



CobbleStone Software - Release Notes

Contract Insight Version 22.7.0 Rev 260330 (Update)



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Update Overview-Version 22.7.0

Release Version Information

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

Release Version Number	Client Release Date	Release Type (<i>from prior release</i>)
22.7.0 (Rev 260330)	March 30, 2026	Update



[Click here to download a PDF of the Release Notes](#)

For CobbleStone Software version 22.7.0 (Rev 260330), New Feature(s), Enhancement(s), and/or Resolution(s) were added to the following areas:

- Core System: Contract Insight
- Module: Vendor/Client Collaboration Gateway



Update 22.7.0 (Rev 260330) - Core System: Contract Insight

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

CORE SYSTEM NEW FEATURES

NEW FEATURE: Clause Playbooks

Reference #: 260330.1204.16940

We're excited to introduce Clause Playbooks, a new way to help teams review contracts faster, apply preferred language more consistently, and provide clearer guidance during negotiations.

Clause Playbooks bring together your approved clauses, negotiation guidance, and business rationale into one easy-to-use resource—so reviewers always know what language to use and why it matters.

Clause Playbooks are now available in Contract Insight and the CobbleStone Add-In for Word, with support coming soon to the Collaborative Online Editor.

Why Clause Playbooks Matter

Contracts often require balancing speed, accuracy, and consistency. Clause Playbooks help by:

- Making approved and preferred clause language easier to find
- Providing built-in guidance to support negotiations
- Reducing rework and guesswork during reviews
- Supporting more consistent decision-making across teams

How Clause Playbooks Work

Clause Playbooks can be accessed and managed through three integrated areas of Contract Insight, making them easy to maintain and easy to use during reviews.

1. Centralized Playbook Management

Administrators can create and manage playbooks from a central location. Each playbook groups together clauses from your Clause Library and allows admins to define:



- Negotiating Comments – how a clause should be handled during review
- Business Justification – why the clause is recommended
- Playbooks stay aligned with your existing clause library, helping teams keep standards up to date without maintaining duplicate content.

Actions	Playbook Name	# of Clauses	Description
View / Manage	Sample Playbook	12	This is a sample clause playbook.
View / Manage	Master Services Agreement (MSA)	1	Clause Playbook for Master Services Agreements (MSA)
View / Manage	Consulting Agreement (created via VISDOM Add)	6	
View / Manage	Independent Contractor Agreement	2	Clause Playbook for Independent Contractor Agreements
View / Manage	Statement of Work (SOW)	1	Clause Playbook for Statements of Work
View / Manage	Software License Agreement	16	Clause Playbook for Software License Agreements
View / Manage	Technology Services Agreement	19	Clause Playbook for Technology Services Agreements
View / Manage	Employment Agreement	13	Clause Playbook for Employment Agreements

*** Playbook Name:**

Playbook Description:

Clause Selection
Select which clauses should be in this playbook and optionally attach a reason to why this clause is included in the playbook. Additionally clauses can be added later.

Available Clauses

- 1. Definitions
- 2. Term
- 3. Termination
- 4. Fees and Payment
- 5. Confidentiality
- 6. Intellectual Property Rights
- 7. Warranties and Disclaimers
- 8. Limitation of Liability
- 9. Governing Law
- Accelerated Procedure (rev 2024-10-16)
- Acceptance
- Accepting and Dispensing of \$1 Coin (rev 2020-06)
- Access Rights
- Accounting and Audit Rights
- Accounting for unallowable costs
- Affiliates
- Amendments

Selected Clauses

Amendments

Negotiating Comments:

Business Justification:

Evaluation Trial License

Negotiating Comments:

Business Justification:

Limitation of Liability

Negotiating Comments:

Business Justification:

Termination

Negotiating Comments:

Business Justification:

