

CobbleStone Software - Release Notes

Contract Insight Version 26.2.0 Rev 261016 (Update)

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Update Overview-Version 26.2.0 (Rev 261016)

Release Version Information

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

Release Version Number	**Client Release Date**	**Release Type *(from prior release)***
26.2.0 (Rev 261016)	16 October 2026	Update

Click here to download a PDF of the Release Notes

For CobbleStone Software version 26.2.0 Rev 261016, New Feature(s), 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

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Update 26.2.0 (Rev 261016) - High Level Summary

Contract Insight 26.2.0 Rev 261016 Release Notes Summary

This document provides a high-level synopsis of the new features, enhancements, and resolutions included in Contract Insight Version 26.2.0 (Rev 261016). It is not a substitute for the full release notes. For complete details, configuration steps, and important considerations, please review the official release notes in their entirety.

Core System

Core System Release Notes

New Features:

- CobbleStone Marketplace for Sharing Configurations Between Systems: Administrators can browse and install ready-made configurations, such as workflows, ad-hoc reports, and field setups, from a new Marketplace under Administration.
- AI-Assisted Intake Agent for Creating Contract Records: AI reads incoming files and requests, fills in the contract record, flags risks, and asks only for what's missing.
- Launchpad Setup Agent for Faster System Implementation: Turns a customer's existing data into a reviewable, import-ready setup package for new or re-implementing systems.
- Salesforce Connector for Syncing Records With Salesforce: Map fields and sync records between Contract Insight and Salesforce, on a schedule or one record at a time.

Enhancements:

- Contract Financials Redesigned as a Standard Sub-Table With Summary Fields: Contract Financials now live in a standard sub-table on the contract, with summary totals.
- Configurable Columns and Sort Order for Sub-Table Grids and Main Lists: Administrators choose sub-table columns and default sort order, and users can adjust their own view.
- Add, Rename, and Delete Roles From Role Administration: Administrators can create, rename, and delete roles; roles in use are protected from deletion.

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- Save Option Added to the Unsaved Changes Prompt: The unsaved changes prompt now offers Cancel, Don't Save, and Save.
- Launchpad Reads Customer Files and Contract Lists Into System Setup: Launchpad reads customer spreadsheets, agreements, and contract lists to suggest setup items and create records.
- Additional Employees, Departments, and Locations Available on Requests: Requests now support additional employees, departments, and locations, with matching access and email notifications.
- Intake Agent Creates Records Automatically and Holds Only Exceptions for Review: The Intake Agent now creates records on its own and holds only the documents that need a person's decision.
- New Agent Studio for Managing AI Agents in One Place: One screen to monitor, configure, and track reported issues for every AI agent.
- New Pending Requests View on the Requests List: A new view on the Requests list shows only requests still waiting on a decision.

Resolutions:

- Multi-Select Dropdown Values Not Available When Adding Records: Multi-select dropdowns now show their values when adding a record.
- Rate This Company Not Opening the Score Card Form on Vendor Records: Rate This Company now opens the Add new Score Card form.
- Attachments Without a File Extension Unable to Be Downloaded or Edited: Files saved without an extension now download correctly and can be edited.
- Guided Tutorials Not Following Tab Changes on Record Screens: Each record tab now has its own guided tutorials.
- Financials Option Missing From the Contract Actions Menu: Financials is back in the contract Actions menu when turned on.
- Ad-Hoc Report Docks Missing From Converted Standard Dashboards: Converted Standard Dashboards show their ad-hoc reports again.
- System Administrators Unable to Edit Tiles on System Dashboards: System administrators can add, edit, delete, and drag to reorder system dashboard tiles.
- Dashboard Shortcut Buttons and Menu Links Showing Page Not Found After Upgrade: Upgraded dashboard shortcuts and menu links open the correct screens again.
- Unclear Message When Users Without Edit Access Open Contract Files: Users without edit access now get a clear message, and Prevent Downloading blocks all download paths.
- New Request Notification Emails Not Sent When Requests Are Created: Creating a request sends the new request email again, and request emails now match the previous version.
- Dates Not Following Each User’s Regional Setting: Dates follow each user's Regional Setting everywhere in the system.
- Task Reminder Emails Not Following Their Scheduled Intervals or Correct Layouts: Each task reminder runs on its own schedule and uses its own email layout.
- Scheduled Emails Showing ID Numbers and Not Reaching All Recipients: Scheduled emails show names instead of IDs, copy the system CC, and skip invalid addresses.
- Multi-Select Field Selections Not Displaying or Saving on Record Details: Multi-select selections now display and save correctly on records.
- Hidden Fields Appearing as Columns in Sub-Table Grids: Hidden and invisible fields no longer appear as sub-table grid columns.

