



# **CobbleStone Software - Release Notes**

**Contract Insight Version 22.7.2 Rev 260527 (Patch)**



# Table of contents

Release Notes > Contract Insight > Version 22.7 > Patch 22.7.2 (Rev 260527)

<a href="#">Patch Overview-Version 22.7.2</a> .....	3
<a href="#">Patch 22.7.2 - Core System: Contract Insight</a> .....	4
<a href="#">Patch 22.7.2 - Module: Document Collaboration &amp; E-Signature</a> .....	12
<a href="#">Patch 22.7.2 - Module: Vendor/Client Collaboration Gateway</a> .....	16



# Patch Overview-Version 22.7.2

## 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> )
22.7.2 (Rev 260527)	27 May 2026	Patch



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

For CobbleStone Software version 22.7.2 (Rev 260527), 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



# Patch 22.7.2 - 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: Enhanced Field Mask Formatting Support Preserving Display Values in Document Template Merges**

*Reference #: 260527.1157.25772*

Enhancements have been made to Document Template merging to ensure fields configured with Field Masks retain their formatted display values in generated documents.

When merging templates, formatted values such as phone numbers, grouped numbers, and decimal formatting will now display consistently with how they appear within the CobbleStone interface. This functionality applies automatically during document generation and does not require any updates to existing templates.

Please note that spreadsheet-based output formats, such as Excel and CSV files, may not retain numeric formatting for Integer, Decimal, and Decimal4 field types due to formatting limitations inherent to spreadsheet applications. The underlying data will still merge successfully and can be formatted directly within the spreadsheet if needed.

### **ENHANCEMENT: Streamlined Document Template Configuration Workflow Improving Setup Efficiency and Usability**

*Reference #: 260527.1157.26764*



Enhancements have been made to the Document Template configuration experience to provide a more streamlined and user-friendly workflow within the Core system.

Previously, users needed to navigate across multiple separate pages and panels to manage template fields, placeholders, and configuration settings. This update consolidates key setup actions into a more intuitive experience, reducing unnecessary navigation while preserving all existing functionality and system behavior.

These interface improvements are designed to help template creators work more efficiently, reduce setup complexity, and provide a smoother overall configuration experience ahead of the upcoming platform modernization efforts.



COBBLESTONE software

Search

Drop Files Here

Document Authoring Manager: Template Overview

Contracts Active

Return to Template List

Setup

Core Setup

Subtables Setup

Approvals & Signatures

Content Setup

Additional Links

Template Overview Information

Create New Template

Terms

CobbleStone Software 22.7.0 (rev 260423)

### Core Setup

**Mergeable Fields - Preview** 50 fields Manage

Define fields that can be merged into generated documents

Title	Manage
Contract Title	
Entered By	
Date Entered	
Date Updated	
Effective Date	
Expiration Date	
Contract Notify Days	

Item 1 to 10 of 50

**Mergeable Clauses** 0 items Manage

Configure clauses that can be dynamically merged

Name	Manage
No records to display.	

**Rules & Conditions** No Rules Configured Manage/Add Rules

Set rules and conditional logic for template behavior

**Clause Library References** 0 items Manage

Link clauses from the shared clause library

Name	Manage
No records to display.	

**Static Content** 0 items Manage

Add reusable text/system values that automatically merge into documents.

Name	Manage
No records to display.	

Core Setup

COBBLESTONE software

Search

Drop Files Here

Document Authoring Manager: Template Overview

Contracts Active

Return to Template List

Setup

Core Setup

Subtables Setup

Approvals & Signatures

Content Setup

Additional Links

Template Overview Information

Create New Template

Terms

CobbleStone Software 22.7.0 (rev 260423)

### Subtable Setup

Subtables + Add Subtable

Manage	Subtable Name	Display Conditions	Row Conditions
	Obligations	Rules Found	No Rules Found

Subtable Setup



COBBLESTONE software

Search

Drop Files Here

Document Authoring Manager: Template Overview

Contracts Active

Return to Template List

Setup

- Core Setup
- Subtables Setup
- Approvals & Signatures**
- Content Setup
- Additional Links

Template Overview Information

Create New Template

Terms

CobbleStone Software 22.7.0 (rev 260423)

### Approvals & Signatures

E-Approval Flow/Groups

Configure/Manage approval flows and groups to define how approvals are routed and managed.

