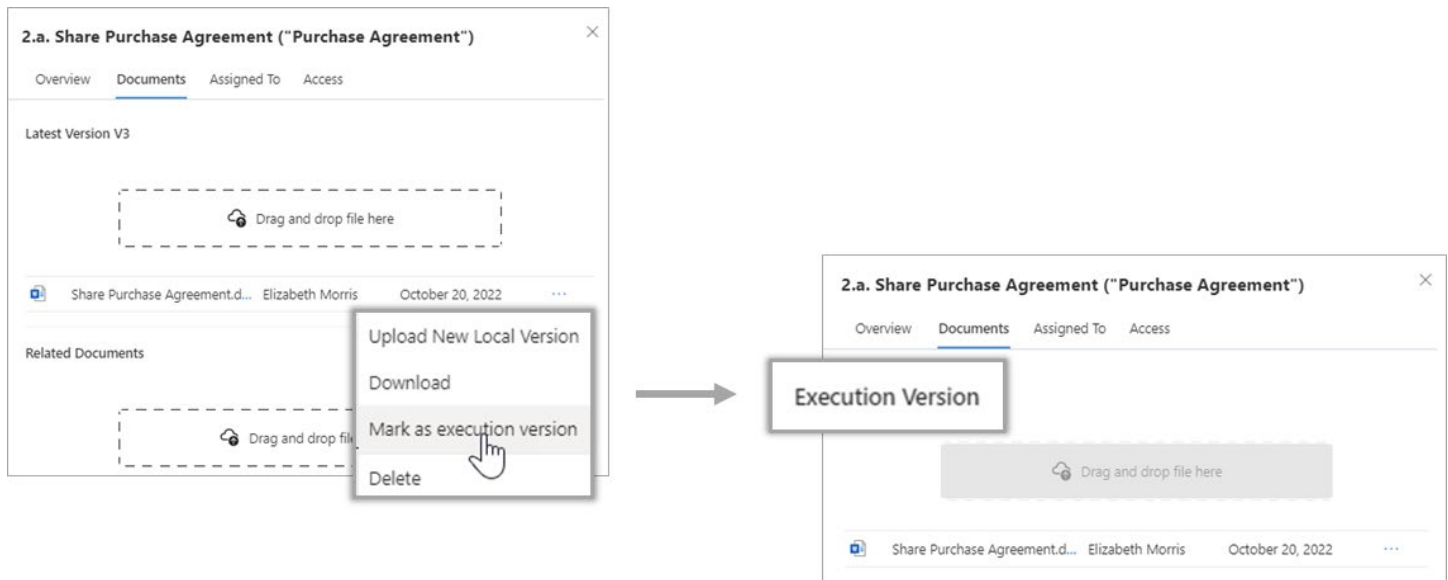


Enhancements

Mark document as execution version

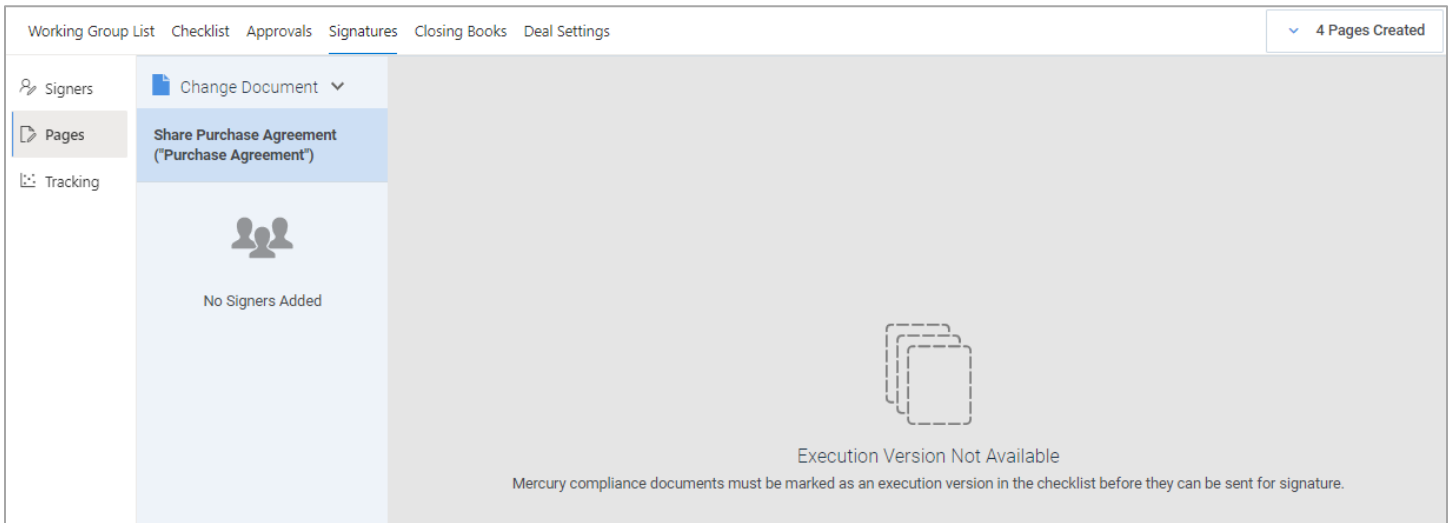
Owning firm users can mark primary documents as the execution version so that everyone in the deal knows that it is the final document.