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- Users Seeing Unassigned System Dashboards in Their Dashboard List: Users see only dashboards assigned to them, plus the Standard dashboard.
- Role Member Count Including Deleted Employees: Role member counts now exclude deleted employees.
- Copy This Contract Ignoring Field Mappings When Legacy Copy Is Turned Off: With Legacy Copy turned off, Copy this Contract uses the field mappings.
- All User-Defined Subtables Section Repeating Sub-Tables Shown Elsewhere: Sub-tables with their own section no longer repeat in the All User-Defined Subtables section.
- Calculated Link Fields Showing Raw Code in Sub-Tables and Contact Links Not Opening: Calculated link fields are clickable in sub-tables, and contact links open the contact record.
- Clause Numbering Restarting in Generated Documents and Breaking Cross-References: Numbering continues across inserted clauses, so cross-references point to the right sections.
- Mergeable Clauses Missing From Documents Generated by Workflows: Workflow-generated documents now include their mergeable clauses.
- Generated Documents Not Applying Template Word Protection Settings: Generated documents apply the template's Track Changes or read-only protection.
- Workflow IDs Missing, Conditions Displaying Incorrectly, and New Tasks Not Appearing Right Away: The Workflows list shows IDs again, conditions display as saved, and new tasks appear right away.
- Dropdown Fields Unable to Be Changed When Editing Contracts: Dropdown fields load their choices reliably when editing contracts.
- VISDOM Clause Replacement Editing the Wrong Clause and Edits Not Carried Into the New Record: Clause replacement edits only the right clause, reports when nothing changed, and saves edits to the new record.

Document Collaboration & E-Signature

Document Collaboration & E-Signature Release Notes

Resolutions:

- New Process Owner View on My Assignments for Approval and Signature Processes: A new Process owner view lists approval and signature processes a user started or is notified on.

E-Sourcing/Procurement Management

E-Sourcing/Procurement Management Release Notes

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Resolutions:

- Rating and Scoring and Request Line Items Unable to Be Added or Edited: Ratings, scores, and request line items can be added and edited like other sub-tables.

Purchase Order Management

Purchase Order Management Release Notes

Resolutions:

- Purchase Order Fulfill All Not Updating and Placed Order Line Items Still Editable: Fulfill All updates the screen immediately, and placed orders lock their line items.

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Update 26.2.0 (Rev 261016) - 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: AI-Assisted Intake Agent for Creating Contract Records

Reference #: 261016.1237.38502

The new Intake Agent is an AI-assisted starting point for creating contract records in Contract Insight. It is triggered whenever a user brings a file or request into the system, whether through the system itself, VISDOM Chat, or inbound email. When an item arrives, the agent automatically reads and classifies it to identify the right record type and playbook, then runs the steps configured for that playbook, such as metadata extraction, risk alerts, obligations, and negotiation.

Along the way, the agent fills in supported field values, surfaces only the information that is still missing or unclear, and flags early risks. The record is held as an editable draft throughout and is only saved as a permanent record once it reaches the point set in the playbook. Users can resolve missing information or errors directly in the chat without leaving the conversation.

Once the record is created, its detail page includes a VISDOM report summarizing what each step of the agent found, so the source of every suggested value, flagged risk, and extracted clause stays visible and traceable. The agent works within each system's existing configuration and does not create fields, change workflows, or perform setup. Setup is found under Administration > Agent Studio, and users can submit files by drag and drop and find submitted files in process or completed under the Account menu.

How will this affect users?

Users spend far less time typing information from a document into a record form, since the agent reads the document and fills in what it can. Users are only asked about the details the agent could not find or was unsure of, and early risks are flagged before the record is saved. The standard manual record creation process remains available wherever AI-assisted intake is turned on, so users can continue working the way they do today.

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NEW FEATURE: Launchpad Setup Agent for Faster System Implementation

Reference #: 261016.1237.42860

The new Launchpad Setup Agent helps new and re-implementing customers turn their raw implementation material into a clean, reviewable Contract Insight setup package. The agent can take in contract inventories, exports from a previous contract management system, CRM, ERP, and vendor lists, HR employee files, request forms, sample contracts, and business rules.

From these inputs, the agent recommends fields, master reference data, counterparties, employee mappings, starter workflow configurations, and other foundational setup items. Before anything is configured or imported, it identifies missing information, data-quality issues, mapping conflicts, and other items that would block readiness.

Every recommendation stays subject to human review and approval. Once the recommendations are validated, the agent produces clean, import-ready files and a readiness summary that implementation teams and customer administrators can use to finish system setup.

How will this affect users?

New and re-implementing customers can get to a working system faster and more consistently, with less manual entry of fields, lists, and reference data. Data problems and conflicts are caught before import rather than after, which reduces cleanup later. Because nothing is applied without approval, administrators stay in full control of what goes into their system.

NEW FEATURE: Salesforce Connector for Syncing Records With Salesforce

Reference #: 261016.1237.46569

A new Salesforce connector is available under Administration > Connections > Salesforce, allowing administrators to connect Contract Insight to Salesforce and move record data between the two systems. Administrators set up field mappings that pair Contract Insight fields with Salesforce fields; the Contract Insight side is chosen from a dropdown of the selected table's fields with their labels, and a link opens that table in Schema Explorer for reference.

Mappings can include conditions that control which records are moved, for example pulling Salesforce Accounts only when the billing state is CA, or sending only employees whose email contains a certain value. Mappings can run on a schedule, and Pull now runs one on demand. The run history links each run to the Contract Insight record it created, updated, or sent, and shows Skipped when a condition left a record out.

