

2026.1 Release Preview

February 26, 2026

Today's Speakers



Stephen Hardy
Director, Customer Success



Grant Gearhart
Product Manager



Mai Suzuki-Scull
Product Manager



Rashad Mohammed
Product Manager



Greg White
Sales Engineer

2026.1 Release Reminders

- Today’s webinar covers highlights only – be sure to check out the Release Notes for a complete list of all new features, enhancements, and fixes
- **Apr 13**: Release available for deployment
- **Available Now**: New & updated documentation on our Customer Success Portal
 - 2026.1 Release Resources Page
 - Release Notes
 - Configuration Guides
 - User Guides
 - Today’s Webinar Recording & Slides

TechnoMile / Release Notes / 2026.1 Release

TechnoMile 2026.1 Release Resources

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TechnoMile is excited to announce the 2026.1 release of our Growth and Contracts products. This article consolidates all documentation and other resources available for the 2026.1 release.

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On-Demand Webinar		<ul style="list-style-type: none">• Release webinar recording - Register for Live Event
		<ul style="list-style-type: none">• Release webinar PPT - Coming Soon!
Release Notes	Growth Suite	<ul style="list-style-type: none">• Growth CRM (on Salesforce Sales Cloud) - Read Article
		<ul style="list-style-type: none">• Growth CRM (on Salesforce Platform) - Read Article
		<ul style="list-style-type: none">• Growth CRM (on Microsoft Dynamics) - Read Article
	Contracts Suite	<ul style="list-style-type: none">• Winit CRM (on Salesforce) - Read Article
		<ul style="list-style-type: none">• Contracts Suite (on Salesforce) - Read Article
		<ul style="list-style-type: none">• Contracts Suite (on Microsoft Dynamics) - Read Article



In January 2026, TechnoMile and SIMS combined to deliver an integrated, AI-enabled solution that **supports mission-critical operations end-to-end** – from identifying contract opportunities through compliant, secure execution – **connecting growth, contracts, and security workflows** for GovCon, Defense, and Public Sector organizations to strengthen compliance, reduce risk, safeguard brand reputation, boost operational efficiency, and fuel mission success and sustained business growth.



Growth

+



Contracts

+



Security

Stronger Compliance • Reduced Risk • Safeguarded Reputation • Operational Efficiency • Mission Success • Sustained Growth



Trusted partner to **450+** clients



Leaders in Defense, High Tech, IT & Professional Services



DoW, Civilian Agencies & the Intelligence Community



Educational Research Labs

Agenda

Growth Suite Update & Demo

Grant Gearhart & Rashad Mohammed

01

Contracts Suite Update & Demo

Mai Suzuki-Scull, Greg White & Rashad Mohammed

02

Live Q&A

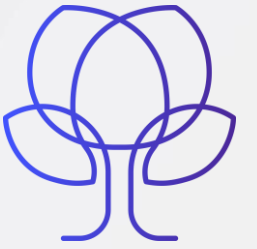
TechnoMile Product Management Team

03

Growth Suite

Update & Demo

Release Themes for Growth Suite



Build the pipeline.

- Intelligent tools to help your team rapidly find relevant opportunities and fill your company's pipeline



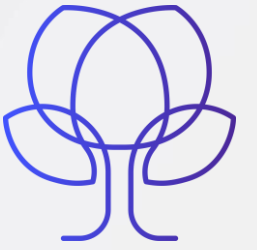
Research the pipeline.

- Insights and automation that inform smart bid/no bid decision making and save your team time



Execute the pipeline.

- Human-AI collaboration that focuses your team on the right priorities, reinforces sales best practices, and boosts win rates



2026.1 Key Updates for Growth Suite on Salesforce or Dynamics

- GovSearchAI: Reimagined, Agentic-Driven Experience
 - New User Interface, AI-Powered Search
 - Find Opportunities
 - Mila
 - Personalized Opportunity Profile
 - The TechnoMile Opportunity
 - Streamlined Market & Competitive Research
 - Alerts & Notifications