1 item(s) Manage

Title	Participants	Sequence	Manage
Approval Group 1	1	1	

E-Signature Flow/Groups

Configure/Manage signature flows and groups to define how signatures are routed and managed.

1 item(s) Manage

Title	Participants	Sequence	Manage
Signing Group 1	1	1	

*Approvals & Signatures*

COBBLESTONE software

Search

Drop Files Here

Document Authoring Manager: Template Overview

Contracts Active

Return to Template List

Setup

- Core Setup
- Subtables Setup
- Approvals & Signatures
- Content Setup**
- Additional Links

Template Overview Information

Create New Template

Terms

CobbleStone Software 22.7.0 (rev 260423)

### Content Setup

Mergeable Content Attachments

Mergeable Fields

Copy Placeholder	Field Name	Merge Placeholder
	Addendums	{--Addendums--}
	Amendments	{--Amendments--}
	Annual Review Date	{--Annual Review Date--}
	Arbitration	{--Arbitration--}
	Assignment	{--Assignment--}

*Content Setup - Mergeable Content*



Manage	File Title/Notes	Sequence	Reference File?	File Type	Published Version	Rules
	Clover Agreement	1	False		Initial Version	No Rules Found
	ABC TRIAL LICENSE AGREEMENT	2	False		Initial Version	No Rules Found

Content Setup - Attachments

## CORE SYSTEM RESOLUTIONS

### **RESOLUTION:** Permission State Handling Causing Inconsistent Access to Collaborative Online Editor

Reference #: 260527.1203.26767

An issue was identified where certain users with elevated permissions could experience difficulties launching the Collaborative Online Editor, despite having the appropriate access rights assigned.

This was caused by permission settings not being consistently maintained during page refresh and validation events within the application. Updates were applied to properly reassert user permissions throughout the process, ensuring authorized users retain access as expected.

### **RESOLUTION:** Deprecated Clause Search Function Causing VISDOM Processing Errors During Contract Creation

Reference #: 260527.1222.29417

An issue was identified where users attempting to create contracts through the VISDOM Drag and Drop process could receive an "Error Processing VISDOM" message across multiple contract types.

This was caused by the application relying on an outdated clause search function during document processing. Updates were applied to replace the deprecated functionality with the current supported process, restoring normal VISDOM operation.



## **RESOLUTION: Hidden Line Break Formatting Handling Causing Multi-Line Text Fields to Display as Single Paragraphs**

*Reference #: 260527.337.30703*

An issue was identified where formatting within Multi-Line Text Box fields, such as line breaks and spacing, was not consistently displaying correctly in records and reports. In some cases, content appeared as a single paragraph even though formatting was preserved while editing the field.

This was caused by hidden line break formatting not being properly recognized during display and reporting processes. Updates were applied to improve formatting support for Multi-Line Text Box fields and ensure line breaks and spacing display correctly throughout the application.

## **RESOLUTION: Case-Sensitive Subtable Matching Causing Duplicate User-Defined Subtable Displays on Record Tabs**

*Reference #: 260527.337.33986*

An issue was identified where certain user-defined subtables could appear more than once on record tabs when both individually assigned subtables and the "Display All User-Defined Subtables" option were enabled.

This occurred because the system was not consistently recognizing previously assigned subtables when comparing names with different capitalization. Updates were applied to improve the matching process and prevent duplicate subtable displays.

## **RESOLUTION: Incorrect Request Task Reference Causing Progress Indicators to Remain at Zero**

*Reference #: 260527.365.34083*

An issue was identified where the task progress indicator within the Requests table did not update correctly as tasks were completed. In affected cases, the progress bar remained at "0" regardless of task activity.

