CobbleStone Software - Release Notes

Contract Insight Version 22.6.0 Rev 260127 (Hotfix)

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Overview-Version 22.6.0 Rev 260127

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 260127)	03 February 2026	Hotfix

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For CobbleStone Software version 22.6.0 (Rev 260127), Enhancement(s), and/or Resolution(s) were added to the following areas:

- Core System: Contract Insight
- Module: Document Collaboration & E-Signature
- Module: Vendor/Client Collaboration Gateway
- Connector: Single Sign-On (SSO) Authentication
- Connector: External E-Sign Integrations
- Aggregated Data Feed Services

Hotfix 22.6.0.260127 - 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 ENHANCEMENTS

ENHANCEMENT: **View History Added for Inbound Record Template Changes**

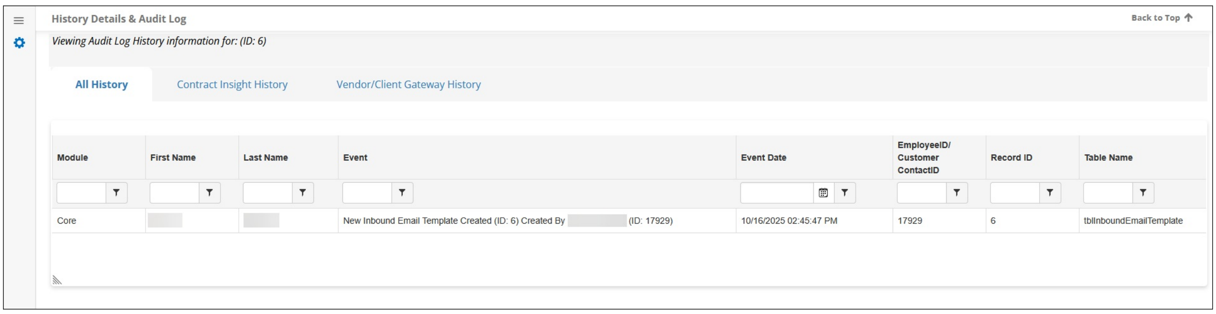
Reference #: 260127.1259.21678

Inbound Record Templates have been enhanced to include a new View History page, giving users greater visibility into changes made within the templates. This enhancement helps teams track updates, maintain oversight, and ensure consistency.

Users can now review a complete audit history for Inbound Record Templates, including:

- Who made each change
- What action was taken (creation, edit, update, etc.)
- When the change occurred (date and time)
- Relevant IDs for reference and tracking

This new page mirrors the existing history view available on other areas.



<u>How will this affect users?</u>

Teams now have clearer insight into template modifications, improving transparency, collaboration, and version accountability.

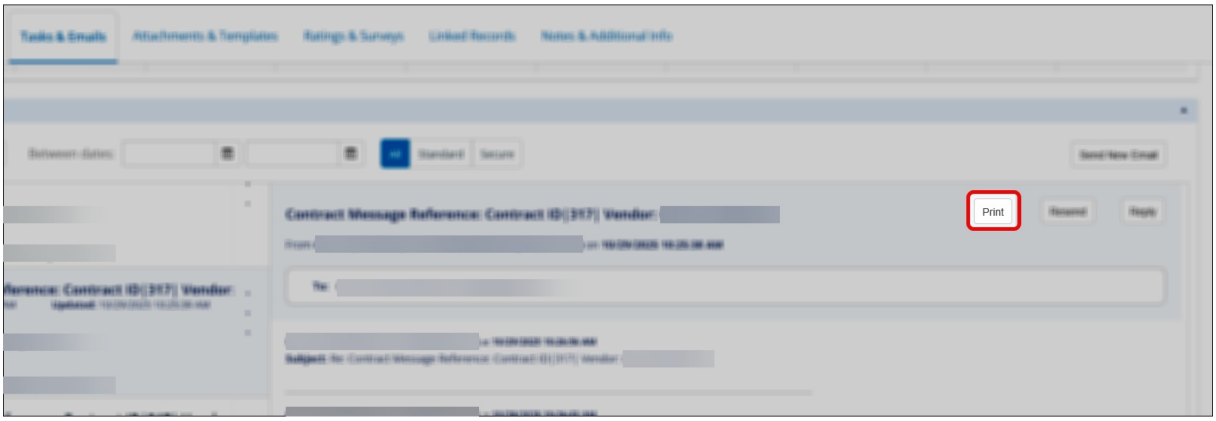
ENHANCEMENT: **Print and PDF Download for Email Chains**

