in use (e.g.,

Requests, Vendors, etc.).

ENHANCEMENT: **Improved Visual Cues for Document Signing**

Reference #: 250926.345.17362

To make the signing experience smoother and more intuitive, we've enhanced the visual indicators that guide users through the signing process. The "Start" and "Next" buttons are now more prominent, helping signers easily begin and continue signing documents.

We've also updated the signature placeholder to make it clearer where action is needed, ensuring signers don't miss a step.

These improvements apply specifically to documents using the Placeholder Signatures option for Signing Action. The Free Form Signing experience remains unchanged.

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: **Add New Attachment Popup Behavior**

Reference #: 250926.1157.18850

We've resolved an issue where the Add New Attachment popup on the Document Process Manager: Set Up page was not expanding properly. The popup window now expands and shrinks as expected, allowing users to manage attachments with improved ease and visibility. This fix enhances usability and ensures a smoother experience when adding attachments during document setup.

RESOLUTION: **Employee Dropdown Field Formatting in Excel Templates**

Reference #: 250926.1092.19118

We've resolved an issue where user-created Employee Dropdown fields were incorrectly merging the Employee ID instead of the Full Name when used in Excel Templates. The field now merges in the expected Full Name format, ensuring clarity and consistency in exported documents.

RESOLUTION: **Participant Replacement in IntelliSign & IntelliApprove**

Reference #: 250926.1157.18333

We've resolved an issue where users were previously **unable to replace participants** during an active IntelliSign or IntelliApprove process.

- Users can now **successfully replace participants mid-process**, ensuring flexibility and continuity.
- Replacement notifications are now sent with the **correct and expected information**, keeping all parties informed.

This update improves workflow adaptability and ensures smoother collaboration during approval and signing processes.

RESOLUTION: Mergeable Clause Formatting Update

Reference #: 250926.1157.18766

We've addressed an issue affecting how **Mergeable Clauses** are combined within document templates. Previously, clauses set to "No Break" were still separated by line breaks after merging, and clauses set to "Line Break" did not consistently apply the expected spacing.

With this update:

- Clauses set to **No Break** will now merge seamlessly without unwanted spacing.
- Clauses set to **Line Break** will correctly insert a line break between sections.
- Clause formatting behavior now aligns with the selected settings in the document template.

RESOLUTION: Signature Font Display on My Approval & Signature Settings Page

Reference #: 250926.1157.16851

We've resolved an issue where saved signatures were always displayed in the **Segoe Script** font, regardless of the font selected during signature creation.

With this fix:

- Saved signatures now correctly appear in the **chosen font**, as intended.
- The display on the **My Approval & Signature Settings** page reflects user preferences accurately.

Patch 22.5.2 - Module: E-Sourcing/Procurement Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of E-Sourcing, Solicitations, Procurements, Bids, RFxs (RFIs, RFPs, RFQs) and more.

E-SOURCING/PROCUREMENT MANAGEMENT RESOLUTIONS

RESOLUTION: **Solicitation Question Editing**

Reference #: 250926.1286.17393

We've addressed issues affecting how users respond to respondent questions on Solicitations. Previously, some users encountered errors when editing answers using the group field edit option. This has now been resolved—answers will save correctly regardless of the editing method used.

Additionally, we've improved how bulleted text is handled when editing question details. The system now properly displays and saves formatted content, ensuring a smoother experience when entering detailed responses.

Patch 22.5.2 - Module: Vendor/Client Collaboration Gateway

Optional Add-On Module used to extend the functionality and collaboration scope of Contract Insight by providing a dedicated gateway portal for your vendors, suppliers, providers, clients, customers, respondents, etc. to view and interact with the contracts, solicitations, etc. you have with them.

VENDOR/CLIENT COLLABORATION GATEWAY ENHANCEMENTS

ENHANCEMENT: **Enhanced File Viewing on the Gateway**

Reference #: 250926.1171.18730

We've improved the **Files/Attachments** tab within Solicitation records on the Vendor/Client Gateway to make file access more intuitive:

- The tab now **defaults to an "All Files" view**, showing users all files they have permission to access.
- A new **View Files dropdown** lets users easily switch between:
    - **My Files** – files they personally uploaded
    - **Public Files** – files shared for general access

How will this affect users?