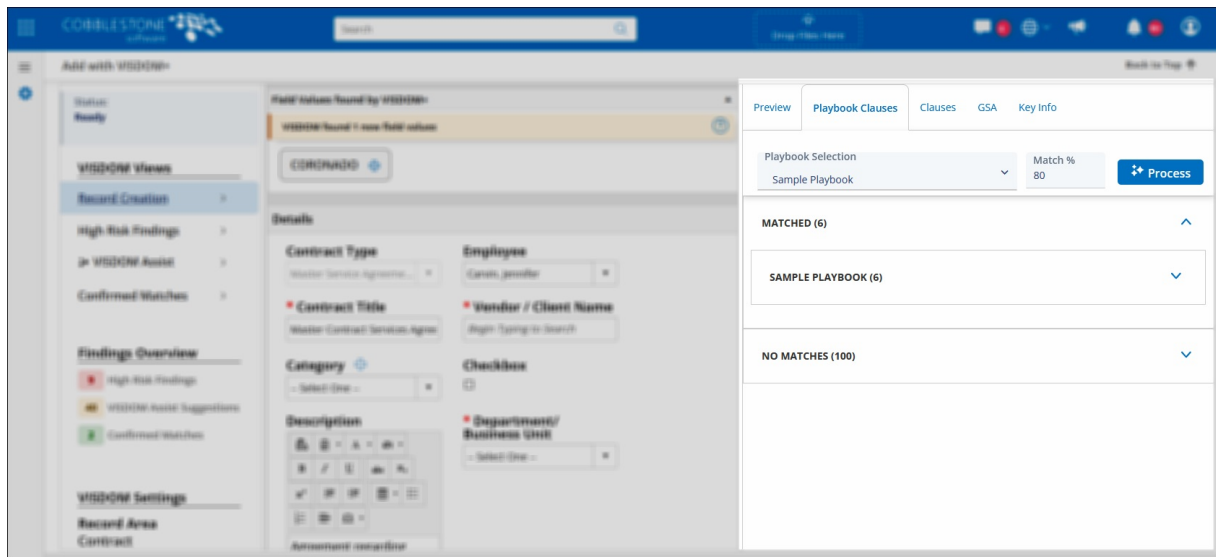


2. Using Playbooks During Contract Review

When reviewing a document using VISDOM, users can select one or more playbooks to compare against the contract. The system automatically identifies:

- Clauses in the document that match your approved language
- The closest matches from your playbooks
- Clauses in the contract that don't yet exist in your Clause Library

Reviewers can easily compare language side by side, view match percentages, and see clear guidance for how each clause should be handled.





Preview **Playbook Clauses** Clauses GSA Key Info

Playbook Selection: Sample Playbook Match %: 80 **Process**

MATCHED (6)

SAMPLE PLAYBOOK (6)

6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statem... [Read more](#)

Playbook Match

CONFIDENTIALITY 80.7% **View >**

6.3 Non-Disclosure and Limitation of Use. Except as provided in Section 6.1, Receiving Party shall not disclose the Disclosing Partys Confidential Information,... [Read more](#)

[Add to Library](#)

6.3 Non-Disclosure and Limitation of Use. Except as provided in Section 6.1, Receiving Party shall not disclose the Disclosing Party's Confidential Information, except to its employees or agents in accordance with Section 6 and sh... [Read more](#)

Playbook Comparison

Found in Document

6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work. Notwithstanding anything to the contrary herein, Receiving Party may disclose the Confidential Information of the Disclosing Party to an Affiliate who is under similar obligations to keep such Confidential Information confidential and to the extent required by law. If such disclosure is requested by legal process, the Receiving Party will make commercially reasonable efforts to notify the Disclosing Party of this request to disclose Confidential Information prior to any disclosure in order to permit the Disclosing Party to oppose such disclosure, at the sole cost and expense of the Disclosing Party, by appropriate

Playbook Selection: Sample Playbook **Redline**

Playbook Text

Confidentiality 80.7% Match

6.3 Non-Disclosure and Limitation of Confidentiality Use Obligations. Except as It provided is in anticipated Section that 6.4, each Receiving of Party the shall parties not will disclose to the Disclosing other Partys party Confidential Information; except to its employees or agents in accordance with the Section course 6 of and performing shall such take parties' at obligations least under the same precautions to Agreement, protect including the each confidentiality Statement of the Work. Disclosing Notwithstanding Partys anything Confidential to information the as contrary it herein, takes Receiving to Party protect may its disclose own the Confidential Information; but of in the no Disclosing event Party less to than an commercially Affiliate reasonable who precautions is Receiving under Partys similar shall obligations not to remove keep any such trademark, Confidential copyright, information restricted confidential rights, and limited to rights, the proprietary extent rights required or by confidentiality law, notices if included such in disclosure or is affixed requested to by the legal Disclosing process, Partys the Confidential Receiving Information Party and will shall make reproduce commercially all reasonable such efforts notice to on notify any the copies Disclosing Party of the this Disclosing request Partys to disclose Confidential Information made in accordance prior with to this any Agreement: disclosure Receiving in Party order

If a clause from the document isn't already in your library, it can be added directly during review. When adding a new clause, users can also:

- Include negotiating guidance and business justification
- Leverage AI-assisted suggestions to help draft those explanations
- Add the clause directly to one or more playbooks for future use

This helps ensure new learnings from real negotiations are captured and reused.



Preview | **Playbook Clauses** | Clauses | GSA | Key Info

Playbook Selection: Sample Playbook | Match %: 80 | **Process**

MATCHED (6)

SAMPLE PLAYBOOK (6)

6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statem... [Read more](#)

Playbook Match

CONFIDENTIALITY 80.7% [View](#)

6.3 Non-Disclosure and Limitation of Use. Except as provided in Section 6.1, Receiving Party shall not disclose the Disclosing Party's Confidential Information,.... [Read more](#)

Add to Library

6.3 Non-Disclosure and Limitation of Use. Except as provided in Section 6.1, Receiving Party shall not disclose the Disclosing Party's Confidential Information, except to its employees or agents in accordance with Section 6 and sh... [Read more](#)

Add To Library

Clause Name: Confidentiality

Clause Text: 6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work.