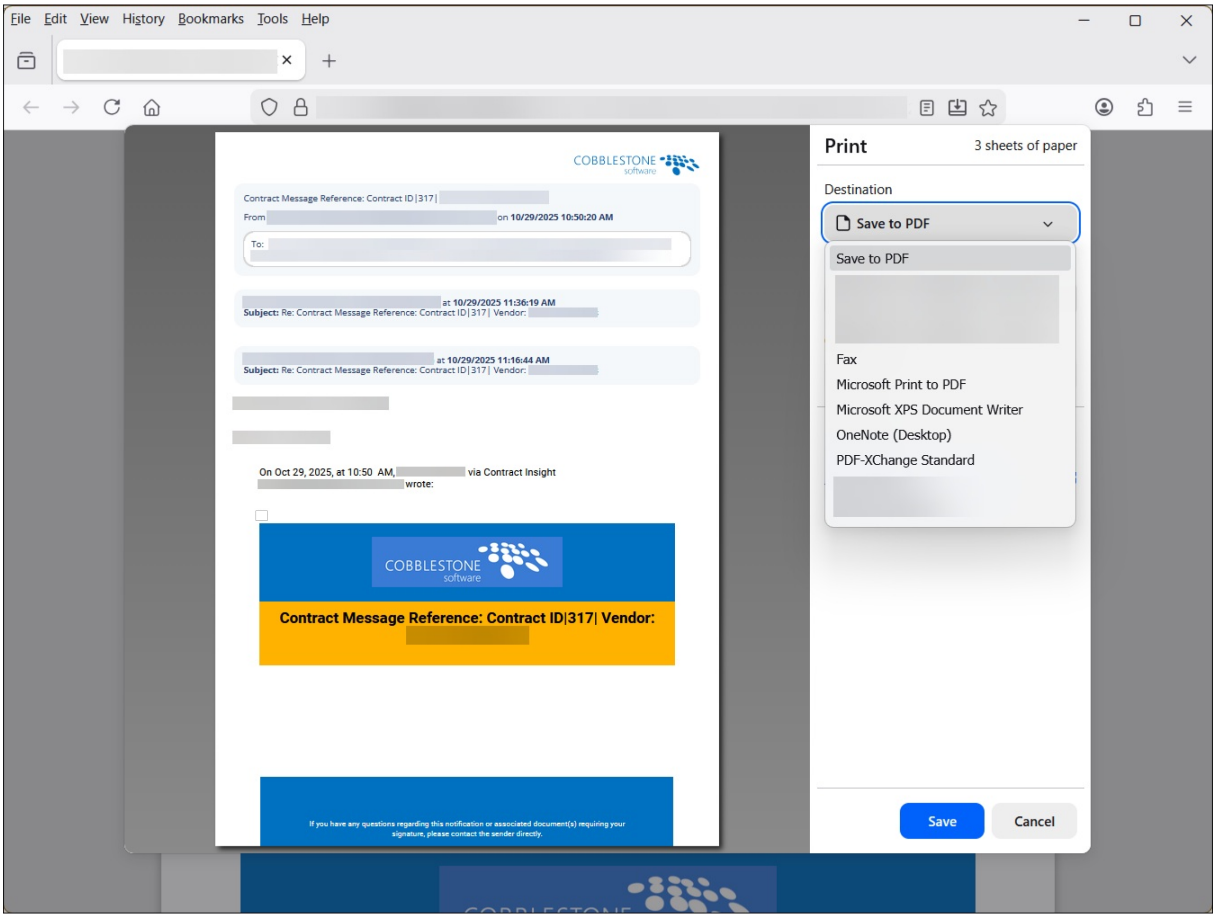
Reference #: 260127.1259.23932

Users now have the ability to print or download a complete email chain as a PDF. This option is available on the Task & Emails tab within each record.

This enhancement provides the following benefits:

- Access to a comprehensive view of all messages within an email thread
- The ability to generate a PDF copy for compliance, auditing, or archival purposes
- A straightforward print option for maintaining physical records of communication





How will this affect users?

This update supports more efficient information management and ensures that full communication histories can be easily saved and shared as needed.

CORE SYSTEM RESOLUTIONS

RESOLUTION: **Contract Search for Assigned Parties**

Reference #: 260127.1203.19007

We resolved an issue where users were unable to search for additionally assigned Vendors, Departments, Locations, and Employees on Contract records. This prevented users from locating contracts based on these assigned parties through the Find/Search screen.

With this fix, when the “Enables Expanded Contract Find by Field” configuration setting is enabled, users can once again filter and search for all additionally assigned parties as expected.