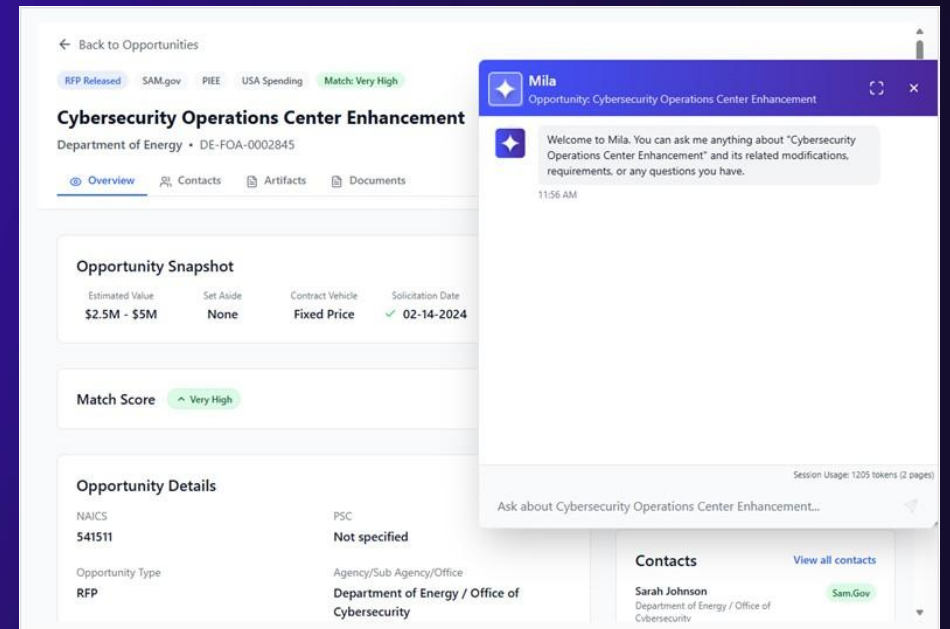
GovSearchAI: Reimagined, Agentic-Driven Experience

Key Capabilities

- Optimized user experience: more intuitive navigation and search, personalized filters
- AI agents analyze past performance to recommend the leads your organization is best positioned to win
- AI-enhanced opportunity records consolidate all relevant details into one, comprehensive view: the TechnoMile Opportunity
- Mila offers instant, conversational access to opportunity insights and rapid creation of proposal artifacts
- Integrated market insights on competitors, partners, customers, and government contacts
- Speak with your TechnoMile CSM to request this update

Business Value

- **Accelerate opportunity identification** with tailored, AI-curated leads.
- Consolidate all opportunity details into a single, holistic record for **faster qualification and decision-making**.
- See personalized intelligence aligned to each user's role, **saving time**.
- **Streamline document analysis and artifact creation** with instant, conversational access to opportunity details.



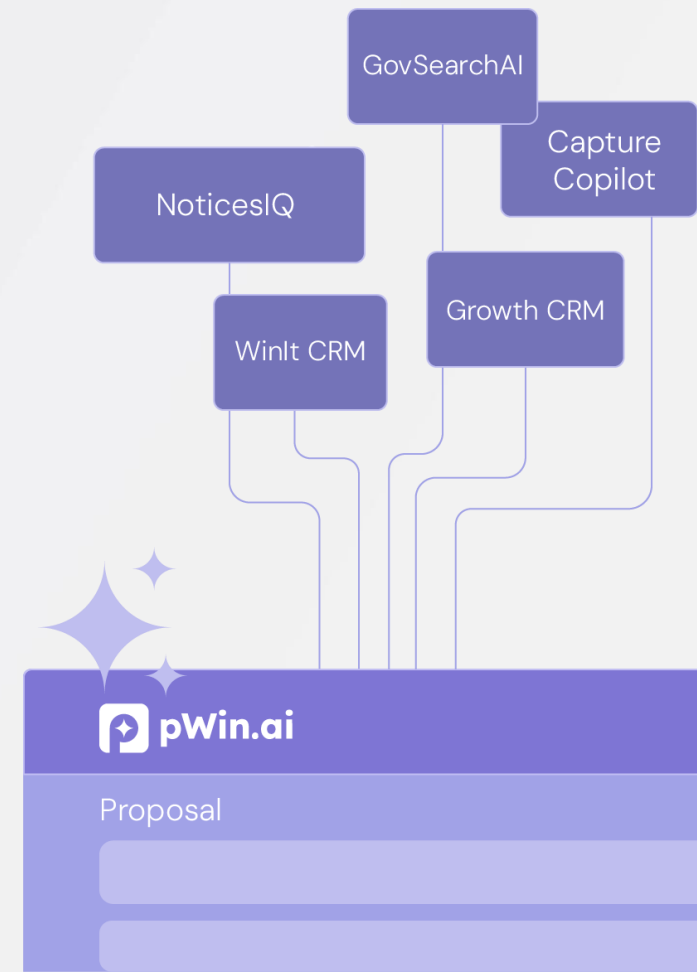
New Partnership!

AI Proposal Generation: TechnoMile + pWin.ai

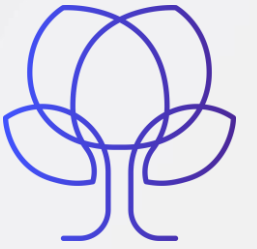
- pWin.ai accelerates proposal creation using AI and proven, Shipley-based best practices
- Complements TechnoMile's opportunity and capture intelligence foundation
- Integration between TechnoMile's Growth Suite and pWin enables a complete opportunity-to-award process

Business Value

- Seamlessly **unify BD, capture, and proposal workflows.**
- Complete **Pink Team-ready drafts 80% faster** without any compromise on quality or security.
- Tightly align responses with your capture strategy, differentiators, and past performances to help you **win more.**



