CobbleStone Software - Release Notes

Contract Insight Version 22.6.1 Rev 260210 (Patch)

Table of contents

Release Notes > Patch 22.6.1 (Rev 260210)

Patch Overview-Version 22.6.1.260210 3
Patch 22.6.1.260210 - Core System: Contract Insight 4
Patch 22.6.1.260210 - Module: Document Collaboration & E-Signature 23
Patch 22.6.1.260210 - Module: E-Sourcing/Procurement Management 26
Patch 22.6.1.260210 - Module: Purchase Order Management 27
Patch 22.6.1.260210 - Module: Vendor/Client Collaboration Gateway 29
Patch 22.6.1.260210 - Aggregated Data Feed Services 34

Patch Overview-Version 22.6.1.260210

Release Version Information

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

Release Version Number	**Client Release Date**	**Release Type *(from prior release)***
22.6.1 (Rev 260210)	13 February 2026	Patch

Click here to download a PDF of the Release Notes

For CobbleStone Software version 22.6.1 Rev 260210, 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: Purchase Order Management
- Module: Vendor/Client Collaboration Gateway
- Aggregated Data Feed Services

Patch 22.6.1.260210 - 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: **VISDOM Preloading for Faster Document Processing**

Reference #: 260210.1204.19819

We're excited to introduce **VISDOM Preloading**, a major enhancement designed to make working with VISDOM significantly faster and more efficient. Users can now drag and drop a file into the system and have it processed *in the background*—allowing them to continue working while VISDOM does the heavy lifting.

This reduces the time spent waiting on the VISDOM Add-In to evaluate documents.

What This Enhancement Allows You to Do

Drag & Drop Documents to Be Processed in the Background

Users can now drop Word or PDF files directly into the system and choose to have them:

- Saved into a background processing queue
- Automatically processed by VISDOM
- Delivered with a notification when the analysis is complete

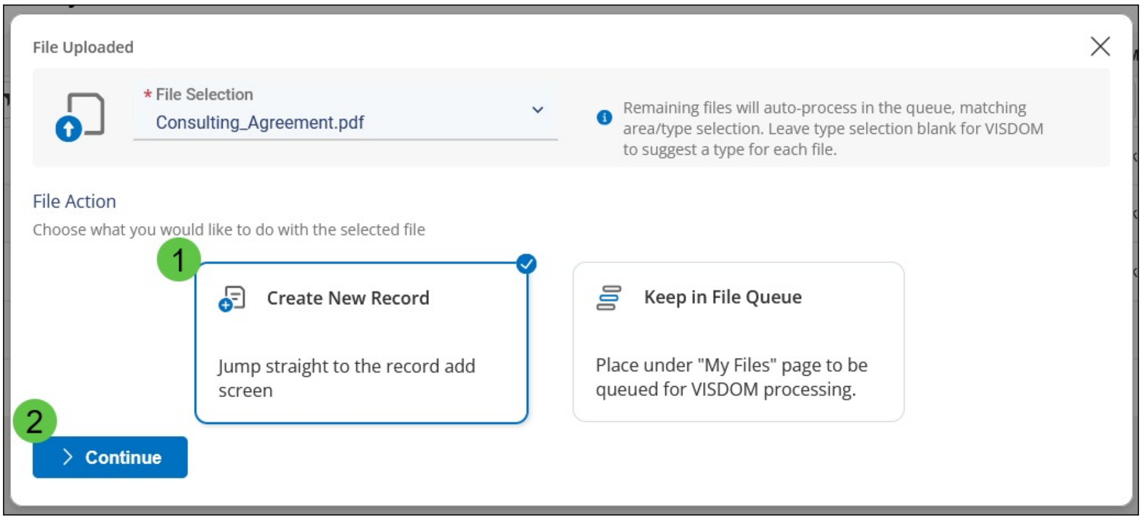
This means you no longer need to wait on the VISDOM Add screen while VISDOM performs its processing.

Choose Your Workflow: Create Now or Keep in the Queue

When you drag and drop a file, you'll see a modernized layout with two options:

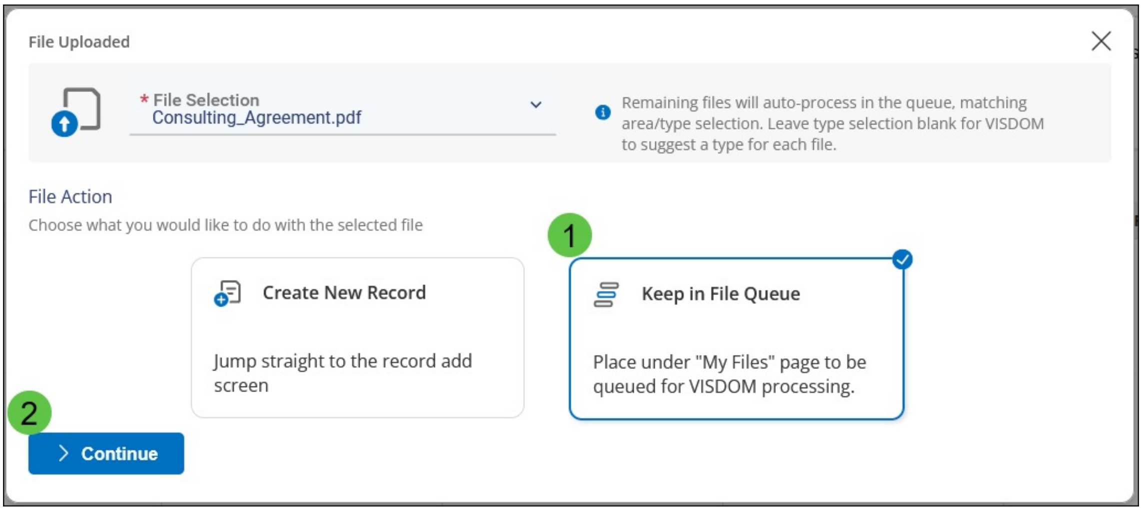
Option A — *Create New Record*

Choose the module and record type, then proceed directly to the VISDOM Add screen.



Option B — *Keep in File Queue*

Select the area/type and save the file to be processed in the background. This option lets you step away and handle other tasks while VISDOM works.



