# CobbleStone Software - Release Notes

**Contract Insight Version 22.6.0 Rev 251212**

# Table of contents

**Release Notes > Update 22.6.0 (Rev 251212)**

# Overview-Version 22.6.0 Rev251212

## Release Version Information

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

| Release Version Number | Client Release Date | Release Type *(from prior release)* |
|---|---|---|
| 22.6.0 (Rev 251212) | December 12, 2025 | Update |

Click here to download a PDF of the Release Notes

For CobbleStone Software version 22.6.0 Rev 251212, 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: Single Sign-On (SSO) Authentication
- Connector: External E-Sign Integrations
- Aggregated Data Feed Services
- VISDOM+

# Update 22.6.0 - 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.

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## CORE SYSTEM
## NEW FEATURES

### NEW FEATURE: Collaborative Online Document Editing

*Reference #: 251212.1203.12700*

We're excited to announce a major upgrade to our document editing experience with the launch of a new Collaborative Online Editor.

> **Important Note:**
> With the introduction of this new editor, the legacy Online Document Editor will be decommissioned in early 2026. We recommend transitioning to the new collaborative editor for a better, more efficient experience.

**What's New?**

- Real-Time Collaboration: Invite other employees, company contacts, or share a link via email to collaborate on documents in real time.
- Modern Interface: A sleek, updated design with all the text editing capabilities of the legacy editor—and more.
- Track Changes Enabled: Changes are tracked automatically, and you can grant permissions for collaborators to accept or reject edits.
- Easy Workflow: When collaboration is complete, simply click Save and End Session to finalize your work.

**Access:**

- The new editor is available from Core system via the Files/Attachments table and Company Contacts can be invited through the editor. There is a configuration setting in the new Collaborative Online Editor configuration group that allows the option to invite collaborators solely with an email address, without a corresponding Employee Record or Company Contact Record.

**Why This Matters:**

This enhancement brings powerful real-time collaboration to your document workflows, helping teams work together seamlessly and stay competitive.

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# CORE SYSTEM ENHANCEMENTS

## ENHANCEMENT: **Improved Tabbed Details Screens and Inline Editing**

*Reference #: 251212.337.20502*

We've enhanced the tabbed details screens introduced in version 22.4.0 (Rev 241230) to deliver better performance.

**What's New?**

Faster Tab Loading:

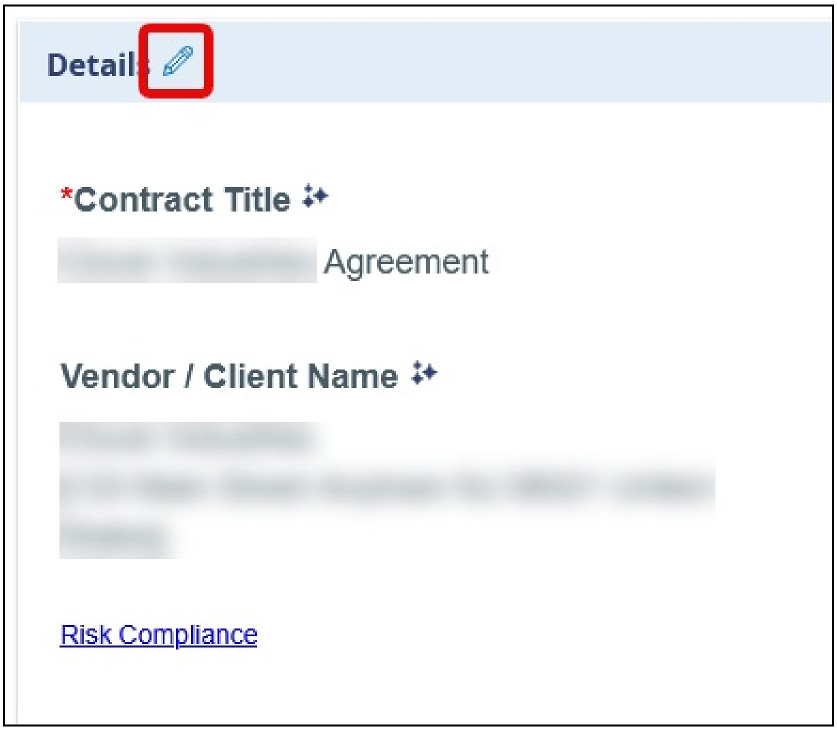
- When you click a tab for the first time, it will take a moment to load.
- After the initial load, tabs remain ready for quick access unless the page is refreshed.

Inline Editing by Field Group:

- To aid in performance, we've updated editing to occur at the Field Group level instead of individual fields.
    - Click the pencil icon next to a field group name to edit all fields in that group inline.
    - Changed fields are outlined in yellow for easy tracking.
    - Required fields without values are highlighted red with a notice.

Save or Cancel with Ease:

- Click Save next to the field group name to confirm changes (a green confirmation message will appear).
- Click Cancel to discard changes and revert to original values.


Details
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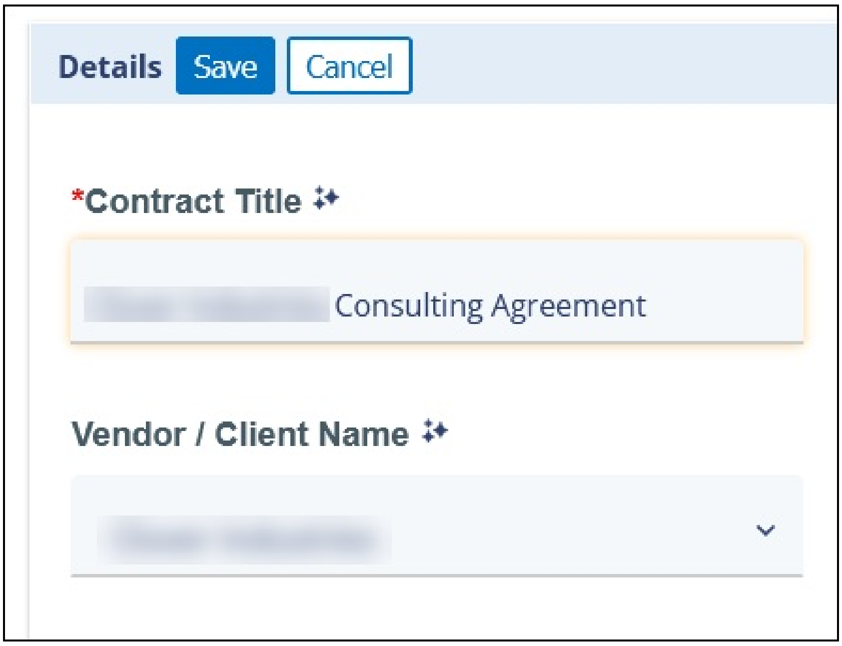
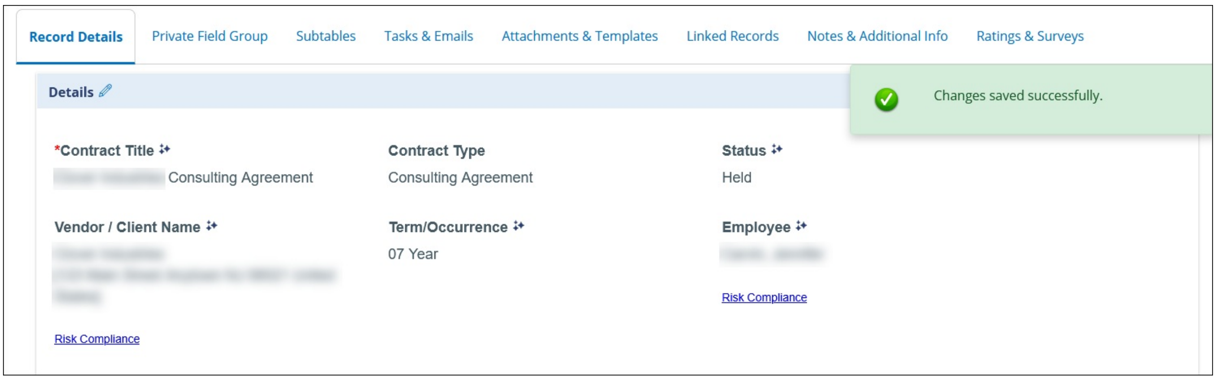
Agreement
Vendor / Client Name
Risk Compliance


Details
Save
Cancel
*Contract Title
Consulting Agreement
Vendor / Client Name


Record Details
Private Field Group
Subtables
Tasks & Emails
Attachments & Templates
Linked Records
Notes & Additional Info
Ratings & Surveys
Details
Changes saved successfully.
*Contract Title
Consulting Agreement
Contract Type
Consulting Agreement
Status
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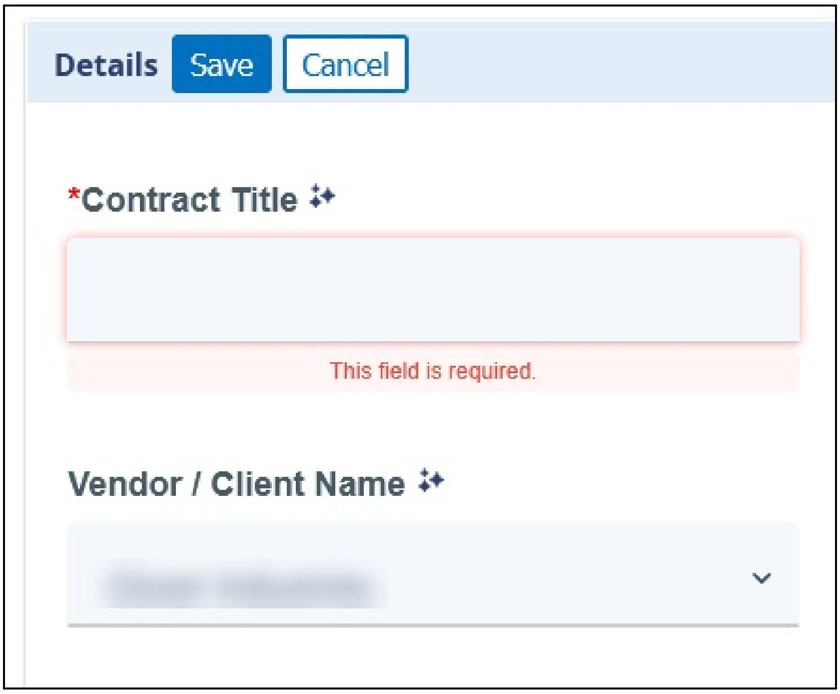
07 Year
Employee
Risk Compliance
Risk Compliance




**Why This Matters:**

These updates improve performance and streamline editing, making it faster and easier to manage record details.