2026.1 Key Update for Growth Suite on Salesforce Sales Cloud



- Capture Copilot

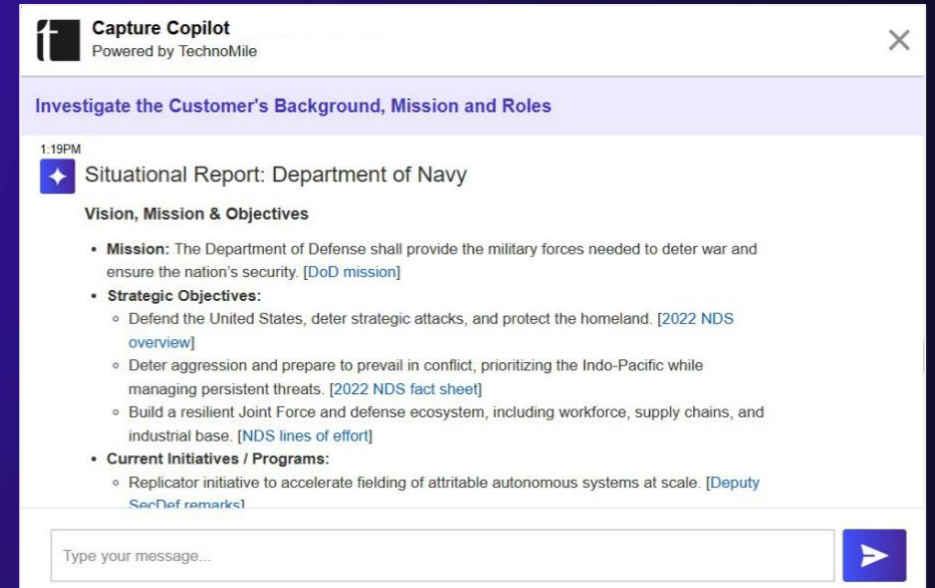
Capture Copilot

Key Capabilities

- Domain-trained AI agents augment your team, executing or assisting with BD and capture activities
- Automates tasks such as:
 - Conducting research (e.g., customer, competitors, partners)
 - Analyzing historical opportunities and past performances
 - Creating documents and briefs
 - Monitoring for updates
 - Capturing/updating data in your CRM
- Helps execute a disciplined capture process
- Add-on to Growth CRM – speak with your TechnoMile CSM

Business Value

- **Consistently execute a disciplined capture process**, improving your win rate and predictability of forecasts.
- **Free up sales professionals** to focus on strategy, creative solutioning, and relationship building.
- **Reduce labor costs** for each pursuit and **create bandwidth** to pursue more business without adding headcount.



The screenshot displays the 'Capture Copilot' interface, powered by TechnoMile. The main heading is 'Investigate the Customer's Background, Mission and Roles'. Below this, a timestamp '1:19PM' is shown next to a blue star icon. The report title is 'Situational Report: Department of Navy'. Under the heading 'Vision, Mission & Objectives', there are three main sections: 'Mission', 'Strategic Objectives', and 'Current Initiatives / Programs'. Each section contains bulleted points with links to external documents. At the bottom, there is a text input field with the placeholder 'Type your message...' and a blue send button with a white arrow.

Capture Copilot
Powered by TechnoMile


Investigate the Customer's Background, Mission and Roles

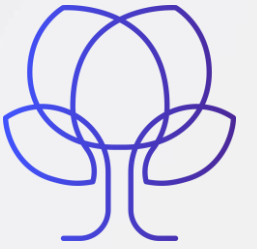
1:19PM

Situational Report: Department of Navy

Vision, Mission & Objectives

- **Mission:** The Department of Defense shall provide the military forces needed to deter war and ensure the nation's security. [DoD mission]
- **Strategic Objectives:**
 - Defend the United States, deter strategic attacks, and protect the homeland. [2022 NDS overview]
 - Deter aggression and prepare to prevail in conflict, prioritizing the Indo-Pacific while managing persistent threats. [2022 NDS fact sheet]
 - Build a resilient Joint Force and defense ecosystem, including workforce, supply chains, and industrial base. [NDS lines of effort]
- **Current Initiatives / Programs:**
 - Replicator initiative to accelerate fielding of attributable autonomous systems at scale. [Deputy SecDef remarks]

Type your message... 



2026.1 Key Updates for Growth Suite on Microsoft Dynamics

- Spark Improvements
 - Manual Spark Capture
 - Enhanced Spark-to-Opportunity Conversion Admin Panel
- New Business Process Flows (BPF) for Business Line-Specific Opportunity Workflows