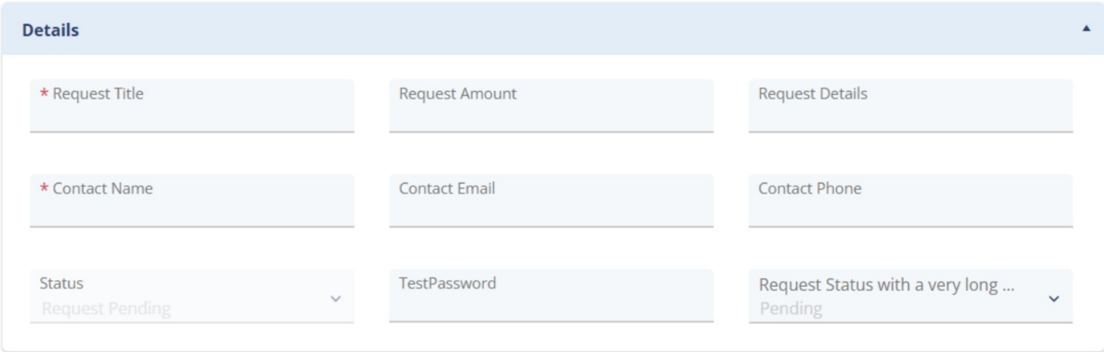
This update helps users quickly find the files they need without extra navigation.

ENHANCEMENT: **UI Configuration: Floating Labels Option**

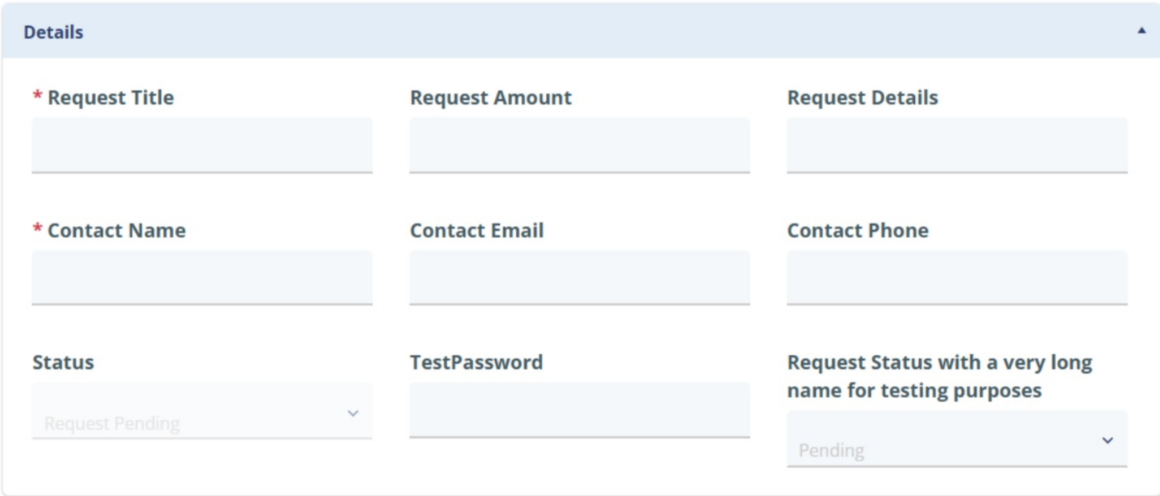
Reference #: 250926.1203.20185

A new setting called *Use Floating Labels in UI* has been added to the Vendor/Client Gateway Configuration group within Application Configuration. This setting allows administrators to control whether floating labels are used in the UI when adding or editing certain field types in the Vendor/Client Gateway.

When the configuration is set to True (default), the field names appear within the field:



When the configuration is set to False, field names on the Vendor/Client Gateway will appear above the field:



VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: **Application Configuration and performance loading File grids**

Reference #: 250926.1203.5474

The ability to enable or disable the Questions and Answers section on Solicitation records is now available again in the system settings. This affects both the Core system and the Vendor/Client Gateway. You can find the *Allow Q&A Section on Solicitation Records* setting under: **Application Configuration > Config Settings > Solicitations > General**

In addition, we've resolved a performance issue that was causing slow load times and occasional timeouts when viewing file grids. The system now only loads the necessary columns, resulting in faster page loads and a more stable experience.

