COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.9.0 (rev 210429)

Thursday April 29, 2021

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Release Notes Overview

CobbleStone Software's Contract Insight application release notes are meant to assist our clients and users in obtaining a high level or overview understanding of the new features, enhancements and issue resolutions associated with each released version of the application.

Release Version Information

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

Release Version Number	Client Release Date	Release Type *(from prior release)*
17.9.0 (Rev 210429)	Thursday April 29, 2021	Update

Version Numbers, Segments & Types

The initial questions most users ask are:

- What exactly do the version numbers mean?
- What does the release type mean?

CobbleStone Software's development of Contract Insight follows an industry standard for naming and numbering consisting of **three (3) segments of numbers**, separated by a period. When a new release is deployed, its release type is determined based on what changes, enhancements, issue resolutions or new functionality is included with the new release.

Below is a breakdown of the release version number and release type with these items in mind.

1 First Segment:

The first segment represents the ***system or application number***. This number only changes if there is a major overhaul to the system or application on a whole.

A release altering this segment is an **upgrade** release type.

2 Second Segment:

The second segment represents a ***new major functionality release***. This number only changes if there is new functionality or major enhancements to multiple areas of the system/application.

A release altering this segment is an **update** release type.

3 Third Segment:

The third segment represents the ***patch number***. This number changes with each new patch. The patch refers to targeted enhancements and issue resolutions.

4 Rev:

The rev (revision) represents the ***hotfix***. This changes with each hotfix. The hotfix refers to security updates and issue resolutions.

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.

- **New Feature:** Online Document Editing on a Record
  Reference #: 210429.439.15

  Online Document Editing is a new feature that enables users to create a new Web Document or edit a File/Attachment directly from a Record in Contract Insight. The options for document editing are similar to other word processing tools with the added ability to insert clauses found in the Clause Library.

  A new .docx (default) or .pdf can be created by going to the Files/Attachments area on a Record and clicking the Add Web Document button. After saving, the file will automatically be attached to the Record. Any subsequent saves to the document will be attached as a new version.

  To edit an attachment that is a .docx, .doc, or .pdf, click the Edit Document button next to the file in the Files/Attachments area of the Record. Each time a file is saved through the Online Document Editor it will automatically be attached to the Record as a new version.

  Note that System Administrators can disable the creation and editing of PDFs via the Application Configuration setting "Allow adding and editing of pdf documents" found under General Configuration Group.

  How will this affect users?
  End users with permission will be able to create and modify files using the Online Document Editor.

- **New Feature:** File Restriction on Vendor Records
  Reference #: 210429.416.2739

  Similar to Contracts, users with access now have the ability to Lock/Unlock access to an attachment on the Vendor/Customer record. To set users or Security Groups with access to the attachment, click the Document Toolbox next to the attachment then click Lock/Unlock Access.

  How will this affect users?
  Only users with permission will have the ability to Lock/Unlock access to an attachment.

- **New Feature:** Session Performance, Reporting and Profiling
  Reference #: 210429.337.3016

  A new central monitoring tool has been added to provide more in-depth monitoring for performance and troubleshooting of the system. This new monitoring capability enables System Administrators to view performance metrics on an easy-to-understand administrative screen and also provides the ability to quickly step through a user's session, viewing each page and action, for easier troubleshooting. This is the first step in improvement for monitoring performance and troubleshooting.

How will this affect users?
End users are not affected as only System Administrators have access to this tool.

- **New Feature:** Enhanced Searching with a Search Engine
Reference #: 210429.362.2578

A new Search Engine is available within Contract Insight. This Search Engine will look for the entered term in records, files, tables, and subtables and will return results based on relevancy rather than by area. It will also allow users to save searches they perform often as well as see their recent searches. The top 3 can be seen directly on the Search results page or click the My Saved Searches or My Recent Searches in the side menu to see the full list.

System Administrators will be able to configure the Search Engine by clicking the Search Engine option in the Application Configuration side menu. Once on the configuration page, the search text box at the top of the screen can be configured to continue using Quick Search or to use the Search Engine. The Quick Search results page can be configured to show a link to the Search Engine results. The search engine can be configured to index any area of the system and System Administrators will also have the ability to configure the user defined tables that should be indexed for searching with the Search Engine.

How will this affect users?
If configured, end users will be able to perform enhanced searches of the system.