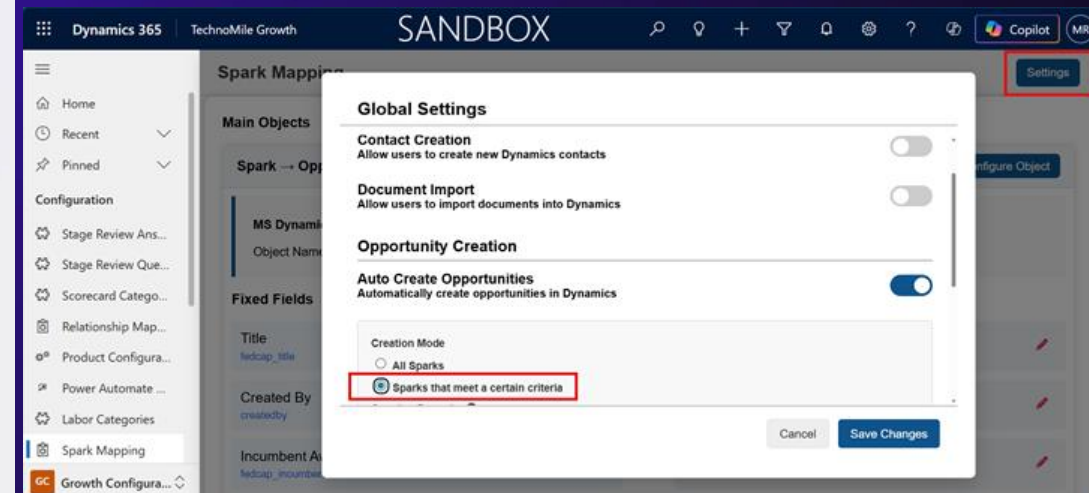
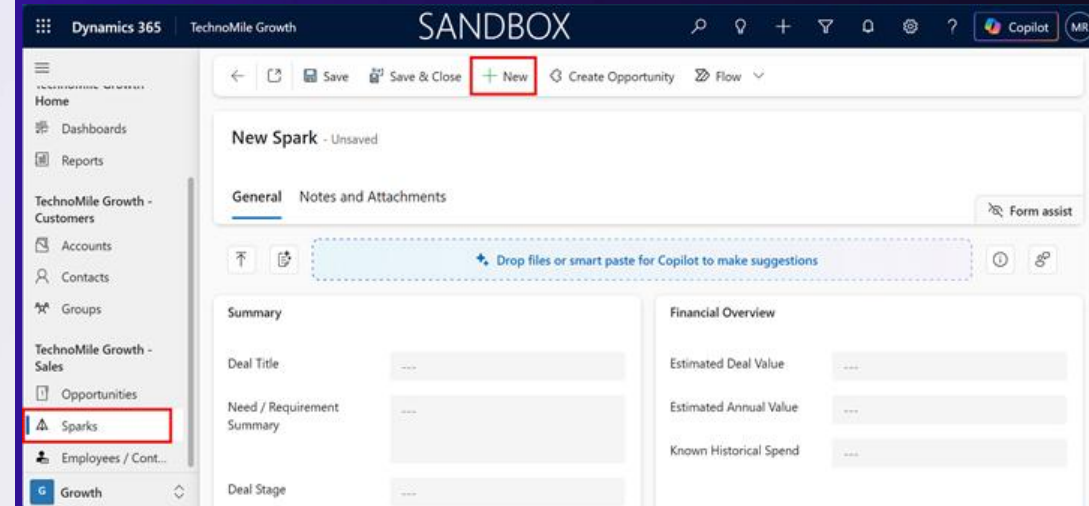
Spark Improvements

Key Capabilities

- Manual Spark Capture: In addition to creating Sparks from leads found on SAM.gov, users now have the flexibility to use the Create a New Spark Record option and manually enter lead details
- Enhanced Spark-to-Opportunity Conversion Admin Panel:
 - Spark entity was enhanced to capture additional details that may be available for a potential opportunity – such as contacts and document attachments
 - For clients that prefer a Spark-to-Opportunity conversion workflow without any user intervention, the admin can configure the solution to auto-convert all incoming Sparks into Opportunity records and designate whether to create new opportunities from “All Sparks” or only “Sparks that meet certain criteria”

Business Value

- **Gain flexibility** to capture leads from any source.
- Reduce the need for manual opportunity creation, **saving users' time**.
- **Efficiently fill your pipeline** with opportunities that satisfy your company's unique criteria.



New BPFs for Business Line-Specific Opportunity Workflows

Key Capabilities

- New Business Process Flows (BPFs) in the Dynamics 365 Opportunity entity enable an organization to manage opportunities for multiple lines of business – e.g., Federal vs. Commercial – all within Growth CRM
- Each LOB can have its own distinct BPFs configured to align with its unique business processes
- Contact your TechnoMile CSM if interested in exploring the new BPFs and their compatibility with your Growth CRM implementation

Business Value

- **Enable consolidation** of sales operations on a single CRM to **save IT cost**

The screenshot shows the Dynamics 365 interface for an Opportunity entity. The top navigation bar includes 'Dynamics 365', 'TechnoMile Growth', and 'SANDBOX'. The left sidebar shows the navigation menu with 'Opportunities' selected. The main content area displays the 'Federal Opportunity PAT' record. A red box highlights the 'Opportunity BPF - Federal' section, which shows a process flow with phases: Phase Z, Phase 0 (71 D), Phase 1, and Phase 2. Below this, the 'Group' field is set to 'Federal', also highlighted with a red box. Other fields include 'Account Name' (Department of War), 'Our Role' (Prime), and 'Contract Type'.