RESOLUTION: Submit Request Icon Visibility & Configuration in VCG

Reference #: 250926.1203.18231

We've resolved an issue where the **Submit Request icon and function remained visible** in the Vendor Client Gateway (VCG) top menu, even after admin actions were taken to remove it.

- An enhancement has been made to the **"Allow submission of Contract Requests" configuration setting**, which now allows admins to define both the **ability and authentication level** required for Vendors/Clients to submit contract requests.
- Available options include:
    - **Public**: Visitors and Accounts
    - **Accounts Only**
    - **No Requests Allowed**

This update provides greater control over request submission visibility and access, ensuring the VCG behaves according to your organization's preferences.

RESOLUTION: Help Link Correction in VCG Password Reset Email

Reference #: 250926.1203.18804

We've resolved an issue where the Help link in the Vendor Client Gateway (VCG) password reset email was incorrectly redirecting users to the homepage.

The link has been updated to point to the correct Help page, ensuring users can easily access support when resetting their password.

RESOLUTION: Visibility of Inactive Users During Simplified Login Setup

Reference #: 250926.1259.17196

We've resolved an issue affecting the Simplified Login configuration for the Vendor Contact Gateway (VCG):

- Previously, when updating usernames, **Inactive Users were not displayed**, which could cause confusion or missed updates.
- The system has been updated to **include all users—active and inactive—during username updates**, ensuring full visibility.
- Please note: Whether a contact receives emails still depends on several factors, including:
    - Vendor status (must be Active)
    - Contact status (must be Active)

- Contact must have a valid email address
- “Allow Login” must be set to Yes

This update improves transparency and ensures consistent communication settings across all user types.

Patch 22.5.2 - Connector: External E-Sign Integrations

Optional Add-On Connector that provides your organization with the capability of electronic/digital signing of documents/contracts. Currently this connector is configured for integrations with DocuSign, AdobeSign, and DocJuris.

EXTERNAL E-SIGN INTEGRATIONS RESOLUTIONS

RESOLUTION: **Adobe Sign Integration – Email Case Sensitivity**

Reference #: 250926.1086.17417

We've resolved an issue where some approved signers were unable to access Adobe Sign due to differences in letter casing between their email address in Contract Insight and the one registered with Adobe.

- The integration has been improved to **recognize signers regardless of email casing**, ensuring smoother access and fewer disruptions.
- This update enhances compatibility and reliability for users leveraging Adobe Sign for contract workflows.

Patch 22.5.2 - VISDOM+

Optional Add-On license that takes VISDOM, our powerful artificial intelligence (AI) backed by machine learning, to the next level with generative AI and other helpful functionality by harnessing OpenAI.

VISDOM+ RESOLUTIONS

RESOLUTION: **Improved PDF Parsing in VISDOM+**

Reference #: 250926.1222.19017

We've resolved an issue that caused inconsistent results when uploading PDF files to the Files tab in VISDOM+. Previously, certain PDFs—especially those with embedded text—were not parsed correctly, resulting in unreadable characters and missing data such as Counterparties and Effective Dates.

With this update VISDOM+ properly processes embedded text in PDF files and users can now reliably upload and parse PDF documents without encountering random or unreadable characters.

RESOLUTION: **VISDOM+ Clause Replacement and Training Data Fixes**

Reference #: 250926.1222.18221

We've resolved issues affecting key buttons in the VISDOM+ Add and Edit screens. Previously, the **Replace Clause** and **Add to Training Data** buttons were unresponsive, preventing users from completing important actions.

With this update:

- The **Replace Clause** button now correctly opens the clause replacement window in the Add screen.
- The **Add to Training Data** button is now functional in both the Add and Edit screens.
- The **taxonomy dropdown** in the Add to Training Data modal is now properly populated, making it easier to categorize training data.

Patch 22.5.2 - Aggregated Data Feed Services

Optional Add-On Data Feeds that provide your organization with the capability of pulling in feeds of data relating to risk, compliance, contract management, procurement management, etc. from CobbleStone's Data Aggregator Service. Currently this service is configured for data feeds from OFAC.

AGGREGATED DATA FEEDS ENHANCEMENTS

ENHANCEMENT: **Export Risk Analysis Data to Excel**

Reference #: 250926.1203.18278

We've added a new export button to the Risk Analysis Management pages for Employee Compliance Review and Company Compliance Review, making it easier to generate reports. With one click, users can now download the grid data as an Excel file—perfect for monthly compliance reporting or sharing insights with stakeholders.