This was caused by an incorrect reference being used when calculating Request task progress. Updates were applied to ensure progress information is now properly linked and displayed.

## **RESOLUTION: Incorrect Icon Preview Pathing Causing Broken Image Displays in Dashboard Button Tile Configuration**

*Reference #: 260527.365.34244*



An issue was identified where icon preview images did not display correctly within the Tile Icon selection list when configuring Dashboard Button Tiles. Although the selected icons appeared properly after being applied, the preview images within the dropdown menu showed as broken links.

This was caused by incorrect image path handling within the icon preview list. Updates were applied to correct the preview pathing and restore proper image display during tile configuration.

### **RESOLUTION: Enhanced Field Editing Controls Improving Individual Record Updates on Details Screens**

*Reference #: 260527.337.34857*

Enhancements have been made to restore and improve the ability to edit individual fields directly from record detail screens across the primary application areas.

Users can now choose to edit an entire field group at once or make updates to individual fields independently within a field group. Additional improvements were also made to support smoother edit, save, and cancel actions, as well as improved display handling for longer field group names.

### **RESOLUTION: UTC Date Conversion Handling Causing Date Fields to Shift Backward During Record Editing**

*Reference #: 260527.337.34943*

An issue was identified where date fields within record detail groups could unexpectedly change to the previous day each time a user re-entered edit mode.

This was caused by how date values were being processed behind the scenes during editing, resulting in incorrect date conversion behavior. Updates were applied to ensure date values remain consistent and no longer shift backward when editing records multiple times.

### **RESOLUTION: Duplicate Dropdown Rendering Logic Causing Repeated Values Across Record Detail Forms**

*Reference #: 260527.365.35058*

An issue was identified where certain dropdown fields displayed duplicate values across multiple areas of the system, including Employee Details, Vendor Details, and Contract Details.

This was caused by duplicate rendering logic within the field group control template, which resulted in some dropdown options being added more than once during display. Updates were applied to correct the rendering behavior and eliminate the duplicate entries.



## **RESOLUTION: Incorrect Unicode Text Handling Causing Quick Search Failures for Non-Latin Contract**

### **Titles**

*Reference #: 260527.337.35153*

An issue was identified where contracts containing non-Latin characters in the title, such as Arabic, Chinese, Korean, or Japanese text, could not be found through Quick Search.

This was caused by the search process not consistently handling Unicode text formatting during the search operation. Updates were applied to ensure fields that accept non-Latin characters are processed correctly throughout the Quick Search experience.

## **RESOLUTION: Inverted Auto-Complete Task Visibility Logic Causing Hidden Tasks and Missing Display**

### **Controls**

*Reference #: 260527.337.35284*

An issue was identified where the "Hide Auto Complete Tasks" configuration setting was not behaving as expected within task grids. In affected cases, enabling the setting could completely hide auto-complete tasks without providing users the option to display them when needed.

This was caused by incorrect visibility logic introduced during prior updates to the tabbed detail screen experience. Updates were applied to restore the intended behavior of the configuration setting and task visibility controls.

When the setting is enabled, auto-complete tasks will now remain hidden by default while providing users with the option to display them as needed. When the setting is disabled, all tasks will display automatically without additional filtering controls.



# Patch 22.7.2 - 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: Streamlined Document Collaboration Workflow Enhancing Signing Process Efficiency**

*Reference #: 260527.345.25518*

Enhancements have been made to the IntelliSign and E-Signature collaboration experience to provide a more streamlined and intuitive workflow within the Core system.

Previously, users needed to navigate across multiple screens and panels to manage participants, configure placeholders, and initiate signing processes. This update consolidates these key actions into a more unified experience, reducing unnecessary navigation while maintaining compatibility with existing system functionality and configurations.