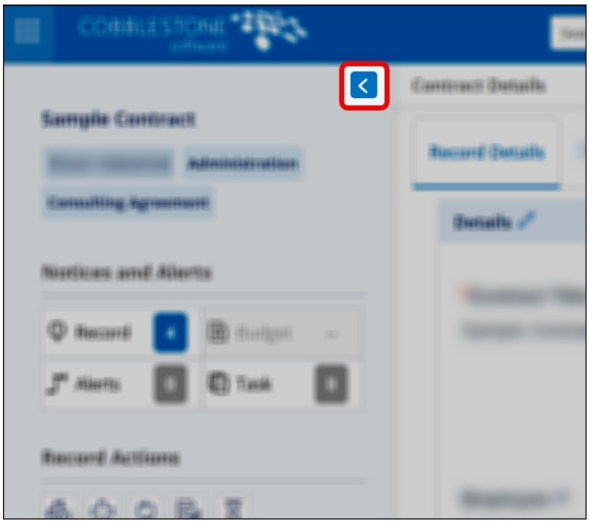
## ENHANCEMENT: **Collapsible Side Panel for a Cleaner View**

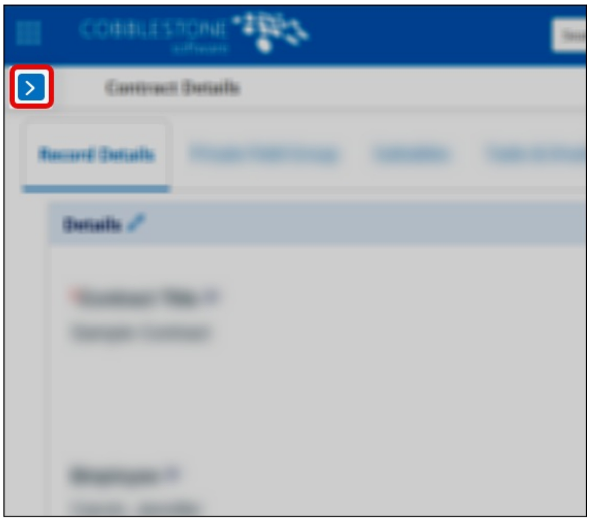
*Reference #: 251212.386.16829*

We've added a simple way to reduce visual clutter and give you more space to focus on your work.

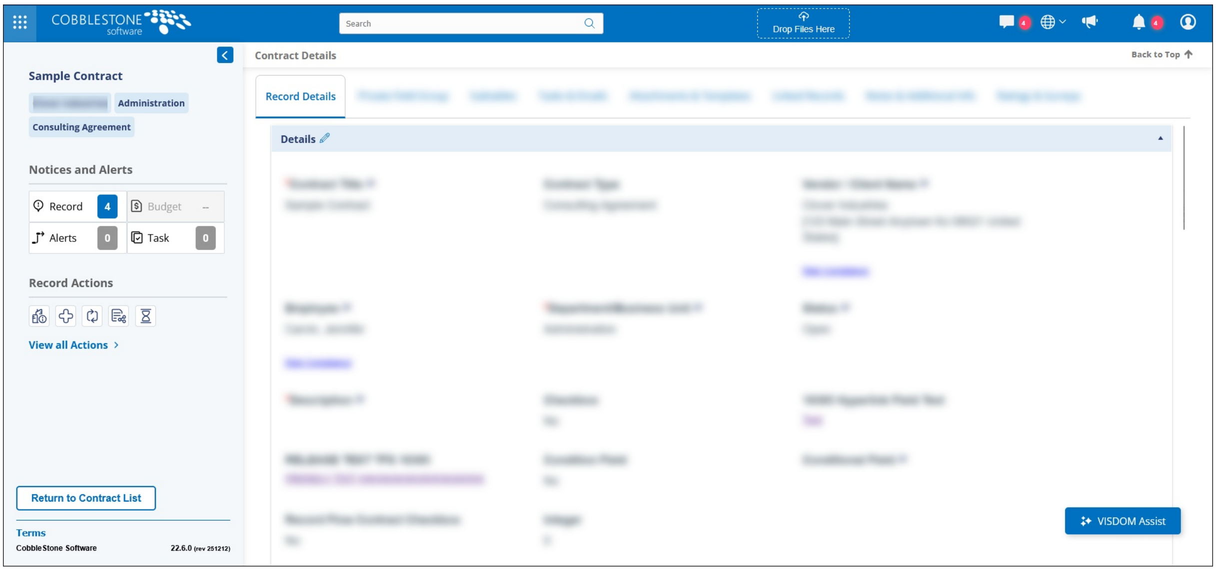
**What's New?**

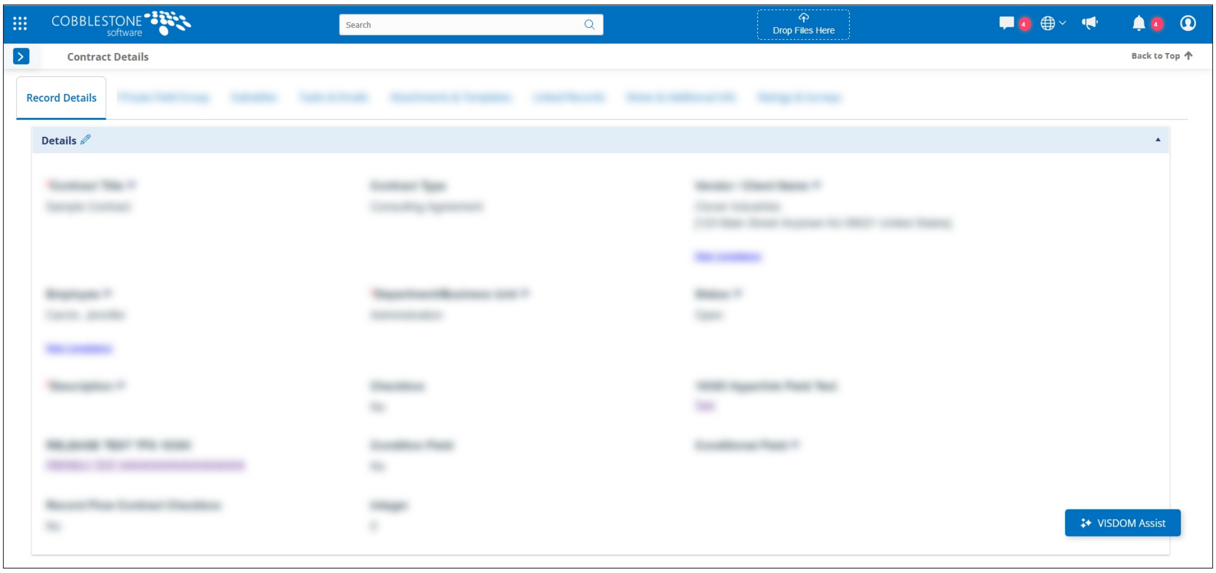
- On any record details page with the side panel, you'll now see a collapse/expand button at the top right of the side panel.





- Click the arrow to collapse the side panel and free up screen space.
- The arrow button remains visible so you can easily expand the side panel again when needed.
- Your preference (collapsed or expanded) will stay in place even if you refresh or navigate to another page.




**Why This Matters:**

This enhancement gives you more control over your workspace, helping you keep your screen clean and organized.