Negotiating Comment

Business Justification Field

Add to Playbook:

Playbook: [New Playbook](#)

Playbook Selection: Type to search...

Add Clause **Cancel**

Add To Library

Clause Name: Confidentiality

Clause Text: 6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work.

Negotiating Comment: AI drafting ...

Business Justification Field

Add to Playbook:

Playbook: [New Playbook](#)

Playbook Selection: Type to search...

Add Clause **Cancel**

Click the AI icon...

Add To Library

Clause Name: Confidentiality

Clause Text: 6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work.

Negotiating Comment

AI suggestion

We prefer to maintain strict confidentiality obligations, ensuring that any disclosure of Confidential Information is limited to necessary parties only. Our fallback position is to allow disclosure only under legal compulsion, with prior notice to us. We are concerned about potential risks related to unauthorized disclosures and the impact on our competitive advantage.

Hide reasoning

Reasoning: This comment outlines our preferred position while addressing fallback options and associated risks.

Apply **Cancel**

Business Justification Field

...to draft suggested text for the field.



Clause Name: Confidentiality

Clause Text: 6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work.

Negotiating Comment: We prefer a strong confidentiality clause that limits disclosure to only necessary parties and requires prior notification for legal requests. As a fallback, we can accept a clause that allows disclosure to affiliates but still requires reasonable

Business Justification Field: The confidentiality clause is essential to protect sensitive information shared between parties, ensuring that disclosures are limited to necessary affiliates and that prior notification is provided for legal requests. This safeguards our interests

Add to Playbook: New Playbook

Playbook Selection: Sample Playbook

Clause added to playbook successfully.

Add to existing Clause Playbooks

Clause Name: Confidentiality

Clause Text: 6.2 Confidentiality Obligations. It is anticipated that each of the parties will disclose to the other party Confidential Information in the course of performing such parties' obligations under the Agreement, including each Statement of Work.

Negotiating Comment: We prefer to maintain strict confidentiality obligations, ensuring that any disclosure of Confidential Information is limited to necessary parties only. As a fallback, we can agree to disclose information to affiliates under similar

Business Justification Field: The confidentiality clause is essential to protect sensitive information shared between parties, ensuring that it is only disclosed to necessary affiliates under similar obligations. This safeguards our competitive advantage and maintains trust

Add to Playbook: New Playbook

Playbook Name: [Empty]

Playbook Description: [Empty]

Save Playbook

Or create a new Clause Playbook

3. Managing Playbooks at the Clause Level

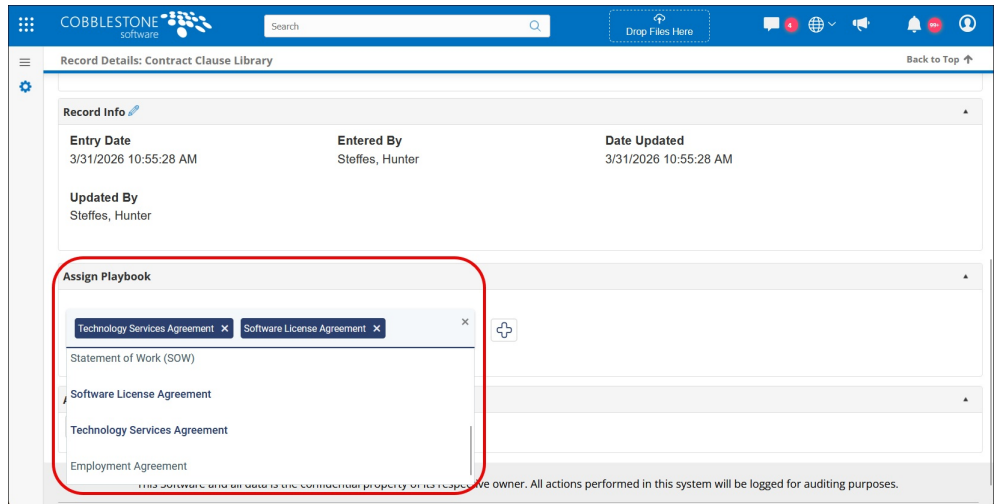
Clause Playbooks can also be managed directly from the Clause Library, giving admins flexibility to assign and maintain playbooks as part of normal clause maintenance.