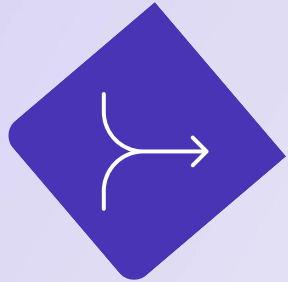
The screenshot shows the Dynamics 365 interface for the 'Groups' entity. The top navigation bar includes 'Dynamics 365', 'TechnoMile Growth', and 'SANDBOX'. The left sidebar shows the navigation menu with 'Groups' selected. The main content area displays a list of 'Active Groups'. A red box highlights the 'Active Groups' header. The list includes columns for 'Group Name' and 'Created On'. The data rows are as follows:

Group Name	Created On
Commercial 1	12/17/2025 11:11 AM
Federal	11/10/2025 9:37 AM
Regular	11/10/2025 9:38 AM
Regular_1	1/13/2026 12:43 PM
Task Order	11/10/2025 9:39 AM
Test Demo 13_1	1/13/2026 12:12 PM
US Defence	11/20/2025 7:06 AM

Contracts Suite

Update & Demo

Release Themes for Contracts Suite



Streamline pre-award analysis.

- Agentic-fueled solutions that enhance collaboration, assessment of risk, and pricing strategy in the pursuit of new business



Speed award intake.

- Automation and intelligence that accelerate contract set up so your team can focus on strategic priorities



Simplify post-award risk and compliance management.

- Tools and AI agents that streamline contract administration, safeguard against compliance gaps, and mitigate risk

2026.1 Key Updates for Contracts Suite on Salesforce or Dynamics



- Transform Copilot for Pre-Award
- Mila for Contracts
- Pre-Award Management: PoP and CLIN/SLIN Details on Proposals

Transform Copilot for Pre-Award

Key Capabilities

- AI-powered extraction of key business intelligence from solicitations – including proposed Periods of Performance, CLINs/SLINs, and clauses – to automate creation of detailed solicitation and proposal records
- AI summary of the solicitation and any identified risks
- Leverages Mila to enable conversational querying of the solicitation
- Compatible with Pre-Award Management, which can be added on to CLM or Growth/WinIt CRM

Business Value

- **Eliminate hours of manual data entry** when intaking solicitations, freeing your team to **focus on strategic priorities.**
- **Fast-track risk assessment and compliant proposal creation.**
- **Enhance decision-making** with AI-driven insights surfaced through natural language interaction.
- Familiar wizard and interface mean no additional training needed, enabling **rapid adoption.**

The screenshot displays a procurement system interface. At the top, it shows 'Used SF-33' and a link to 'See the TC FAQ for help reviewing results'. The main header area is titled 'Step 1 / 4 Solicitation Header Details'. Below this, there are search and navigation controls, including a search bar with '100%' and buttons for 'Reset Zoom', 'First', 'Jump to 1', 'Go', 'Last', and 'Open PDF'. The central part of the screen is a detailed form for 'SOLICITATION, OFFER AND AWARD'. This form includes fields for 'SOLICITATION NUMBER' (W912HQ24R0015), 'DATE ISSUED' (10/08/2024), and 'RETURN BY' (11/08/2025, 16:30). Below these are fields for 'CONTRACT NUMBER', 'PURCHASE ORDER NUMBER', 'DPAS RATING', 'SOLICITATION TYPE' (RFP), and 'FOR INFORMATION CALL'. The bottom section of the form is a table with columns for 'CODE', 'DESCRIPTION', 'TITLE OR REFERENCE', and 'PAGE(S)'. The table lists various contract clauses such as 'SOLICITATION', 'OFFER', 'CONTRACT ADMINISTRATION', and 'SCHEDULES'. The right sidebar contains a list of key fields: Solicitation Number, Date Issued, Return By, Contract Number, Purchase Order Number, DPAS Rating, Solicitation Type, and For Information Call.