These improvements help simplify document collaboration workflows, improve usability, and enable users to complete signing processes more efficiently within the current Core experience.



For Signature Process: E-Signatures Process (ID: 5817) Start Process Cancel Process

Cannot Start Document Signing - Missing Signing Placeholders

Clover Agreement ↶ ↷ 1 100% ☰ 🔍 Return to Signatures History

**Signature & Form Fields**  
Signature Date Text

**Document Signers**  
1. Signing Group 1  
Signer

*Placeholder Signature Process - Before placeholder(s) set*

For Signature Process: E-Signatures Process (ID: 5817) Start Process Cancel Process

Ready to Start

Clover Agreement ↶ ↷ 3 100% ☰ 🔍 Return to Signatures History

**Signature & Form Fields**  
Signature Date Text

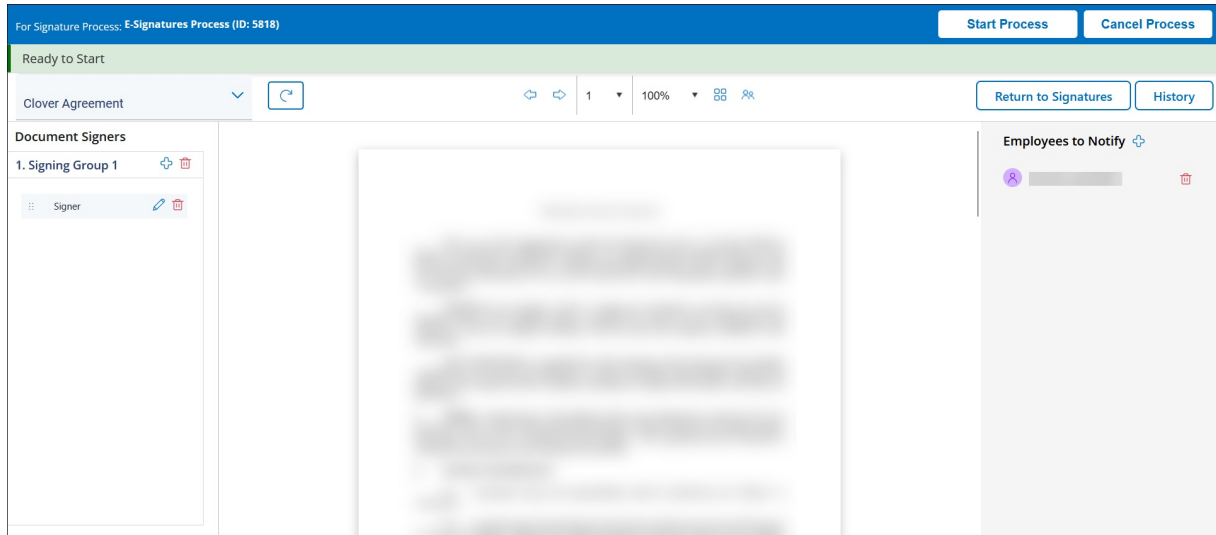
**Document Signers**  
1. Signing Group 1  
Signer

Field Properties  
(Sign for Signer)  
Signer (ID: 6507)

ToolTip  
  
Save

Counterparty Name CobbleStone Systems  
By: \_\_\_\_\_ Signer  
Hereunto Duly Authorized

*Placeholder Signature Process - After placeholder(s) set*



*Free Form Signature Process*

## **ENHANCEMENT:** Restored Electronic Signature Date Appending Option Enhancing Signature Audit Visibility

*Reference #: 260527.345.32846*

The configuration option to append dates to electronic signatures has been restored to the system.

When the **"Append Date to Electronic Signatures"** setting is enabled, completed IntelliSign and E-Signature processes will automatically display the signing date alongside the electronic signature, improving signature visibility and audit tracking.

This configuration setting can be found under:

**Manage/Setup > Application Configuration > Config Settings**

Select **Document Authoring** from the **Configuration Group** dropdown menu.