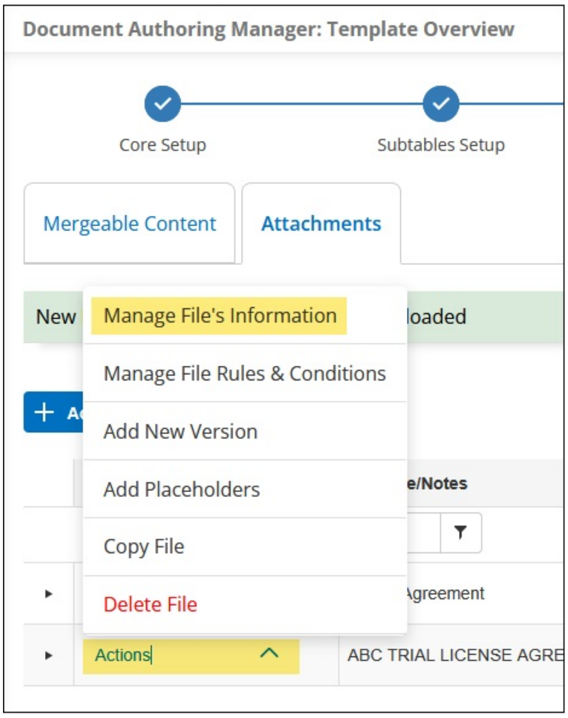
## ENHANCEMENT: New Options for Document Templates: Convert and Lock PDFs

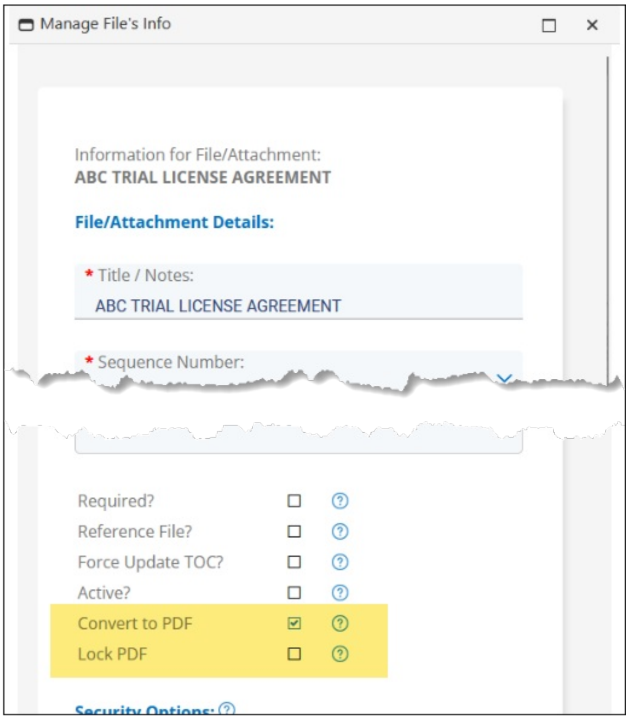
*Reference #: 251212.345.19328*

We've added two new options to make managing document templates easier and more secure.

**What's New?**

- When uploading a Word document to a template and opening Manage File Info, you'll now see:
  - Convert to PDF: Automatically convert the document to PDF when merging.
  - Lock PDF: Appears after checking Convert to PDF. If selected, the PDF will be locked to prevent further editing after conversion.






- For PDF files, you'll see the Lock PDF option only.

**Why This Matters:**

These enhancements give you greater flexibility and control over document formatting and security, ensuring your templates remain consistent and protected.

## ENHANCEMENT: **Import Line Items for Requests**

*Reference #: 251212.365.19895*

We've made it easier to manage line items in Requests by introducing a bulk import option.

**What's New?**

The Requests Line Items subtable now includes an Import Record(s) button, similar to the functionality in Purchase Orders. Simply:

1. Navigate to a Request record and open the Line Items subtable.
2. Click Import Record(s) to download the CSV template.
3. Fill in your line items and upload the file.

Once uploaded, your line items will automatically appear in the subtable.

**Why This Matters:**

This enhancement reduces manual data entry, saves time, and streamlines your workflow for managing Requests.

## ENHANCEMENT: **Flexible "From" Address for Non-SendGrid Email Configurations**

*Reference #: 251212.1259.22176*

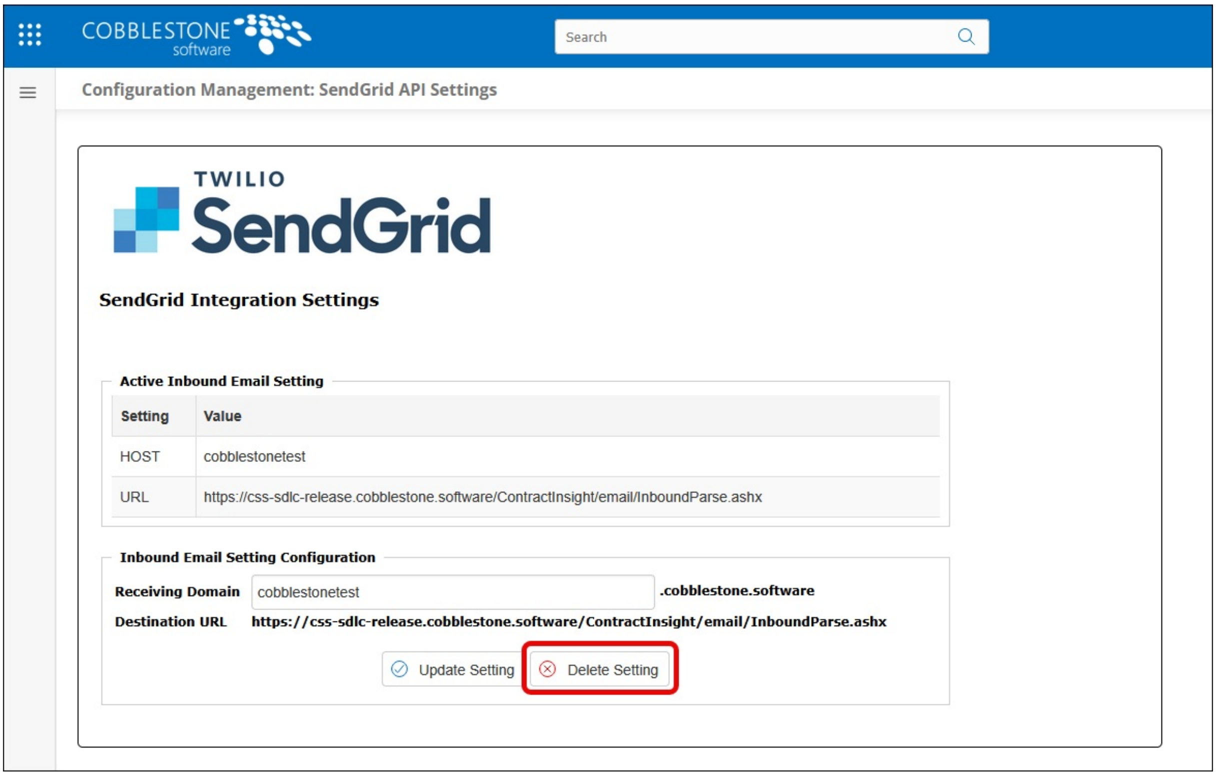
We've added more flexibility to email sending when SendGrid is not enabled.

**What's New?**

- Users can now select a different "From" address when sending emails from the system.
- A new field, Include in From Email List, has been added to Employee records.
- Set this field to Yes to make that employee available in the "From" dropdown.
- The dropdown appears when you clear the default sender and begin typing to search.
- Only one "From" address can be selected per email.

**Important:**

- This feature is **exclusive to non-SendGrid configurations**.
- To enable this functionality, delete SendGrid Setting under Manage/Setup → SendGrid API Management → Delete Setting.




**Why This Matters:**

This enhancement gives organizations more control over email communication, allowing messages to be sent on behalf of other authorized users for improved flexibility and workflow efficiency.

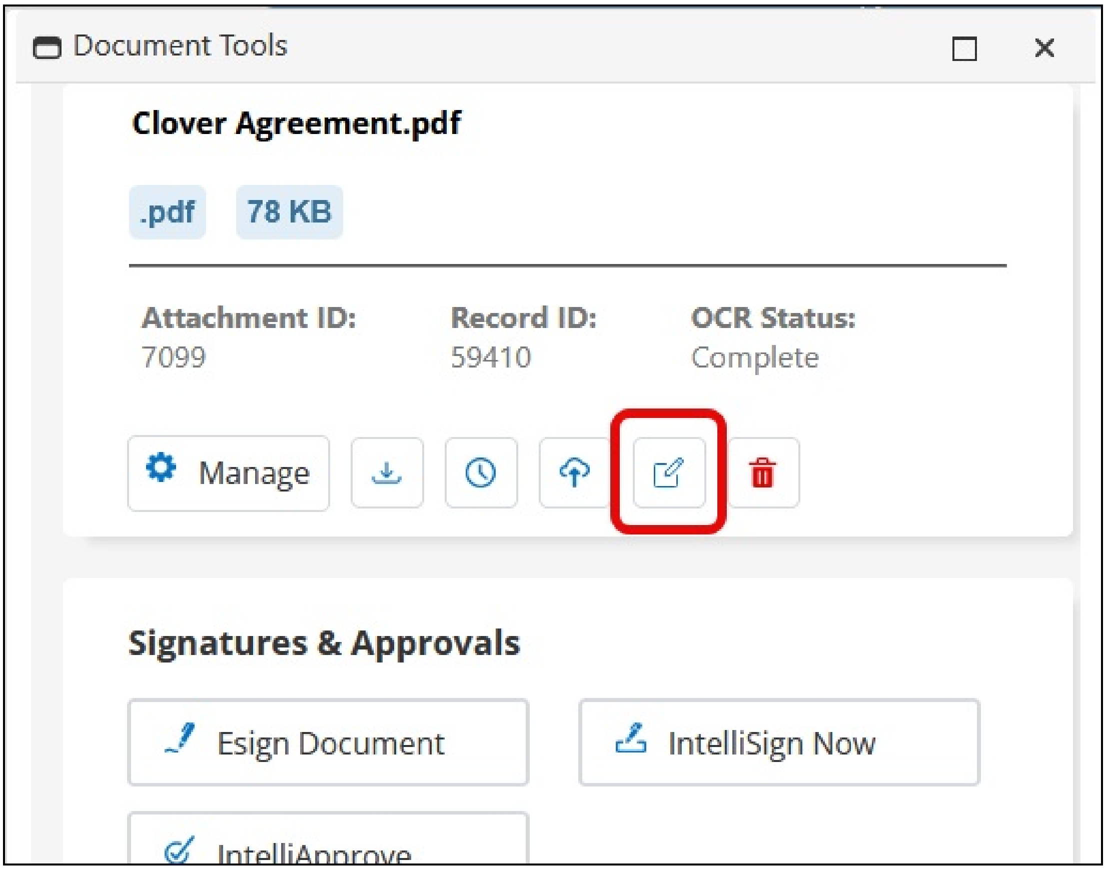
**ENHANCEMENT: VISDOM Assist Now Available in the Legacy Online Editor**