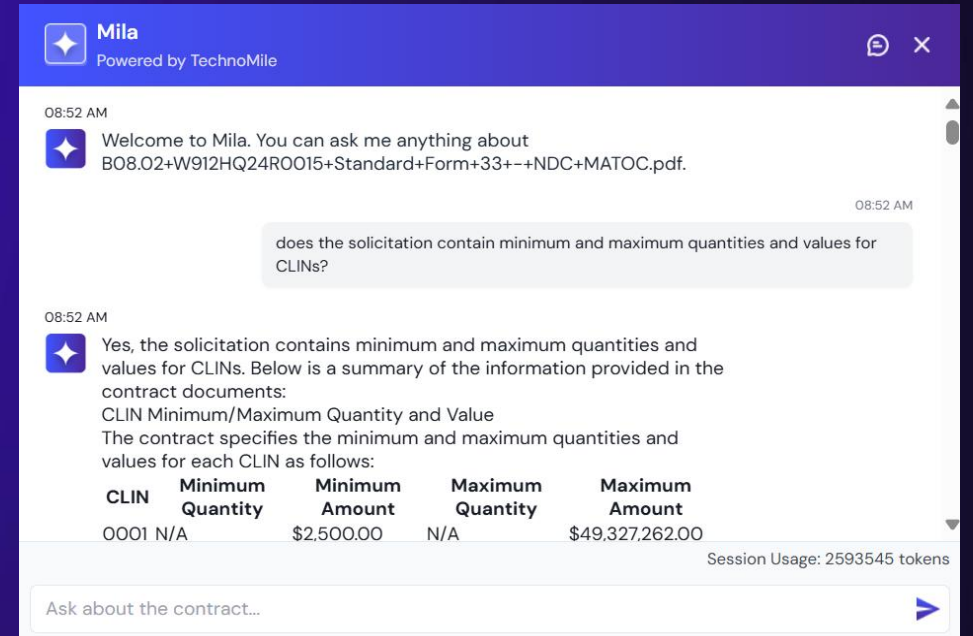
Mila for Contracts

Key Capabilities

- Utilize AI through natural conversation
- Pre-trained model speaks to you like an experienced Contracts Manager
- Enables rapid analysis of solicitation, contract award, and mod documents ingested via Transform Copilot, as well as on-demand production of proposal artifacts, executive briefs, and more

Business Value

- **Accelerate document analysis** with instant, conversational access to solicitation and contract details.
- Streamline artifact creation, **reducing manual effort and turnaround time.**
- **Enhance decision-making** with AI-driven insights surfaced through natural language interaction.



The screenshot shows a chat window for 'Mila' (Powered by TechnoMile). The chat history includes a welcome message and a user query: 'does the solicitation contain minimum and maximum quantities and values for CLINs?'. The AI response is: 'Yes, the solicitation contains minimum and maximum quantities and values for CLINs. Below is a summary of the information provided in the contract documents: CLIN Minimum/Maximum Quantity and Value The contract specifies the minimum and maximum quantities and values for each CLIN as follows:'. Below the text is a table with the following data:

CLIN	Minimum Quantity	Minimum Amount	Maximum Quantity	Maximum Amount
0001	N/A	\$2,500.00	N/A	\$49,327,262.00

At the bottom of the chat window, there is a text input field with the placeholder 'Ask about the contract...' and a blue arrow button. The session usage is noted as 'Session Usage: 2593545 tokens'.

Pre-Award Management: PoP and CLIN/SLIN Details on Proposals

Key Capabilities

- Proposal records now include the ability to track the proposed Periods of Performance and CLINs/SLINs associated with the related solicitation
- Upon award, when using Create Contract, clients have the option to use the PoP and CLIN/SLIN detail from the proposal record to auto-populate these details on the new contract record

Business Value

- Centrally document the financial expectations outlined in your proposal document, enabling **clear stakeholder visibility**.
- **Eliminate keystrokes** and **save time** during new award intake.

The image displays two screenshots of a proposal management system. The top screenshot shows the 'Details' tab for proposal PRO-0019, with 'POP' and 'CLIN/SLINs' tabs highlighted. The 'POP' tab is selected, showing details for 'Total Aviation Support Services (TASS) - DEA'. The 'CLIN/SLINs' tab is also visible. The bottom screenshot shows the 'Proposal Process' flow, with 'Draft (40 Hrs)' selected, and 'POP' and 'CLIN/SLINs' tabs highlighted. The 'Draft' tab is selected, showing details for proposal A-1761.

Proposal PRO-0019 Details:

Field	Value
Proposal Record No.	PRO-0019
Proposal Title	Total Aviation Support Services (TASS) - DEA
Customer	AVIATION DIVISION (DEA)
Contract Action	New Contract (Qualifying Proposal for Definitization)
Type of Estimate	Not To Exceed
Description	See RFP 15DDHQ24R00000041 and Exhibits attached. Also, please find the Q&As from the pre-solicitation notice 15DDHQ24N00000001 attached.
Owner	Contract Manager
Due Date	8/23/2024, 2:00 PM
Validity Date	11/15/2024, 12:00 PM
Proposal Status	Approved
Competition Type	Full and Open
Contract Type	CPFF

Proposal A-1761 Details:

Field	Value
Proposal No.	A-1761
Proposal Title	Proposal for W912HQ24R0015
Description	lorem ipsum
Customer	---
Contract Action	---
Contract Type	---
Proposal Status	Draft
Negotiations Confirmation Date	---
Due Date	---
Estimate Type	Firm
Parent Proposal	---
Product Line	---
Customer Site/Location	---

2026.1 Key Updates for Contracts Suite on Salesforce



- CLM: AI Agents for Contracts
 - CDRL-to-Deliverable Agent
 - Executive Summary Agent
 - Ingest Agent
- CLM: SLDS 2 (Salesforce Lightning Design System) Compatibility

