November 2018 Release Webinar

Question and Answer Session

Q: Can a legend be added to the heat map?

A: Yes. One option is to display what the categories are. In the demo, we counted on a related table, on the status, which things we wanted to include, and then on the display chose only to show numerical values but you can also show the values themselves. Or just leave it blank as well as choosing a color.

Q: Can contract information be uploaded via Excel to transfer data from another system?

A: We can do an import from text, Excel, or XML files. We have a template we often use for importing contract data from Excel.

Q: Can you see pending approval by person and contract, as a dashboard item?

A: Yes. It's possible to put a chart or a heat map on a table widget in the dashboard.

Q: Is there a minimum required version to upgrade to the latest version?

A: There isn't a minimum required version as long as when you update the version, we refresh the licenses for the new version. If you are on a version before 2015 then we ask you upgrade to our 2017 01 release first as that has a lot of major background updates in it, and then once you've upgraded you can go to the new release.

Q: Has the configuration documentation for Bomgar Cloud been updated?

A: Yes. Documentation is constantly being worked on and updated.

Q: What is the name of the look and feel scheme shown in the demo?

A: It's our standard orange. We have a 2017 team Calibri default. You can download it by right-clicking "Save Link As" on this link.

Q: Who is the best contact for DocuSign integration?

A: Please contract your sales representative. Your sales representative can answer questions and get you started.

Q: Are new features, related to on premise upgrades, only available for new KBs created within the installation?

A: As soon as you update the version number, all of the new features will be available. Some new features aren't turned on by default. The JavaScript charts for example, aren't turned on by default. Otherwise if you were to upgrade, your charts would change without warning. There is a global variable called "Always Use JavaScript Charts". If you want to flip your charts over immediately, you can turn on this global variable and all of the homepage widgets will update. Otherwise, there is an option in each one of the individual charts as to whether or not you want to use the JavaScript charts. The rest of the things shown in the demo will immediately become available.

Q: When will the new release be available to download to an on premise installation?

A: It's available to download right now from the [Downloads](#) page.

Q: Is Agiloft just CLM or does it have CRM features?

A: Agiloft offers a CRM and Sales Enablement solution with Salesforce integration.

Q: Have there been any integrations done with Dynamics 365 or Great Plains accounting software?

A: They've been integrated through scheduled export import and we're looking at building real-time integrations in Q1 and Q2 of 2019.

Q: Are the look and feel features for KBs hosted in the Agiloft environment?

A: Look and feel features are part of the base code so as soon as you update to this release those features will be available.

Q: What's the best process to request product enhancements?

A: For an enhancement related to a change in the codebase, log in through our website support portal [here](#) or create a user account first if you need to. When you log in through our support portal there's an Ideas table where you can request enhancements and those get voted on and then they get turned into tickets within the development processes. Alternatively, to request configuration changes, you can talk to your existing project manager or sales representative.

Q: Are there plans for a spreadsheet view of table record information in the upcoming 2019 releases?

A: We recently added direct editing into the table so from the table view you can come in and modify any of the fields that are marked with a pencil icon.

Q: Do we have an open API?

A: We have REST and Web Services open APIs.

Q: How often do we roll out new enhancements?

A: We typically offer two major releases per year. We also provide minor enhancements as they're available.

Q: Can customers with scripting and integrations already in place in on premise installations get temporary licenses to support testing those capabilities for a period of time before an upgrade takes place?

A: Yes. Please speak to your sales representative to obtain licenses for testing.

Q: What is the rollout date for the enhancements marked for 2019?

A: Q1 and Q3 of 2019.

Q: Will the table design layout also be updated similar to the dashboard layout changes?

A: Yes. All the baseline display code is getting updated.