



CobbleStone Software - Release Notes

Contract Insight Version 22.7.1 Rev 2600501 (Patch)



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Patch Overview-Version 22.7.1

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>)
22.7.1 (Rev 260501)	06 May 2026	Patch



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

For CobbleStone Software version 22.7.1 (Rev 260501), 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
- VISDOM+
- [CobbleStone Software Mobile Application](#) (Under the CobbleStone Add-ins and Applications Release Notes section)



Patch 22.7.1 - 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: Expanded VISDOM Feature Integration Enhancing Playbook and Clause Management in Collaborative Online Editor

Reference #: 260501.1203.26225

Enhancements have been made to the Collaborative Online Editor (COE) to further integrate VISDOM functionality previously available only through the Word add-in experience.

This release introduces Playbook functionality directly within the COE, including the ability to add clauses to Playbooks, view Playbook matches for found clauses, and manage Playbook selections within the VISDOM Review experience. Initial support for Swap Clauses functionality has also been included as part of this enhancement effort.



ABC TRIAL LICENSE AGREEMENT.docx (ID: 317) Saved Share Save

File Home Insert Layout Review View References CobbleStone

CobbleStone

Clauses

- Clause Library
- Found Clauses
- Playbooks

VISDOM Tools

- High Risk Findings
- Sentiment Indicators

Page 1 of 6 100%

Confidentiality Policy Powered by COBBLESTONE Software VISDOM Assist 1.0.0.0



Viewing Clause Library/Playbook Matches displays the match percentage, enables users to redline against the document text, and provides the option to replace content directly within the document:

The image consists of two side-by-side screenshots of the Cobblestone Software interface, illustrating the process of viewing and redlining clause matches.

Left Screenshot: The 'Found Clauses' screen shows a summary: 'Found 9 matched, 17 identified, and 0 GSA clauses.' Below this, there are controls for '14 selected' items and a '65%' match percentage. A list of 'Library / Playbook Matches (9)' is shown, with 'Clause Library (4)' highlighted by a red box. Other matches include 'Professional Services Standard Terms (1)', 'Sample Playbook (2)', 'Sample playbook 4/23/26 (1)', and 'Standard Consulting Agreement Terms (1)'. There are also sections for 'Missing Clauses (17)' and 'GSA Clauses'.

Right Screenshot: This screenshot shows a detailed view of a match. The 'Clause Library (4)' category is expanded, showing 'Amendments' (71% match) and 'Consideration' (71% match). The 'Consideration' match is selected, and its details are shown. The 'Found in Document' section displays the original text: 'now, therefore, in consideration of the mutual promises made herein and for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the parties hereto agree... Show More'. The 'Library Text' section shows the redlined version: 'NOW THEREFORE, now, therefore, in consideration of the mutual promises made herein and mutual covenants herein contained, for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the parties hereto agree as follows: SECTION 1 Definitions; Interpretation.' A 'Redline' toggle is turned on. A blue 'Replace in Document' button is visible at the bottom of the match details. Other matches like 'Governing Law (76%)' and 'Recitals (93%)' are also visible.



Clicking **Replace in Document** replaces the clause within the document and automatically adds comments identifying the deleted text and the inserted text:

The screenshot displays the CobbleStone Software interface for reviewing a document titled "ABC TRIAL LICENSE AGREEMENT.docx". The main document area shows a clause with two changes made by Jennifer Carvin on May 6, 2026, 1:11 PM. The first change is an insertion of the text "NOW THEREFORE, in consideration of the promises and mutual covenants herein contained, the parties hereto agree as follows: SECTION 1 Definitions; Interpretation." The second change is a deletion of the text "NOW, THEREFORE, IN CONSIDERATION of the mutual promises made herein and for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the parties hereto agree as follows:". Each change has "Accept" and "Reject" buttons.