---

## **DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS**

### **RESOLUTION:** Insufficient Signature Display Sizing Causing Truncated Signatures on Completion Certificates

*Reference #: 260527.345.34275*



An issue was identified where signatures displayed on IntelliSign and E-Signature completion certificates could appear partially cut off after the signing process was completed.

This was caused by insufficient display sizing within the generated certificate layout, which prevented the full signature image from being shown properly. Updates were applied to adjust the signature display area and ensure signatures are fully visible on completion certificates.

### **RESOLUTION: Signature Placeholder Resizing Limitation in IntelliSign**

*Reference #: 260507.1157.25313*

An issue was identified where signature placeholders in IntelliSign could only be enlarged, not reduced in size. This limitation was due to how placeholder scaling behavior was originally configured, which restricted users' ability to properly fit signature fields within documents.

This has been resolved by enabling both upscaling and downscaling of signature placeholders. Resizing is now performed from a single corner to maintain the correct aspect ratio and ensure consistent formatting. Additionally, typed and drawn signatures will automatically adjust to fit the updated placeholder size, improving overall usability and visual consistency.

---



# Patch 22.7.2 - 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:** Enhanced Solicitation Attachment Notifications Improving Vendor/Client Gateway Email Awareness

*Reference #: 260527.1203.29551*

Enhancements have been made to the Vendor/Client Gateway (VCG) to improve notification handling for solicitation-related file and attachment activity.

Users can now receive email notifications when files or attachments are added to a solicitation through the Vendor/Client Gateway, helping ensure stakeholders remain informed of solicitation updates and newly available documentation.

This functionality is controlled through the **"Enable Alerts for File Uploads"** configuration setting, located under:

**Manage/Setup > Application Configuration > Config Settings**

Select **Vendor/Client Gateway** from the **Configuration Group** dropdown menu.

---

## VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

### **RESOLUTION:** Missing File Storage Fallback Handling Causing Upload Errors During Vendor Registration

*Reference #: 260527.1258.34680/34899/35427/35477*



An issue was identified where users could encounter errors when uploading files during the Vendor Gateway registration process.

This occurred because the system did not properly handle situations where a back-end file storage configuration was unavailable during upload processing. Updates were applied to introduce a fallback upload method, ensuring files can still be processed successfully even when the primary storage configuration is not present.

**RESOLUTION: Configurable Solicitation Close Date Mapping Enhancing Vendor/Client Gateway Flexibility**

*Reference #: 260527.1203.35069*

Enhancements have been made to the Vendor/Client Gateway (VCG) solicitation details experience to provide greater flexibility in determining which date field is used as the solicitation Close Date.

A new configuration setting has been introduced that allows administrators to specify an alternate Date/Time field to be used in place of the default Close Date field when displaying solicitation closing information on the VCG solicitation details page.

If a valid override field is configured, the system will automatically use that field when calculating and displaying the solicitation Close Date. If no override is provided, the default Close Date field will continue to be used.

This enhancement provides organizations with greater control over solicitation date management while preserving existing functionality and compatibility.

**RESOLUTION: Improper URL Parameter and Legacy Routing Handling Causing Inaccessible Application Pages**

*Reference #: 260527.1203.35148*

An issue was identified where certain application pages could become inaccessible due to problems processing encoded URL parameters and handling navigation to legacy .ASPX pages.

This could cause links, bookmarks, or internal navigation paths to fail, resulting in broken pages or redirects that prevented users from accessing the intended content.

Updates were applied to improve URL parameter processing, restore support for legacy page rerouting, and enhance navigation handling throughout affected areas of the application. Additional safeguards were also added to redirect users back to the appropriate search pages when invalid or outdated links are encountered.



## **RESOLUTION: Configurable Solicitation Terminology Enhancing Vendor/Client Gateway Terminology Flexibility**

*Reference #: 260527.1203.35148*

A new configuration setting has been introduced to provide greater flexibility in how solicitation terminology is displayed throughout the Vendor/Client Gateway (VCG).