Users cannot edit or delete an execution version and cannot add any additional document versions. Owning firm users can unmark a document as the execution version.

Improvements in the Mercury compliance workflow

The new execution version supports our improvements to the Mercury signatures workflow in Litera Transact. When Mercury compliance is set for a checklist item, users will not be able to add signers or configure signature pages until the document in that item is marked as the execution version.



When a document is marked as the execution version, users can set up signature pages at a signer level by selecting the signature page from the document.

Note: Users cannot configure signature pages at the document level or the signature group level, and they cannot upload a custom signature page.

Improvements to closing books

To improve the look and feel of closing books, which users often send to clients, we've made the following enhancements.

Customizing the closing book index

Checklist items are shown in the closing book index if they, or any of their sub-items, have a document attached. Users can drag and drop top-level sections within the closing book index – any sub-items are moved with the top-level section. Users can also delete checklist items from the closing book index.

Show hierarchy in closing book index

The closing book index now more closely reflects the checklist, indenting for up to 9 levels, and each level is identified with a tab. Checklist numbers are shown for the top level and related documents are displayed beneath the checklist item that they belong to.

Create Closing Book

Build Table of Contents

Rename, reorder, and remove/add documents to build your desired closing book and table of contents.

① Indicates the name exceeds 200 characters. If you shorten the name here, the shortened name appears in the index and as the file name in the closing book. Names longer than 200 characters will appear in the index but the file name in the closing book will be truncated from the beginning.

Times New Roman ▼ 12 ▼

+ Choose from Checklist

Document	Tab #
1. PRE-CLOSING ITEMS	1
Form Purchaser	
Articles of Association	2
Articles of Association Buyer	3
Articles of Association Seller	4
Certificate of Incorporation	5
Form of Sellers Transaction Expenses Payoff Letter	6
Merger of [_____] and [_____]	7
2. JOINT CLOSING ACTIONS	8
Unit Purchase Agreement ("UPA")	9
Escrow Agreement	10
3. SELLERS CLOSING ACTIONS	11

Create Closing Book

We've also removed underlining to provide a cleaner look that is easier to navigate.

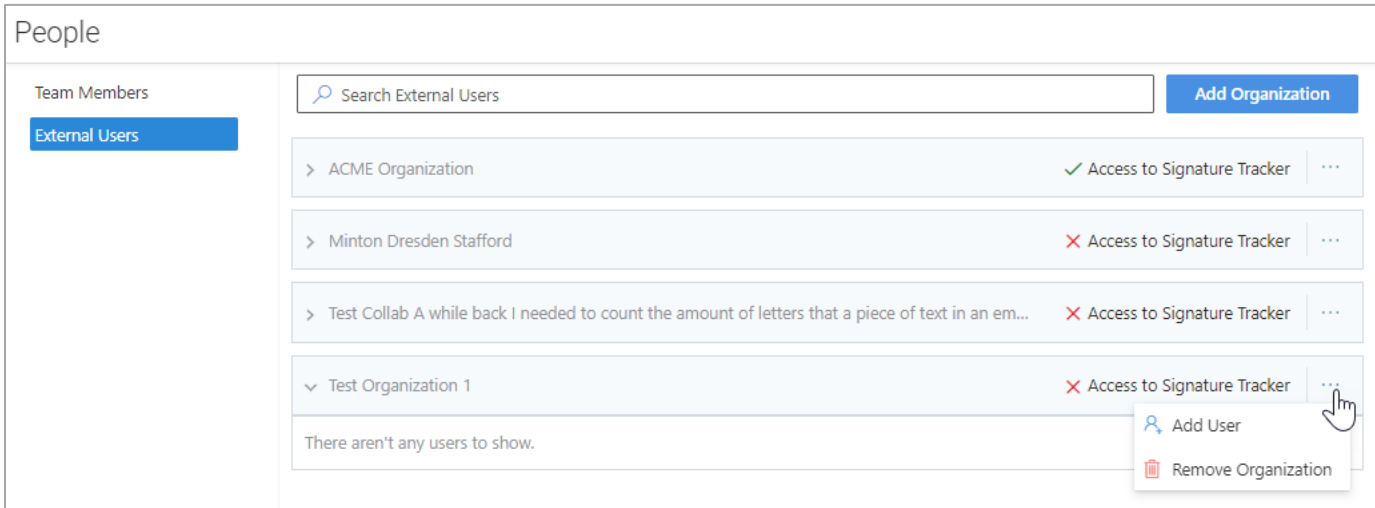
Additional enhancements

- Checklist sections with documents attached are now given a tab number in the closing book index so there is no need to prepend the word "section" to the document name in the closing book zip file.
- There is no character limit when users edit related document names in the closing book index. However, file names longer than 200 characters will be truncated from the beginning in the closing book zip file.