On the right side, the "Found Clauses" panel shows that 9 clauses were matched, 17 were identified, and 0 were GSA clauses. It lists 14 selected items and 65% completion. A "Library / Playbook Matches" section shows 9 matches, including "Amendments" (4) and "Consideration" (4), both with green checkmarks. A "Found in Document" section shows the text of the clause being reviewed, with a "Redline" toggle and a "Replaced" status. A "Library Text" section shows the clause being replaced with the text from the library. The bottom of the interface shows "Page 1 of 6", "Confidentiality Policy", "Powered by COBBLESTONE SOFTWARE", and "Help | Version 1.0.0.0".

Clicking Add to Playbook allows users to add the clause to an existing Playbook or create a new Playbook, while also entering a Business Justification and Negotiating Comments for the clause:



COBBLESTONE software

Found Clauses

Found **21** identified and **0** GSA clauses.

Select playbook(s)... 65%

Active Items **Reload**

Identified Clauses (21)

Amendments **VISDOM**

Clause Text:
this evaluation trial software license agreement shall not be deemed or construed to be modified, amended, rescinded, cancelled or waived, in whole or in part, except by written amendment signed by... [Show More](#)

Add to Playbook

Add to Clause Library

- Assignment **VISDOM**
- Audit Rights **VISDOM**
- Compliance with Laws **VISDOM**
- Confidentiality **VISDOM**
- Consideration **VISDOM**
- Force Majeure **VISDOM**
- Governing Law **VISDOM**

Add Clause

Clause Name: *
Amendments

Clause Text: *
this evaluation trial software license agreement shall not be deemed or construed to be modified, amended, rescinded, cancelled or waived, in whole or in part, except

Add to Playbook

Existing Playbook **New Playbook**

Playbook Name: *
Select playbook...


Business Justification: ⓘ

Negotiating Comments: ⓘ

Cancel **Add Clause**



From the Playbooks menu, users can view all Playbooks or only their own Playbooks and perform actions such as Edit Playbook (pencil icon), Compare Against Document Clauses (book icon), and Run a Playbook Review (replay icon):










































COBBLESTONE software  ?


☰ Playbooks

13 playbooks with 112 clauses. ⓘ

 All Playbooks  Reload



- > Consulting Agreement (created via VISDOM Add)   
- > Employment Agreement ⓘ   
- > Franchise Agreements   
- > Independent Contractor Agreement ⓘ   
- > Master Services Agreement (MSA) ⓘ   
- > Playbook from Clause   
- > Professional Services Standard Terms ⓘ   
- > Sample Playbook ⓘ   
- > Sample playbook 4/23/26   
- > Software License Agreement ⓘ   
- > Standard Consulting Agreement Terms   
- > Statement of Work (SOW) ⓘ   
- > Technology Services ⓘ   




New Playbook

COBBLESTONE software  ?