Patch 22.5.2 - CobbleStone Helper Applications

CobbleStone Software offers all of our Contract Insight clients free access to Helper Applications and Add-ins. These include CobbleConnect, CobbleStone Add-In for Microsoft Word, CobbleStone Add-in for Microsoft Outlook, and others. Additional information can be found on our Wiki.

COBBLESTONE HELPER APPLICATIONS AND ADD-INS NEW FEATURES

NEW FEATURE: CobbleConnect - Data Assistant Application

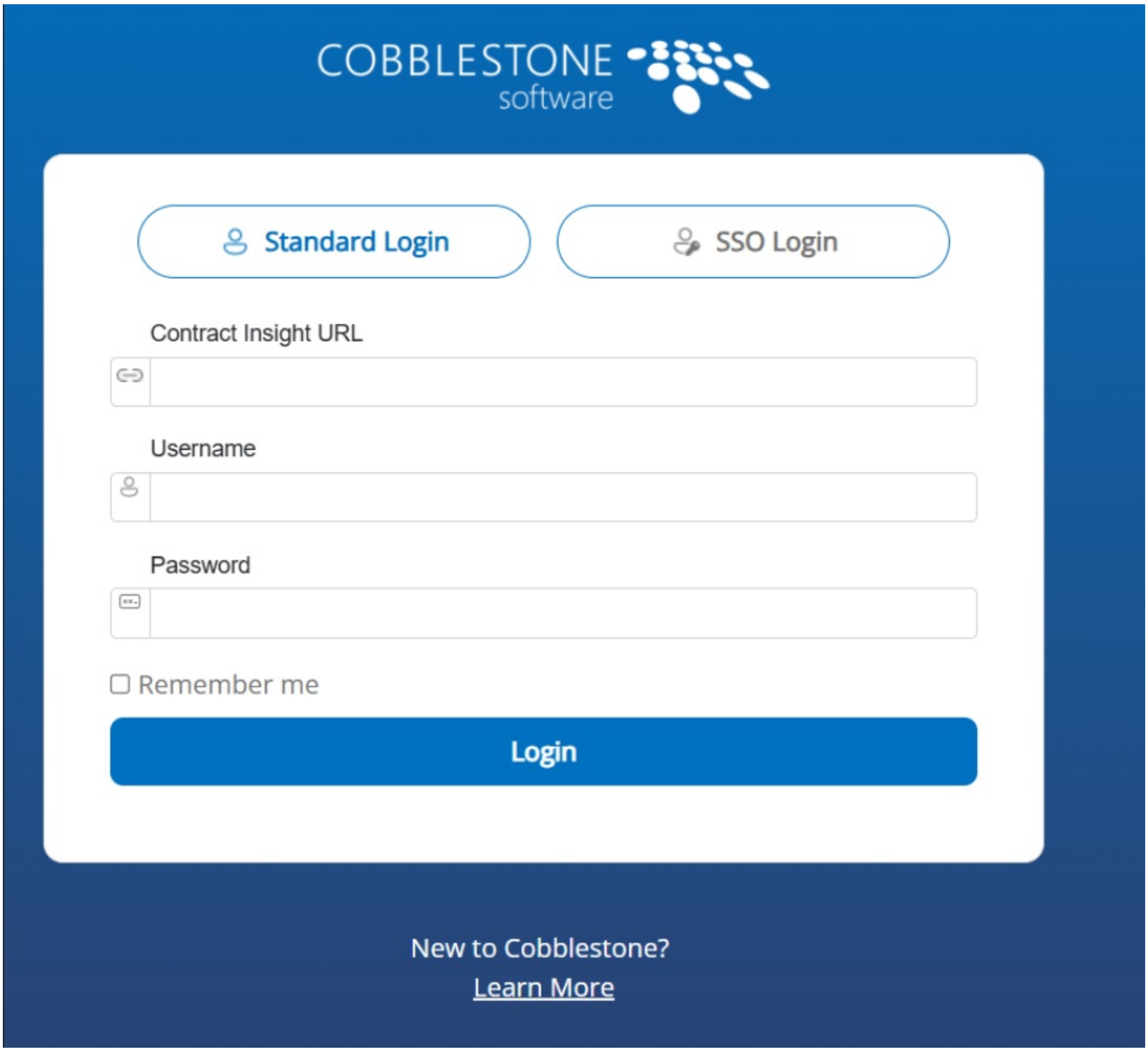
Reference #: 250926.1249.1919

We're excited to announce the launch of **CobbleConnect**, a new application designed to streamline your workflow and enhance your experience. CobbleConnect will eventually replace the legacy **PC Helper Application**, which has become outdated.