From the Clause Library, users can:

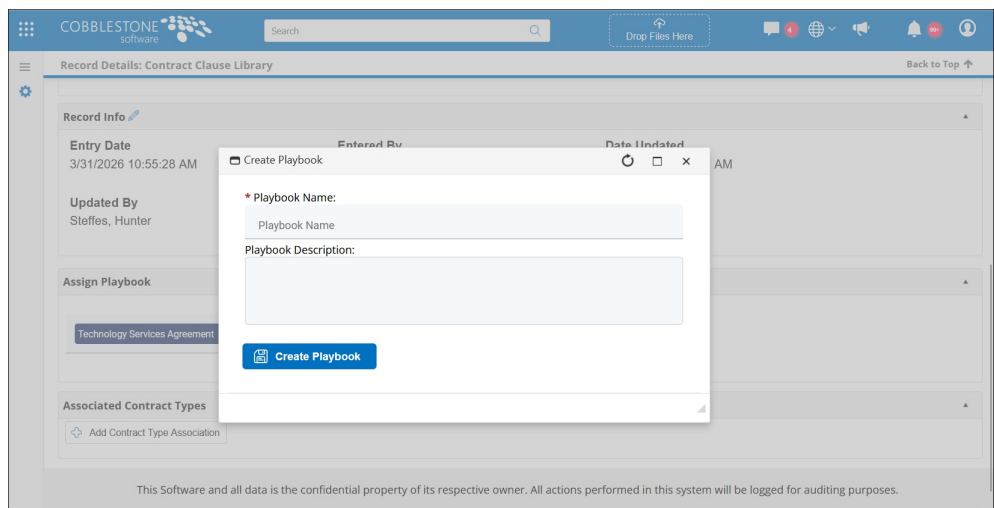
- Add or update Negotiating Comments and Business Justifications

Clause Name	Clause Text	ID
Non-Compete	During the term of this Agreement and for a period of twelve (12) months following its termination, Consultant shall not directly or indirectly solicit, recruit, or hire any employee or contractor of Client without Client's prior written consent.	214
Is Active	Clause Preference	Wisdom Category
Yes		
DFARClauseID	Is Preferred Version	Federal Clause Library Number
0	No	
Business Justification	Negotiating Comments	
We prefer a shorter non-compete period of six months post-termination to allow for greater flexibility in future opportunities. If the client insists on twelve months, we can agree but would like to negotiate a reduced scope of covered individuals. Be aware that a lengthy non-compete may limit our ability to work in the industry.	The non-compete clause is essential to protect the Client's workforce and proprietary information, ensuring that the Consultant does not leverage relationships developed during the engagement to the detriment of the Client.	

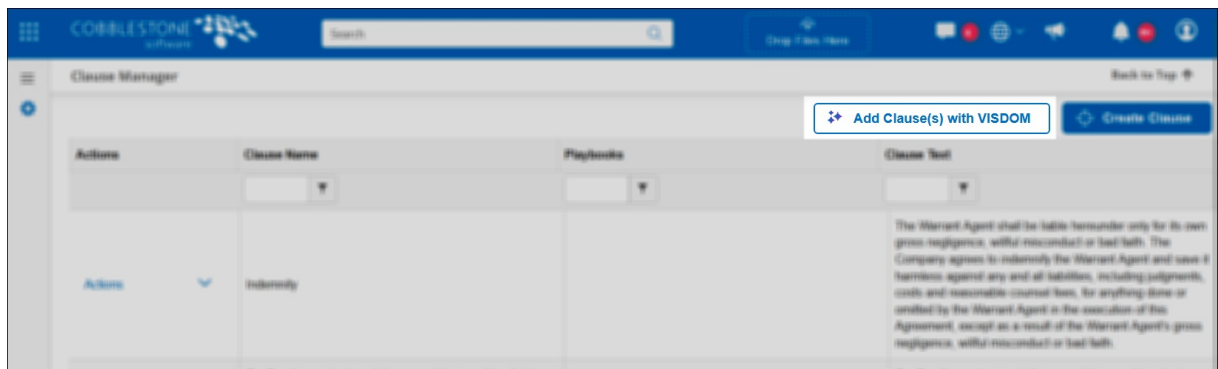
- Assign existing clauses to one or more Playbooks (assigned Playbooks appear bolded in the list)



- Create a new Playbook directly from a clause by clicking the plus icon next to the Playbooks field



New clauses can also be added using VISDOM, allowing teams to extract clauses from documents, compare them against existing standards, and update the Clause Library and associated playbooks in one streamlined workflow.





COBBLESTONE software

Search

Drop Files Here

Add Clause(s) with VISDOM

Back to Top ↑

Upload files
Upload documents and templates for processing. VISDOM will extract clauses for review.

Browse Or drop files here

- EDGAR_Master Services Agreement_Coronado Biosciences Inc_Pro... X
- EDGAR_Master Services Agreement_Coronado Biosciences Inc_Pro... X

Process File(s) Go Back

This Software and all data is the confidential property of its respective owner. All actions performed in this system will be logged for auditing purposes.