- **New Feature:** View Employee Permissions by Record
Reference #: 210429.416.805

System Administrators are now able to view which Employees have access to a record directly from that record's Details screen. A new button can be found at the very top of a Request, Contract, PO, Employee, Company/Vendor, Sourcing, and Purchasing Record named 'View Employee Permissions for this Record'. Clicking this button will show a filterable grid with each Employee that can View, Edit, or Delete that specific record as well as whether the employee is marked as Active. Employees that do not have access to the record will not show in the grid.

There is an additional button on the Employee Details screen named 'View Employee's Permissions for all viewable records'. Clicking this button will show a filterable list of records in the system that specific user has access to View, Edit, and/or Delete.

How will this affect users?
End users are not affected as this feature is only available for System Administrators.

New Feature: Add one-off Tasks while creating a new record from a file
Reference #: 210429.362.3015

Users can now add one-off Tasks while creating a new record using the drag and drop feature or with Add Record with File menu items. The one-off Tasks can be added manually from the right side of the screen using the Tasks tab (next to the Record tab), or using a link from VISDOM paragraph extraction, and Natural Language Processing (NLP) paragraph categorizations on the left side of the screen.

How will this affect users?
Users with access can add one-off Tasks while creating a new record with a file.

Enhancement: Enable My Calendar export to support .ics format for Google Calendar
Reference #: 210429.416.2901

Contract Insight's My Calendar .ics export format has been updated to enable importing into Google Calendar.

How will this affect users?
Users can now export their My Calendar to an .ics file and import it into Google Calendar.

Enhancement: Find/Search Contracts page dropdowns configured as filtered dropdowns
Reference #: 210429.337.2936

Dropdown fields on the Find/Search Contracts page are now configured as filtered dropdowns. This allows users to begin typing a value in the field and filter the dropdown list to only show possible matches.

How will this affect users?
End users searching for Contracts from the Find/Search Contracts page can begin typing to filter the options presented in a dropdown.

Enhancement: Message for blank Wizard Tabs due to hidden conditional fields
Reference #: 210429.439.2950

Wizard tabs containing only conditional fields will now show a message if none of the conditions were met for showing any of the hidden fields. The message will notify users: *Fields are not needed for this section based on data provided. Please continue to the next section.

How will this affect users?
End users will easily see that the Wizard tab is blank because conditions were not met to show any of the fields on that tab.

- **Enhancement:** Employee Additionally Assigned Departments added for Data Import Manager
  Reference #: 210429.337.2970

  The Additionally Assigned Departments on an Employee record are now available for use with the Data Import Manager.

  How will this affect users?
  End users are not affected by this as only System Administrators can perform data imports.

- **Enhancement:** Export to Word and Export to PDF hidden on Linked Contract View
  Reference #: 210429.337.2994

  While viewing the Linked Contract View, the options for Export to Word and Export to PDF have been hidden. The Export to Excel option remains available.

  How will this affect users?
  End users with access will only be able to export to Excel.

- **Enhancement:** DB View Ad-hoc Reports can be filtered by Employee ID or Vendor ID
  Reference #: 210429.416.2995

  A reference column has been added for Ad-hoc Reports using DB Views so the reports can filter by Employee ID or Vendor ID. When adding fields to an Ad-hoc report using DB Views, a new checkbox is available to select that field as the reference. When checked, the report will only show results related to the Employee or Vendor (on the Vendor/Client Gateway) who ran the report.

  How will this affect users?
  When configured, end users will only see results associated with their Employee ID when the report is run.

- **Enhancement:** Enable/Disable Add In-line for individual reference data fields
  Reference #: 210429.439.2989

  Users with access to the Field Manager will be able to configure reference data fields to show or hide the Add In-line option.

  How will this affect users?
  Users with access will only be able to add new information in-line if configured.

- **Enhancement:** Unique Fields check extended to Edit screens
  Reference #: 210429.439.2990

  Unique fields check can now be configured to check for unique values while *editing* a record instead of just while *adding* a new record. The configuration can be set under General System in Config Settings.

  How will this affect users?
  End users are not affected as only System Administrators can configure this setting.

- **Resolution:** Conditional Fields Update for Wizard Add
  Reference #: 210429.439.2974

  Under specific circumstances, users noted that conditional fields using Record Type as the parent field were not showing the appropriate fields when adding a new record with the Wizard Add functionality. The functionality has been updated so the conditional fields based on Record Type work as expected for Wizard Add.

