



CONTRACTPRO® VERSION 4.2 FEATURES RELEASE

Release Date: March 1st, 2010

The Answers Systems Team is pleased to announce the ContractPro Trade Management Application Release 4.2 has been approved for general user availability on the morning of Monday, March 1st, 2010. This release will also contain a number of [training videos](#) designed to supplement our standard training material for those features that we felt required them. Below are the details of the changes introduced in this exciting new release:

Major System Enhancements

1. **NEW: Auto-Load Estimated Volume from Actuals*** – This promises to be one of our most significant features yet! Many of our Manufacturer Clients have been with us for enough time to amass a considerable amount of historical customer purchase and claiming activity data. This new feature analyzes actual Claim volume for a prior Contract term and automatically loads that volume into the current Contract version's Estimated Volume at a Product or Category level! You can choose to import these historical volumes directly, or choose to adjust them for growth or any other factors via formulas you control during import. All of this functionality is provided inside of a simple, intuitive Excel Pricing worksheet, which has replaced the Bulk Pricing Screen. Gone are the days of inaccurate or non-existent volume estimates and the time and effort they took to develop!
2. **NEW: Account Login to Email Address Migration** – We have modified the ContractPro Sign-In process and in doing so, made the switch from the custom Login Names that were created for each User of the system, to email addresses. No more having to remember yet another special login! Our Account Managers will be contacting each of our Clients to collect the information necessary to configure each instance of ContractPro for this change. This feature will be enabled for each Manufacturer Client in the weeks following the March 1st release, following a brief setup process. Training material and notifications related to this upcoming change will be released prior to the start of migration.
3. **NEW: Password Reset and Password Strength** – A new security policy system has been developed that will allow each Manufacturer Client to customize the requirement for and frequency of Password changes for their Users. In addition, this feature will allow our clients to specify various criteria related to the “strength” a password must possess. Our Account Managers will be contacting each of our Clients to collect the information necessary to configure each instance of ContractPro for this change. This feature will be enabled for each Manufacturer Client in the weeks following the March 1st release, following a brief setup process. Training material and notifications related to this upcoming change will be released prior to the start of migration.
4. **NEW: Generic Templates** – Contract Templates remain perhaps the most powerful feature ContractPro offers. With extensive support for customized visibility rules, workflow routing, exclusions and the ease of Contract creation that Templates bring to the table, we are extremely happy to make this key feature available to ALL existing ContractPro Manufacturer Clients! [Watch an introductory video on Templates here...](#)



5. **NEW: Excel Pricing** – One of the features that our Users absolutely love about ContractPro, is its Excel Pricing. Now that all clients have access to Templates, they also all have access to Excel Pricing. Using the power and familiarity of the Microsoft Excel® application, ContractPro allows Users to price their Contracts in either on-line or off-line mode. This means you can see and interact with your ContractPro Contract as an Excel Worksheet, tab between fields with lightning speed, leverage the power of Excel formulas (off-line mode only) to calculate and automatically assign



pricing to thousands of SKUs in seconds – and do all of this without the need for Excel! If that weren't enough, you can take advantage of all of these features while online, connected to ContractPro, or off-line say, while flying to that customer meeting!