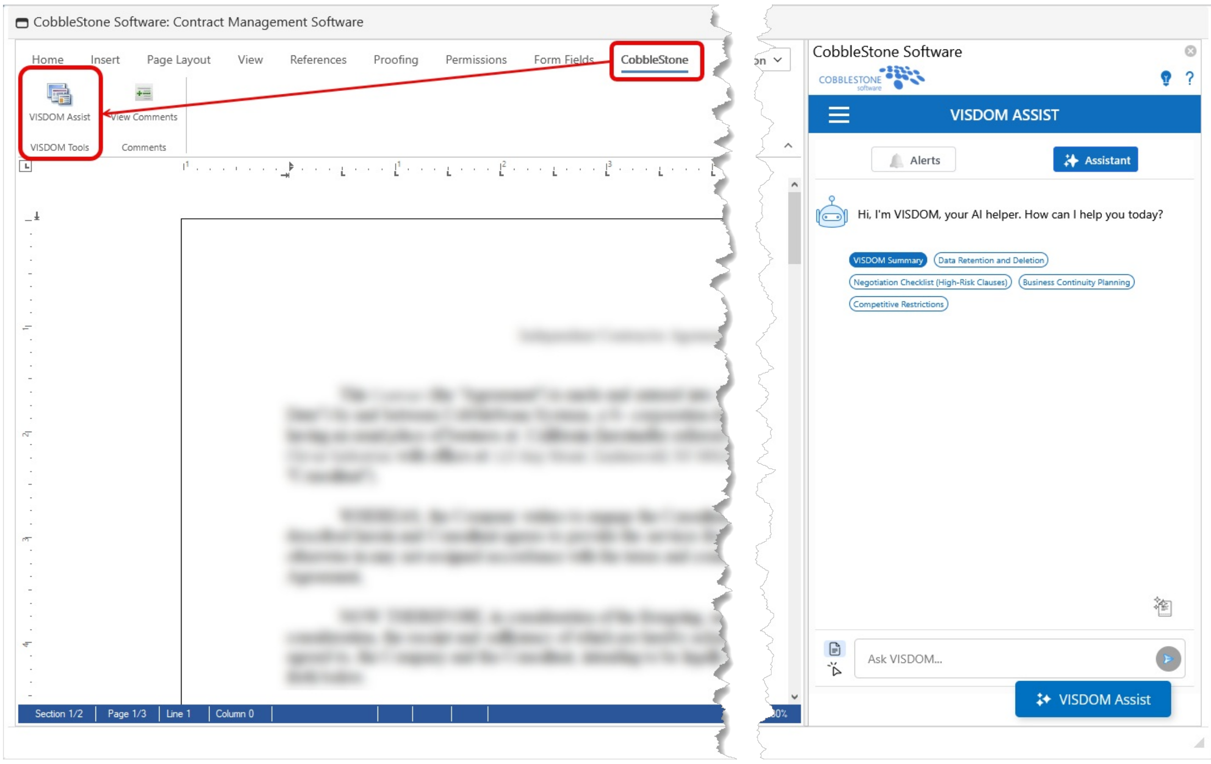
*Reference #: 251212.1273.9675*

We've enhanced the Legacy Online Editor in Contract Insight to bring it closer to the powerful functionality you know from our Word Add-In and VISDOM Basic/VISDOM+ tools.

What's New?

- VISDOM Assist Integration: When using the Online Document Editor, you can now access VISDOM Assist directly from the editor.






- Smart Chatbot:
    - Get a document summary instantly.
    - Use prompt suggestions or ask your own questions about the document.
    - Save custom prompts for future use.
- Alerts: Enable Critical, Warning, and Info alerts to receive actionable suggestions for improving your document.
- Advanced Features: Access tools like:
    - Clause Library
    - Found Clauses
    - Sentiment Analysis (VISDOM+)
    - High-Risk Findings (VISDOM+)

**Why This Matters:**

This update standardizes functionality across platforms, giving you the same powerful insights and editing tools whether you're working in Word or directly in Contract Insight's Online Editor.

## CORE SYSTEM RESOLUTIONS

## RESOLUTION: Email Sending Errors for Certain Records

*Reference #: 251212.1259.19325*

We resolved an issue where sending emails from specific records resulted in errors for certain users. This occurred inconsistently and was linked to email addresses containing spaces or special characters at the beginning or end.

The email sending logic has been updated to handle spaces and special characters correctly. Users can now send emails from records without encountering errors caused by formatting issues in email addresses.

## RESOLUTION: Task Buttons Displayed in Email Alerts Despite Configuration

*Reference #: 251212.1259.20732*

We resolved an issue where task alert emails continued to display task action buttons even when the configuration was set to hide them. This behavior was reported in a client system and has now been corrected.

Email alerts for task statuses now fully respect configuration settings. Users can toggle the display of task action buttons on or off, and the system will apply these preferences as expected.

## RESOLUTION: Special Characters Display Incorrectly in Excel Export

*Reference #: 251212.1258.20892*

Clients reported that when exporting reports to Excel, special characters in the Description field were not displaying correctly. For example, an apostrophe (') appeared as ’, and similar issues occurred with slashes and dashes.

We updated the export process to properly handle and display special characters in Excel. Apostrophes, slashes, dashes, and other symbols will now appear as intended.

## RESOLUTION: Missing Primary Record Information in Workflow Email Alerts from Request Notes

*Reference #: 251212.1259.21807*

We resolved an issue where email alerts triggered by workflows from the Request Notes table did not include the Primary Record Information section when using the default notification template. This caused incomplete context in workflow notifications.

Email alerts now correctly include Primary Record Information when workflows are triggered from Request Notes updates, ensuring recipients have full visibility into the related record details.

## RESOLUTION: Page Refresh When Updating Conditional Fields

*Reference #: 251212.1287.22142*

We have resolved an issue where the page would refresh and return to the top of the Contract Details section when updating conditional fields on the Add Contract page (using a file or drag-and-drop in VISDOM). This behavior required users to scroll back down to continue entering additional values, causing unnecessary interruptions.

The refreshing logic has been updated to provide a smoother experience. Users can now update conditional fields without the page fully resetting, allowing for faster and more efficient contract creation.

## RESOLUTION: Errors When Using Filter, Sort, or Add Record on Application Maintenance Page

*Reference #: 251212.1287.22771*

We resolved an issue where users encountered errors when attempting to use the Filter, Sort, or Add Record buttons on the Application Maintenance page. These errors disrupted normal functionality and prevented users from managing records effectively.

The underlying logic for these actions has been corrected. Users can now filter, sort, and add records on the Maintenance page without encountering errors.

## RESOLUTION: Some Contract Fields Empty After Using IntelliXtract

*Reference #: 251212.1275.14085*

Some clients reported that certain contract fields appeared empty after using the Update with VISDOM feature. This typically occurred when creating a contract via Drag and Drop, then updating fields through VISDOM. Even though fields were populated before contract creation, the data was not retained as expected.

We've improved the logic that stores original field values during the update process. The system now correctly maps and saves values using the column name as the key, ensuring that data remains intact after VISDOM updates.

## RESOLUTION: Deleted or Inactive Companies Appearing in Search Results

*Reference #: 251212.337.16787*

Some clients reported that standard users could still see companies that had been deleted or marked as inactive when performing quick searches. System administrators, who have the Is Deleted toggle, did not see these records when the toggle was turned off, causing inconsistent visibility between user roles.

We've updated the filtering logic to properly separate conditions for deleted and inactive companies. Now:

- Deleted companies will only appear if the Is Deleted toggle is enabled.

- Inactive companies will no longer appear in quick search results for standard users.

## RESOLUTION: **Improved Track Changes Color in Redlining**

*Reference #: 251212.1273.17250*

When redlining a document, users noticed that their edits appeared in red, while edits from the next participant appeared in yellow. These colors were difficult to read and caused confusion during document review.

We've updated the color scheme for track changes to use more legible and visually distinct colors, making it easier to identify edits from different participants.

## RESOLUTION: **User Unable to Delete Records Despite Correct Permissions**

*Reference #: 251212.349.19030*

A client reported that a user could not delete records even though they had the appropriate permissions. During troubleshooting, we confirmed that the user had both a security group assigned and most individual permissions.

We identified and corrected the underlying logic that prevented record deletion when permissions were configured in this manner. Users with proper delete permissions—whether through security groups or individual settings—can now delete records as intended.

## RESOLUTION: **Survey Invitations and Response Handling for Vendor Contacts**

*Reference #: 251212.1259.20398*

We resolved two issues related to survey distribution and response behavior:

1. Survey Invitations Sent Despite "Send Email" Setting
   Previously, vendor/company contacts with Send Email set to No were still receiving survey invitations. This has been corrected—contacts marked as Send Email = No will no longer receive survey emails.
2. Incorrect Survey Response Display
   When multiple contacts accessed the same survey link, the second user could see the first user's responses. If Allow Retake = No, these responses appeared greyed out, preventing the second user from answering. This issue has been resolved to ensure each participant can respond independently without viewing another user's answers.