- **Resolution:** Reporting count of Record Attachments included deleted attachments
  Reference #: 210429.445.2888

  Creating an Ad-hoc report showing the Count of Files Attached would produce results that included counts for attachments that had been deleted. The application query was changed to omit deleted file history.

- **Resolution:** Workflow was excluding the 'Alternate Email' to the Task/Alert
  Reference #: 210429.445.2893

  For Workflow Tasks with Alternate Email set to "Vendor/Customer Email" and used for more than 2 Tasks, the "Vendor/Customer Email" value was being omitted. The application was updated to ensure selected value(s) are propagated to Workflow Task.

- **Resolution:** Deleted files included in Attachment selection for Secure Emails
  Reference #: 210429.445.2897

  When including an attachment on a Secure Email, attachments that had been deleted were showing as selection options. This has been resolved so deleted attachments no longer show when selecting attachments for a Secure Email.

- **Resolution:** Contacts for Additionally Assigned Companies not appearing for Secure Emails
  Reference #: 210429.445.2904

  The list of Company Contacts for selection on a Secure Email did not show those from Additionally Assigned Companies on the record. This has been updated to ensure the Company Contacts are listed.

- **Resolution:** Vendor Name not appending to Email subject line as expected
  Reference #: 210429.445.2906

  When the Append Vendor configuration was enabled, the Vendor Name was not appending to the email subject line. This has been resolved so the Vendor Name is shown as expected.

- **Resolution:** Bulk Add option for system-defined subtables
  Reference #: 210429.445.2922

  The option for Bulk Add on system-defined subtables could not be disabled. This has been resolved so the option can now be disabled.

- **Resolution:** Workflow Task Not Generating Merged Documents
  Reference #: 210429.362.2930

  When attempting to generate merged documents using a workflow, some users were receiving a message stating the conditions for the Approval or Signature template were not met. This has been updated to ensure the Approval Process and Signature Process templates are accounted for when processing the automatically merged documents though a workflow.

- **Resolution:** Report Designer not saving new reports
  Reference #: 210429.416.2934

  After creating and saving a Report Designer report, some users noted the report was not saved. This has been resolved so the Report Designer report saves as expected after being created or updated.

- **Resolution:** Autocomplete dropdown fields not showing selected value when editing
  Reference #: 210429.337.2937

  Field Group names containing a special character would not display the selected value of an autocomplete dropdown field when a user would attempt to edit the field. This has been resolved so the selected value shows as expected.

- **Resolution:** Non-System Admins unable to view all pages in the Document Library
  Reference #: 210429.445.2941

  After moving to the 2nd page of the Document Library, non-System Admin users were unable to continue moving forward or backward through the remaining pages. This has been resolved so users can access all applicable pages.

- **Resolution:** Specific Summary Tiles Not Functioning as Expected for Standard users
  Reference #: 210429.445.2945

  When a Summary Tile was configured to use the 30-, 60-, or 90-Day Contract Expiration reports, Standard users were seeing the count for all Contracts in the system. This has been updated so the Standard users only see the count of Contracts for their user account.

- **Resolution:** Full field names not displaying when creating or editing an Ad-hoc report
  Reference #: 210429.445.2946

  While creating or editing an Ad-hoc report, users noted that the field name and field display name were not fully visible. This has been updated so the full names can be seen.

- **Resolution:** Document Template File Preview unavailable for Word documents
  Reference #: 210429.445.2951

  Word documents were unable to be previewed for Document Template attachments. The file previewer has been updated so Word documents can be previewed as expected.

- **Resolution:** Summary Tiles using non-legacy Ad-hoc reports dropping decimal places
  Reference #: 210429.416.2924

  Summary Tiles showing a dollar amount were only showing the dollars and not the decimal places. This has been updated so the decimal places appear on the Summary Tiles.

- **Resolution:** Users without permission to view a record seeing Legal Hold message
  Reference #: 210429.416.2925

  Users without View permissions for a record were seeing the Legal Hold enabled message, even though there was no Legal Hold set for the record. This has been resolved so that only the expected ‘You are not authorized to view this record.’ message appears.