On any record whose table has a mapping, Actions > Sync with Salesforce sends or refreshes that one record. The record's Recent activity shows exactly what changed, for example a city updated from one value to another, or confirms that the record was already up to date, and a send lists which fields were sent to Salesforce. A record that does not meet a mapping's conditions shows as not included, and the same changes are recorded in the record's View History.

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How will this affect users?

Teams that use Salesforce can keep company, employee, and other record information in step between Salesforce and Contract Insight without entering it twice. Administrators decide exactly which fields and which records are synced, and can see what each run did. Users can refresh or send an individual record on demand and see which values changed. Existing mappings are not affected until someone edits them.

CORE SYSTEM ENHANCEMENTS

ENHANCEMENT: Contract Financials Redesigned as a Standard Sub-Table With Summary Fields

Reference #: 261016.1237.37134

Contract Financials have been redesigned to work as a standard sub-table on the contract record instead of on their own separate page. The Financials sub-table now includes summary fields, similar to the summary shown on Purchase Orders, so totals are visible alongside the individual financial entries. The redesigned Financials sub-table is available on any contract record where Financials has been made available through tab assignment.

How will this affect users?

Users can view and manage a contract's financial entries directly on the contract record, in the same way they work with other sub-tables, without moving to a separate page. The summary fields give users an at-a-glance view of the contract's financial totals.

ENHANCEMENT: Configurable Columns and Sort Order for Sub-Table Grids and Main Lists

Reference #: 261016.1237.37136/47044

Administrators can now control which columns appear in a sub-table grid on a record and the order its rows open in. Previously, a sub-table grid always showed the first ten fields in field order, with no way to change them and, on most layouts, no set sort order. In Administration > Field Management, choosing a sub-table as the Area and opening Area setup shows a

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new In grids and lists section. From there, administrators can pick the fields to show, from a single field up to a full set, and set the default sort order using the same field editor found in Administration > List Fields.

Main record lists gain the same sort control in Administration > List Fields, which now shows the order a list opens in. Only published fields can be used for sorting, and the sort direction is worded to fit each field type, such as Soonest/Latest for dates, Lowest/Highest for amounts, and A to Z for text. Unset lists continue to open newest first.

Each grid's toolbar now includes Fields and Sort buttons, letting individual users hide columns they do not use and keep their own preferred order on top of the administrator's layout. A user's column choices also apply to the grid's Excel, CSV, and PDF exports, and Use the default returns to the administrator's order. Clicking a column header still re-sorts the grid as before, and both sub-table layouts on a record (the tabbed layout and the Subtables section) now show rows in the same order.

How will this affect users?

Users see the sub-table columns that matter most to them instead of a fixed set of the first ten fields, and grids open in a meaningful order. Each user can further tailor their own view and exports without affecting anyone else. Nothing changes until an administrator configures a grid, so every existing grid looks and behaves as it does today. Users without administrator rights can use the Fields and Sort buttons on grids but cannot change the published layout.

ENHANCEMENT: Add, Rename, and Delete Roles From Role Administration

Reference #: 261016.1237.46452

Administrators can now add, rename, and delete roles directly from Administration > Roles. Previously this page could only change which employees belonged to a role, with no way to create a new role. Access to these actions uses the same permissions as the previous version, so users without employee-record rights cannot add, rename, or delete roles.

Because roles drive workflow task assignment and notifications, a role that is still in use anywhere in the system cannot be deleted. Its Delete option is unavailable, and hovering over it explains what is using the role. Deleting a role that is not in use also removes its member list, so no leftover memberships remain. If a new or renamed role uses a name that already exists, the system shows a warning but still allows it.

The roles list also now includes a search box to quickly find a role in a long list, and an In use marker on roles that cannot be deleted. A deleted role disappears from the list and from role pickers elsewhere in the system.

How will this affect users?

Administrators can manage their roles fully from one screen without needing support assistance. The in-use safeguard prevents roles that workflows and notifications depend on from being removed by mistake, which protects task assignment and notification delivery. Search and the In use marker make it much easier to work with systems that have a large number of roles.

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ENHANCEMENT: **Save Option Added to the Unsaved Changes Prompt**

Reference #: 261016.1237.46552

When a user leaves a record that has unsaved changes, the warning prompt now offers to save those changes first, in the same way most desktop applications do. The prompt asks whether the user wants to save their changes to the record by name and offers three choices: Cancel, Don't Save, and Save. Previously, the prompt only offered to stay on the page or leave without saving.

Choosing Save saves the record and then takes the user to the page they clicked. If the save cannot be completed, for example because a required field is empty, the user stays on the record with a message showing what is missing, and nothing is lost. Don't Save leaves the page and discards the changes, while Cancel or closing the prompt keeps the user on the record, still editing. The new prompt works for Edit All, for editing a single section, and for editing a single field.

Add forms for new records continue to use the previous Stay here / Leave without saving prompt, and closing the browser tab still shows the browser's own standard warning.

How will this affect users?