COBBLESTONE software

Search

Drop Files Here

Add Clause(s) with VISDOM

Back to Top ↑

Files
EDGAR_Master Services Agreement_Coronado Biosciences Inc_Progenitor C ... View/Edit >

Create Clause Save and Continue

All
entire agreement

Order Best Match%

Entire Agreement 82.8% Match

9.5 Entire Agreement. This Agreement constitutes the entire agreement of the parties with regard to its subject matter, and supersedes all previous written or oral representations, agreements and understandings between CORONADO and Service Provider. In the event of any conflict, discrepancy, or inconsistency between this Agreement and any Statement of Work, the terms of the Statement of Work will control. The execution of a Statement of Work by one party which is not executed by the other party shall not be deemed an agreement or evidence against the party executing the Statement of Work as to the intent of the parties at the time of the first party's execution of the Statement of Work.

File: EDGAR_Master Services Agreement_Coronado Biosciences Inc_Progenitor Cell Therapy LLC.pdf PG: 6

Negotiating Comment Business Justification

Assign To Playbook(s)

Playbook
* Playbook Selection

New Playbook

Clause Review Compare To Existing

Suggested Match
Sample Playbook

Entire Agreement 82.8% Match

45. Entire Agreement. The Parties acknowledge that, as between NFLE, on the one hand, and CBS, AOL and SportsLine, collectively, on the other hand, this Agreement reflects the entire understanding of the Parties with respect to the subject matter hereof, that this Agreement cancels, terminates and supersedes any prior or contemporaneous agreement or understanding, whether oral or

Select Specific
Select Playbook
Select Clause

Entire Agreement

9.5 Entire Agreement. This Agreement constitutes the entire agreement of the parties with regard to its subject matter, and supersedes all previous written or oral representations, agreements and understandings between CORONADO and Service Provider. In the event of any conflict, discrepancy, or inconsistency between this Agreement and any Statement of Work, the terms of the Statement of Work will control. The execution of a Statement of Work by one party which is not executed by the other party shall not be deemed an agreement or evidence against the party executing the Statement of Work as to the intent of the parties at the time of the first party's execution of the Statement of Work.

Update Existing Clause Text

81.9%

This Software and all data is the confidential property of its respective owner. All actions performed in this system will be logged for auditing purposes.



COBBLESTONE software

Search

Drop Files Here

Add Clause(s) with VISDOM

Files: L_Master Services Agreement_... View/Edit >

All entire agreement

Order: Best Match%

Entire Agreement 82.8% Match

9.5 Entire Agreement. This Agreement constitutes the entire agreement of the parties with regard to its subject matter, and supersedes all previous written or oral representations, agreements and understandings between CORONADO and Service Provider. In the event of any conflict, discrepancy, or inconsistency between this Agreement and any Statement of Work, the terms of the Statement of Work will control. The execution of a Statement of Work by one party which is not executed by the other party shall not be deemed an agreement or evidence against the party executing the Statement of Work as to the intent of the parties at the time of the first party's execution of the Statement of Work.

File: L_Master Services Agreement_... PG: 6

Negotiating Comment Business Justification

Assign To Playbook(s)

Playbook [New Playbook](#)

* Playbook Selection

81.9%

Clause Review

Compare To Existing

Suggested Match

Sample Playbook

Entire Agreement 82.8% Match

45. Entire Agreement. The Parties acknowledge that, as between NFLE, on the one hand, and CBS, AOL and SportsLine, collectively, on the other hand, this Agreement reflects the entire understanding of the Parties with respect to the subject matter hereof, that this Agreement cancels, terminates and supersedes any prior or contemporaneous agreement or understanding, whether oral or

Entire Agreement

45.9.5 Entire Agreement. ~~The Parties~~ This ~~acknowledge~~ Agreement ~~that constitutes as the~~ ~~between entire NFLE agreement on of the one parties hand~~ with regard to its subject matter, and CBS supersedes all previous written or oral representations, AOL agreements and SportsLine understandings ~~collectively~~ between ~~on~~ CORONADO and Service Provider. In the ~~the other hand~~ of any conflict, discrepancy, or inconsistency between this Agreement ~~reflects and the entire~~ Statement ~~understanding of~~ Work, the terms of the ~~Parties~~ Statement ~~without respect~~ Work ~~will the control. subject~~ The ~~matter~~ execution ~~hereof, of that~~ this Statement ~~Agreement of cancels~~ Work ~~terminates by and one supersedes~~ party ~~any which prior is or not~~ contemporaneous executed by the other party shall not be deemed an agreement or ~~understanding~~ evidence ~~whether~~ against ~~oral~~ the ~~or~~ party executing the Statement of Work as to the intent of the parties at the time of the first party's execution of the Statement of Work.

This Software and all data is the confidential property of its respective owner. All actions performed in this system will be logged for auditing purposes.

Compare an extracted clause to a Suggested Match from the Clause Library...

