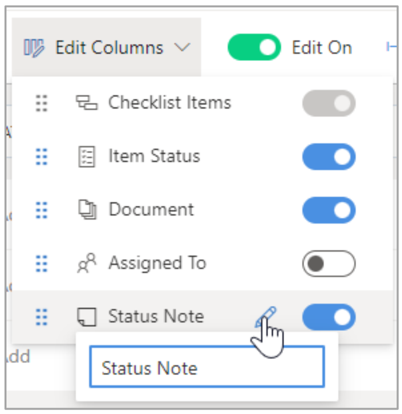
Enhancements

Customizable checklist columns

Previously, although the names of checklist columns could be changed, the position and presence of each column could not. Some firms want to hide columns in the checklist or re-order them to match particular deal workflows. To accommodate this, we've added the ability to edit checklist columns into the checklist.



With edit mode on, users can rename checklist columns, change the order they appear in the checklist, and select whether to show or hide the column. Any customizations are saved for the deal, and will be reflected in the exported checklist.

Points to note:

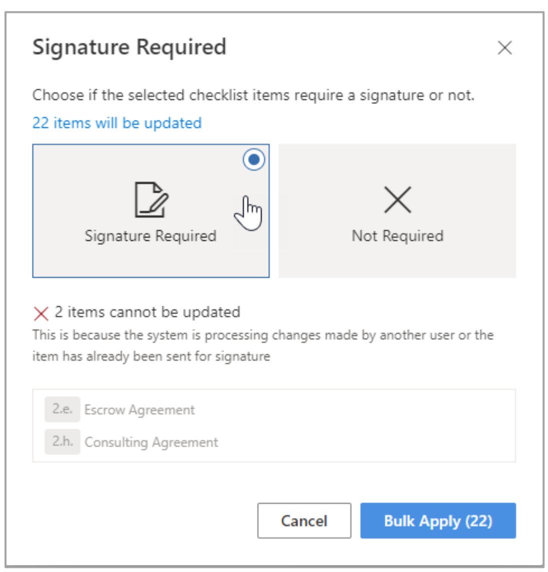
- The **Checklist Items** column cannot be hidden or moved from the first (leftmost) position; its name can be changed.
- Owning firm users (except for Associate users) can customize checklist columns; external users cannot.
- Any checklist column customizations will be copied over if the deal is cloned to create a new deal.
- As a consequence of this enhancement, the **Column Names** section is removed from Deal Settings.

Bulk application of signature required

Previously, marking a checklist item as requiring a signature, was an action taken on an item by item basis. Changing checklist items one at a time in this way was time-consuming for users. To speed up the process of making the same change to many items, we've introduced the ability to make these changes in bulk.

Note: The existing functionality for applying status labels to multiple items has been moved into the new **Bulk Apply** dropdown.

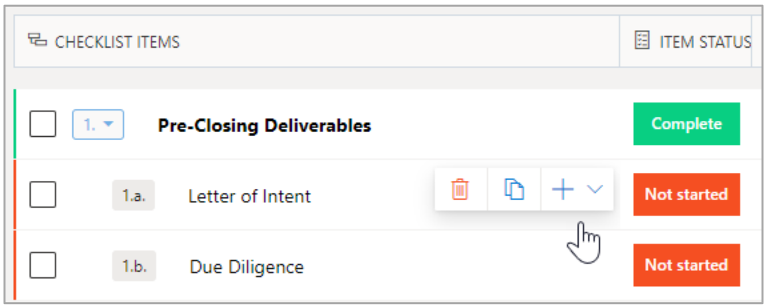
When selecting to mark multiple items as requiring a signature or not requiring a signature, Litera Transact updates users about any items that cannot be updated.



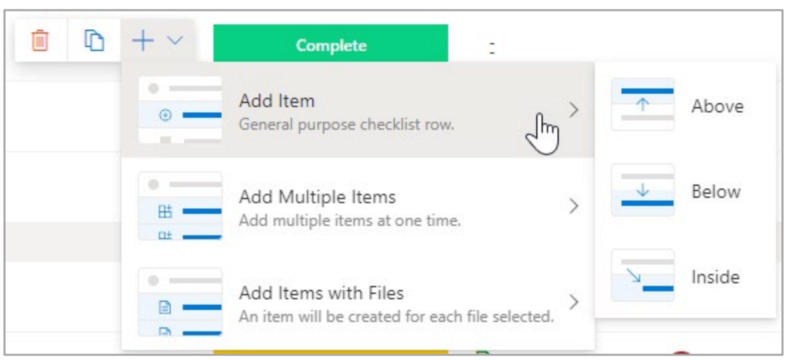
Tip: Users can use Shift + click to select multiple consecutive items.

Quick access action bar

Previously, in order to perform actions on checklist items, such as deleting or adding new checklist items, users needed to select items and then use tools at the top of the checklist. This could be quite a cumbersome process, particularly with large checklists. To provide users with easy access to options when working in the checklist, we've added a quick access action bar that displays when hovering over any checklist item.



The options available in the quick access action bar - delete, duplicate and add – deliver the same familiar user experience for deleting, duplicating, and adding checklist items, but users can access these options very easily from wherever they are within the checklist and with fewer clicks.



Note: The options still also exist at the top of the checklist.

Performance improvements

Previously, some processes in Litera Transact could take a long time, particularly in deals with huge numbers of files and lengthy checklists. We've improved performance and the user experience in several areas:

- **Deal cloning or creating new deals based on existing deals**: Cloning a large deal will have less impact on the overall application performance.
- **Audit log**: For deals created after this 4.22 release, the deal audit log will generate much faster.

Note: There can be a short delay before new events show in the audit log. The audit log is intended as a record of what happens during a deal, not a live feed of events. Immediate notification or daily digest emails should be used for the most up to date change log"

Issues Fixed

- For a particular deal, downloading specific signature packets was triggering an error. This issue has been fixed and the signature packets are downloading successfully.
- Various performance and stability improvements.