6. **NEW: Workflow Rules Engine*** – The ContractPro Team has worked hard to develop a new rules engine that introduces a game-changing level of flexibility and automation to Contract management. Over 100 new rules have been developed related to all kinds of Contract characteristics. With the new Workflow Rules Engine, these rules can be strung together in countless combinations to make decisions about how a Contract should be handled at submission time. Contact your Account Manager today to learn more about this powerful new set of automation capabilities!
7. **NEW: Custom Header Field Search*** – Custom Header Fields provide the option to include a Manufacturer's custom information in your Contracts. We have provided support for Drop-Down Lists, Checkboxes, Date Fields and Long and Short versions of Free-Text Fields for some time now and virtually all of our Manufacturer Clients have taken advantage of this powerful feature. Until now however, Custom Header Fields could only be used in custom reporting to group and sort Contract information. With this release, a *complete overhaul of the Contract Search Page* will allow for the inclusion of your Custom Header Field data in Contract searches.
8. **NEW: Column Chooser** – Now, virtually all of the major grids of data in ContractPro (like all search results, Pending & On-Holds, the "My Queues" grids, etc.) support adding and removing their columns at any time via this new feature. Simply right-clicking on most column headings in the application will present an option to display special new dialog called the Column Chooser. This dialog will allow you to drag available columns into the grid in any order you require, as well as drag existing columns back out of the grid and off screen. ContractPro will remember the changes you make with the column chooser automatically!
9. **NEW: Distributor Groupings** – ContractPro has always supported custom groupings of companies (both Distributors and Operators). This change introduces a new workflow for adding and removing Distributors from a Contract. Say for example, you want to add all but two of the individual Sysco houses to a Contract. Before this change, you would have had to add each of the houses you wanted, by selecting each individually. With this new capability, ContractPro allows you to add all "children" of any parent Distributor with a single click. Once added, you could simply remove the two houses you wanted to exclude. This is very similar to the way Products and Categories function.
10. **NEW: Account Owner Search*** – ContractPro now supports an "Account Owner" to be associated with every Company record in the system. Once an Account Owner has been defined for all of your Companies, ContractPro will allow Users to search for those Companies and Contracts via this association and to view this new data in several locations.
11. **NEW: Product Category Search** – When searching for Products to add to a Contract, your search term is now compared to, and may match, the Category Name. Previously, search terms were matched only to Product Name, Description, and SKU.
12. **NEW: Operator Contracted Price % Cost Basis*** – ContractPro contains support for defining many of its Program Types as percentages. When defining a discount as a percentage, you must also include a "basis" from which the percentage is to be calculated. In the 4.2 version of ContractPro, a new Cost Basis called "Operator Contracted Price" has been added.
13. **NEW: Product Category UOM Conversion** – Until now, Product Categories were limited to a single Unit of Measure. With this release, ContractPro will allow you to switch between a Category's Unit of Measure and Unit of Sale (for example, Cases and Pounds), at the Category Level. Provided that all Products within a given Category have a Unit of Measure and a Unit of Sale defined, along with a conversion from one to the other, ContractPro will allow you to switch back and forth between them at any time.



14. **NEW: Distributor Group Association** – A “Group” column has been added to the Distributor Search Screen. This new column allows a User to view the ContractPro Hierarchy Group association for each Distributor returned in a search.

Reporting & Analytics Enhancements

15. **NEW: New Reports Screen** – We’ve made a change to the design of the Reports Screen to allow for more intuitive execution of reports and to pave the way for future releases of additional reporting features. This new screen design will also allow for the presentation of our new 3D Report Deployment workflow.
16. **NEW: 3D Report Deployment**** – The new ContractPro 3D Reporting features integrate seamlessly into the new Reports Screen to allow Users with Create rights inside of 3D Reporting (previously known as “Project Athena”), to deploy 3D Reports to other Users of this much-anticipated reporting environment.

Minor Bug Fixes and Errata

1. **BUGFIX: Excel Pricing Program Type Mismatch** – A bug in the application caused an error to occur when a program type was allowed to be edited via Excel Pricing, after that program type had been removed from the application in the UI. This bug has been resolved.
2. **BUGFIX: Date Changes in Renew-Revised Status** – ContractPro was preventing changes to the Effective and Expiration Dates on a Contract when the Contract status was set to "renew-revise". Date changes are now allowed in this status.
3. **BUGFIX: Client Contract ID Displayed Incorrectly** – It was discovered that the Advanced Claim Search results grid was displaying the Client ContractID in the Column named ContractPro ID. For most clients this would result in the two IDs being equivalent but for any client that tracks their own ID for a ContractPro Contract, the ID would have been incorrect. This has been resolved and the correct ID is now showing.
4. **BUGFIX: View Contract Versions Link** – The "View Contract Versions" Link located in the Contract header section on the Contract View and Edit Screens has been modified. The link is now displayed only when the Contract version being displayed is one of multiple versions.
5. **BUGFIX: Status Code Cheat Sheet (8103, 8404)** – It was determined that there was no “Cheat Sheet” popup available for Claim status codes 8103 and 8404. This has been resolved.
6. **BUGFIX: Contract Search Screen Scrollbars** – Under certain situations, horizontal scrollbars were being displayed on the Contract results grid on the Contract Search Screen. The scrollbars have been eliminated.
7. **BUGFIX: Contract Time Period 1 Day Short on Renew** – Under certain circumstances, the Contract effective and expiration dates that are generated automatically during Contract renewal resulted in a Contract time period that was 1 day shorter than required. This bug has been resolved.

*** Note** – This feature requires additional Manufacturer configuration and setup and may not be available for the Manufacturer account(s) that you have access to within ContractPro. To find out more about this feature or to add its capabilities to your instance of ContractPro, contact your Answers Systems Sales Representative or Account Manager.

**** Note** – Access to the 3D Reporting Environment is contingent upon the completion of 3D Reporting integration and User Training. To find out more about this feature or to add its capabilities to your instance of ContractPro, contact your Answers Systems Account Manager.