COBBLESTONE software

Search

Drop Files Here

Add Clause(s) with VISDOM

Files: EDGAR_Master Services Agreement_Coronado Biosciences Inc_Progenitor C... View/Edit >

All entire agreement

Order: Best Match%

Entire Agreement 82.8% Match

9.5 Entire Agreement. This Agreement constitutes the entire agreement of the parties with regard to its subject matter, and supersedes all previous written or oral representations, agreements and understandings between CORONADO and Service Provider. In the event of any conflict, discrepancy, or inconsistency between this Agreement and any Statement of Work, the terms of the Statement of Work will control. The execution of a Statement of Work by one party which is not executed by the other party shall not be deemed an agreement or evidence against the party executing the Statement of Work as to the intent of the parties at the time of the first party's execution of the Statement of Work.

File: L_Master Services Agreement_... PG: 6

Negotiating Comment Business Justification

Assign To Playbook(s)

Playbook [New Playbook](#)

* Playbook Selection

Clause Review

Compare To Existing

Select Specific

Sample Playbook

Waiver

Entire Agreement

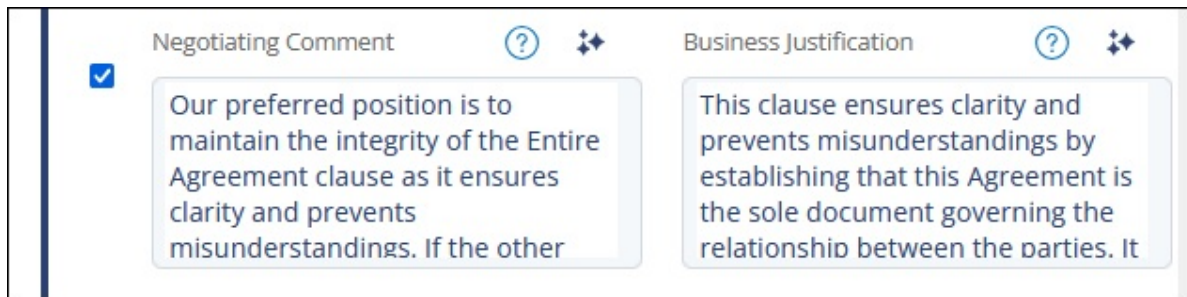
399.5 No Entire Waiver Agreement. ~~The This failure~~ Agreement ~~of constitutes any~~ the entire agreement of the ~~Parties~~ parties with regard to ~~insists upon~~ subject matter, and supersedes all previous written or ~~enforce oral strict~~ representations, ~~performance~~ agreements ~~by and~~ the understandings ~~other~~ between Parties () and Service Provider. In the event of any ~~provision~~ conflict, ~~of discrepancy, or inconsistency~~ between this Agreement ~~and~~ ~~any~~ ~~exercise~~ Statement ~~any of right~~ Work, ~~under the this terms~~ Agreement ~~of shall the not~~ Statement ~~be of~~ construed ~~Work as will~~ control. The execution of a ~~waiver~~ Statement ~~or of relinquishment~~ Work ~~to by~~ anyone ~~extent~~ party ~~of which~~ such ~~Party's not right~~ executed ~~to by~~ assert ~~the or other~~ rely ~~party~~ ~~upon shall any not~~ such ~~be provision~~ deemed an agreement or ~~right~~ evidence ~~in~~ against ~~that~~ the ~~or party~~ ~~any~~ executing ~~other~~ the ~~instance~~ Statement ~~rather, of~~ Work as to the ~~same~~ intent ~~shall of~~ be ~~the and~~ parties ~~remain at in the full time~~ force ~~of and the effect~~ first party's execution of the Statement of Work.

This Software and all data is the confidential property of its respective owner. All actions performed in this system will be logged for auditing purposes.

...to an existing clause in a specified Clause Playbook



AI-assisted suggestions help draft negotiating comments and business justifications, giving teams a faster starting point while retaining full control.



What's New

Smarter clause matching

When reviewing a document using VISDOM, its content is automatically compared against your Clause Library. The most relevant approved language is surfaced, helping reviewers move faster with confidence.

Centralized playbook management

Admins can manage playbooks either from a dedicated management area or directly within the Clause Library—keeping standards aligned as they evolve.

Clear guidance for reviewers

Business Justifications explain why a clause is recommended, making it easier to leave consistent, well-supported comments and redlines.

Use multiple playbooks at once

Apply multiple playbooks during a single review—ideal when contracts span different deal types, industries, or counterparties.

Clause Playbooks transform your contract standards into practical, actionable guidance—available wherever contracts are reviewed.

NEW FEATURE: Automated Obligation Detection & Task Creation with VISDOM

Reference #: 260330.1222.15813

We've introduced a powerful new capability that helps you quickly identify obligations within legal or contractual documents and turn them into actionable tasks—automatically.



VISDOM can now scan documents to find obligations (such as requirements, deadlines, or responsibilities), highlight them, and add them directly to your records. These identified obligations can then drive tasks, reminders, and updates—helping ensure nothing important is missed.

How this helps you

- Save time: Automatically find obligations instead of manually reviewing lengthy documents.
- Reduce risk: Ensure key commitments and deadlines are clearly captured and tracked.
- Improve consistency: Standardize how obligations are identified and managed across records.