## RESOLUTION: **Email Sending Restricted to Edit Permissions**

*Reference #: 251212.1259.20993*

We resolved an issue where users were unable to send or reply to emails from the system, even though they had the appropriate view permissions on contract records. Previously, the Send Email and Reply to Email buttons were restricted to users with edit permissions.

The permissions logic has been updated so that users with applicable view permissions on a record can now send and reply to emails directly from the system.

## RESOLUTION: **Silk Theme Causing Toolbar Icons Overflow When Adding Notes to Attachments**

*Reference #: 251212.1287.21074*

When using the Silk theme and  adding a note to an attachment within a Contract Record, several icons above the text box did not fit properly in the toolbar, causing visual overflow. Despite this, notes still saved correctly and remained visible after navigating away from the page.

We updated the toolbar styling by setting its height to adjust automatically. This ensures all icons fit within the toolbar without overlapping or being cut off.

## RESOLUTION: **Error During Update-Only Import Process**

*Reference #: 251212.1258.22185*

Clients reported encountering an error message stating “Invalid column name 'Admin'” during an Update Only import process. This error prevented the import from completing successfully.

We added a validation check for the Employee table during the import process to ensure that all column references are correct. This prevents the system from attempting to use invalid column names.

## RESOLUTION: **Email Attachment Download and Access Flow**

*Reference #: 251212.1259.18076*

We have addressed several issues impacting the download and access of email attachments for both internal and external users. These improvements ensure secure, streamlined access to files shared via email.

Internal Users:

- Previously, clicking an attachment link redirected users to the related record instead of the file. Now, internal users are taken directly to the file for download.
- Added proper permission checks to confirm the user has rights to access the file.

Custom Email Recipients:

- When authenticated email download was enabled, custom recipients could not access the file. This has been resolved by adding logic to verify if the recipient is part of the email chain before granting access.

External Users (Vendor Gateway):

- Added validation to ensure external users are correctly associated with the vendor before allowing file download.
- Fixed an issue where copying an attachment link into another browser session could allow unauthorized access. This is now prevented.

These updates improve security, ensure proper permissions, and provide a smoother experience when downloading attachments from email notifications.

## RESOLUTION: HTML Tags Appearing in Excel Export

*Reference #: 251212.1287.20928*

When exporting data to Excel from pages under Manage/Setup > Master Reference Data, some clients noticed HTML tags appearing around the View/Manage link in the exported file. This made the exported data look cluttered and harder to read.

The export process has been updated to remove unnecessary HTML formatting. Now, the View/Manage link will display cleanly in Excel without extra tags.

## RESOLUTION: Unable to Add Attachments While Record Is on Legal Hold

*Reference #: 251212.1250.18415*

Clients reported that even when Legal Hold was configured to allow adding attachments to a record under Legal Hold, the system did not permit attachments to be added. This issue was confirmed and replicated across multiple environments, including demo, QA, and the latest release.

We corrected the logic controlling attachment permissions for records under Legal Hold. When the setting is configured to allow attachments, users can now successfully add files without restriction.

## **RESOLUTION:** VISDOM IntelliXtract Page Navigation After Record Creation with VISDOM Basic

*Reference #: 251212.1222.17930*

Some clients reported difficulty navigating document pages when using VISDOM IntelliXtract after creating a record via Drag and Drop. In certain cases, the viewer would open on a random page (first, last, or another) and was prevented from switching between pages. This issue primarily affected OCR documents (such as PDFs) in VISDOM Basic.

We've corrected the page navigation logic so that:

- The page drop down now accurately reflects the page number being viewed.
- Navigation between pages works consistently, and the displayed text matches the correct page content.

## **RESOLUTION:** File Download from Vendor Contracts

*Reference #: 251212.349.21744*

We've addressed an issue where users were unable to download attachments from the Vendor Contracts section within a Contract record. Previously, attempting to open these files could result in an error or the page failing to load. This has now been resolved, and downloading files from Vendor Contracts will work as expected.

## **RESOLUTION:** View Links After Email Replies with Attachments

*Reference #: 251212.1259.21983*

We've fixed an issue that occurred when replying to an email sent from the system with an attachment. Previously, after the reply with an attachment was processed, some View links on list pages (such as search results for Contracts, Companies, or Requests) could display an error message: "The file does not exist." This happened because the links were incorrectly modified during the process.

This issue has been resolved. Replies with attachments will no longer affect the functionality of View links, and users can navigate list pages without interruption.

# Update 22.6.0 - 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.

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## DOCUMENT COLLABORATION & E-SIGNATURE NEW FEATURES

### NEW FEATURE: Complimentary Approval and Signing Access

*Reference #: 251212.345.1367*

We've introduced a way for all clients to experience the benefits of IntelliSign/IntelliApprove and E-Signature/E-Approval—even without a full license.

**What's New?**

- Free Monthly Usage:
    - Get 3 free IntelliSign/IntelliApprove processes and 3 free E-Signature/E-Approval processes each month.
    - Usage resets on the first of every month.
- Usage Banner:
    - When starting a signing or approval process, you'll see a banner showing how many free processes you've used out of your monthly total.
- Upgrade Option:
    - Once you reach your limit, you'll see a prompt with a link to email sales@cobblestonesoftware.com to upgrade to the unlimited version.

**Important Details:**

- Free processes count when the process is **created**, not when recipients start signing or approving.
- Licensed clients will not see the banner or upgrade prompt.

**Why This Matters:**

This enhancement gives you a chance to try IntelliSign/IntelliApprove and E-Signature/E-Approval at no cost—streamlining document collaboration and helping you decide if unlimited access is right for your organization.

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# DOCUMENT COLLABORATION & E-SIGNATURE ENHANCEMENTS

## ENHANCEMENT: Expiration Settings for Document Signing and Approval Links

*Reference #: 251212.1157.6201*

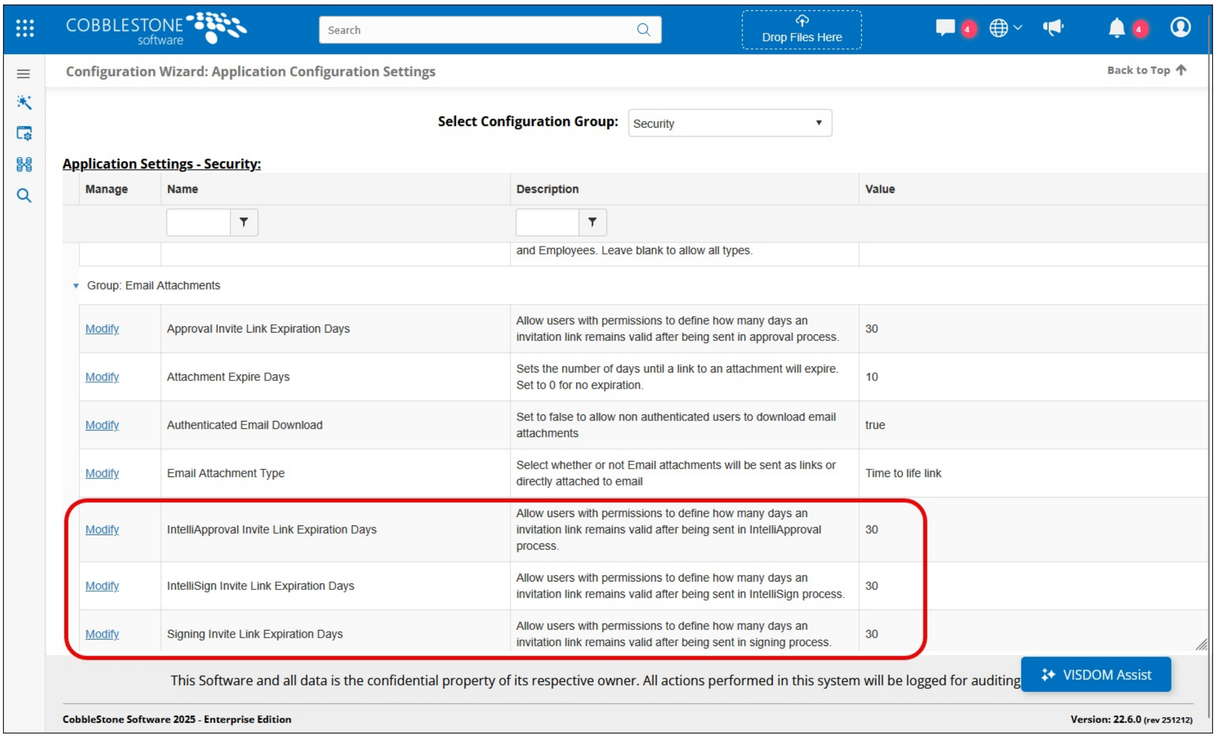
We've introduced an important security enhancement to help you maintain better control over your document workflows.

**What's New?**

Invitation links for document signing and approval sent via email can now have an expiration date. This means you can set a time limit for how long these links remain active, reducing security risks and ensuring timely action.