- **Resolution:** Filters/Conditions on Ad-hoc Report showing additional values for linked custom dropdown fields
  Reference #: 210429.445.2959

  When adding Filters/Conditions on an Ad-hoc Report using a custom dropdown from a linked table, users were not seeing the custom list. This has been resolved so the set custom list values show when configuring the Filters/Conditions for the linked dropdown on the Ad-hoc Report.

- **Resolution:** Access Level on Files/Attachments being reset if chosen before File Category
  Reference #: 210429.416.2960

  If the Access Level was sent in the Files/Attachments area before the File Category, the Access Level was being reset to Internal. This has been resolved so the Access Level chosen remains whether chosen before or after the File Category.

- **Resolution:** Permissions remaining after a Security Group is deleted
  Reference #: 210429.416.2967

  Permissions assigned to a Security Group were remaining after the Security Group was deleted. This has been resolved so that the permissions are removed when the Security Group is deleted.

- **Resolution:** Hyperlink Friendly Text not appearing in subtable preview on primary record
  Reference #: 210429.416.2981

  The friendly text configured for a hyperlink field on a subtable was not appearing when viewing from the primary record. This has been updated so the friendly text shows in the grid on the primary record.

- **Resolution:** Graphical Dashboards showing timeout message
  Reference #: 210429.416.2987

  While viewing certain reports on a Graphical Dashboard, some users were receiving a "timeout from server" message along with an error log. This has been resolved so the error log should no longer appear.

- **Resolution:** Document Template attachments with footnotes unable to have password or protection level set
  Reference #: 210429.337.2993

  Previewing a Document Template attachment that has footnotes was causing users to be unable to select a password or protection level for the document. This has been resolved so Word documents with footnotes can be set up as needed for a Document Template.

- **Resolution:** Record Types Export out of order
  Reference #: 210429.445.3022

  When exporting the list of Record Types, the Type ID column was not included, and the columns were not in the same order as on the list screen. This has been updated to ensure all fields show as expected when exported.

- **Resolution:** Quick Search not displaying Direct URL field in results
  Reference #: 210429.337.3025

  After configuring the Direct URL field to display on the Quick Search results for Contracts, the field was not showing the expected data. This has been resolved so the results show the correct data after searching.

- **Resolution:** Unable to add a new Vendor/Company in-line on a Contract Add screen
  Reference #: 210429.445.3036

  If the Record Type was configured to be locked on the Add screen, users were unable to add a new Vendor/Company in-line as they could not choose the Vendor Type. This has been resolved so that the Vendor Type when the new Vendor/Company is being added in-line.

- **Resolution:** Ad-hoc report results different when viewed on a Dashboard
  Reference #: 210429.416.3038

  Users experienced results from an Ad-hoc report appearing as expected when the report was run, however, was showing different results when the same Ad-hoc report was viewed on a user's Dashboard. This has been resolved so the Dashboard report is showing the correct information.

- **Resolution:** Record Types list showing inconsistent ForArea names
  Reference #: 210429.445.3041

  When viewing the Record Types list, the naming was inconsistent for some ForArea names – e.g.- 'tblContracts' vs 'Contracts'. This has been updated so the naming in the ForArea column is consistent on the Record Types list.

- **Resolution:** 'Export All' not including Contract ID column
  Reference #: 210429.445.3044

  When using Export All on a non-legacy Ad-hoc report, users noticed the Contract ID column was not being included. This has been resolved so the Contract ID column is part of the export as expected.

- **Resolution:** Color for arrows on Alert Others to this Task inconsistent with text
  Reference #: 210429.445.3046

  The notes for Alert Others to this Task indicate that the arrows for assigning and removing Employees should be red and blue but the actual arrows were grey. This has been updated so the arrows are red and blue.

- **Resolution:** Subtable entries on Contract and Request could be added, edited, or deleted when Legal Hold was enabled
  Reference #: 210429.416.3045

  After enabling Legal hold on a Contract or Request, users noticed that subtable entries could still be added, edited, or deleted. This has been resolved so the subtable entries are locked as expected for Legal Hold.

- **Resolution:** Default text for new field is overwritten on initial setup
  Reference #: 210429.445.3051

  Adding default text while creating a new field was overwritten with 0 after the initial setup but would remain if the default text was added after the new field was created. This has been resolved so the default text remains when added during initial creation of the new field.