Current Features Available in CobbleConnect:

- **Search Records** – Quickly locate the information you need.
- **View Records** – Access and review data with ease.
- **Upload Files** – Seamlessly add documents and files to the system.

Once the application is launched, log in using your usual credentials.

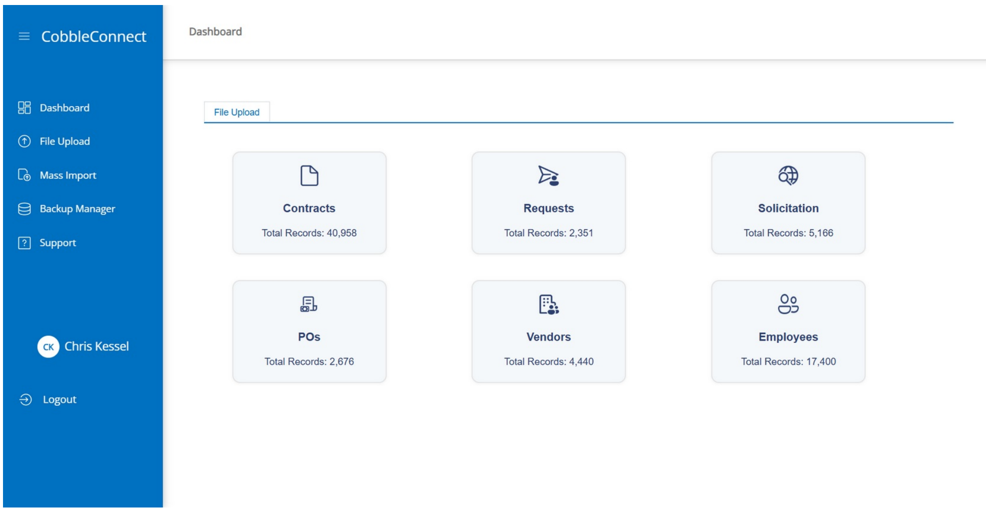


Here's a quick guide to help you navigate the key features:

1. **Dashboard Overview**

   After logging in, select **Dashboard** to view all six record sections along with their total record counts.

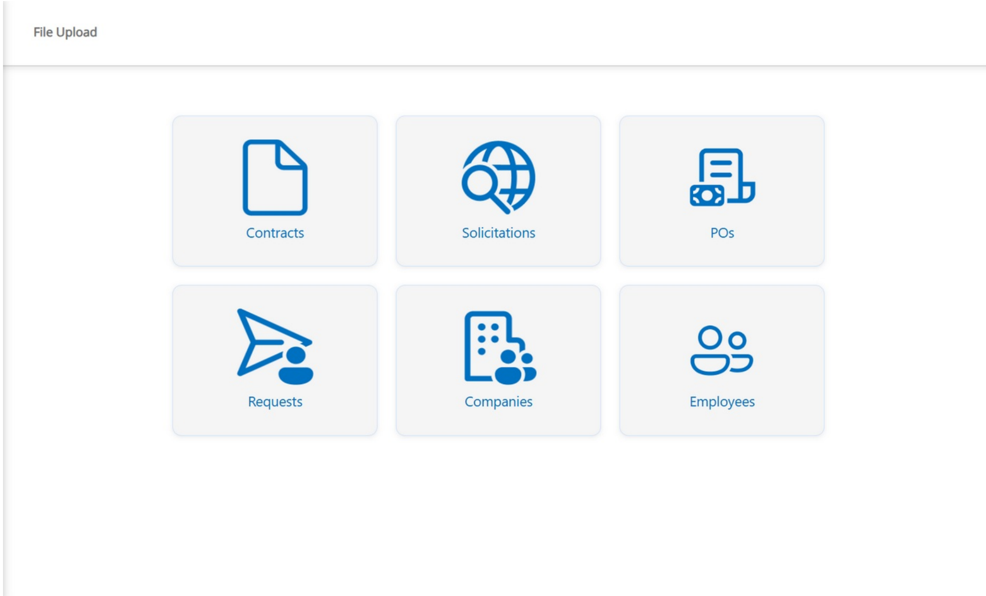
   a.