☰ Playbooks

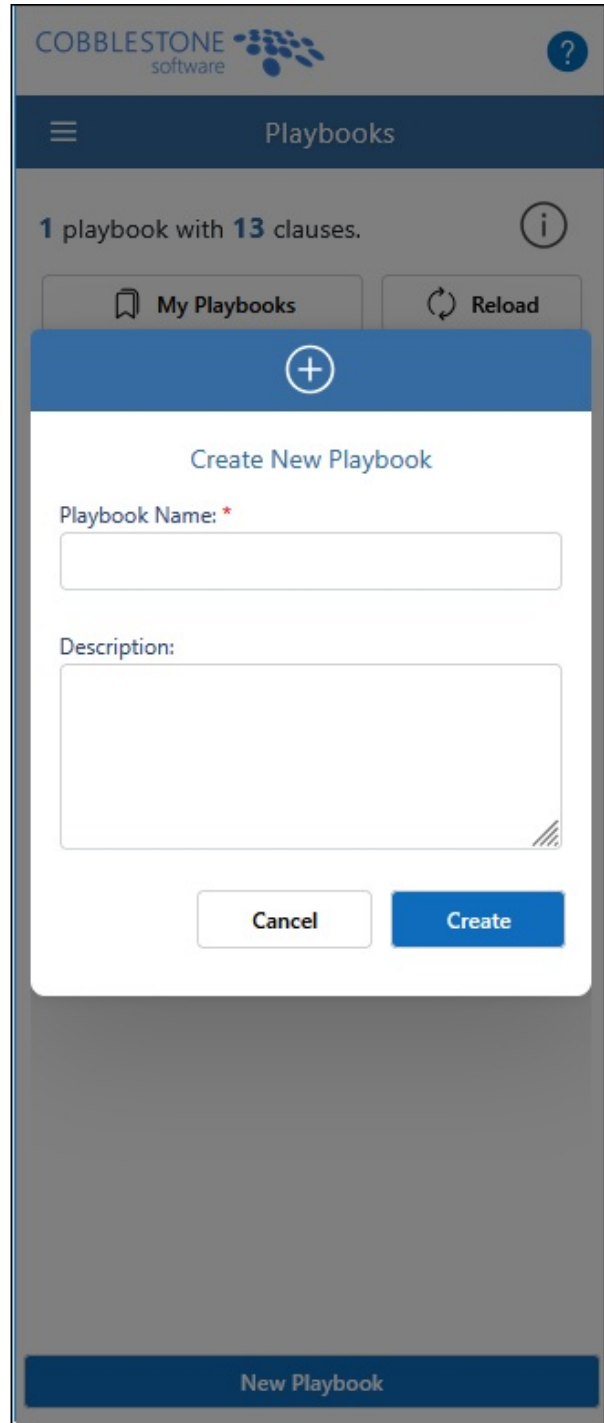
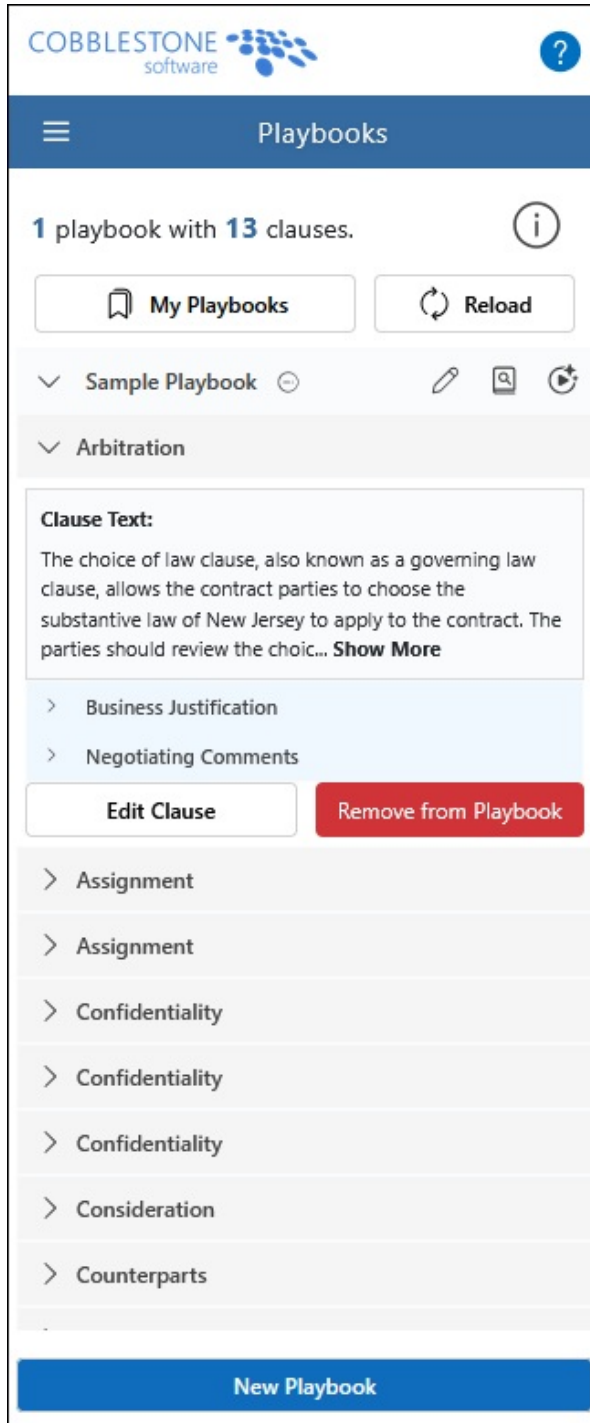
1 playbook with 13 clauses. ⓘ

 My Playbooks  Reload

- > Sample Playbook ⓘ   

New Playbook

Users can also edit existing Playbooks and create new Playbooks:



These updates provide a more streamlined and centralized document review experience by bringing additional VISDOM tools directly into the browser-based collaboration environment.