Remove organizations

To improve the user experience, we've introduced the option to remove organizations from Litera Transact that are no longer required or were added for testing purposes.

System Admins or Firm Admins can remove organizations from the People tab, after first removing the organization from any active deals.



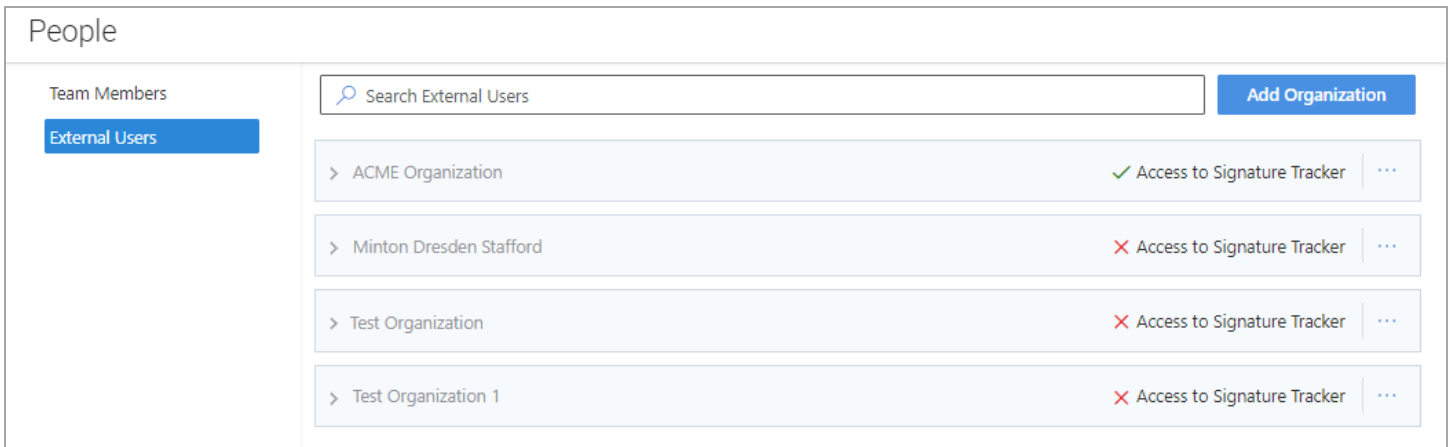
The screenshot shows the 'People' tab interface. On the left, there are tabs for 'Team Members' and 'External Users'. A search bar for 'Search External Users' is at the top right, next to an 'Add Organization' button. Below the search bar is a list of organizations:

- ACME Organization: ✓ Access to Signature Tracker
- Minton Dresden Stafford: ✗ Access to Signature Tracker
- Test Collab A while back I needed to count the amount of letters that a piece of text in an em...: ✗ Access to Signature Tracker
- Test Organization 1: ✗ Access to Signature Tracker

At the bottom of the list, there is a message: 'There aren't any users to show.' A dropdown menu is open for 'Test Organization 1', showing options: 'Add User' and 'Remove Organization'.

Note: An organization is removed from a deal from the deal's Working Group List, and all members of the organization must be removed before the organization can be removed.

Additionally, we've improved the terms used in the People tab. Rather than dividing organizations into Law Firms and Parties according to their access to the signature tracker, we have one list of **External Users** and access to the signature tracker for each organization is clearly indicated.



This screenshot shows the 'People' tab interface with a list of organizations and their access to the signature tracker:

- ACME Organization: ✓ Access to Signature Tracker
- Minton Dresden Stafford: ✗ Access to Signature Tracker
- Test Organization: ✗ Access to Signature Tracker
- Test Organization 1: ✗ Access to Signature Tracker

Issues Fixed

- When the checklist was at least 4 levels deep, the closing book index was not always matching the checklist order. This issue has been fixed and regardless of how deep the hierarchy of the checklist, the closing book follows the checklist order correctly.
- In the Litera Transact European environment, a particular user received an error message when attempting to send packets out for manual signature. This issue has been fixed and the user can successfully send packets for signature.
- After sending a signature packet to a particular signer to be signed with DocuSign, attempting to send additional signature packets to the same signer was sometimes failing. We've added retries to stop this issue from occurring so users can send additional pages to existing signers.
- Checklist export was failing in specific scenarios. This issue has been fixed and users can successfully export the checklist from the deal.
- Various performance and stability improvements.