Continue Working While VISDOM Processes Your Document

Once a file is added to the queue:

- The system begins OCR (if needed)
- VISDOM processes the document

- The results are saved and linked to the file
- You will receive both an **on-screen notification** and an **email** when the processing is finished

Users can continue with other work while VISDOM completes the extraction in the background.

On-Demand Processing for Administrators

Administrators can manually trigger background processing from the job scheduler if needed.

Scheduled Jobs

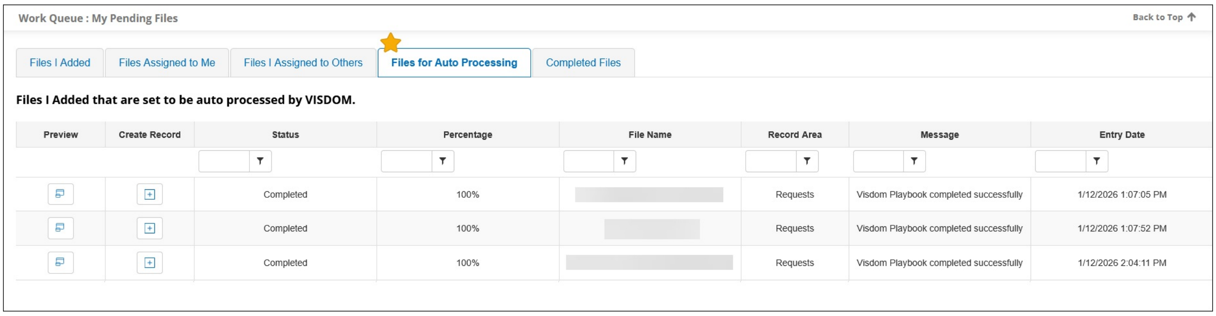
Run Now	Actions	Job Name	Runs Every (minutes)	L
Run Now	View Manage	Document Authoring - Document Generation	240	2/
Run Now	View Manage	Data Aggregator Import	60	2/
Run Now	View Manage	Visdom Services	30	2/
Run Now	View Manage	OCR Services	30	2/
Run Now	View Manage	DNB Monitor	1440	2/
Run Now	View Manage	Visdom Background Preloader	15	2/

Review Completed Files and Create a Record Instantly

When processing is complete:

- Your file will appear in **My Pending Files → Files for Auto Processing**
- You can view the processed file
- A new **Create Record** button will appear
- Clicking it sends you straight to the VISDOM Add-In screen
- The VISDOM Add-In loads instantly **because the heavy processing was already done**

This creates a much faster and more seamless record-creation experience.



How will this affect users?

This enhancement provides:

- Much faster VISDOM Add-In loading
- Reduced waiting time for large documents
- More efficient workflows for power users
- More flexibility and fewer interruptions
- Automatic notifications when processing finishes

ENHANCEMENT: **Streamlined VISDOM Add Screen — Improved Saving Options, Faster Reloads, and Better Page Performance**

Reference #: 260210.1204.24557/24558/25195

1. New Split Save Button for VISDOM Add Screen

When creating records from the Pre-Processor, the Save button has been replaced with a **split-button** offering two workflow options:

- **Save and Continue**
  Saves the record and returns you to the Queue.
- **Save and Continue to Detail**
  Saves the record and opens the newly created record's Detail Page.

This makes it easier for users to choose the next step and reduces unnecessary navigation.

2. Faster Reload Times After a Failed Save

Previously, if a save failed, VISDOM would fully reload the page and re-evaluate all fields, resulting in slow load times and the "Evaluating field group..." message.

With this enhancement:

- VISDOM now reloads **much faster**
- Field evaluation is not repeated unnecessarily
- Users will **no longer see "Evaluating field group..."** after a failed save

This creates a smoother, more efficient retry experience.

3. Overall VISDOM Add Screen Performance Improvements

The VISDOM Add screen has been optimized in several ways:

- **Faster load time** when starting from drag-and-drop
- The main content becomes visible **as soon as it's ready**
- The Save button stays locked until the page is fully rendered
- A temporary cover appears on the left panel while loading
- VISDOM extraction will **not override user changes** if the save fails
- The Save button has been moved to the **center** for better visibility

How will this affect users?

These updates provide a much smoother experience when creating records:

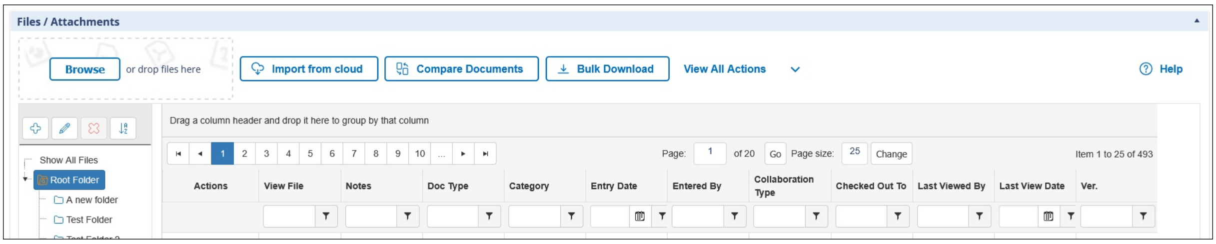
- **Faster page loads**
- **Clearer save options**
- **Less waiting after errors**
- **Better protection against losing work**
- **More intuitive page behavior while loading**

This means users can complete tasks more efficiently and with fewer interruptions.

ENHANCEMENT: **Modernized File Upload Experience on the Files & Attachments Page**

Reference #: 260210.1267.25104

We've updated the **Files & Attachments** page to provide a cleaner, more intuitive, and more controlled file-upload experience. This enhancement modernizes the drag-and-drop area, improves clarity, and reduces upload errors—all while keeping the existing functionality and controls clients are familiar with.