Organizations can now choose whether the system displays the term “Bid” or “Solicitation” within solicitation-related search pages, detail pages, and menu navigation areas. By default, the system will continue using the current “Bid” terminology unless updated through the new configuration setting.

## **RESOLUTION: Incorrect Configuration Mapping Causing Inaccurate Terms and Conditions Link Text in Vendor/Client Gateway**

*Reference #: 260527.1203.35148*

An issue was identified where the Terms and Conditions link displayed incorrect text on the Vendor/Client Gateway login and registration pages.

This was caused by the page referencing the wrong configuration setting when loading the Terms and Conditions link information. Updates were applied to ensure the correct configuration setting is now used consistently throughout the gateway experience.

## **RESOLUTION: Survey Visibility Logic Causing Empty Survey Tabs to Display on Record Detail Screens**

*Reference #: 260527.1258.35330*

An issue was identified where Survey and Survey Response tabs could still appear on record detail screens even when no surveys were associated with the record.

This occurred when survey visibility settings were enabled but the system did not properly hide the survey-related panels when no survey data was available. Updates were applied to ensure Survey and Response tabs are automatically hidden when there are no linked surveys for the selected record.

## **RESOLUTION: Field Help Tooltip Visibility Logic Causing Missing Descriptions When Floating Labels Were Disabled**

*Reference #: 260527.1258.35330*

An issue was identified where field help descriptions did not appear when hovering over field names if floating labels were disabled.



This occurred because the tooltip visibility behavior was incorrectly tied to the floating label configuration setting. Updates were applied to ensure field help descriptions display consistently on hover regardless of whether floating labels are enabled or disabled.

**RESOLUTION: Outdated Document Version Linking Causing Hyperlinked Document Library Fields to Open Incorrect Versions**

*Reference #: 260527.1258.35330*

An issue was identified where clickable hyperlinks connected to Document Library records could open an older version of a document instead of the most recent version available in the Document Library.

This occurred because hyperlink processing was not correctly retrieving the latest uploaded document version when accessed from linked fields or request submission screens. Updates were applied to ensure document hyperlinks now open the current version of the associated document consistently across the application.

**RESOLUTION: Subtable Field Header Display Styling Causing Truncated and Non-Wrapping Field Names**

*Reference #: 260527.1258.35330*

An issue was identified where longer field names within subtables were not displaying correctly. In affected cases, field headers no longer wrapped onto multiple lines and portions of certain characters could appear cut off.

This was caused by display styling behavior affecting how subtable field headers were rendered within the interface. Updates were applied to restore proper text wrapping and improve header spacing to ensure field names display completely and clearly.

**RESOLUTION: Missing Vendor/Client Gateway Audit Logging Causing Incomplete User Activity Tracking**

*Reference #: 260527.1258.35330*

An issue was identified where certain user activities within the Vendor/Client Gateway (VCG) were not being properly recorded in the audit history.

This affected actions such as viewing solicitation records, uploading or viewing files, updating record details, submitting questions, updating response statuses, and sending solicitation-related emails. As a result, audit logs could be incomplete for important gateway interactions.

Updates were applied to restore and expand audit logging coverage across the affected VCG processes. Relevant activities are now properly tracked along with supporting details such as filenames, field updates, selected statuses, and submitted questions where applicable.



These improvements provide more complete activity visibility and stronger auditing support throughout the Vendor/Client Gateway experience.

**RESOLUTION: Document Preview Handling Failure Causing Inaccessible File Previews in Vendor/Client Gateway**

*Reference #: 260527.1258.35330/35458*

An issue was identified where users were unable to preview documents within the Vendor/Client Gateway (VCG), resulting in preview errors when attempting to open files.

This was caused by the document preview process not correctly handling file rendering requests within certain environments. Updates were applied to introduce a standalone preview handler, improving document preview processing and restoring access to file previews within the VCG.

---