CORE SYSTEM RESOLUTIONS



RESOLUTION: Filtered Counterparty Dropdown Not Persisting Selection During VISDOM Drag-and-Drop Contract Creation

Reference #: 260501.1275.29374

Users experienced an issue where the Counterparty (Vendor/Client Name) field was not recognized as populated when creating a record via VISDOM drag-and-drop if the field was configured as a filtered dropdown. This prevented users from saving without reselecting the value and, in some cases, resulted in no company being associated on the details page. Additionally, deleted companies were appearing in the dropdown list.

This issue was caused by how filtered dropdown selections were being captured on the add screen. The VISDOM interface has been updated to properly recognize and retain Counterparty values selected from filtered dropdowns during drag-and-drop processing, ensuring accurate field population and preventing invalid dropdown entries from appearing.

RESOLUTION: Configuration Values to Appear Missing when Selected

Reference #: 260501.365.30699

Users experienced an issue where selected values within Application Configuration, Department/Business Unit, and Workflow Manager grids appeared to disappear after being chosen. This was caused by a page styling conflict that made the selected text appear hidden. The issue has been resolved, and selected values now display correctly when configuring settings.

RESOLUTION: Improper URL Formatting Causing Legacy Editor to Close and Redirect to Dashboard

Reference #: 260501.1273.33013

Users experienced an issue where attempting to open the Legacy Editor would briefly load and then return them to the main dashboard. This occurred when certain file names contained spaces or special characters, which disrupted how the system processed the request and triggered a security redirect.

This has been resolved by improving how file information is handled behind the scenes, ensuring the Legacy Editor opens as expected regardless of file naming.

RESOLUTION: Permission Controls Added to Restrict Tracked Changes Management in Collaborative Online Editor