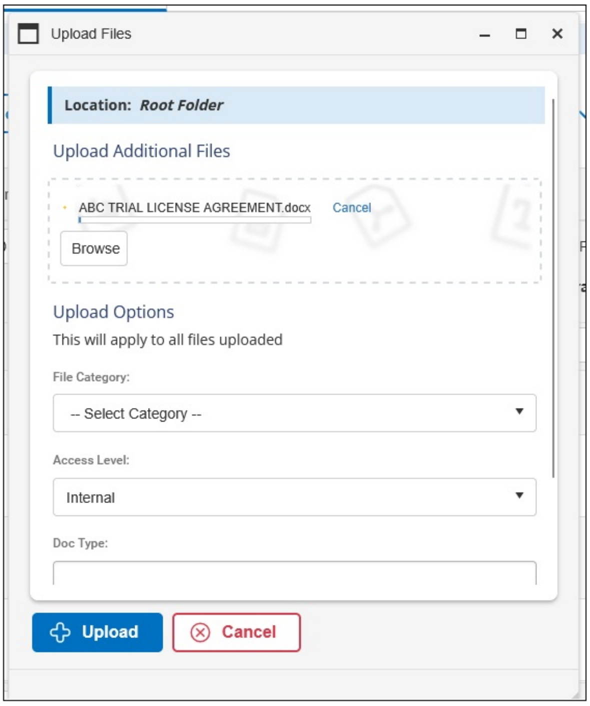
1. Drag-and-Drop No Longer Auto-Uploads Files

Previously, dropping a file onto the upload area immediately uploaded it.

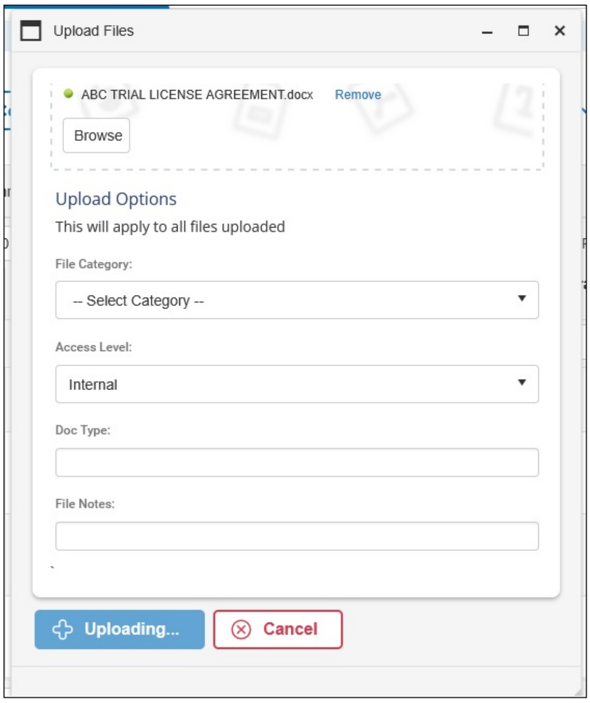
Now:

- Dropped (or selected) files **open a new modal window**
- The file is held in a “pending upload” state
- Users enter any required metadata **before** confirming the upload

This gives users more control and prevents accidental or incomplete uploads.



Click the Upload button when options configured.



After clicking, button shows the file is being uploaded

2. New Upload Modal for Better Accuracy and Control

A streamlined modal now appears whenever files are dropped or selected:

- Shows a list of files pending upload
- Allows additional files to be added by dropping them directly into the modal
- Displays required fields (Category, Access Level, Document Type, Notes, etc.)
- Ensures all information is captured **before** the upload begins

For Solicitations, the modal also includes two additional fields:

- **Respondent**
- **Is Public**

This helps ensure correct metadata is captured across all modules.

3. Improved Drop-Zone Styling

The drag-and-drop area has been visually refreshed with:

- A more modern, clean design
- Better visual indicators for drag-and-drop actions
- A simplified and more organized layout

This makes it easier to understand exactly how to upload files.

4. Buttons and Actions Now Behave More Consistently

To improve clarity and reduce clutter:

- The **Bulk Download** button appears only for users with administrative permissions
- View All Actions now mirrors the same visibility rules
- In the Employees module, **VCG Download History** is hidden
- All "View" actions continue to open as modal windows, maintaining consistency across the system

These refinements help ensure users only see actions they are permitted to use.

5. Clearer Upload Feedback

Once users confirm the upload:

- The modal processes the file(s)
- A confirmation message appears once the upload is complete
- The newly uploaded files appear immediately in the grid with the metadata applied

This provides reassurance that the upload was successful and properly recorded.

How will this affect users?

This enhancement:

- Reduces user mistakes during file uploads
- Makes the upload process clearer and more intuitive

- Modernizes the user interface without requiring any configuration changes
- Maintains full compatibility with existing permissions and system behaviors

These improvements are lightweight but deliver a noticeably better user experience.

ENHANCEMENT: **New Joint Document Process Management for Collaborative Editing**

Reference #: 260210.1203.21587

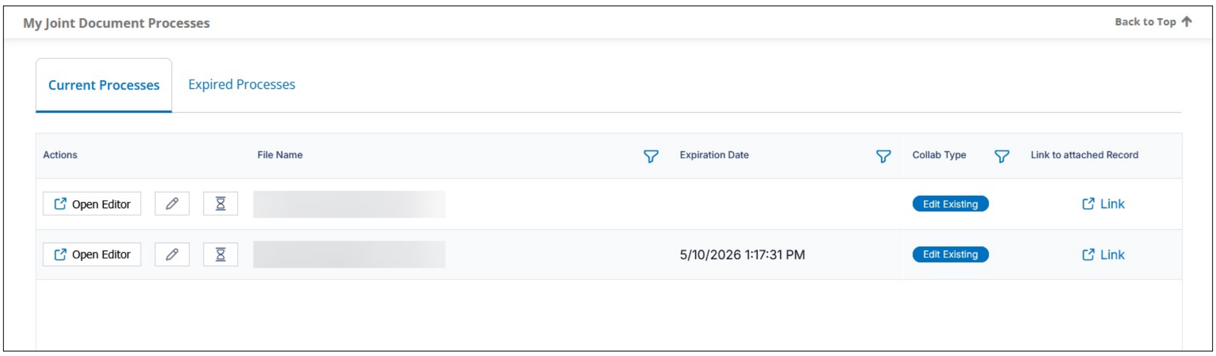
We've introduced an extensive set of enhancements to support the new **collaborative document editor**, giving users and administrators a dedicated place to manage, monitor, and track all active and past collaboration sessions. These enhancements bring greater transparency, improved control, and full auditing to the collaboration experience.