- **Resolution:** Managing specific Security Groups showing an error
  Reference #: 210429.445.3055

  Under certain circumstances, users were seeing an error when managing specific Security Groups. This has been resolved so Security Groups can be managed as expected.

- **Resolution:** Contract Attachments Navigation
  Reference #: 210429.445.3058

  After viewing a Files/Attachments subfolder with more pages of results than the Root Folder, the Root Folder was stating there were no records. This has been updated so the Root Folder grid shows the expected documents in the folder.

- **Resolution:** Unable to create Graphical Dashboards with Ad-hoc reports using 'User Performing Action' in a condition
  Reference #: 210429.445.3061

  Users were unable to create a Graphical Dashboard when using an Ad-hoc report with conditions saved that use the 'User Performing Action' option. This has been resolved so the Graphical Dashboard will be created as expected.

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.

- **Enhancement:** Ability to add the 'Reason' for a Signer to the signature on a document
  Reference #: 210429.445.2793

  A configuration setting has been added to include the 'Reason' set for the Signature Participant during the Signing Process. The Reason will be appended to the signature block on the document being signed.

  How will this affect users?
  End users are not affected by this enhancement.

- **Enhancement:** Signing & IntelliSign Signing Actions Update
  Reference #: 210429.337.2954

  Wording and options have been updated for the "Allow Sign Anywhere" option on Signature and IntelliSign signature processes. The option has been updated to 'Signing Action' with the options 'Placeholder Signatures' and 'Free Form Signing'.

  How will this affect users?
  End users are not affected by this enhancement.

- **Resolution:** Manage Signature Processes for Employees & Users not retrieving the specified data
  Reference #: 210429.445.2894

  When viewing the Manage Signature Processes page, users would see an error after selecting Employees & Users as the Area. This has been resolved so the signature processes for Employees & Users are displayed as expected.

- **Resolution:** Reference Files not viewable for multiple Signature Process groups
  Reference #: 210429.445.2929

  When multiple Signature Process are configured, groups past the first signature group could not view the included Reference File(s). This has been updated so that the Reference File(s) are available for all signature groups.

- **Resolution:** IntelliSign Company Contact Signer list not limited to contacts from the record
  Reference #: 210429.445.2913

  Some users reported seeing all Company Contacts when viewing the Company Contact Signer list for the IntelliSign process. This has been resolved so that only the company contacts show for the primary and additionally assigned companies.

- **Resolution:** Mass Process Jobs: Filters/conditions saving field value instead of friendly/display text and "merge only" job needed page reload to view
  Reference #: 210429.337.2933

  When selecting filters/conditions for a mass process job and picking a drop-down field, the filters and conditions were saving the value of the field (typically the primary key/id), whereas the grid was looking for the friendly/display text when applying the filters.

  Also, when setting up a "merge only" mass process job, specifying and/or changing filters and conditions would require a reload of the page to see the information.

  These items have been resolved to use and display the information as expected.

- **Resolution:** Date being appended to Quick Sign/Sign Now regardless of configuration setting
  Reference #: 210429.445.2935

  After signing a document using the Quick Sign/Sign Now process, the date was being appended to the signature even if the setting was turned off. This has been resolved so the 'Append Date' configuration setting applies the date only when configured to do so.

- **Resolution:** Links on Negotiations tab only linking to Contract Details screens
  Reference #: 210429.337.2980

  Links from the Negotiations tab were not directing as expected for Details screens for records other than Contracts. This has been updated so the links for areas outside of Contracts direct users to the associated record.

- **Resolution:** Signing Portal Authentication Issue
  Reference #: 210429.337.2992

  After logging in to the Signing Portal using a PIN, the link could be viewed if copied and pasted into a separate browser. This has been resolved so the user needs to authenticate again using their PIN.

- **Resolution:** Display of Signer's Name in IntelliSign
  Reference #: 210429.445.2996

  The list of Employee Signer and Company Contact Signer names were not alphabetized when going through the IntelliSign process. This has been updated so the names show in alphabetical order.

- **Resolution:** Replace Participant functionality sending inverse of replacement emails
  Reference #: 210429.337.2999

  When replacing a participant in the Approval or Signature processes, the replacement email was being sent to the original participant. This has been resolved so the new participant receives the email as expected.