Users no longer need to go back, save, and navigate again when they forget to save before clicking away from a record. Changes can be saved in one click from the prompt, and required-field checks still apply, so incomplete records are not saved by accident. No existing data or setup is changed.

ENHANCEMENT: **Launchpad Reads Customer Files and Contract Lists Into System Setup**

Reference #: 261016.1237.46591

Launchpad can now read a customer's own files and turn them into reviewable setup suggestions, instead of an administrator typing everything in by hand. Files are added under Launchpad > Setup files, where several can be dropped at once and are identified automatically. Spreadsheets fill the system's lists, such as contract types, departments, locations, statuses, and counterparty types, with different spellings of the same value grouped under one proposed name and the old spellings kept so existing records still match. Sample agreements suggest fields based on what appears across the documents, showing how many documents each was found in and the sentence it came from, and clause documents are sorted into the Clause Library by category with near-duplicates grouped. Nothing is created until a person accepts it, and rejected suggestions do not return on the next run.

When adding a suggested field, administrators can place it on several areas at once and have VISDOM draft help text that can be edited before saving. Clauses can be edited before being added to the library and can include playbook guidance, with a negotiating comment and business justification that VISDOM can draft. Suggested record types and list values can be added to a specific area.

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On the Records tab, agreements can be read and created as Contracts or Requests. Reading runs in the background, so users can switch tabs, leave, and come back while it continues; documents appear as they are read, and Stop ends the read while keeping what was already read. A document whose type cannot be identified comes back quickly asking the user to choose its type. Each document opens beside the record it will become, with missing required fields listed first and each value VISDOM read pinned to the page where it was found. A spreadsheet listing the customer's contracts can also be turned into records: its columns are matched to fields, a check shows what each row would create, values the system does not have yet can be added in one click, and the records are created through the standard import, with matching agreements attached.

Launchpad also adds an organization legal name setting, a side-by-side view of duplicate counterparties so records can be moved onto the copy to keep, a list of active people with a security group picker, uploads grouped by date, a guided step-by-step view for both setup and System health, and a handover pack with import files, a field list, unresolved exceptions, and a readiness summary.

How will this affect users?

Implementation teams and administrators can set up a system from the customer's real data far faster, with much less manual entry and a clear record of where every suggestion came from. Users can keep working while documents are read and can review each suggestion before it is applied, so nothing changes in the system without approval. Customers moving from another system can bring in their existing contracts and supporting values as records with their documents attached.

ENHANCEMENT: **Additional Employees, Departments, and Locations Available on Requests**

Reference #: 261016.1237.46791

Requests now include several record features that were already available on contracts and vendors. From a request's Actions menu, Assign Employees, Assign Departments, and Assign Locations list, add, and remove additional employees, departments, and locations, and the same assignments can be managed from the Related Parties panel. Each change is recorded in the request's history.

Employees assigned to a request now fall under the request's My permissions (view, edit, and delete My records), and assigned departments fall under My Dept. permissions, the same way assignments work on contracts. Assigned employees also receive the request's status-change emails (Pending, Accepted, Rejected, and Cancelled). On request workflow tasks, the Also assign the record's additional employees option now works, adding those employees to the task so they receive its reminders.

Document access permissions in the File Toolbox, which restrict a document to chosen people or security groups, now work on Requests, Solicitations, Purchase Orders, and Employees, not just Contracts and Vendors. Restricted documents are also hidden from the email file picker and the start-a-process file picker on every record type. The message saying assignments are turned off for the system now appears only on Contracts, where that setting exists, and the legal hold banner now refers to the record rather than always saying contract.

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How will this affect users?

Teams that work with requests can involve additional employees, departments, and locations in the same way they do on contracts, and those people automatically get the right access and stay informed through status emails and task reminders. Restricting sensitive documents to specific people now works consistently across record types. Nothing changes on existing requests or tasks until someone is assigned, and updated permissions take effect after users sign out and back in, or within an hour.

ENHANCEMENT: **Intake Agent Creates Records Automatically and Holds Only Exceptions for Review**

Reference #: 261016.1237.47740

Documents sent to the Intake Agent now become records on their own, and users only need to step in for the documents the agent was unsure about. Documents can be sent through the Send to intake option when dropping a document, by email to an intake address, or through additional channels such as watched folders or an API that administrators can set up. For each document, the agent reads it with VISDOM, decides the record type, fills in the form, double-checks its work, looks for an existing matching record, and then either creates the record with the document attached or holds it with a one-sentence reason. Scanned PDFs are read as well, and the record receives a searchable copy.

Administrators choose how much the agent does on its own: Fully automatic, Automatic when complete, or Approval required. At Fully automatic, the record is created even when required fields are blank, and those blanks are listed for follow-up. Administrators can build hold rules from any field, such as holding contracts over a certain amount or with a vendor not already in the system, and can choose how possible duplicates are handled, including creating a new record anyway. Default field values fill in fields that documents do not carry, and the agent learns from approvals, filling a field automatically once it has been approved with the same value three times and remembering vendor matches.