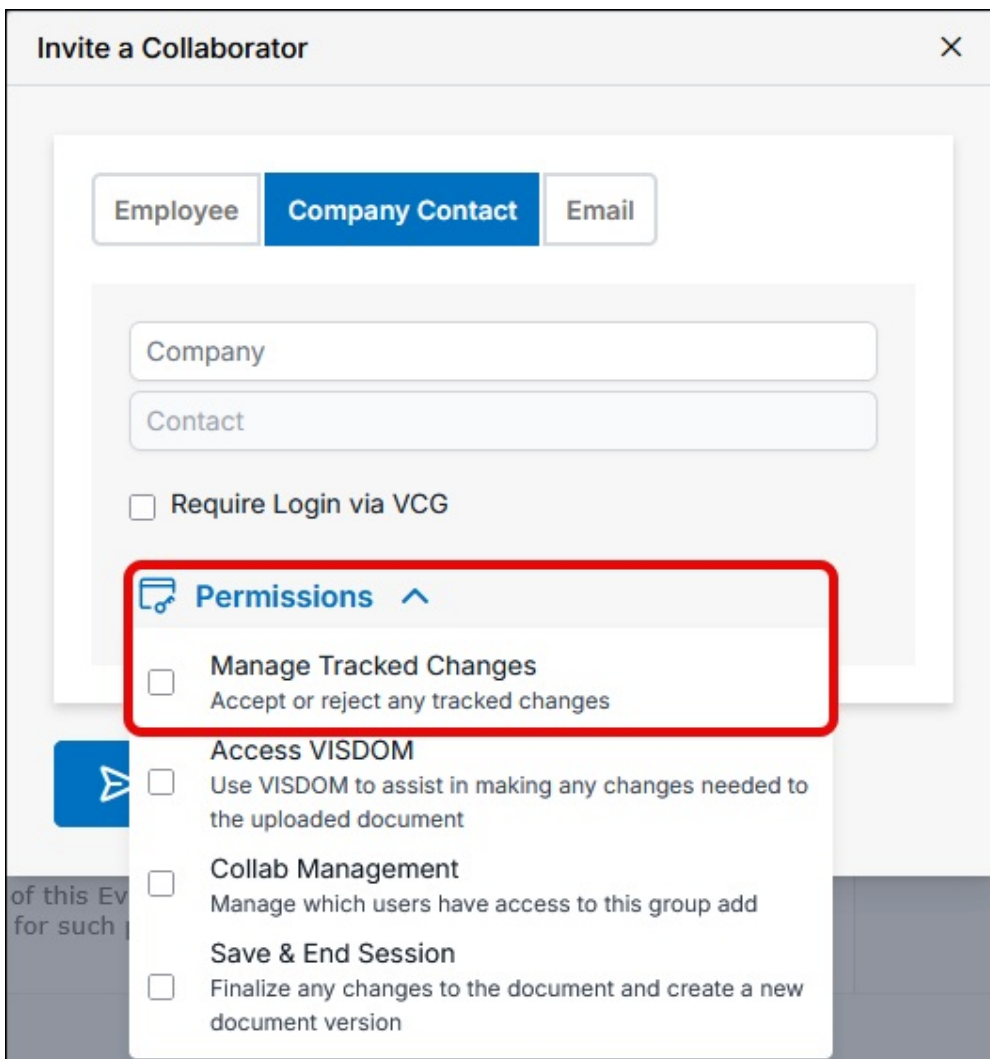
Reference #: 260501.1203.34226



Permission controls have been introduced to better manage how tracked changes are handled within the Collaborative Online Editor.

Employees assigned the *“Collaborative Online Editor: Prevent Tracked Changes Management”* permission can no longer grant collaborators the ability to accept or reject tracked changes, nor can they be given that ability when invited to a collaboration.

Employees without this restriction can continue to assign the *“Manage Tracked Changes”* option to Employee, Company Contact, and Email collaborators. However, this option cannot be assigned to any Employee who has the restriction in place. If selected, the system will automatically remove the option upon sending the invitation and notify the sender that the selected user does not have permission to manage tracked changes.



These updates help ensure that only authorized users can control the approval of tracked changes, supporting more structured and secure document review workflows.



RESOLUTION: Missing Import Validation Causing Unintended Removal of System Administrator Access

Reference #: 260501.337.34580

An issue was identified where Employee records updated through the Data Import Manager could unintentionally lose their System Administrator access. This occurred when certain fields were not included in the import file, causing the system to incorrectly reset this setting during the update process.

This has been resolved by improving the validation logic during imports to ensure System Administrator access is only changed when explicitly intended. Existing permissions will now remain unchanged unless specifically updated.



Patch 22.7.1 - 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 RESOLUTIONS

RESOLUTION: Ineffective Default Sorting Causing Difficulty Identifying Pending Assignments on My Negotiation Assignments Page

Reference #: 260501.337.34528

Users experienced difficulty identifying which assignments still required action on the My Negotiation Assignments page. This was due to the default sorting displaying items by their original assignment date, which did not change after completion and caused completed items to remain at the top.

The default sorting has been updated to prioritize active assignments first, followed by the assignment date. This ensures that pending work remains clearly visible at the top of the page, with the oldest active assignments shown first.

RESOLUTION: Document Process Manager Checkout Restriction Preventing File Deletion When Not Checked Out

Reference #: 260501.337.26815

Users were required to check out a file before they could delete it, even when the file was not checked out by anyone else. This has been updated so users can now delete files without first checking them out, unless the file is currently checked out by another user.



Patch 22.7.1 - 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: Configuration Setting Providing Control Over Client Registration Login Email Notifications

Reference #: 260501.1203.34291

A new configuration setting, "Enable Alerts for Client Registration," has been added to provide greater control over Vendor/Client Gateway registration notifications.

When enabled, newly registered clients will continue to receive the standard registration email containing their login information. When disabled, the registration process will still complete successfully, but the login email will not be sent.

For auditing purposes, the system will continue to record an internal log entry whenever the email notification is disabled and no registration email is sent.