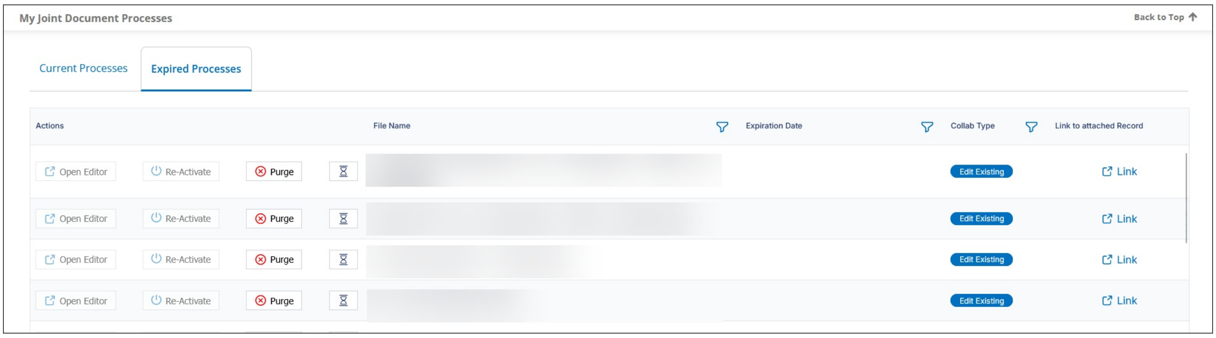
1. "My Joint Document Processes" – View and Manage Your Active Collaborations

Users now have a new page under the **My** menu called **My Joint Document Processes**, where they can:

- See all document processes they are actively collaborating on
- Open the document in the editor to continue working
- Manage collaborators (if permitted)
- Review the full audit log for the process
- Jump directly to the record where the file is stored
- View both *current* and *expired* document processes

Expired processes can also be **reactivated** or **purged**, depending on the user's permissions.





2. "System Joint Document Processes" – Admin-Level Visibility Across All Collaborations

Administrators gain a new page under **Manage/Setup** called System Joint Document Processes showing:

- Every joint document process in the system
- All active and expired processes
- The ability to open, review, and audit any collaboration
- Centralized oversight of collaboration activity across all users

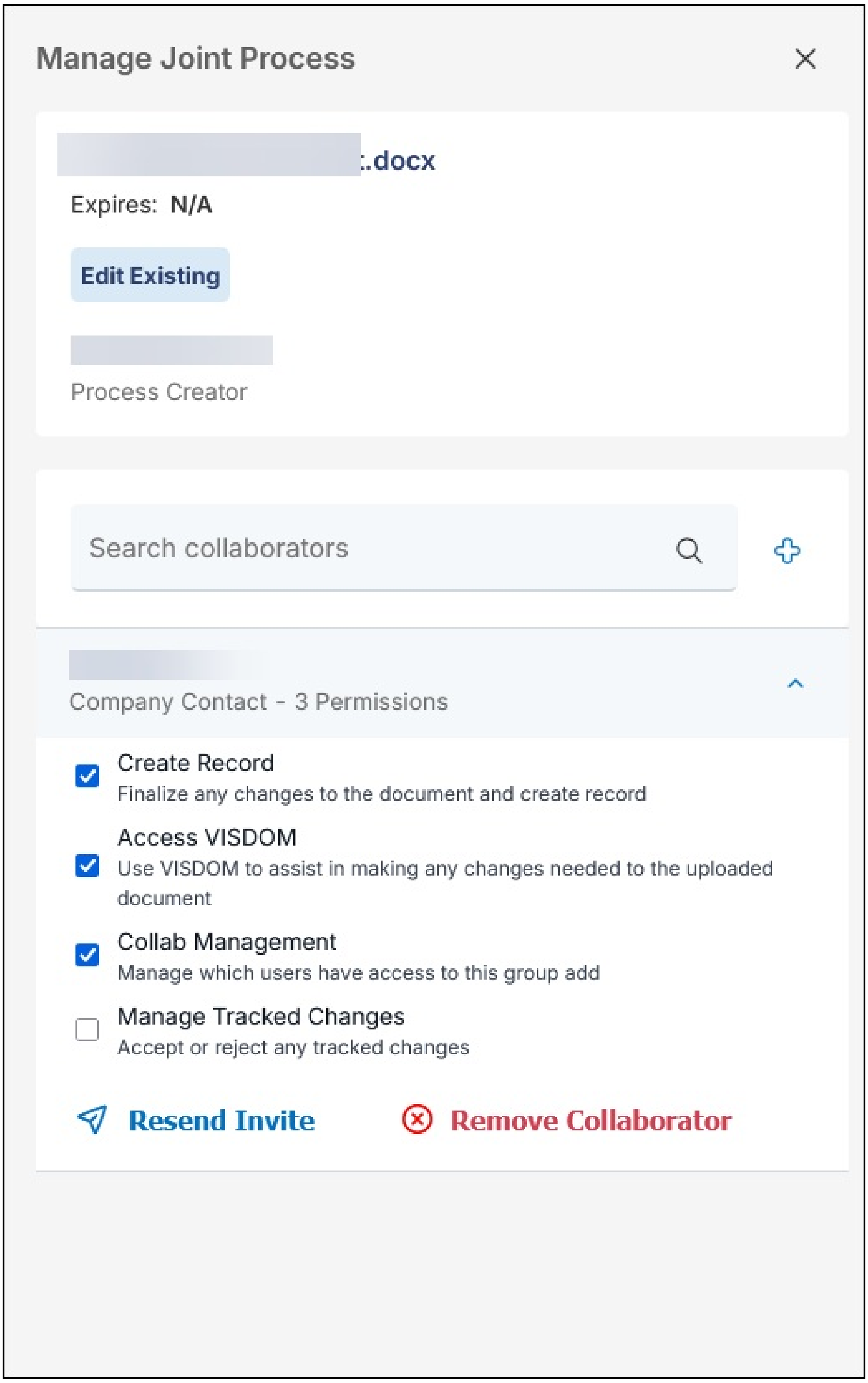
This gives administrators a complete view of collaboration activity throughout the organization.

3. New Collaboration Management Sidebar

From either page, users with collaboration-management permissions can open a new sidebar that allows them to:

- View all collaborators on a process
- Invite new collaborators (employees, company contacts, or email addresses)
- Set or adjust collaborator permissions
- Re-send invitations
- Remove collaborators

This provides an intuitive, centralized way to manage joint editing access.