Every record the agent creates includes an Intake Summary showing what was captured, values worth a second look, risks found in the clauses, and clauses not yet in the clause library, each with a one-click action. The intake queue has Working, Needs me, Ready, and Everything views, a filter, and quick approval with progress shown. A document that needs input opens in Create with VISDOM already filled in. The sender is notified on screen and through the notification bell when a record is created or needs input, and records the agent created on its own can be undone for one day.

The agent never creates a record without knowing its type, never writes a dropdown value it could not match, and never edits or deletes an existing record. It acts with the permissions of the person who sent the document, and a document from an unrecognized sender creates nothing. The Intake Agent's settings are now found under Administration > Agent Studio, and Intake is available from the account menu with a count of documents waiting.

How will this affect users?

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Users can send contracts and other documents to Contract Insight and have records created for them without typing in the details, freeing them to focus only on the exceptions that need a decision. Administrators control how independently the agent works and when documents are held for review. The Intake Summary and record history make it clear what the agent did on every record, and safeguards prevent unexpected changes to existing records.

ENHANCEMENT: New Agent Studio for Managing AI Agents in One Place

Reference #: 261016.1237.50004

Administrators now have a single screen for every AI agent in the system: Administration > Agent Studio, found in the VISDOM AI group. The studio's dashboard shows runs this quarter, records created, the share of reviewed documents approved without a correction, and the number of open reported issues.

The Agents table lists each agent with its status, how much it may do on its own, and its reported issues. Configure turns an agent on or off, sets its autonomy (Fully automatic, Automatic when complete, or Approval required), and links to the agent's full settings. Run history lists every document an agent has handled, newest first, showing what it worked on, the result (such as Created on its own or Created after review), a link to the record, who started it, and when.

Users can now report an AI agent's mistake through Submit a System Request using the new An AI agent got something wrong option, or with the Report an issue button on the Intake page. Agent Studio counts open reports for each agent and links to them. The Intake Agent is the first agent in the studio; its settings now open from Administration > Agent Studio > Intake Agent, and searching Administration for intake still finds it. Only system administrators can manage agents.

How will this affect users?

Administrators can see how their AI agents are performing and adjust them from one place, instead of finding each agent's settings separately. Users have a simple way to report when an agent gets something wrong, and administrators can track and follow up on those reports. No existing data is changed.

ENHANCEMENT: New Pending Requests View on the Requests List

Reference #: 261016.1237.50080

The View dropdown on the Requests list now includes a Pending requests option, alongside existing views such as Created by me. This view shows every request with a status of Request Pending that the user is allowed to see, so requests still waiting on a decision can be worked as a queue. Accepted, rejected, and cancelled requests do not appear, and a request drops out of the view as soon as its status changes.

Like the other views, Pending requests can be starred as the user's default view so the list opens on it, and exporting from this view includes only pending requests. Standard record permissions continue to apply. Requests holding a non-standard status

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value, such as older imported data on some systems, are not treated as pending.

How will this affect users?

Users who review and process requests can see exactly what is still waiting on a decision without building filters by hand each time. Setting it as the default view puts the pending queue front and center every time the Requests list is opened, and exports match what is on screen.

CORE SYSTEM RESOLUTIONS

RESOLUTION: Multi-Select Dropdown Values Not Available When Adding Records

Reference #: 261016.360.38034

An issue has been resolved where the available values for multi-select dropdown fields were not provided when adding a new record. Multi-select dropdown fields now load their reference values on add screens, so users can make their selections while creating the record.

RESOLUTION: Rate This Company Not Opening the Score Card Form on Vendor Records

Reference #: 261016.1237.45026

An issue has been resolved where selecting Rate This Company from a vendor or customer record's Actions menu moved users to the Ratings & Surveys tab without letting them add a rating. Contract ratings could also be added but not viewed. Rate This Company now opens the Add new Score Card form, and ratings saved this way are linked to the vendor and appear on its Score Card list. View Ratings also opens the list of saved ratings.

RESOLUTION: Attachments Without a File Extension Unable to Be Downloaded or Edited

Reference #: 261016.1237.45251

An issue has been resolved where some attachments were stored with a name that had no file extension, most often files returned from the e-signature process. These files downloaded as an untyped file that could not be opened outside of

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Contract Insight, and their editing options, including Edit with VISDOM, Collaborative edit, and Edit in Word, were unavailable with a message saying the format was not supported.

These files now download with their correct extension and can be opened and edited like any other Word or PDF document. In addition, renaming a file in its details can no longer remove its extension; if the extension is removed, it is restored on save.

RESOLUTION: Guided Tutorials Not Following Tab Changes on Record Screens

Reference #: 261016.1237.45255

An issue has been resolved where the guided tutorials, opened from the lightbulb icon at the top of the page, did not change when switching between tabs on a record. The same tutorial was offered no matter which tab was open, and tutorial steps could point to the wrong part of the page.

Each record tab now has its own tutorials. Switching from Record Details to another tab, such as Attachments & Templates, shows that tab's tutorials or offers to build one, and switching back shows the Record Details tutorials again. Existing record tutorials remain on the Record Details tab where they were built. In Administration > Tutorials, tab tutorials are now named by record type and tab. This applies to all six main record types that use tab layouts.