RESOLUTION: **Primary Key Values Display as Standard Numbers**

Reference #: 260127.1287.20843

We fixed an issue where certain ID values (Primary Keys) were being incorrectly formatted as if they were regular numbers. As a result, IDs displayed with commas (for example, "12,345" instead of "12345") when filtering or viewing records in various grids across the system.

This formatting has now been corrected. All Primary Key values will appear as full, unformatted whole numbers, ensuring consistency and preventing confusion when searching or filtering.

RESOLUTION: **One-Off Email Reply "To" Field Not Populating as Expected**

Reference #: 260127.1259.23969

We resolved an issue where replying to a one-off email on a Contract record caused the system to replace the original recipients with the replying user in the "To" field. Although the previous email addresses were not visibly displayed, they could still receive the message, leading to confusion.

This functionality has now been corrected. The Reply option for one-off emails works as intended, and the "To" field now accurately auto-populates with the appropriate recipients.

RESOLUTION: **Contract Links Not Accessible from Customer Records**

Reference #: 260127.1203.21988

We have resolved an issue that affected the visibility of contract links associated with customers and vendors in the system. Previously, Contract links were not always appearing as expected on Vendor/Customer records. This update restores the intended functionality and provides a clearer, more dependable way to view Contract relationships within the system.

RESOLUTION: **Product Service Code Descriptions Not Displaying**

Reference #: 260127.1267.22754

We resolved an issue that caused Product Service Code descriptions to stop appearing when adding codes to Solicitation or Vendor records. Previously, users could type part of the description in the dropdown to quickly find the correct code, and the system displayed the code in the format "Code (Description)". Due to the issue, only the code number appeared, and the description was missing both in the dropdown and in the subtable after the code was added.

This has now been corrected so Product Service Codes once again display in the format "Code (Description)" when selecting a code and the full Code + Description also displays properly in the subtable after the code is added.

RESOLUTION: **White Space Display on Record Details Pages**

Reference #: 260127.1203.24012

We have resolved an issue where extra white space remained at the bottom of a details page after users closed the "Notices and Alerts" banner located above the page tabs.

As part of this fix:

- The close ("X") button has been moved to the left side of the Notices and Alerts bar to make it easier to access without scrolling
- The page now automatically resizes correctly when the banner is closed, preventing unnecessary white space

With this update, the details page now displays as expected once notices are closed, ensuring a cleaner and more consistent user experience.

RESOLUTION: **Force Password on Reset Dropdown Duplicating "No" Option**

Reference #: 260127.1203.24018

We resolved an issue where the "Force Password Reset on Login" dropdown on the Employee Details page was displaying two "No" options. With this update the dropdown now shows the correct set of options, eliminating the duplicate

RESOLUTION: **Search Engine Functionality Not Responding in Reports/Searches**

Reference #: 260127.360.24416

An issue affecting the Search Engine within the Reports/Searches module has been resolved. Previously, users encountered an error message when attempting to perform a search, preventing use of the search functionality. Search requests are now routed appropriately, and the system's response time allowance has been increased to ensure results can be returned reliably. This resolution restores the expected functionality and enhances the overall user experience within the reporting and search modules.

RESOLUTION: **Vendor Contracts Dock on Contracts Not Loading Correctly if Contract ID Field Not Included**

Reference #: 260127.337.25114

We resolved an issue where the Vendor Contracts dock on the Contract Details page failed to load under certain conditions. This occurred when users customized the Contract Search page to display selected fields but did not include the Contract ID field. Without this required field, the dock could not load properly. With this resolution, the system will automatically include the Contract ID field when needed on the Vendor Contracts Dock.

Hotfix 22.6.0.260127 - 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: **Improved Formatting Support for Subtables in Document Templates**

Reference #: 260127.1157.24340

We've improved how subtables behave during document generation to ensure they match the formatting defined in your templates. This enhancement resolves prior issues where subtables appeared with the wrong font, size, bolding, alignment, or margin placement.

- Subtables now inherit the font style, size, and bold formatting of the placeholder.
- Table headers will always display in bold for clarity.
- Subtables now respect page margins and no longer shift off-center.
- Indentation behaves consistently based on surrounding content.
- When converting to PDF, all subtable formatting is fully preserved.

How will this affect users?

Merged documents will now display subtables exactly as configured—creating cleaner, more consistent, and professional-looking output with no manual adjustments needed.