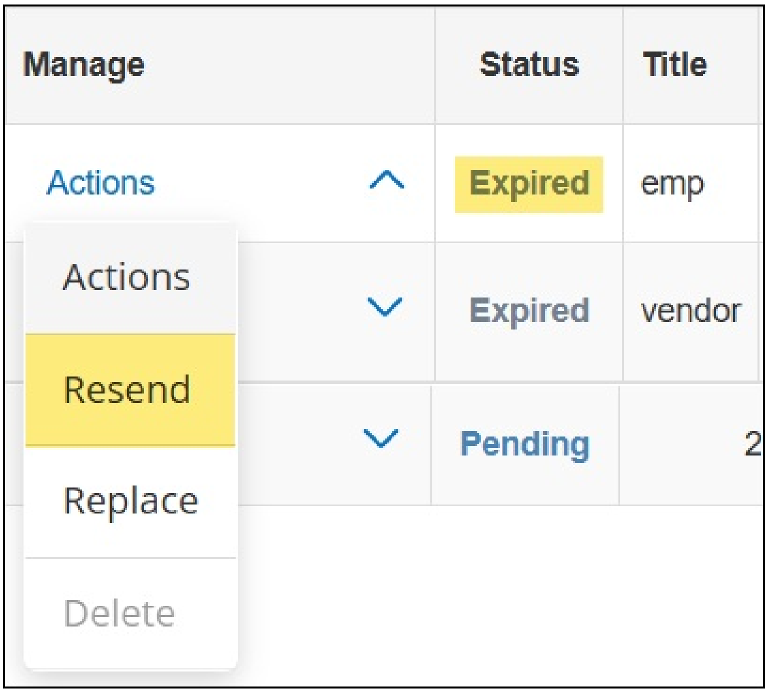
**How It Works:**

- Administrators can configure expiration periods (in days) for both signing and approval links under Application Configuration -> Config Settings -> Security .




- If a link expires, the system will automatically notify the recipient via email.

- Need to resend an expired link? Simply go to the Signing/Approval dashboard, select Actions, and resend the invitation.




**Why This Matters:**

This update gives you greater control over sensitive documents and helps enforce deadlines for signing and approval processes.

## ENHANCEMENT: **Improved IntelliSign Experience: Simplified Signing Actions**

*Reference #: 251212.345.7673*

We've made IntelliSign even easier to use by reducing clicks and streamlining the signing process.

**What's New?**

When starting a new IntelliSign process, the Signing Action options have been redesigned for a more intuitive experience. Instead of selecting from a dropdown menu, you'll now see active/inactive buttons for:

- Sign Anywhere
- Signature Placeholders

**Why This Matters:**

This update simplifies the workflow, reduces unnecessary clicks, and provides a cleaner, more user-friendly interface for managing signing actions.

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# DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

## RESOLUTION: **E-Signature Process Not Finalizing**

*Reference #: 251212.1157.17738*

We resolved an issue where certain e-signature processes did not finalize even after all participants had completed their signatures. This prevented the document from returning to the system and blocked users from starting a new signing process on the same record.

- The system now correctly finalizes the e-signature process once all signatures are complete.
- Updated the Finalize Process button to improve reliability.
- Removed the Pause toggle button to streamline the process.

## RESOLUTION: **Updating Signers in an Active Signature Process**

*Reference #: 251212.1157.18592*

Previously, if a signer was deleted as a Company Contact from a Vendor record while a signature process was still in progress, the system did not allow replacing that signer.

Users can now successfully replace a Company Contact signer during an active signature process, even if the original contact was deleted from the Vendor Record's Company Contact table. This ensures smoother handling of signer changes without interrupting the process.

## RESOLUTION: Placeholder Signature Blocks Could Not Be Resized

*Reference #: 251212.1157.19353*

We resolved an issue where placeholder signature blocks could not be resized during the signing process. This limitation was reported by clients and confirmed in certain versions.

- Users can now resize placeholder signature blocks within defined limits for better flexibility.
- If the process involves placeholder signing, the signature will display according to the specified height for signing.
- A new styling feature has been introduced, allowing users to apply a preferred signature style for a more personalized experience.

## RESOLUTION: Unintended ".Test" Text in E-Signature Description

*Reference #: 251212.1092.20964*

We resolved an issue where a ".Test" string was incorrectly appended to the description when initiating an E-Signature process. This caused confusion for users during signature workflows.

The extra ".Test" text has been removed. Users will now see only the intended description when starting an E-Signature process.

## RESOLUTION: IntelliSign Process Completion Status

*Reference #: 251212.345.21664*

We have addressed an issue where completed IntelliSign processes were not being properly recognized by the system. As a result, signed documents and Certificates of Completion were not automatically generated or attached, and the process continued to display as "In Process" even after all signers had finished.

The system now correctly registers the completion of IntelliSign processes. Signed versions and Certificates of Completion will be automatically generated and attached as expected once all signers have completed their actions.

## RESOLUTION: Correct Version Titles Displayed When Starting IntelliSign

*Reference #: 251212.337.18375*

Clients reported confusion when starting an IntelliSign process from a completed E-Approval. The file drop down displayed File Titles instead of Version Titles, making it appear as though the initial (archived) version was being selected. In cases where later versions had different titles, this caused uncertainty about which version was being signed.

The drop down now displays Version Titles instead of File Titles when selecting files for IntelliSign. This ensures users can clearly identify and select the correct version for signing.

# Update 22.6.0 - 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.

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## E-SOURCING/PROCUREMENT MANAGEMENT ENHANCEMENTS

### ENHANCEMENT: **Status Change Tracking for Respondents**

*Reference #: 251212.1203.9517*

We've added more visibility and transparency to respondent status updates in E-Sourcing records.

**What's New?**

- The Interested/Assigned Respondents table now includes a column showing the last date the status was changed for each respondent.
- You can also view a history of status changes for individual respondents, providing a complete audit trail.

**Why This Matters:**

This enhancement makes it easier to track updates, monitor engagement, and maintain accurate records throughout the E-Sourcing process.

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## E-SOURCING/PROCUREMENT MANAGEMENT RESOLUTIONS

## RESOLUTION: Error When Answering Solicitation Questions

*Reference #: 251212.1286.17334*

We resolved an issue where users with appropriate permissions were unable to answer solicitation questions. When attempting to respond, the system displayed the message:

*"You do not have permission to access this record. Please contact your administrator."*

The permissions logic for solicitation questions has been corrected. Users with valid access to the solicitation record can now answer questions as expected, regardless of the question’s due date.

# Update 22.6.0 - 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.

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## VENDOR/CLIENT COLLABORATION GATEWAY NEW FEATURES

**NEW FEATURE: Customizable Record Detail Tags on Vendor/Client Gateway**

*Reference #: 251212.1203.20845*

We've added flexibility to how record details are displayed on the Vendor/Client Gateway.

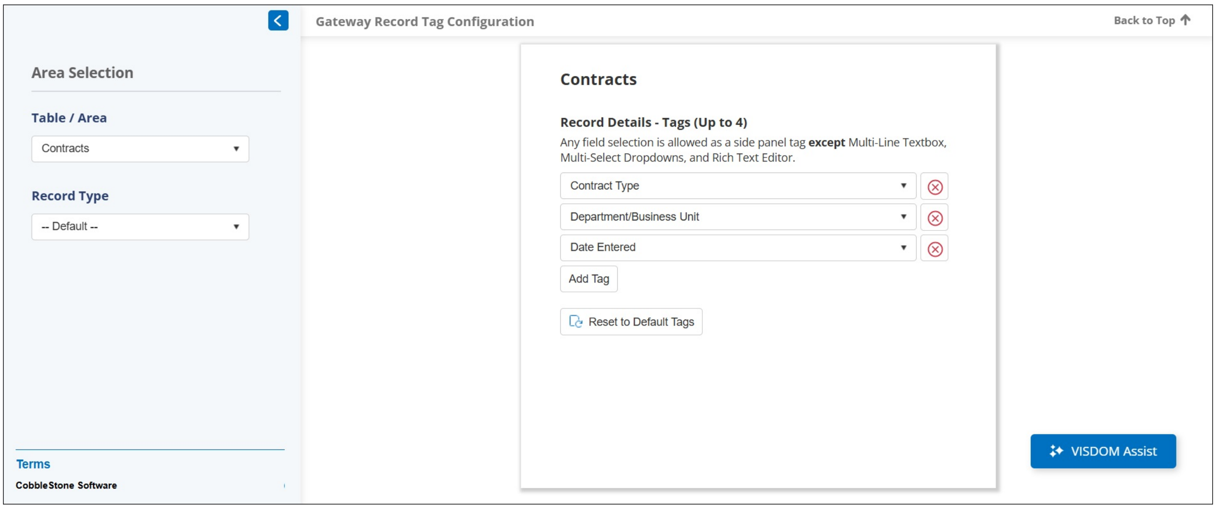
**What's New?**

Permissioned users can now configure which tags appear on record detail pages for each record type. This configuration is available under:

Manage/Setup → Field Manager → Vendor/Client Gateway Configuration → Gateway Record Tag Configuration

From this page, you can:

- Select a table/area and a record type (or leave as default).
- Click Add Tag to choose which fields to display as tags.
- NOTE: Certain field types (e.g., MultiSelect, MultiSelect List Box, MultiLine Text Box, Rich Text Editor) are not available for tag configuration.




**Why This Matters:**

This enhancement gives you full control over what information is visible to vendors and clients, helping you tailor the experience to your organization's needs and maintain data privacy.

## NEW FEATURE: Sub-Table Support on Request Add Screen

*Reference #: 251212.1203.19416*

We've enhanced the Vendor/Client Gateway to make submitting Requests more flexible and efficient.