Key capabilities

- Automatic obligation detection: VISDOM highlights potential obligations within your documents.
- Centralized obligation tracking: All detected (and manually added) obligations appear in a new “Obligations Found” section on the record.
- Actionable follow-up: Obligations can trigger tasks or updates based on your configured rules.
- Flexible review: You can review, edit, add, or save only the obligations that matter to you.

New: Obligation Type Manager

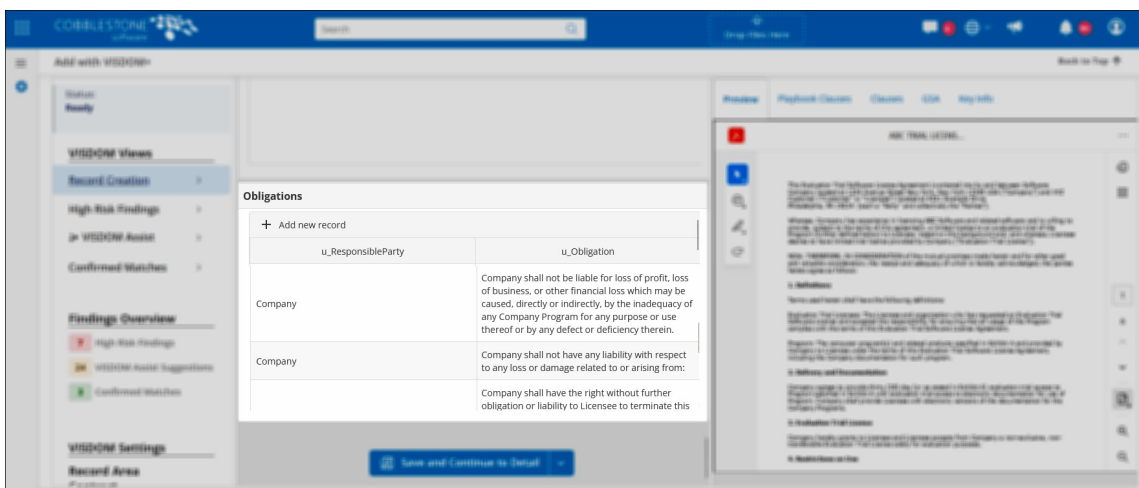
Administrators can now manage obligation categories in one place:

- Create, edit, or remove Obligation Types
- Define how VISDOM recognizes each type
- Optionally link obligation types to automated actions (such as field updates or task creation)

This new setup gives teams greater control over how obligations are identified and handled.

Where you’ll see it

- While adding or editing records with VISDOM





- On the Record Details page under the new “Obligations Found” subtable

COBBLESTONE software

Search

Drop Files Here

Contract Details

Show Notifications and Alerts

Record Details Private Field Group **Subtables** Tasks & Emails Attachments & Templates Linked Records Notes & Additional Info Ratings & Surveys

Obligations Found

+ VISDOM Find Obligations Create Obligation

Drag a column header and drop it here to group by that column

	Associated Party	Type	Obligation Text	File
▶ View		No obligation type associated	Consultant agrees that during the Term he/she will devote up to Ten (10) days per month to his/her Duties.	
▶ View	Internal	No obligation type associated	The Company shall pay Consultant a consulting fee of \$5,000.00 for Services provided to the Company.	
▶ View	Internal	No obligation type associated	Early termination fee of \$10,000 will be paid within 10 days.	
▶ View		No obligation type associated	Consultant shall comply, to the best of his/her knowledge, with all business conduct, regulatory and health and safety guidelines established by the Company.	
▶ View		No obligation type associated	Consultant will not, directly or indirectly, solicit or request any employee of or consultant to the Company to leave the employ of or cease consulting for the Company.	

- From the document toolbox, where you can choose a file and extract obligations on demand



Document Tools

.pdf 78 KB

Attachment ID: 7099	Record ID: 59410	OCR Status: Complete
-------------------------------	----------------------------	--------------------------------

Manage [Download] [Clock] [Upload] [Document with Pencil] [Trash]

Signatures & Approvals

Esign Document IntelliSign Now IntelliApprove

Manage

Auto Redline Compare OCR Combine PDFs Update with VISDOM Find Obligation

Obligations can also be added manually from the Record Details subtable tab and do not require an obligation type to be assigned.

CORE SYSTEM ENHANCEMENTS



ENHANCEMENT: Reintroduced Drag-and-Drop Multiple File Upload to One Record

Reference #: 260330.1273.26810

We've improved the drag-and-drop experience to make adding multiple files to a single record faster and more intuitive.

You can again drag several files into the system at once and attach them all to one record in a single action. When you begin creating the record, the files you dragged in will stay with you throughout the process and will automatically be added as attachments when you save.

This enhancement restores the convenient work path many users relied on—no more repeating steps for each file or deciding what to do with every upload. Just drag, create, and save.