2. **Uploading Files**

   Click **File Upload** to choose a section where you'd like to upload files.

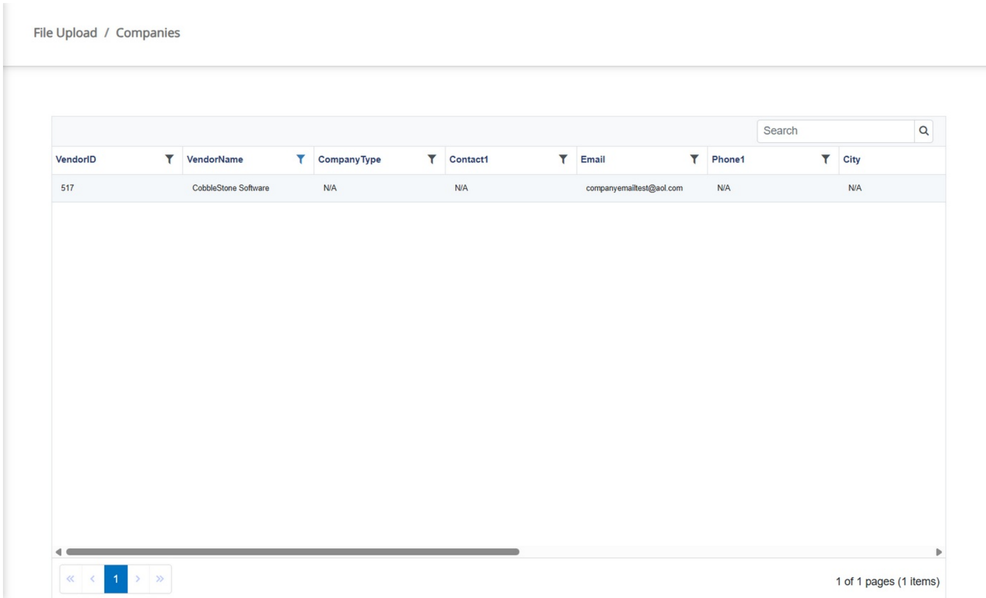
   a.



3. **Searching Records**

   Once a section is selected, a searchable grid will display records from the Core system.

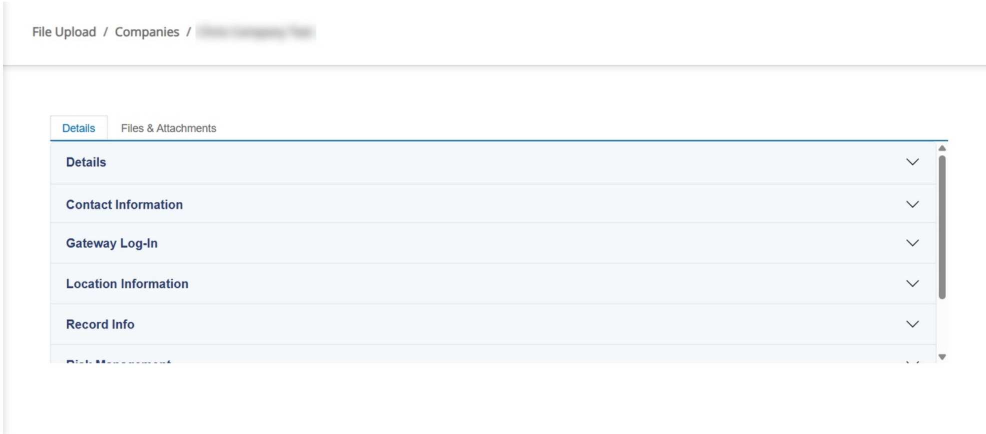
   - Use **Filter** and **Sort** options to organize your view.
   - Review high-level data before opening a specific record.
   -



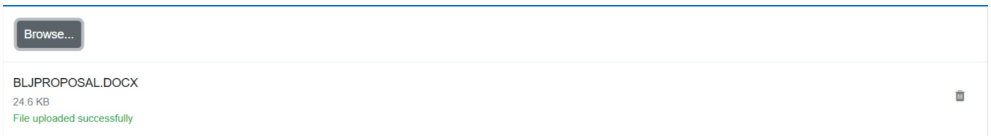
4. **Viewing Record Details**

   Click on a record to open its detailed view.