RESOLUTION: Financials Option Missing From the Contract Actions Menu

Reference #: 261016.1237.45275

An issue has been resolved where the Financials option was missing from the Actions menu on contract records. Contracts once again show Financials in the Actions menu when the Show Financial Menu setting is turned on in Application Configuration. Selecting it opens the Financials sub-table on the Subtables tab with the Add new Financial form ready to fill in, and turning the setting off removes the option from the menu.

RESOLUTION: Ad-Hoc Report Docks Missing From Converted Standard Dashboards

Reference #: 261016.1237.45360

An issue has been resolved where Standard Dashboards carried over from the previous version of the system displayed only their action buttons and summary tiles, without their ad-hoc report docks. These dashboards now display their ad-hoc reports with live data, so they do not need to be rebuilt.

Note: a dashboard that was opened and saved in the dashboard editor before this fix may need its ad-hoc report docks added back manually.

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RESOLUTION: System Administrators Unable to Edit Tiles on System Dashboards

Reference #: 261016.1237.46342/48188

An issue has been resolved where system administrators received an error saying they could only change tiles on their own dashboards when trying to add, edit, delete, or reorder tiles on a system dashboard. This occurred from Administration > System Dashboards and System Standard Dashboards, for both Core and Vendor/Client Gateway dashboards.

System administrators can now add, edit, delete, and reorder Button and Summary tiles on system dashboards, and changes are kept after the page is reloaded. Tiles in the Button tiles and Summary tiles lists can now be reordered by dragging the handle at the left of each row, or with the arrow keys, both on system dashboards and when customizing a user's own dashboard. Users without administrator rights can still see the tiles on dashboards assigned to them but cannot change them, and personal dashboards are otherwise unchanged.

RESOLUTION: Dashboard Shortcut Buttons and Menu Links Showing Page Not Found After Upgrade

Reference #: 261016.1237.46746

An issue has been resolved where some colored shortcut buttons on dashboards stopped working after upgrading and showed a That page isn't here message instead of opening the intended screen. This most often affected buttons and navigation menu items that had been set up using the full web address of a page from the previous version, which made the problem appear random, with some buttons working and others not.

These shortcuts and menu links now open the correct screens without needing to be recreated. This includes request forms that open with the request type already applied, the Add Vendor/Customer screen, and links where the page name is preceded by a folder. Links to genuinely external websites and to the Vendor/Client Gateway continue to work as before, and external links still open in a new tab.

RESOLUTION: Unclear Message When Users Without Edit Access Open Contract Files

Reference #: 261016.1237.48007

An issue has been resolved where users who could view a contract but not edit it were unable to open its files and received a misleading message saying the file was restricted to named people. When the Application Configuration setting that allows view-only users to download and preview contract files is turned off, the previewer now clearly states that edit access to the contract is needed to open its files, and no download options are shown.

In addition, the Contracts: Attachments - Prevent Downloading permission now consistently blocks every way a file could be downloaded, including from Quick Search, version compare downloads, Edit in Word, and direct file links, while still allowing users to read the file in the previewer. Removing the permission restores downloads as before, and administrators are never affected.

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RESOLUTION: New Request Notification Emails Not Sent When Requests Are Created

Reference #: 261016.1237.49171/49242

An issue has been resolved where creating a new request did not send a notification email to the requester or to the members of the assigned review group, even though emails were sent when the request's status was later updated. When request emails are turned on, adding a request now sends the New Pending Contract Request email with the request's details and a link.

Request emails have also been brought fully in line with the previous version. Emails now show who acted on the request, use the system's own address as the reply-to address, and are copied to the system-wide CC address when one is set. Date fields in the email show as a date only, without a time. Each email sent is recorded in the request's Audit History, showing who it was sent to and from and its subject. Status emails for accepted, rejected, or cancelled requests also reach the Vendor/Client Gateway contact who submitted the request, even when no internal users are on the list.

RESOLUTION: Dates Not Following Each User's Regional Setting

Reference #: 261016.1237.49392

An issue has been resolved where dates were always shown in the US month-first format, regardless of the Regional Setting on the employee's profile. For example, a user set to English - New Zealand saw 10/13/2026 instead of 13/10/2026.

Dates and times now follow each person's own Regional Setting wherever they appear, including lists, records, date pickers, exports, files, generated documents, status history, and surveys. A date typed in the person's own format is saved correctly, and dates merged into generated documents without a set format now print in the person's format. Users set to English - United States see no change. Number formats and the date stamped on QuickSign signatures are unchanged, and a changed Regional Setting takes effect at the person's next sign-in.

RESOLUTION: Task Reminder Emails Not Following Their Scheduled Intervals or Correct Layouts

Reference #: 261016.360.49826

An issue has been resolved where task reminders for Contracts, E-Sourcing, Purchase Orders, Customers/Vendors, Requests, and Employees ran together only once a day instead of on their own configured schedules. In Administration > Scheduled Jobs, these jobs also appeared stalled, with a Last run time that only changed after using Run now. In addition, every type of task reminder was sent using the Contract task email layout, so the other task types received the wrong banner, opening text, detail links, and notification title.