4. Expiration Dates & Reactivation Options for Collaborative Sessions

Document processes now include **configurable expiration dates**, allowing organizations to control how long collaborative editing sessions remain active.

New configuration settings allow admins to define:

- When expiration begins (process start or last update)
- How long a process remains active
- Whether expired processes can be reactivated

Once expired, a process becomes view-only unless reactivated by an authorized user.

5. Comprehensive Audit Log for Each Document Process

Every collaboration session now includes a full audit trail accessible via a History icon. Events tracked include:

- Process start, end, and reactivation
- When collaborators open the document
- Opening expired documents
- Collaborator invitations, removals, and permission changes

This ensures full transparency and meets compliance and governance needs.

6. Improved Visibility in Files & Attachments

Documents that are currently part of an active joint editing process are now highlighted in the Files & Attachments grid.

Additionally:

- Files in an active process **cannot be deleted** until the process is completed or closed

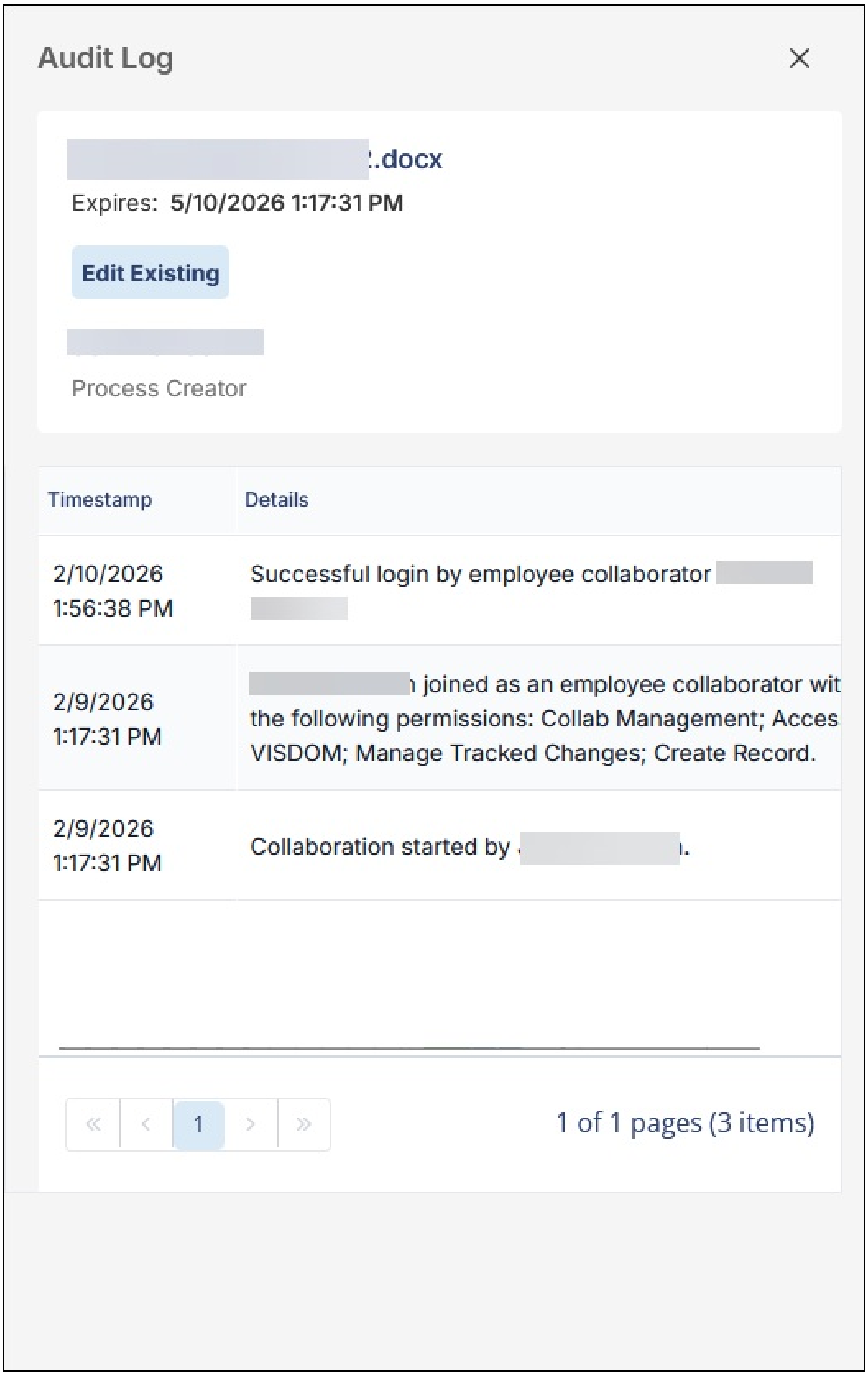
This helps prevent accidental changes or removal of in-use documents.

7. Optional Login Requirements for Vendor/Client Gateway Users

Organizations can now specify whether external collaborators must log in through the Vendor/Client Gateway to access the editor.

- By default, external collaborators **do not** need to log in
- A new option allows requiring login **per contact** when sending invitations

This provides added flexibility for balancing ease of access with security.



How will this affect users?

This enhancement provides:

- A clear place to monitor all ongoing document collaboration
- Easy access to audit logs and process history
- Better control over who can collaborate and how
- Improved oversight for administrators
- Safer file management when documents are actively being edited

Together, these enhancements offer a much smoother, more transparent, and more manageable collaboration experience.

ENHANCEMENT: **Configurable Field Limit for VISDOM Basic Drag-and-Drop**

Reference #: 260210.360.18277

We've improved the VISDOM Basic drag-and-drop experience by making the maximum number of fields that can be processed **fully configurable** through Application Configuration settings.

The drag-and-drop interface in VISDOM Basic is designed to handle up to **100 fields** reliably. Exceeding this number may cause:

- Browser slowdowns
- Excessive memory usage
- System instability, which may affect other applications running on the user's computer

Previously, this limit was hard-coded into the system.

You can now adjust the **VISDOM Max Field Count** limit directly through system configuration settings.

- The default value remains **100**, which is the recommended and supported maximum.
- Administrators may increase this limit if absolutely necessary; however, values above 100 are **not supported** and may impact performance.
- This setting is now visible in **Application Configuration** → **General System**.

This enhancement provides flexibility for organizations with special use cases, while still protecting system stability for typical usage.