The screenshot shows the Salesforce interface for a contract. At the top, it displays "Our Contract N66604-22-C-0000" with a list of actions: Follow, Generate Contract Brief, Update Contract (TC), Initiate OCI, Create Subcontract, and New Adverse Action. Below this is a table with columns for Contract Number, Our Anticipated Contract Val..., Exercised Contract Value, Total Contract Funding, Record Status (Draft), and Record Type (Definitive). A "Contract Unlocked" notification is shown with a lock icon and a "Lock Contract" button. A progress bar at the bottom indicates the contract's status: Draft (selected), Negotiate, Execute, Administer, Contract Ended/Expired, Close Out, Closed, Extension Pending, and Terminated. A "Related List Quick Links" section contains various links with counts, such as Adverse Actions (0), Agreements (0), Customer Contacts (0), Contract Partners (0), CLM Labor Categories (0), Labor Category Rates (0), CPAR (0), Contract Wage Determination (0), Deliverables (0), OCIs (0), Subcontracts (0), Small Business Plans (0), Small Business Reports (0), Contract Audit Histories (0), Files (0), and Our Contract History (6). A vertical "AI SUMMARY" button is on the right side.

AI Agents for Contracts

Key Capabilities

- TechnoMile's domain-trained AI agents augment your team, automating or assisting with contracts processes to help Contracts teams increase efficiency, assess risk, and improve compliance:
 - CDRL-to-Deliverable Agent: Auto-generates deliverables from CDRLs
 - Executive Summary Agent: Summarizes key contract actions and risks across the portfolio
 - Ingest Agent: Automates creation of orders and deliverables from structured electronic subcontracts
- Available with Salesforce deployment

Business Value

- **Save substantial time** for users.
- Focus users on **higher value activities**.
- Enable clients to **focus on results**, not process.



Weekly Executive Summary: February 17 - 23, 2026

Activity Metrics Summary

- **New Contracts Created:** 7
- **Contracts Modified:** 5 (Base: 5)
- **Contracts Closed Out:** 1
- **Opportunities Advanced:** 3 (Pursue to Proposal Development: 1, Proposal Development to Closed Won: 1, Interest to Pursue: 1)
- **Agreements Executed:** 2 (Draft to Submitted for Internal Review: 1, Requested to Draft: 1)
- **Proposals Submitted:** 0

Potential Risks and Action Items

1. New Contracts Pending Initial Review & Approval

- [D2A Full Scope](#) - Owner: Kevin Bancato (kevin.bancato@technomile.com) - Created Date: 2026-02-20
- [Golden Dome](#) - Owner: Kevin Bancato (kevin.bancato@technomile.com) - Created Date: 2026-02-18
- [DBM Installation](#) - Owner: Sales OOB Demo 2025 (sales-cloud-oob-demo-2025@technomile.com) - Created Date: 2026-02-18
- [89233126DNA000072](#) - Owner: Kevin Bancato (kevin.bancato@technomile.com) - Created Date: 2026-02-17
- [346 Mobile Assessment Vehicle \(MAV\)](#) - Owner: Sales OOB Demo 2025 (sales-cloud-oob-demo-2025@technomile.com) - Created Date: 2026-02-20
- [USCG Drone support IDIQ](#) - Owner: Sales OOB Demo 2025 (sales-cloud-oob-demo-2025@technomile.com) - Created Date: 2026-02-20

Action: Legal department to review contract terms and pricing by February 25. Contract Administrators to prepare approval documentation by February 26.

2. Open Contract Modifications Pending Final Approval

2026.1 Key Updates for Contracts Suite on Microsoft Dynamics



- CLM: Contract Brief Improvements
- CLM: New Active TechnoMile Process Configurations Admin Panel

CLM: Contract Brief Improvements

Key Capabilities

- The contract brief template has been optimized to include only the details most relevant to our clients' needs:
 - Additions: All contract team member names, the contracting officer's name and email, and any contract-specific clauses
 - Removed: Anticipated Contract Value and the Total Contract Summary sections
 - Renamed: Mandatory Clauses section was renamed Key Clauses
- If using the option to auto-generate a contract brief following any contract mod, the email distributing these briefs now includes a SharePoint link, rather than an attachment

Business Value

- Save time** for users by automating contract brief creation and auto-capturing historical snapshots of a contract each time it evolves, without requiring any human intervention.
- Ensure that access to contract briefs **aligns with the client's established SharePoint permissions.**



ContractBrief 11-19-2025 12-17-12 PM ▾

Accessibility Mode

Contract Brief

INTERNAL POINTS OF CONTACT					
Name	Email	Team Role			
Apurva Upadhyaya	apurva@TechnoMileUSA.onmicrosoft.com	Contract Administrator			
Apurva Upadhyaya	apurva@TechnoMileUSA.onmicrosoft.com	Finance Representative			
Apurva Upadhyaya	apurva@TechnoMileUSA.onmicrosoft.com	Program Manager			