- **Resolution:** Unable to complete Signature process using the 'Complete' button
  Reference #: 210429.416.3029

  Some users were receiving an error when attempting to complete a Signature process. This has been resolved so the Complete button finishes the Signature completion process.

- **Resolution:** E-Approval/E-Signature Participant that is replaced can still log in to portal
  Reference #: 210429.337.3054

  After replacing an Approver or Signer, the original participant still had the ability to sign into the portal and approve or sign a document. This has been updated so only the new participant is able to access the document for approving or signing.

- **Resolution:** Comments disappearing on deleted text when redlining a document
  Reference #: 210429.337.2965

  Comments added to deleted text in Word while redlining a document would disappear from the comment bubbles for the next viewer. This has been updated so the comments appear in Word for all document reviewers.

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.

- **Resolution:** Unable to change sections on Survey Review and questions out of order
  Reference #: 210429.416.2973

  When reviewing Survey results, users were unable to switch sections using the dropdowns or Next/Previous buttons. In addition, when viewing an individual Survey review report, the questions were ordered by type as opposed to number. These have been resolved so users can change sections as expected and so the questions are ordered by question number.

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.

- **Enhancement:** Submit Public/Unauthenticated Request
  Reference #: 210429.439.3056

  The Vendor/Client Collaboration Gateway can now be configured to enable submission of Request by users not logged into the Gateway. These Requests can be set up in the Field Manager's Manage Gateway Fields by Type and checking the 'Show selected type for submitting public request' checkbox.

  How will this affect users?
  End users are not affected.

- **Resolution:** Multi-Factor Authentication on the Vendor/Client Gateway not sending validation code if only set up for email
  Reference #: 210429.337.2979

  When multi-factor authentication for the Vendor/Client Gateway was configured to only use email (and not SMS), users would not receive the validation code. This has been resolved so the validation codes are sent as expected if only using email form multi-factor authentication.

- **Resolution:** Vendor/Client Gateway page jumping while scrolling
  Reference #: 210429.416.3052

  Some users experienced their screen on the Vendor/Client Collaboration jumping while scrolling through the page. This has been updated so the pages no longer unexpectedly move while scrolling.

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.

- **New Feature:** Integration with DocJuris
  Reference #: 210429.362.2395

  CobbleStone Software has partnered with DocJuris to offer an integration between the two systems. Users of both DocJuris and CobbleStone now able to take advantage of an integrated platform that offers web-based negotiations and full contract lifecycle management functionalities.

  How will this affect users?
  End users with a DocJuris integration can begin web-based negotiations through DocJuris from within Contract Insight.

- **Enhancement:** Addition of Notes field into Create Envelop for DocuSign file selection
  Reference #: 210429.337.3027

  Files/Attachments Notes have been added into the Create Envelope step of the DocuSign process. This enables users setting up the signing process to see any notes related to the specific attachments to ensure the correct attachments are selected.

  How will this affect users?
  End users with access to start the DocuSign process will now see the Notes column on the Create Envelope screen.

- **Resolution:** External eSign Records screen viewable to System Administrators only
  Reference #: 210429.362.2988

  The External eSign Records page was only available to System Administrators and not showing for other users based off their View permissions. This has been updated so that users can see results on the External eSign Records page according to the user's assigned permissions.

- **Resolution:** External eSign unable to process Contacts/Employees with commas in their names
  Reference #: 210429.416.2895

  Users attempting to add a Contact or Employee with a comma in their name during the External eSign process setup would be unable to continue. This has been updated for both DocuSign and AdobeSign to allow for commas in a recipient's name.

Connector: SMS/Text Integrations

Optional Add-On Connector that provides your organization with the capability of sending SMS notifications for Task Alerts and Multi-Factor Authentication Verification Codes for both the Core System and Vendor/Client Gateway logins. Currently this connector is configured for integrations with Twilio.

- **Enhancement:** Ad-hoc Reporting for Multi-factor Authentication SMS/Text and Internal SMS Messages
  Reference #: 210429.416.2840

  Several DB View tables have been added for creating Ad-hoc reports that enable users to create reports based on the following: SMS Internal Messages To Customer Contacts, SMS Internal Messages To Employees, SMS MFA Messages To Customer Contacts, and SMS MFA Messages To Employees.

  How will this affect users?
  End users with access to create reports using the new DB Views will be able to report on various aspects of SMS/Text messaging and MFA SMS/Text messages sent through the system.