How it works:

- Drag and drop multiple files at the same time
- Choose *Create New Record*
- Select the *Attach to Record* option then continue through the VISDOM Add process
- When you save the new record, all the files you dragged in will appear in the Attachments section

This update streamlines your workflow and saves time, especially when working with several related files.

CORE SYSTEM RESOLUTIONS

RESOLUTION: Drag-and-Drop Requests Not Triggering Pending Notification Emails

Reference #: 260330.1259.24281

When Contract Requests were created using the drag-and-drop option, the Request was successfully submitted but notification emails were not sent to the review group to indicate that the Request was pending.

This behavior did not occur when Contract Requests were created using the standard (manual) entry method.

Contract Requests created via drag-and-drop will now correctly send pending notification emails to the appropriate review recipients, consistent with manually created requests.



RESOLUTION: Workflow Task Email Notification Template Causing Duplicate Action Buttons

Reference #: 260330.1259.25224

In certain Workflow task emails, duplicate action buttons appeared when a task included an automatic field update. This resulted in multiple buttons being displayed for the same task status, which could cause confusion when responding to the email.

Workflow task emails now display only one action button per task status, as intended. In addition, the task email buttons have received a minor visual update to improve clarity and consistency.

RESOLUTION: Contract Note Permissions Refresh Causing Delete Option to Appear Incorrectly

Reference #: 260330.365.25532

In certain scenarios, users who had permission to add Contract Notes briefly saw the delete option appear after refreshing the page or saving a note, even if their security group did not allow note deletion. This led to confusion around which users were permitted to delete notes.

The system now consistently respects security group permissions for Contract Notes. Users will only see the delete option if their security group explicitly allows it, regardless of page refreshes or note updates.

RESOLUTION: Contract Creation Workflow Timing Issue Delaying Automatic Document Attachment

Reference #: 260330.1203.27872

When Contracts were created with an automated document-generation workflow, the associated template did not always attach immediately. Although a generation message appeared, the document often did not display until the page was fully reloaded or the user logged out and back in. This caused delays and interruptions for teams creating multiple contracts throughout the day.

Document-generation workflows now complete reliably at the time of Contract creation, and the generated document attaches automatically without requiring page reloads or re-login. The process has been improved to ensure workflow steps remain synchronized and complete as expected.

RESOLUTION: Details Page Hyperlink Configuration Causing Links to Open in the Same Window

Reference #: 260330.337.28018



URL fields configured to open in a new tab or window did not behave as expected when clicked from the Details page. Instead of opening a new tab, the link opened in the current window, which could interrupt a user's workflow.

Hyperlinks configured to open in a new tab or window now follow that setting correctly when accessed from the Details page.

RESOLUTION: Field Display Formatting Causing Inconsistent Text Highlighting on Details Pages

Reference #: 260330.337.29250

Users experienced inconsistent behavior when highlighting text on Record Details screens. Clicking and dragging to select text did not always work as expected—sometimes no text was selected, and other times only part of a word was highlighted. This made it difficult to reliably copy information and disrupted normal workflows.

Text fields have been updated to ensure consistent text-selection behavior across the application. Users can now reliably highlight and copy full words or sections of text without issue.

RESOLUTION: Dropdown Field Sorting Logic Overriding Configured Value Order

Reference #: 260330.337.29509

When editing dropdown fields on top-level records (such as Contracts and Requests), the available options were displayed in alphabetical order, even when a different order had been configured. This caused dropdown lists to appear in an unexpected sequence that did not match the intended setup.

Dropdown fields now display values in the configured order, whether that order is defined by how the list was set up or by system logic behind the scenes. The application no longer forces alphabetical sorting when editing these fields.



Update 22.7.0 (Rev 260330) - 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: Vendor/Client Gateway Performance & Experience Improvements

Reference #: 260330.1258.13429

We've made an important behind-the-scenes improvement to the Vendor/Client Gateway experience to better support performance, usability, and future enhancements.

What's New

- Improved performance and responsiveness
 - The VCG experience has been modernized on an updated platform, resulting in faster load times and a smoother overall experience.
- More consistent, modern user experience
 - The update better aligns the VCG interface with today's UI and usability standards, improving reliability and long-term scalability.
- Configurable menu restored
 - The customizable navigation menu has been reintroduced, allowing teams to tailor access to what matters most.
- Customizable Help page
 - The Help page can now be customized again to better reflect your organization's content and guidance.

What This Means for You

- No changes to your existing workflows



- All existing Vendor/Client Gateway functionality continues to work as expected
- A stronger foundation that enables future enhancements and improvements

VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: Gateway E-Sourcing File Preview Display Condensed

Reference #: 260330.1203.29162

When users previewed a document from an E-Sourcing record in the Gateway, the preview window initially opened in a condensed or smaller-than-expected size. This made the document difficult to view until the window was resized or refreshed.

The document preview window now opens fully maximized on first view, providing a consistent and clear display right away. This ensures documents are immediately readable without requiring additional user interaction.