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: **Vendor/Client Name Truncated on Document Template Merge**

Reference #: 260127.345.24080

We fixed an issue where Vendor/Client names longer than 30 characters did not fully appear when merging a document template into an Amendment. Previously, only the first 30 characters of the Vendor/Client name from the Contract Details table were included in the merged document.

This has been corrected, and the entire Vendor/Client name now successfully merges into templates as expected.

RESOLUTION: **Amendment Clause Merge Numbering**

Reference #: 260127.1157.22703

Some customers experienced an issue where amendment-specific merge fields did not populate correctly when generating documents. In certain cases, the amendment number displayed in the document header would change unexpectedly when multiple placeholders were merged within the same document.

We've resolved the issue to ensure that:

- Amendment numbers remain stable and accurate throughout the document.
- Header placeholders no longer change unexpectedly during merges.
- Clause formatting is preserved consistently—especially when multiple placeholders must be replaced in a single document.

Documents will now reliably display the correct amendment number in all locations, and mergable clauses will behave as expected when tied to amendment line items.

RESOLUTION: **Document Template Attachments Set to Lock PDF Not Printable**

Reference #: 260127.345.24369

We've corrected an issue that prevented certain merged PDFs from being printed. When users selected Convert to PDF and Lock PDF on a document template's attachment settings, the generated PDF could be downloaded but not printed.

The locking logic has now been updated so that PDFs created with these settings are printable as expected, while still maintaining their intended protections.

RESOLUTION: **Users without External E-Sign Module Unable to Use IntelliSign**

Reference #: 260127.345.24614

Some clients using Document Collaboration and IntelliSign—but not the External E-Sign module—were incorrectly seeing a message indicating they were "out of free processes" and were unable to use IntelliSign.

A fix has been applied, and IntelliSign is now fully accessible and functioning as expected for these clients.

RESOLUTION: Document Merge Issues Using Request Task Details

Reference #: 260127.1157.22816

Some users were unable to successfully merge documents when their templates included fields from Request Task Details. In these cases, attempting to merge the document produced an error indicating an invalid Request ID.

In addition, templates that used Request Task Details inside mergeable clauses did not show an error—but the merged document would generate without pulling in any of the expected task information.

We've updated the logic that validates how Request Task Details are used within a template. This ensures the system correctly recognizes and connects the relevant task data before merging.

RESOLUTION: Mergeable Clause Content Not Matching Attached Clause

Reference #: 260127.1157.24751

Some customers experienced an issue where the content merged into a document template did not match the content of the attached mergeable clause. In some cases, header and footer content from the attached clause was inserted into the body of the document instead of remaining in the header or footer.

We updated the document-merge behavior to correctly respect the formatting and placement of mergeable clauses.

RESOLUTION: Document Template Font Formatting Not Preserved During Merge

Reference #: 260127.1157.23327

We resolved an issue where the font type and formatting of a document template changed unexpectedly when the template was merged onto a record. This occurred specifically in areas containing mergeable placeholders, which caused the merged document to display a different font than the original template.

This behavior has now been corrected.
Document templates will retain their original font and formatting throughout the entire document, including all sections that use merge placeholders.

RESOLUTION: **Missing Signatures on Finalized Landscape Documents in IntelliSign**

Reference #: 260127.345.22434

During the signing workflow, users noticed that signatures appeared correctly while in progress. However, once the signing process was completed and finalized, the merged output failed to retain all participant signatures on landscape-formatted documents. In certain environments, landscape documents also failed to finalize and appeared stuck "in process." This impacted both PDF and Excel files that were formatted in landscape. Documents using portrait orientation were not affected.

We updated the handling of landscape documents within IntelliSign to properly recognize document orientation and maintain signature placement during the finalization step. The system now correctly preserves all participant signatures regardless of whether the file is in landscape or portrait format.

RESOLUTION: **Extra Line Breaks and Formatting Issues in Mergeable Clauses**

Reference #: 260127.1157.24336

Some users found that mergeable clauses no longer appeared in documents with the correct formatting. In many cases, documents generated with inserted clauses showed unexpected extra line breaks—both within the clause content and immediately before the clause itself. This caused sentences to be split apart and altered the overall layout of the document.

When merging a clause into a document, the system introduced additional paragraph breaks that were not part of the original clause. These formatting issues affected a variety of scenarios, including:

- Clauses placed back-to-back or inline with other content
- Clauses that appear in multiple locations within the same document
- Clauses with numbering or cross-references
- Inline text replacements
- Formatting applied according to clause configuration
- Situations where empty paragraphs should have been removed after a placeholder was replaced

As a result, merged documents did not reflect the intended structure or appearance defined in the template or clause settings.