This enhancement provides organizations with additional flexibility in managing client onboarding communications and notification preferences.

VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: Public File Download Validation Preventing Access to Shared Contract Attachments

Reference #: 260501.1203.30518



Resolved an issue affecting public contract records in the Vendor/Client Gateway where users could preview attached documents but received an error when attempting to download them. The download validation process has been updated to directly verify the file and its associated collaboration settings, allowing users to successfully download publicly shared contract attachments without requiring login access.

RESOLUTION: Cached Subtable Data Causing Unintended Rows to Appear on Gateway Request Records

Reference #: 260501.1258.34159

Some users experienced an issue where subtables on Vendor/Client Gateway request forms could display unexpected rows, even when no subtable information had been entered during the request add process.

A correction has been implemented to ensure only intentionally entered subtable data is carried forward and displayed on the completed record.



Patch 22.7.1 - VISDOM+

Optional Add-On license that takes VISDOM, our powerful artificial intelligence (AI) backed by machine learning, to the next level with generative AI and other helpful functionality by harnessing OpenAI.

VISDOM+ ENHANCEMENTS

ENHANCEMENT: VISDOM+ Edit Experience Enhancements Improving Feature Consistency and Field Recognition Functionality

Reference #: 260501.1273.22931

Enhancements have been made to align the VISDOM+ Edit experience more closely with the existing VISDOM+ Add functionality, creating a more consistent and streamlined user workflow.

Users updating records with VISDOM+ will now experience the same enhanced navigation and interface behavior available during record creation, including access to the GSA tab and integrated field recognition capabilities within the Record Info area.

After running Update with VISDOM+, the screen will appear similar to the Add with VISDOM+ screen, displaying the extracted document information, identified clauses, and suggested record updates for review:

The right panel displays a Preview of the document; Clauses identified in the document that can be added to Training Data and/or the Clause Library; GSA Clauses found within the document; Key Info based on the selected Info Type; and Record Info, which contains the data identified for updating the record:



Preview | Clauses | **CLAUSE** | Key Info | Record Info

ABC TRIAL LICENS...

This Evaluation Trial Software License Agreement is entered into by and between Software Company located at 1234 Avenue Street New York, New York 12345 USA ("Company") and XYZ Customer ("Customer" or "Licensee") located at 4321 Example Drive Philadelphia, PA 19224 (each a "Party" and collectively the "Parties").

Whereas, Company has experience in licensing ABC Software and related software and is willing to provide, subject to the terms of this agreement, a limited license to an evaluation trial of the Program (further defined below) to Licensee based on this background and; and whereas, Licensee desires to have limited trial license provided by Company ("Evaluation Trial License");

NOW, THEREFORE, IN CONSIDERATION of the mutual promises made herein and for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the parties hereto agree as follows:

1. Definitions

Terms used herein shall have the following definitions:

Evaluation Trial Licensee: The Licensee and organization who has requested an Evaluation Trial Software License and accepted the responsibility for ensuring that all usage of the Program complies with the terms of this Evaluation Trial Software License Agreement.

Program: The computer program(s) and related products specified in Exhibit A and provided by Company to Licensee under the terms of this Evaluation Trial Software License Agreement, including the Company documentation for such program.

2. Delivery and Documentation

Company agrees to provide thirty (30) day (or as stated in Exhibit A) evaluation trial access to Program specified in Exhibit A with evaluation trial access to electronic documentation for use of Program. Company shall provide Licensee with electronic versions of the documentation for the Company Programs.

3. Evaluation Trial License

Company hereby grants to Licensee and Licensee accepts from Company a non-exclusive, non-transferable Evaluation Trial License solely for evaluation purposes.

4. Restrictions on Use

Preview | **Clauses** | **CLAUSE** | Key Info | Record Info

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[Add to Training Data](#) [Add to Clause Library](#)

ASSIGNMENT

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[Add to Training Data](#) [Add to Clause Library](#)

AUDIT RIGHTS

not make or permit to be made any more copies of any Company software, program, data, or documentation other than are necessary for the Licensee's internal evaluation of that Program.