Important Note

Increasing the limit beyond 100 may cause degraded performance or browser instability. Clients should exercise caution when adjusting this setting.

How will this affect users?

- No changes to day-to-day functionality
- Administrators gain more control over VISDOM Basic's field-processing threshold
- The system remains protected under normal conditions with the 100-field default

This update enhances configurability while maintaining performance safeguards.

CORE SYSTEM RESOLUTIONS

RESOLUTION: Contract End Date Not Calculating When Using Mixed Taxonomies in VISDOM Extract

Reference #: 260210.360.16876

Some clients using VISDOM Standard (Basic) extract plans that combined both **Common Clauses** and a **custom (user-defined) taxonomy** noticed that the system was not calculating the **Contract End Date** as expected.

When determining the Contract End Date, the system should review all available taxonomies to find the right clause information. However:

- VISDOM Standard only looked at the **first** taxonomy in the results.
- In VISDOM+, the Common Clauses taxonomy was listed first, so the Data Point was found.
- In VISDOM Standard, the **custom taxonomy appeared first**, and it did not contain enough information—so the system stopped too early and could not calculate the date.

We updated the logic so the system now:

- **Checks all taxonomies**, not just the first one,
- Finds the correct clause information wherever it exists, and
- Successfully calculates the **Contract End Date** using the VISDOM Data Point.

Clients using extracts that combine Common Clauses with custom taxonomies will now see the Contract End Date calculated consistently across both VISDOM Standard and VISDOM+.

RESOLUTION: Auto-Complete Tasks Not Displaying Correctly on the Contract Task Subtable

Reference #: 260210.365.25556

Auto-Complete Tasks were not appearing on the Contract Task subtable even when the **Show AutoComplete Tasks** checkbox was selected. This occurred specifically when the Hide Auto Complete Tasks admin configuration setting was turned ON.

Clients experienced symptoms such as:

- The **progress bar** showing additional tasks pending, even though they did not appear in the task list.
- Toggling **Show AutoComplete Tasks** had **no effect** on what was displayed.
- The checkbox state sometimes did **not persist** when navigating between tabs.
- Auto-Complete Tasks appeared normally only when the Hid Auto Complete Tasks configuration setting was turned **OFF**.

We updated the system so that task visibility behaves consistently and predictably:

- The system now correctly honors the **Hide Auto Complete Tasks** admin setting.
- When the setting is **True**, the **Show AutoComplete Tasks** checkbox is hidden (since Auto-Complete Tasks are not intended to be shown).
- When the setting is **False**, the checkbox becomes visible and properly controls whether Auto-Complete Tasks appear in the task list.
- The checkbox state now **persists** when navigating between tabs on the Contract Record page.
- The **Notice and Alert sections**, along with the **task progression bar**, always reflect all open tasks - both manual and Auto-Complete - so progress is displayed accurately.

All clients should now see Auto-Complete Tasks displayed consistently based on their admin configuration and checkbox selections.

RESOLUTION: "View Contracts" Link Error in Company Pages

Reference #: 260210.1203.25988

We identified an issue where the "View Contracts" link displayed an error instead of opening the expected contract information. This occurred in several areas of the system, including:

- The Company List page
- View All Actions → View Contracts within the Company Details page
- The Linked Records tab within Company Details

Clients accessing contracts through any of these locations may have been unable to view the linked records.

This issue has been fully resolved. All "View Contracts" links throughout the Company pages now operate as expected.

RESOLUTION: Clause Library Edit Screen Not Opening Correctly

Reference #: 260210.337.26015

Some clients encountered an issue where attempting to edit a clause from the **Clause Library** list resulted in an error or a broken page link. This occurred because the system did not properly build the URL that opens the clause edit screen.

We updated the URL logic so the system now correctly recognizes whether the SiteAddress ends with "/" and adjusts the link accordingly.

- Clause edit links now generate properly in all configurations
- The Clause Library is fully accessible again
- No user action or reconfiguration is required

Clients can now open and edit clauses from the Clause Library list without any errors.

RESOLUTION: Error When Rearranging Columns in the Workflow Task Grid

Reference #: 260210.365.26044

Attempting to rearrange columns in the **Workflow Task** grid—specifically when moving the **Task Name** column—resulted in an error. This prevented users from customizing the column layout within that section.

We updated the column behavior within the Workflow Task grid to prevent these errors:

- Grouping has been **disabled** for the **Task Action** and **View** columns, since they are not designed to be grouped.
- All other columns continue to allow rearranging and grouping as expected without issue.

Users can now rearrange columns in the Workflow Task grid without encountering errors. Normal customization of the grid layout is fully restored.

RESOLUTION: **Certain Windows Not Opening When VISDOM Was Disabled**

Reference #: 260210.1222.26045

Some clients experienced issues when **VISDOM was disabled** in their system settings. When attempting to open certain pop-up windows that rely on translation functions—for example, the **CobbleStone IntelliSign window** accessed through **Esign Document** options—the window would fail to open.

In affected cases:

- The pop-up window did not load
- The action appeared unresponsive
- A JavaScript error occurred in the browser console

This prevented users from completing tasks such as initiating an IntelliSign session from a file's toolbox.

We updated the system to ensure pop-up windows continue functioning properly even when VISDOM is turned off:

- Translation scripts now remain available on the page when VISDOM is disabled
- Additional safeguards ensure translation-related calls are skipped entirely when VISDOM is not active
- Pop-up windows like **CobbleStone IntelliSign** now open reliably regardless of VISDOM settings

Clients who disable VISDOM can now continue to use functions as expected.

RESOLUTION: **Field Reordering on Subtables Not Updating on Details Screens**

Reference #: 260210.337.26212

When reordering fields on subtables using **Fields by Type** or **Field Manager**, the changes did not appear on the corresponding **Details** screens. Even though the new order saved successfully, the layout on record screens did not update to match.

We implemented a fix to ensure that subtables are automatically rebuilt whenever field order is changed. This ensures that:

- Updated field ordering is reflected immediately on Details screens
- Reordering made in Fields by Type or Field Manager now displays consistently system-wide

Field reordering now behaves as expected. Clients should see their updated field layouts reflected accurately on all Details screens.

RESOLUTION: **Clause Library References Not Merging Inside Mergeable Clauses**

Reference #: 260210.1157.26063

When generating documents from templates, **clause library references inside mergeable clauses were not merging correctly**.