We resolved the issue so that clause content is inserted exactly as configured—without adding unintended line breaks or altering spacing.

RESOLUTION: **Document Conversion Errors When Sending Files for IntelliSign**

Reference #: 260127.1157.23797

Users encountered an error when sending documents for signature through IntelliSign using a specific document template. The issue did not occur when the document was converted to PDF manually, leading users to believe the problem was related to text boxes or formatting within the Word version of the file.

The affected template included complex text layout elements in both the document header and the body. This formatting prevented the system from successfully converting the Word file to PDF during the IntelliSign/IntelliSignNow process.

The issue has been resolved so the file converts to a PDF as expected so the document can be sent for signature.

Hotfix 22.6.0.260127 - 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: **New “Gateway Date Updated” Field on Request Records**

Reference #: 260127.1203.24229

A new field, Gateway Date Updated, has been introduced to improve visibility into client activity performed through the Vendor/Client Gateway (VCG). This field is available exclusively on Request records within the core system as well as Request records on the Vendor/Client Gateway.

The Gateway Date Updated field automatically records the date and time of the most recent update made by a client through the VCG on a Request record. The timestamp is updated only when a client modifies the following information on a Request record:

- Editing request-specific fields
- Adding or updating request-specific subtable records
- Uploading new attachments

Updates made in unrelated tables or areas outside of a Request will not affect this field.

The Gateway Date Updated field is also fully supported for:

- Reporting, enabling enhanced tracking and audit visibility
- Workflow automation, allowing processes to be triggered based on the latest client activity

How will this affect users?

This enhancement provides improved transparency and strengthens process oversight by allowing teams to easily reference the most recent client-initiated changes directly from the Request record.

VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: **New Gateway User Cannot Login without Password Reset**

Reference #: 260127.1203.23878

We resolved an issue where newly created customer contacts on the Vendor/Client Gateway (VCG) were unable to log in using the password set during creation. This has been updated so new contacts can log in immediately using the password set during creation.

RESOLUTION: **Cannot Submit Request on Vendor/Client Gateway**

Reference #: 260127.1203.24637

Some users were prevented from submitting requests through the Vendor/Client Gateway (VCG). This issue has now been fully addressed so the request submission button now functions correctly for all users, whether logged in or public (if configured).

RESOLUTION: **Subtable Field Settings Not Reflected on Gateway Immediately**

Reference #: 260127.1203.24011

We resolved an issue where changes made to Vendor/Client Gateway (VCG) subtable field settings—such as Required, Allow Add, Allow Edit, and Show on Search—were not immediately reflected on the gateway. This issue has been fixed so the system now refreshes the necessary cache automatically whenever subtable field settings are modified.

RESOLUTION: **Solicitation Gateway Fields Not Displaying on the Vendor/Client Gateway**

Reference #: 260127.1203.24406

Solicitation Gateway Fields configured in the core system were not appearing correctly on the Vendor/Client Gateway (VCG) and some users noted that only a small subset of fields appeared on the Solicitation Details page, even though many more fields had been configured in the Core system. This has now been fully corrected so Solicitation Details pages on the VCG accurately reflect all fields configured in the core system.

Hotfix 22.6.0.260127 - 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: **Temporary System Lockout Not Working with SSO**

Reference #: 260127.360.21693

Users reported that certain individuals—particularly those signing in with Single Sign-On (SSO)—were still able to access the system during a lockout. This issue has now been corrected and Temporary System Lockout now works consistently for both standard and SSO users.

Hotfix 22.6.0.260127 - 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: Company Contacts Not Displaying in Adobe Acrobat Sign Process

Reference #: 260127.345.23177

We resolved an issue where users were unable to select company contacts when initiating an Adobe Acrobat Sign signature process. Although active contacts existed in the system, the selection window did not display any available names. This has been resolved so company contacts now display correctly in the Adobe Acrobat Sign selection pop-up.

Hotfix 22.6.0.260127 - 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 FEED SERVICES RESOLUTIONS

RESOLUTION: Inline Risk Compliance (OFAC/D&B/SAM.gov) Links Not Showing on Add or Details Screens

Reference #: 220127.265.23344

We resolved an issue where inline Risk Compliance links—including OFAC, D&B, and SAM.gov—were not appearing on add screens when entering values in the Vendor ID or Employee ID fields. This occurred despite the "Show Inline Risk Compliance" setting being enabled in Field Manager. This issue has now been corrected and Inline Risk Compliance links will once again display and function as expected when enabled.