CONTRACT INFORMATION					
Award Date:	11/12/2025	Role:			
Contract No:		NAICS Code:			
Contract Name:	Test Contract	Contract Status:	Administer		
PO No:		Contract Ceiling Value:			
Subcontract No(s):	\$0.00				
Contract Vehicle Type:	Task Order				

CONTRACTING OFFICER INFORMATION		
Contracting Officer:	Test ABC	Contracting Officer Email:

PERIOD OF PERFORMANCE			FINANCIAL SUMMARY		
POP Name	Start Date	End Date	Exercised Value	Total Value	Total Funding
	SubK				
	SubK 2				
	SubK 4				
	SubK 6				

Accessibility Mode

TASK ORDER					
Task Order Name	Task Order Number	Our Role	Awarding Organization	Value	Funding

SUMMARY OF CONTRACT MODIFICATIONS					
Name	Mod No	Revision Type	Effective Date	Value Changes	Funding Changes
Modification - Test Contract - Mod 0	Mod 0	Modification	11/12/2025	300.00	300.00
Modification - Test Contract - Mod 1	Mod 1	Modification	11/14/2025	0.00	0.00

CONTRACTUAL POINT OF CONTACT					
POC Name	Role	Phone	Fax	Email	Address
AP Updhayay		08657453211	Test fax	apurva@TechnoMileUSA.onmicroft.com	Test 1 Nagpur Nagpur 1 Nagpur, Maharashtra Test 3

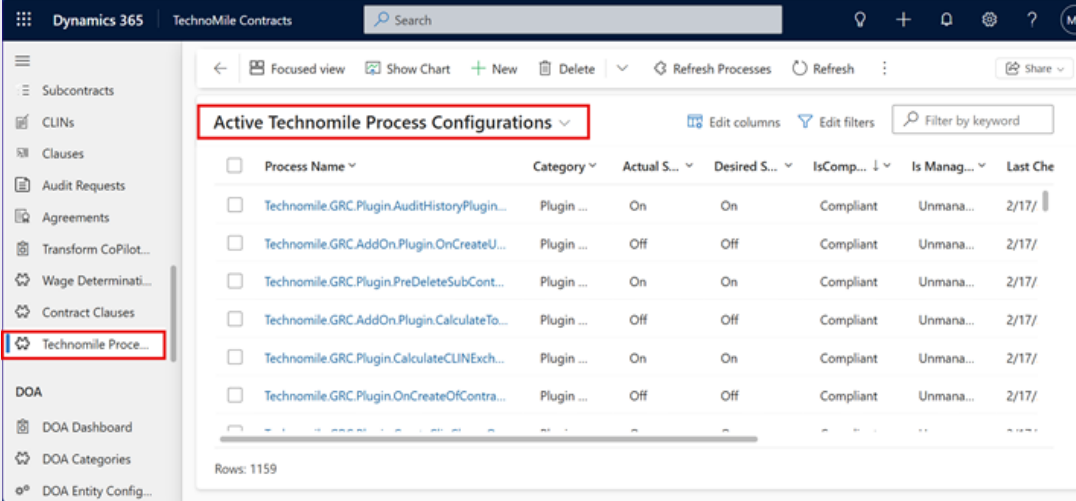
CLM: New Active TechnoMile Process Configurations Admin Panel

Key Capabilities

- For clients who choose to manage their own installation and/or updates, system admins now have a one-stop view of Active TechnoMile Process Configurations that shows the current status (on/off) of all available components relative to their desired status
- System admins receive a weekly email notification that highlights any non-compliant components that require attention

Business Value

- Enjoy **easy visibility** into the current status of all available components.
- Empower admins to **proactively troubleshoot** potential issues and keep their TechnoMile CLM solution **running smoothly**.



The screenshot displays the Dynamics 365 interface for TechnoMile Contracts. The main view is titled "Active TechnoMile Process Configurations" and shows a table with the following columns: Process Name, Category, Actual Status, Desired Status, Is Compliant, Is Managed, and Last Checked. The table contains six rows of data, each representing a different plugin configuration. The "Technomile.Proce..." option is highlighted in the left-hand navigation menu.

Process Name	Category	Actual S...	Desired S...	IsComp...	Is Manag...	Last Che
Technomile.GRC.Plugin.AuditHistoryPlugin...	Plugin ...	On	On	Compliant	Unmana...	2/17/
Technomile.GRC.AddOn.Plugin.OnCreateU...	Plugin ...	Off	Off	Compliant	Unmana...	2/17/
Technomile.GRC.Plugin.PreDeleteSubCont...	Plugin ...	On	On	Compliant	Unmana...	2/17/
Technomile.GRC.AddOn.Plugin.CalculateTo...	Plugin ...	Off	Off	Compliant	Unmana...	2/17/
Technomile.GRC.Plugin.CalculateCLINExch...	Plugin ...	On	On	Compliant	Unmana...	2/17/
Technomile.GRC.Plugin.OnCreateOfContra...	Plugin ...	Off	Off	Compliant	Unmana...	2/17/

Live Q&A

Thank you!