In these cases:

- The main mergeable clause would appear in the document, but
- Any clause library references *inside* that mergeable clause stayed as placeholder text instead of merging in the referenced clause content.

Clause library references outside mergeable clauses continued to work as expected.

We updated the logic so that clause library references are now recognized and merged properly within mergeable clauses.

- Clause references inside mergeable clauses now behave the same as standalone clause references
- All referenced content merges into the final document as expected
- No changes are required to existing templates

Patch 22.6.1.260210 - 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: **Cleaner E Signature Rendering & Improved Mergeable Clause Controls**

Reference #: 260210.345.25920

We've improved the e-signature experience to ensure signatures appear clean, consistent, and free from overlapping or cluttered information. This enhancement modernizes how signature metadata is handled and aligns the system with industry-standard e-signature practices.

1. Signing Reason Now Appears in the Completion Certificate

To improve clarity and ensure proper document formatting:

- When **"Append reason to electronic signatures" = true**, the signing reason will be shown in the **Completion Certificate**, not on the document itself.
- When the setting is **false**, the reason will not appear anywhere.

2. Date Handling Has Been Streamlined

- The **date and time signed** will always appear in the **Completion Certificate**.
- Clients can still include a date within the document by adding a **date merge field** placeholder. This date will appear on the generated document, and once the document is finalized, the system will automatically add a timestamp indicating when it was signed.

These changes ensure the final signature looks clean while all required metadata remains available in the official certificate.

Additional Enhancement: New Option for Mergeable Clause Content Controls

We've added a new configuration option that allows administrators to show or hide the **Content Control Wrapper Settings** when adding or editing Mergeable Clauses.

- When the new setting is **enabled**, the Content Control options will appear on the Mergeable Clause screen.
- When **disabled**, these options remain hidden for a simpler editing

experience.

<u>How will this affect users?</u>
These enhancements:

- Prevent signature text overlap
- Improve readability of signed documents
- Reduce configuration complexity
- Ensure metadata is stored in the appropriate, industry-standard location
- Provide more flexibility when managing mergeable clauses

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: **Signature Placeholder Position Changes After IntelliSign Completion**

Reference #: 260210.345.25261

When using **IntelliSign Now**, the signature placeholders positioned on a document were shifting after the signing process was completed.

We identified that this was occurring when pages within a document had **different orientation settings**, and the signing page's orientation did not match the others. Because of this mismatch, placeholder positioning did not align correctly after processing.

We added new logic that checks page orientation during the IntelliSign process to ensure signature placeholders stay where users place them.

RESOLUTION: **Clause Library References Not Merging Inside Mergeable Clauses**

Reference #: 260210.1157.26063

When generating documents from templates, **clause library references inside mergeable clauses were not merging correctly**.

In these cases:

- The main mergeable clause would appear in the document, but
- Any clause library references *inside* that mergeable clause stayed as placeholder text instead of merging in the referenced clause content.

Clause library references outside mergeable clauses continued to work as expected.

We updated the logic so that clause library references are now recognized and merged properly within mergeable clauses.

- Clause references inside mergeable clauses now behave the same as standalone clause references
- All referenced content merges into the final document as expected
- No changes are required to existing templates

Patch 22.6.1.260210 - Module: E-Sourcing/Procurement Management

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

E-SOURCING/PROCUREMENT MANAGEMENT RESOLUTIONS

RESOLUTION: Questions & Answers Subtable Not Functioning on Certain Record Details Tabs

Reference #: 260210.1203.25825

Some clients reported that the **Questions & Answers (Q&A)** subtable could not be used on certain tabs within the Solicitation Record Details screen. When placed on many of the standard tabs—or on newly created tabs—the Q&A fields appeared but could not be interacted with.

We restored the intended logic so that the Q&A subtable initializes correctly on **every** tab. This means:

- The Q&A subtable now functions as expected on **all out-of-the-box tabs**, and
- It also works properly on **any user-created tabs** where it is added.

Clients can once again interact with and manage Questions & Answers from any tab within the Record Details setup.

Patch 22.6.1.260210 - Module: Purchase Order Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of Purchase Orders as they relate to Contracts.

PURCHASE ORDER MANAGEMENT ENHANCEMENTS

ENHANCEMENT: **Link Requests to Existing Purchase Orders**

Reference #: 260210.365.24902

Users with permission now have the ability to **link a Request to an existing Purchase Order (PO)**. Previously, Requests could only be linked to Contracts—this enhancement expands the Request workflow and improves traceability between Requests and downstream purchasing activity.

This new functionality helps organizations better manage their procurement lifecycle and maintain a complete audit trail between Requests and Purchase Orders.

View Linked Purchase Orders

On a Request record, under the **Linked Records** tab, you will now see a list of any Purchase Orders linked to that Request.

If the Request was originally created **from** a PO, the link will appear automatically and **cannot be removed** to ensure data integrity.

Link a Request to an Existing Purchase Order

You can now attach additional Purchase Orders to a Request:

1. Open a Request record
2. Select **View All Actions**
3. Under **Manage Records**, choose **Link to Purchase Order**
4. Use the search page to find the PO you want to associate
5. Click **Link**

You will be returned to the Request's details page with the linked PO now displayed.

Remove a Linked Purchase Order

If a PO was linked manually, you can remove it:

- Go to the **Linked Records** tab
- Click **Delete** next to the PO you want to unlink
- Confirm the removal on the pop-up prompt

(Reminder: POs that originated the Request cannot be removed.)

How will this affect users?

This enhancement provides:

- Better visibility into the relationship between Requests and Purchase Orders
- A more complete view of procurement activity
- A more flexible workflow that supports real-world processes

Clients now have a more seamless and traceable link between Requests and the purchasing operations that follow.

Patch 22.6.1.260210 - 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: **Restored Ability to Customize the Vendor/Client Gateway (VCG) Menu**

Reference #: 260210.1203.24322

We've reinstated the ability for clients to **fully customize the Vendor/Client Gateway (VCG) menu**, a feature that had previously been removed. Many clients rely on this flexibility to tailor the Gateway experience for their vendors and external users, and this enhancement brings that capability back with improved control and logic.

You can now decide whether the VCG uses a **dynamic** (customizable) or **static** menu layout.