   - Expand **Field Groups** to view individual fields and their associated data.
   -

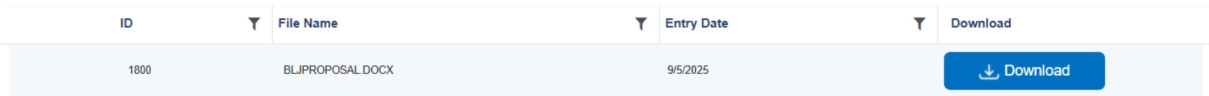


5. **Managing Files & Attachments**
    - Navigate to the **Files & Attachments** tab within a record.
    - Click **Browse** to select files for upload.
    - To upload multiple files, hold **CTRL** and click each file in the picker.
    - Selected files will automatically upload to the record.
    -



6. **Downloading Files**

    Click **Download** to open a file on your local machine.

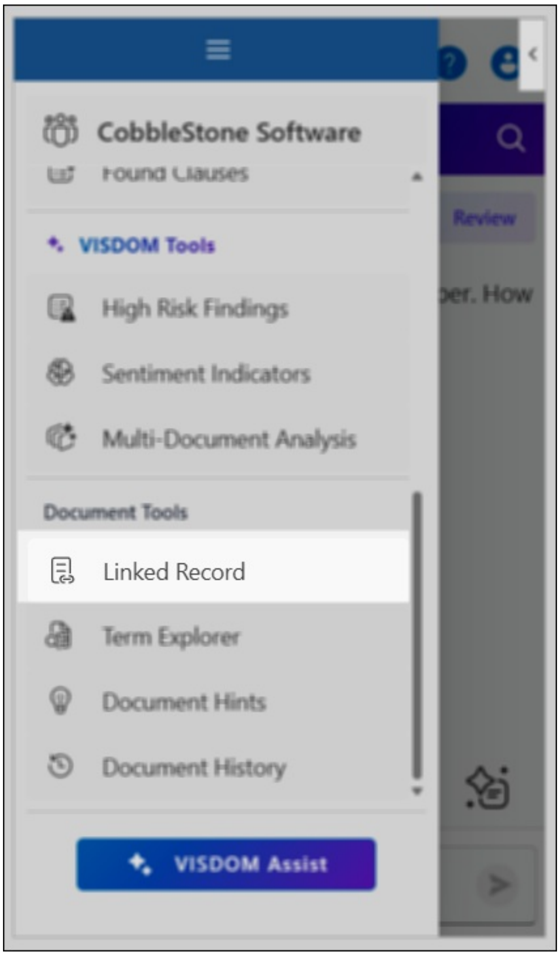


NEW FEATURE: Upload to Linked Record in Word Add-In

Reference #: 250926.1237.18226

We've enhanced the CobbleStone Add-in for Word to support uploading documents directly to a linked record. Previously, users were required to upload documents manually through the main application. Now, if the document is linked to a record, the user can simply click the **Upload Linked Document** button in the header to send it directly to the linked record. If no link exists, users can use the **Section Menu** to select **Linked Record** or click the same button to establish the link before uploading.

Upload Linked Document button



Linked Record via Add-in Menu

RESOLUTION: **Request Record Creation & Contract Type Sorting Fixes**

Reference #: 250926.1237.14406

Previously, when creating a new request from the CobbleStone Add-in for Outlook, users saw a confirmation message indicating success—but the Request ID displayed as “0,” and no record appeared in the system. This issue has now been resolved. Requests created through the add-in will correctly generate and display a valid Request ID, and the record will be visible in the system as expected.

In addition, the Contract Type dropdown list in the add-in was not sorted alphabetically, making it harder to locate specific types. This has been corrected, and the list now appears in alphabetical order for easier navigation.

RESOLUTION: **[TITLE]**

Reference #: [REF #]

[DESCRIPTION]