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Each reminder job now runs on its own interval, and Scheduled Jobs shows the correct next and last run times. Each task type's reminder email now uses its own layout, including its banner, opening text, field details, parent record section, detail links, footer, and notification title. Request and Employee task reminders are also sent as text messages again to assignees with a mobile number. Each task and recipient still receives only one reminder per day.

RESOLUTION: Scheduled Emails Showing ID Numbers and Not Reaching All Recipients

Reference #: 261016.360.49827

An issue has been resolved affecting task reminders, contract and E-Sourcing date alerts, and calendar notifications. These emails showed the stored ID number of lookup fields instead of their names, for example an ID number in place of the assigned employee's name. They were also not copied to the system-wide CC address, and a single invalid CC or BCC address caused the entire email to fail. When an email failed, the matching text message was not sent either.

These emails now show names for lookup fields such as Assigned To and Department, are copied to the system-wide CC address when one is set, and skip any invalid CC or BCC address while still reaching the valid recipients. Each email sent is now logged on the record with its recipients, sender, and subject, and a failed send is logged without stopping the text message. Task reminders also show the correct task logo and header. Other emails, such as sign-in codes and invitations, are unchanged.

RESOLUTION: Multi-Select Field Selections Not Displaying or Saving on Record Details

Reference #: 261016.1237.49836

An issue has been resolved where some multi-select fields did not keep a selection made while editing and appeared blank or showed only the first value on the Record Details page, even though the values were saved and appeared in reports. This happened when a field's list of options had been entered with a space after each comma, which caused only the first option in the list to display correctly.

All saved values in these fields now display on the record, selections made while editing stick, and the record matches what reports show. No existing data was changed.

RESOLUTION: Hidden Fields Appearing as Columns in Sub-Table Grids

Reference #: 261016.1237.50056

An issue has been resolved where fields marked as hidden or invisible could appear as columns in sub-table grids, such as system ID and Is Deleted fields. This pushed the fields users actually work with out of view. For sub-tables without published

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list columns, hidden and invisible fields are now left out before the grid's columns are chosen, so the next visible fields take their place. Sub-tables with published list columns continue to show the same columns as before.

RESOLUTION: Users Seeing Unassigned System Dashboards in Their Dashboard List

Reference #: 261016.1237.50057

An issue has been resolved where users could see every system graphical dashboard in their All Dashboards list, labeled as assigned to them, even when the dashboards had not been assigned to them, their role, or their security group. The All Dashboards list now shows only the user's own dashboards, dashboards assigned to the user, their role, or their security group, and the built-in Standard dashboard. Assigning a graphical dashboard to a security group makes it appear for that group's members as expected.

RESOLUTION: Role Member Count Including Deleted Employees

Reference #: 261016.1237.50058

An issue has been resolved where the member count shown for a role in Administration > Roles included deleted employees, so the count did not match the list of members shown when the role was expanded. The member count now includes only active employees and matches the member list.

RESOLUTION: Copy This Contract Ignoring Field Mappings When Legacy Copy Is Turned Off

Reference #: 261016.1237.50059

An issue has been resolved where Copy this Contract always made an exact copy of every field, including Status, even when the Legacy Copy Contract setting was turned off so that field mappings would be used instead. With the setting turned off, copying a contract now lets the user choose which files and sub-table rows to copy, then opens a new contract form filled in from the contract-to-contract field mappings. Fields that are not mapped, such as Status, use their default values, and the new contract is linked to the original. Systems with the setting turned on continue to make an exact copy as before.

RESOLUTION: All User-Defined Subtables Section Repeating Sub-Tables Shown Elsewhere

Reference #: 261016.1237.50060

An issue has been resolved where the All User-Defined Subtables section on a record tab repeated sub-tables that were already shown in their own section on the same tab. Sub-tables placed in their own section now appear only once, and the All

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User-Defined Subtables section holds only sub-tables without a section of their own. The sidebar Sections list follows the same rule.

RESOLUTION: Calculated Link Fields Showing Raw Code in Sub-Tables and Contact Links Not Opening

Reference #: 261016.1237.50061

An issue has been resolved affecting calculated fields that contain links. In sub-table grids, these fields showed the raw link code as text instead of a clickable link, and calculated links pointing to vendor contact details opened a page that could not be found. Calculated link fields now display as clickable links in sub-table grids as they already did on the record screen, and vendor contact links now open the contact's record.

RESOLUTION: Clause Numbering Restarting in Generated Documents and Breaking Cross-References

Reference #: 261016.1237.50062

An issue has been resolved where numbering in generated documents restarted at 1 after each inserted clause that keeps its own formatting. As a result, section headings repeated numbers instead of counting up, and cross-references inside the document pointed to the wrong section numbers. Inserted clauses now continue the document's numbered list, so headings number in order and cross-references point to the correct sections, matching documents generated in the previous version.

RESOLUTION: Mergeable Clauses Missing From Documents Generated by Workflows

Reference #: 261016.1237.50063

An issue has been resolved where documents generated through a workflow task did not include their mergeable clauses, and each clause placeholder showed its empty message instead. Workflow-generated documents now include every mergeable clause whose conditions are met, matching documents generated directly from the record. Sub-table clauses in workflow-generated documents continue to show their empty message, since no rows are selected during automatic generation.