A new configuration setting — **"Top Menu Configuration"** — determines whether menu customization is enabled. When turned on, clients regain full control over the VCG menu structure.

To enable the customizable VCG menu:

1. Go to **Manage/Setup** → **Application Configuration** → **Config Settings**
2. Select configuration group: **Vendor/Client Gateway**
3. Toggle **"Top Menu Configuration"** to **True**
    - **True** = Use the *dynamic* customizable VCG menu
    - **False** = Use the *static* standard VCG menu

How will this affect users?

This enhancement restores flexibility, improves menu accuracy, and gives clients more control over their Vendor/Client Gateway experience.

ENHANCEMENT: **Improved Subtable Editing Experience in the Vendor/Client Gateway (VCG)**

Reference #: 260210.1203.24864

We've introduced a series of enhancements to make subtable entry and editing within the Vendor/Client Gateway more intuitive, consistent, and user-friendly. These updates improve how required fields are handled, streamline the editing workflow, and introduce new administrative controls for managing subtable entries.

1. More Accurate Required-Field Handling

Required fields in the subtable inline editor now follow the rules defined in the **VCG Contract Type Field Mapping**, ensuring that:

- Fields marked as **required in the Gateway** behave as required
- Fields not designated as required no longer appear mandatory
- Only fields marked **Allow Add** appear in the editor

This provides clearer, more predictable field behavior for external users submitting requests.

2. Helpful Tooltips for Better Guidance

If a field has a **help description**, it now appears as a **tooltip** when hovering over the column header.
This gives users accessible, on-screen guidance while they fill out subtable entries.

3. Cleaner, More Intuitive Toolbar Behavior

The subtable grid now shows buttons only when they are relevant, reducing clutter and confusion:

- **Default state:** Only the **Add** button is visible
- **Edit mode:** Only **Save** and **Cancel** appear
- **Delete button:** Displays **only** when a single row is selected
- **Save button:** Shows only when there are unsaved changes

This streamlined behavior makes the subtable editor easier to understand and significantly more user-friendly.

4. Improved Dropdown Usability

Dropdown fields in the inline editor now **wrap long text** instead of cutting it off, making large or descriptive lookup values easier to read.

5. Enhanced Add Bulk Functionality

The **Add Bulk** pop-up has been redesigned for consistency and ease of use:

- It no longer uses templates
- It now uses the **same field rules and filters** as the inline editor on the Add Request pages
- It supports all field restrictions, tooltips, and required-field behaviors

This creates a consistent experience across all ways of adding subtable data.

6. New Ability to Allow Subtable Record Deletion

Administrators now have more control over subtable data management:

- A new setting allows subtables to be configured to **permit deletion**
- If enabled, subtables will display a **Delete** option both in the grid and on the subtable details page
- For security, **only Vendor/Client Gateway company administrators** can delete subtable entries

This gives organizations more flexibility while maintaining proper access control.

7. Improved Behavior Based on Lookup Table Size ***(when applicable)***

Where possible, the system will now determine whether a lookup should display as a **dropdown** or **autocomplete** based on how many values exist—improving usability for large datasets.

How will this affect users?

These enhancements provide a smoother, more intuitive experience for vendor and client users entering subtable information. Administrators gain better control over required fields, deletion permissions, and data entry behavior, while users benefit from clearer instructions, streamlined tools, and consistent workflows.

ENHANCEMENT: **New "Linked Request Records" Subtable on Request Records**

Reference #: 260210.365.8109

We've added a new way for users in the Core system to easily see relationships between Request records linked on the Vendor/Client Gateway. A **Linked Request Records** subtable is now available on the **Linked Records** tab of a Request, allowing clients to view connections between related Vendor/Client Gateway Requests directly within the system.

1. New "Linked Request Records" Subtable

Request records can now display other Requests that are related or connected to them from the Vendor/Client Gateway. This subtable shows:

- A list of all Request-to-Request links
- Key identifying information
- A clear view of how requests relate to each other

This makes it much easier to track related submissions, follow dependencies, or understand how requests interact.

2. Included in Default Layout (When Resetting to Defaults)

When administrators reset a Request record's layout to default using **Record Details Tab Setup**, the new Linked Request Records subtable will automatically appear as the **first item on the Linked Records tab**.

This gives all systems a consistent starting point while still allowing full customization.

3. Optional Dock for Customized Layouts

For clients who use custom layouts, the subtable will not be added automatically—so no existing customizations are disrupted.
However, admins can easily add it:

- Navigate to **Manage/Setup** → **Application Configuration** → **Record Details Tab Setup**
- Select **Requests**
- Choose the **Linked Records** tab
- Add a new dock and select **Linked Request Records** from the list

This allows flexibility for systems that have carefully tailored screen layouts.

4. Linked Request Data Now Captured in History/Audit Log

All linked Request activity is now recorded in the system's audit log. This provides:

- Improved traceability
- A clearer audit trail
- Better visibility into when and how Request connections change

Important Note

*While the Linked Records tab on Requests in the Core system can now display all Request-to-Request links, the ability to create these links currently exists only through the **Vendor/Client Gateway (VCG)** by clicking the New Associated Request button on an existing Request. Core users can view the links in the new subtable but cannot create new links directly from the core application at this time.*

How will this affect users?

This enhancement improves visibility into related Request activity, strengthens record traceability, and provides an immediate view of linked Requests—all from a familiar location on the Request details page.

Patch 22.6.1.260210 - 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: **SAM.gov Finances & Confidence Sub-Table Not Appearing**

Reference #: 260210.932.23633

We resolved an issue affecting clients who are licensed for the **SAM.gov module** but do **not** have the OFAC or Dun & Bradstreet (D&B) modules.

Some clients reported that the **Finances & Confidence** section was not appearing within the **Record Details Tab Setup**. In these cases:

- The system incorrectly displayed the option as **"Unlicensed Dock Selected."**
- The **SAM.gov Finances & Confidence** control did not appear on Vendor/Company records, even though the SAM.gov module was properly licensed.

We applied a correction that ensures the system properly recognizes the SAM.gov license on its own.

- The **Finances & Confidence** dock now appears correctly in the **Record Details Tab Setup**.
- The **SAM.gov control** is now visible on Vendor/Company record screens **without requiring OFAC or D&B**.

All clients using only the SAM.gov connector should now see the expected SAM.gov fields and configuration options.