**What's New?**

Users can now add sub-table information or upload Excel/CSV files directly from the initial Request submission screen. This functionality uses the familiar Bulk Add feature for easy data entry.

When enabled by your administrator, sub-tables will appear on the Request Add screen. Users can:

- Click Add to enter data into sub-table fields.
- Upload Excel/CSV files for bulk entry.

After editing, click outside the table to exit edit mode, then Save to include your data in the Request.

**Why This Matters:**

This update streamlines the Request submission process, reduces manual entry, and improves efficiency for managing complex record structures.

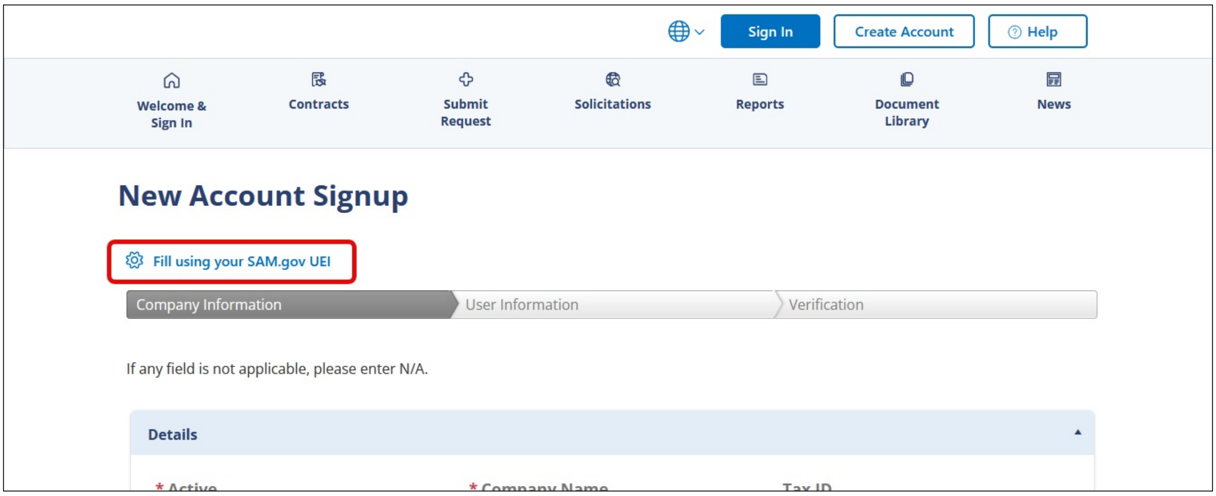
## NEW FEATURE: SAM.gov Integration for Easier Vendor Registration

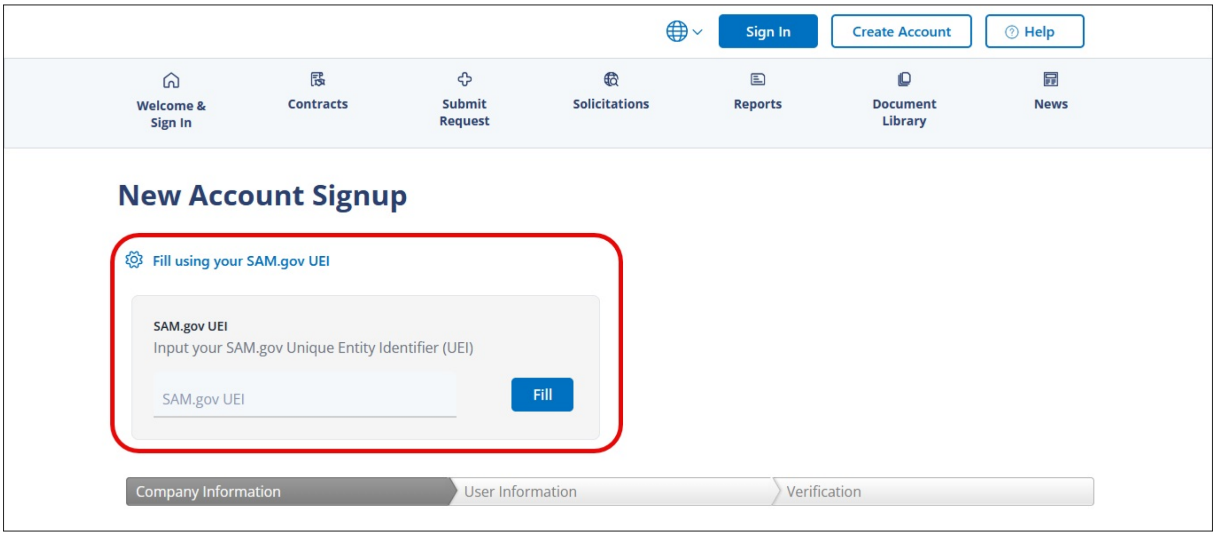
*Reference #: 251212.1171.9806*

We've streamlined the vendor registration process on the Vendor/Client Gateway for clients with a SAM.gov license.

**What's New?**

Vendors can now search SAM.gov directly from the registration page by entering their vendor name. Matching SAM entities will appear, allowing vendors to select their record and auto-populate key fields such as company name and location. Alternatively, vendors can enter their UEI code to instantly fill in company details.




**Why This Matters:**

This enhancement simplifies vendor onboarding, reduces manual data entry, and ensures accurate information—helping you stay competitive with a faster, more user-friendly registration process.

## ENHANCEMENT: **Dynamic Translations for Gateway Form Labels**

*Reference #: 251212.1203.17745*

We've improved the vendor/client gateway experience by introducing dynamic translation capabilities for form field labels.

**What's New?**

Form labels now include additional data attributes that enable dynamic translations. Users with translation access can seamlessly translate field labels based on field ID, field table, and tab column attributes. This enhancement ensures consistent and accurate translations across the gateway for both vendors and clients.

**Why This Matters:**

Dynamic translations make it easier to work in multiple languages, improving accessibility and usability for global teams.

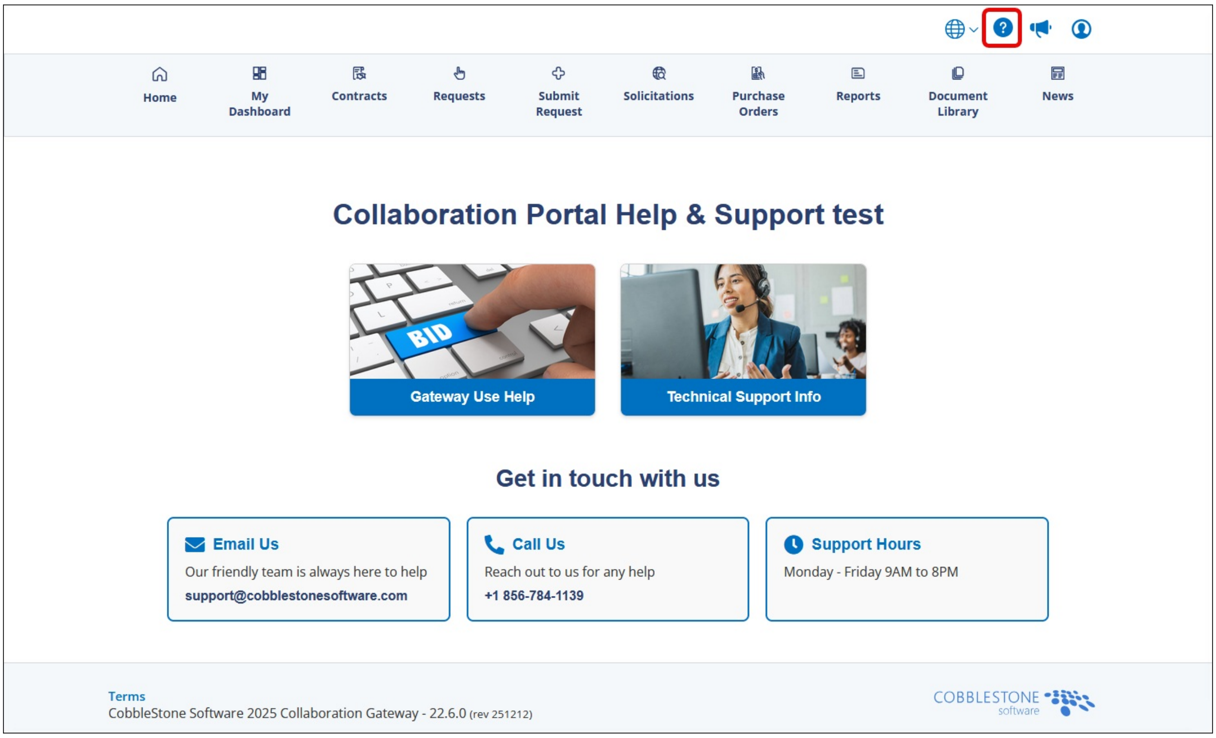
## ENHANCEMENT: **Enhanced Help Page for Vendor/Client Gateway**

*Reference #: 251212.1203.18898*

We've improved the Help Page on the Vendor/Client Gateway to provide better support and guidance for vendors and clients.

**What's New?**

- Updated UI: A cleaner, more user-friendly design for easier navigation.
- Quick Access to Support: CobbleStone phone number, email, and support hours are now prominently displayed.
- Gateway Use Help: Click Gateway Use Help to view configurable help content for using the portal.
- Technical Support Info: Click Technical Support Info to access our wiki page with detailed technical guidance.
- Email Support Option: Click Email Us to open a pre-filled email window with the support address and subject line, making it faster to get help.