RESOLUTION: Generated Documents Not Applying Template Word Protection Settings

Reference #: 261016.1237.50064

An issue has been resolved where documents generated from Word templates did not apply the protection set on the template, such as restricting editing to tracked changes or making the document read-only with a password. Generated Word documents now carry their template's protection settings, so a Track Changes template produces a document with tracking turned on and editing restricted to tracked changes, and a read-only template produces a password-protected read-only

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document. Templates without a protection setting continue to open freely, and Word files produced by mass processing jobs remain unprotected as before.

RESOLUTION: Workflow IDs Missing, Conditions Displaying Incorrectly, and New Tasks Not Appearing Right Away

Reference #: 261016.1237.50073

Three workflow issues have been resolved. The Workflows list in Administration once again shows each workflow's ID, and the list can be searched by ID, making it easy to find a workflow referenced in a record's audit log.

Workflow conditions are now shown and opened for editing exactly as they are saved. Previously, a condition written by hand, such as a status that is not a certain value, could display as the opposite rule and could be changed unintentionally if saved from the editor. Standard dropdown conditions continue to display and edit as before.

On records, a newly added task now appears in the task grid right away with the correct count, and completing a task action such as Approve updates the tasks remaining count immediately. No existing data was changed.

RESOLUTION: Dropdown Fields Unable to Be Changed When Editing Contracts

Reference #: 261016.1237.49073

An issue has been resolved where some dropdown fields could not be changed while editing a contract and showed a message that the field's choices could not be loaded. This most often happened on contracts with a large number of dropdown fields. Dropdown fields now load their choices reliably in Edit All and other edit modes and can be changed as expected. Fields that are read-only by design are unaffected.

RESOLUTION: VISDOM Clause Replacement Editing the Wrong Clause and Edits Not Carried Into the New Record

Reference #: 261016.1237.48078

Three issues on the VISDOM processing page have been resolved. Replacing or redlining a clause, whether from a finding, a playbook comparison, or the coverage view, could change the wrong paragraph, such as one that only shared a sentence with the selected clause. Replace now changes only the clause it can identify with confidence, shows the change as a tracked change on that clause, and lets the user know if it could not find the clause.

The page also no longer reports that a clause was replaced when nothing actually changed; it now says Nothing changed when the suggested wording is already in the document. Finally, a record created from a document added with Drop a document now receives the edited document, saved as a new version alongside the original, instead of losing the edits made during review.

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Update 26.2.0 (Rev 261016) - 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: **New Process Owner View on My Assignments for Approval and Signature Processes**

Reference #: 261016.1237.49166

The My Assignments page now includes a Process owner view, alongside Assigned to me and Assigned to my groups. This view gives standard users a single list of the approval and signature processes they started or are on the notify list for, in addition to the assignments that need their own action. Every step of those processes is listed, including steps assigned to other people, while processes the user has no part in do not appear.

On steps that belong to someone else, the Review & approve and Sign now buttons are shown as unavailable, with an explanation on hover. The view works with the existing Process status, My approval, and Outstanding only filters and the search box, and the page reopens on the Process owner view after a reload. The Open the record icon now works on approval rows in every view.

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Update 26.2.0 (Rev 261016) - 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: Rating and Scoring and Request Line Items Unable to Be Added or Edited

Reference #: 261016.1237.49133

An issue has been resolved where the Rating and Scoring section on a solicitation's Bid Evaluation tab and the Line Items section on a request were read-only, with no way to add bid scores, ratings, or line items. These lists also showed raw database columns and ID numbers instead of names.

Both sections now work like other sub-tables, with New, Bulk add, Manage, edit, delete, and Export, and they show names instead of ID numbers. The columns now follow the In grids and lists setting in Field Management. When adding ratings, the Respondent/Vendor and Rating Type choices list the solicitation's own respondents and weighted rating types, and Weight is filled in from the Bid Rating Weight.

For all sub-tables, adding a row from the side panel now keeps users on the record instead of opening the new row's page. The sub-table refreshes in place in under a second, and the new row is briefly highlighted.

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Update 26.2.0 (Rev 261016) - 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 RESOLUTIONS

RESOLUTION: Purchase Order Fulfill All Not Updating and Placed Order Line Items Still Editable

Reference #: 261016.1237.45406

Two issues with Purchase Order line items have been resolved. Using Actions > Fulfill All PO Items received the line items but did not refresh the screen, so it appeared that nothing happened. The line items, their receive buttons, and the budget summary now update immediately to show everything as received in full.

In addition, once a purchase order is marked as placed, its line items are now locked as they were in the previous version. The line item grid no longer offers New, Bulk add, Import, or Delete, and a note explains that lines cannot be added or removed because the order has been placed. Receiving against lines, opening a line, and exporting continue to work, and the lock appears immediately after an order is saved as placed. Orders that are not placed are unchanged, and the lock does not apply when the classic purchase order screen setting is turned on.

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