[Add to Training Data](#) [Add to Clause Library](#)

Preview | **Clauses** | **CLAUSE** | **Key Info** | Record Info

Info Type
Decisions

Vendor / Client Name

Removing common business name words
Begin Text Extract By Category (NLP)
Returning paragraph.
Begin Double Metaphone > Levenshtein Process
Located 6 results using Metaphone encoding.
Selecting Result
Results found = 1
Single result found. Returning An Example Company

Department

Begin Double Metaphone > Levenshtein Process
Selecting Result
Results found = 9
Multiple results with the same score, use the most frequent. Returning - IT

Contains Indemnity Clause

Removing noise words
Begin Text Extract By Category (NLP)
No results for the the category Indemnification
Begin conditional output
No result found from previous algorithm.
Condition is false. Output user value

Occurrence

Preview | **Clauses** | **CLAUSE** | Key Info | **Record Info**

Details

Vendor / Client Name	Contract Title	Description
[123 Main Street Anytown NJ 08021 United States]	Consulting Agreement Updated	Sample description of this consulting agreement.
Department/Business Unit	Category	Checkbox
Consulting	Book Reviews	Yes
DateTime	Contract Type	Status
12/9/2020 12:00:00 AM	Consulting Agreement	Held
Employee	Entity	Renewal Notes
Renewed	Term/Occurrence	Date For Fiscal Budget Year
No	07 Year	



On the left panel, the High Risk Findings view displays clauses within the document that contain non-standard or uncommon language:

The screenshot shows the 'High Risk Findings' view. The left sidebar has 'High Risk Findings' selected. The main content area shows three findings:

- FORCE MAJEURE**: Clause Contains Non Standard Language. Reasoning: The clause provided does not contain standard language typically found in a Force Majeure clause, which usually outlines specific events (like natural disasters, war, etc.) that would excuse performance. Instead, this clause discusses limitations on the time to bring an action, which is not related to Force Majeure.
- RENEWAL**: Clause Contains Non Standard Language. Reasoning: The clause does not contain standard language typically found in Renewal clauses, as it refers specifically to termination upon expiration rather than outlining renewal terms.
- INTELLECTUAL PROPERTY**: Clause Contains Non Standard Language.

The VSDOM Assist view displays Record Updates, where users can update records with information identified in the document; Possible System Additions, where users can review and add information from the document that may not already exist in the system; and Sentiment, which displays the sentiment analysis of clauses found within the document:

The three screenshots show different views of the VSDOM Assist interface:

- Record Updates**: A table with columns for Description, Current, and Result. It shows updates to 'Simple description of the underlying agreement' and 'The Company shall have the right to assign or otherwise transfer its rights or obligations under this Evaluation Trial Software License Agreement except with the written consent of the Company'.
- Possible System Additions**: A list of 'Missing Clauses' such as 'Assignment' and 'Audit Rights' with 'Add Clause' and 'Copy' buttons.
- Sentiment**: A list of clauses with sentiment analysis results, including 'ASSIGNMENT', 'ASSIGNMENT', and 'AUDIT RIGHTS'.

And, the Confirmed Matches view displays information from the document that already exists within the system:



The screenshot displays the VISDOM+ interface for document analysis. On the left, a sidebar contains a 'Status' section with a 'Newly' filter, a 'File' section with the document name 'ABC TRAIL LICENSE AGREEMENT.docx', a 'Process File' button, and a 'VISDOM Views' section with expandable options for 'High Risk Findings', 'VISDOM Asses', and 'Confirmed Matches'. Below this is a 'Findings Overview' section with three categories: 'High Risk Findings' (red), 'VISDOM Asses Suggestions' (yellow), and 'Confirmed Matches' (green). The main content area on the right features a 'Filters' bar with 'Clauses (0)', 'Counter Parties (1)', and 'Locations (2)'. Below the filters, three findings are listed: 'Found Location' (New York), 'Found Location' (United States), and 'Found Counter Party' (Software Company). Each finding includes a 'Copy' icon.

These improvements provide a more unified editing experience and help simplify document review and data recognition processes across VISDOM+ workflows.