**Why This Matters:**

These enhancements make it easier for vendors and clients to find answers, access technical resources, and reach support quickly—helping you stay competitive and reduce bid loss.

## ENHANCEMENT: **Status Filter Removed from Search Pages**

*Reference #: 251212.1171.20983*

We've simplified the search experience on the Vendor/Client Gateway based on client feedback.

**What's New?**

The Status filter dropdown has been removed from both Contracts and Requests record search pages. This change eliminates unnecessary options and streamlines the search process for a cleaner, more intuitive user experience.

**Why This Matters:**

By removing this filter, we've addressed client concerns and improved usability, making it easier to find the records you need without extra steps.

## RESOLUTION: [TITLE]

*Reference #: [REF #]*

[DESCRIPTION]

## RESOLUTION: [TITLE]

*Reference #: [REF #]*

[DESCRIPTION]

## RESOLUTION: Public Solicitation View Showing Both Open and Closed Solicitations

*Reference #: 251212.1171.21301*

Clients reported that when viewing Public Solicitations on the Vendor/Client Gateway, the list displayed both open and closed solicitations. In the previous gateway version, searching Public Solicitations via the Main Menu only showed Open Solicitations, which caused confusion in the new version.

We updated the logic for the Solicitation Status dropdown on the Vendor/Client Gateway. Users can now filter solicitations more effectively, whether logged in or accessing the gateway publicly. This ensures that you can easily view only the solicitations you need—such as open opportunities.

## RESOLUTION: Download All Button Logic for Solicitations and Contracts

*Reference #: 251212.1203.22269*

We have resolved an issue where the Download All button on the Vendor/Client Gateway was automatically disabled for solicitation records. The logic has now been updated to ensure proper functionality:

- Not Logged In: Users can download all public files.
- Logged In: Users can download public files as well as any files uploaded by the vendor.

This updated logic has also been applied to contract records, ensuring consistent behavior across both record types. Users can now reliably use the Download All button to access the appropriate files.

## RESOLUTION: "View Request" Option Not Navigating for External Users on VCG in Older Versions of Contract Insight

*Reference #: 251212.1203.22578*

We resolved an issue where external users on the Vendor/Client Gateway (VCG) were unable to access request records using the View Request option. Instead of navigating to the request, the page would reload and remain on the same screen. This affected certain users on older versions of Contract Insight.

The system logic has been updated to prevent this issue in the future. External users can now successfully navigate to request records using the View Request option.

## RESOLUTION: Errors When Using Old Vendor/Client Gateway Links

*Reference #: 251212.1203.19541*

Clients reported that accessing the Vendor/Client Gateway (VCG) through hyperlinks containing outdated page names resulted in an error. These links were often from older emails or bookmarked URLs and did not redirect to the correct page.

We implemented the following updates to ensure smooth navigation:

- Updated the code to reset the GatewayURL field to the correct page.
- Added redirects for multiple deprecated pages, automatically sending users to their new equivalents.

## RESOLUTION: Section Navigation in Vendor/Client Gateway Surveys

*Reference #: 251212.1203.20805*

Clients reported that when completing surveys with multiple sections in the Vendor/Client Gateway, the section drop down did not work. Selecting a different section did nothing, making it difficult to navigate through the survey.

We've corrected the page handling logic so that the drop down selection is properly processed. Now, when selecting a different section, the survey will update and display the chosen section as expected.

## RESOLUTION: Incorrect Gateway Links in E-Sourcing Emails

*Reference #: 251212.1203.21154*

Clients reported that vendors receiving E-Sourcing emails through the Vendor/Client Gateway encountered errors when clicking the provided link. The URL in these emails included the word “Public”, which caused the link to fail and prevented vendors from accessing the E-Sourcing record as intended.

We updated the embedded Gateway links to ensure:

- Old E-Sourcing detail page links now point to the correct URL.
- Old login page links have been corrected for consistency.

Combined with recent updates for automatic page redirects on the Vendor/Client Gateway site, these changes ensure that all E-Sourcing links work properly.

## RESOLUTION: **Field Displaying in Vendor/Client Gateway**

*Reference #: 251212.1203.21969*

Clients reported that certain fields were displaying in the Vendor/Client Gateway, even though they were deselected as Show on Search within the Core system. For example, the Description field continued to appear in the E-Sourcing list despite being deselected.

This has been resolved to ensures that field and their mappings are pulled only for existing types, preventing unwanted fields from appearing in the Vendor/Client Gateway.

## RESOLUTION: **Some Users Unable to Create Account on the Vendor/Client Gateway**

*Reference #: 251212.1286.22146*

Some users experienced an issue when creating accounts through the Vendor/Client Gateway using a Self-Registration Wizard. This occurred because the Registration Form was missing required configuration for user information fields.

Two updates were made:

- When configuring a Self-Registration Wizard, a message appears at the top of the screen: *_Please be sure to add and configure fields for the Vendor/Customer and Vendor/Customer Contact tables. If these tables are not included, the Wizard will not show in the Self Registration drop down menu on the Vendor/Client Gateway._*
- And, on the Vendor/Client Gateway, only Self-Registration Wizards correctly configured will show as options in the drop down menu.

This update improves reliability and reduces setup errors, making the self-registration process smoother and more consistent for your users.

## RESOLUTION: **Vendor/Client Gateway Option in Menu Management**

*Reference #: 251212.1286.19539*

Previously, when navigating to Manage/Setup > Application Configuration > Manage Main Menu and selecting Manage Menu Items, the drop down list included Vendor/Client Gateway as an option. However, this menu is no longer configurable through this screen, which caused confusion.

The Vendor/Client Gateway option has been removed from the Manage Menu Items for: drop down. This ensures that only valid, configurable menu options are displayed.

# Update 22.6.0 - Connector: Single Sign-On (SSO) Authentication

Optional Add-On Connector that provides your organization with the ability to use a third-party identity provider (such as ADFS, Ping, or other SAML 2.0 compliant providers) for a single sign-on authentication into your Contract Insight application.

## SINGLE SIGN-ON (SSO) AUTHENTICATION RESOLUTIONS

### RESOLUTION: **Redirect Loop During IDP-Initiated Logins**

*Reference #: 251212.360.18872*

Some clients experienced an issue where opening CobbleStone in one browser and then in a second browser causing an endless redirect loop between two addresses. This occurred with IDP-initiated logins when the Single Sign-On (SSO) module attempted to validate cookies immediately after a successful login, resulting in repeated redirects.

We've implemented changes to prevent the SSO module from performing endless redirects:

- Removed the immediate cookie validation after login, leaving this step to the website. If validation fails, users will be redirected to the log out page, where they can click Login to reauthenticate.
- Updated the redirect process to ensure the full page loads before executing the redirect, improving stability.
- Enhanced log out to validate URLs before using them as navigation links, preventing confusion when returning to dashboards after login.

These updates stop the redirect loop and provide a more reliable login experience for users with IDP authentication, reducing frustration and improving system stability.

# Update 22.6.0 - 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:** **DocuSign Attachment Handling and Auto Import Settings**

*Reference #: 251212.1222.19925*

We resolved two issues related to DocuSign integration:

1. Attachments Sent as Separate Files

   Previously, DocuSign attachments were being sent as separate files despite configurations set to send a single combined PDF. This has been corrected, and attachments will now respect the configured setting to send as one combined document.
2. Auto Import Settings Could Not Be Disabled

   Users reported that once DocuSign Auto Import settings were enabled, they could not be disabled. Although changes appeared to save, the settings remained active upon returning to the integration page. This issue has been resolved, and configuration changes now save and apply correctly.

# Update 22.6.0 - 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.

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## AGGREGATED DATA FEED SERVICES
## NEW FEATURES

**NEW FEATURE: SAM.gov Integration for Easier Vendor Registration**
*Reference #: 251212.1171.9806*

We've streamlined the vendor registration process on the Vendor/Client Gateway for clients with a SAM.gov license.

**What's New?**

Vendors can now search SAM.gov directly from the registration page by entering their vendor name. Matching SAM entities will appear, allowing vendors to select their record and auto-populate key fields such as company name and location. Alternatively, vendors can enter their UEI code to instantly fill in company details.

**Why This Matters:**

This enhancement simplifies vendor onboarding, reduces manual data entry, and ensures accurate information—helping you stay competitive with a faster, more user-friendly registration process.

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# Update 22.6.0 - 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+ ENHANCEMENTS

**ENHANCEMENT: VISDOM Assist Now Available in the Legacy Online Editor**

*Reference #: 251212.1273.9675*

We've enhanced the Legacy Online Editor in Contract Insight to bring it closer to the powerful functionality you know from our Word Add-In and VISDOM Basic/VISDOM+ tools.

What's New?

- VISDOM Assist Integration: When editing documents online, you can now access VISDOM Assist directly from the editor.
- Smart Chatbot:
  - Get a document summary instantly.
  - Use prompt suggestions or ask your own questions about the document.
  - Save custom prompts for future use.
- Alerts: Enable Critical, Warning, and Info alerts to receive actionable suggestions for improving your document.
- Advanced Features: Access tools like:
  - Clause Library
  - Found Clauses
  - Sentiment Analysis (VISDOM+)
  - High-Risk Findings (VISDOM+)

**Why This Matters:**

This update standardizes functionality across platforms, giving you the same powerful insights and editing tools whether you're working in Word or directly in Contract Insight's Online Editor.

# VISDOM+ RESOLUTIONS

## RESOLUTION: **Some PDFs Not Processed As Expected**

*Reference #: 251212.1222.19017*

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.

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