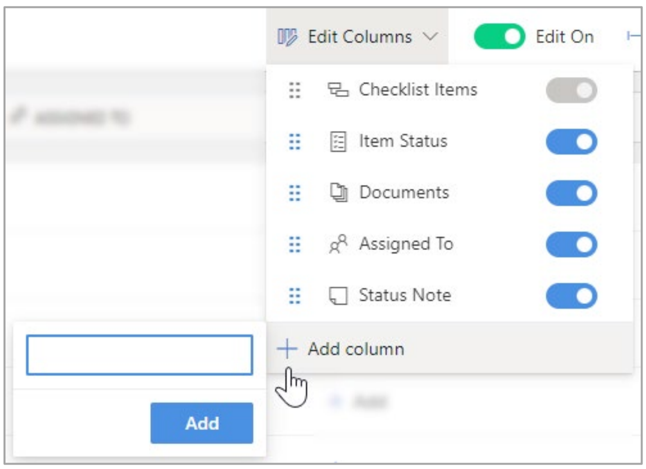
Enhancements

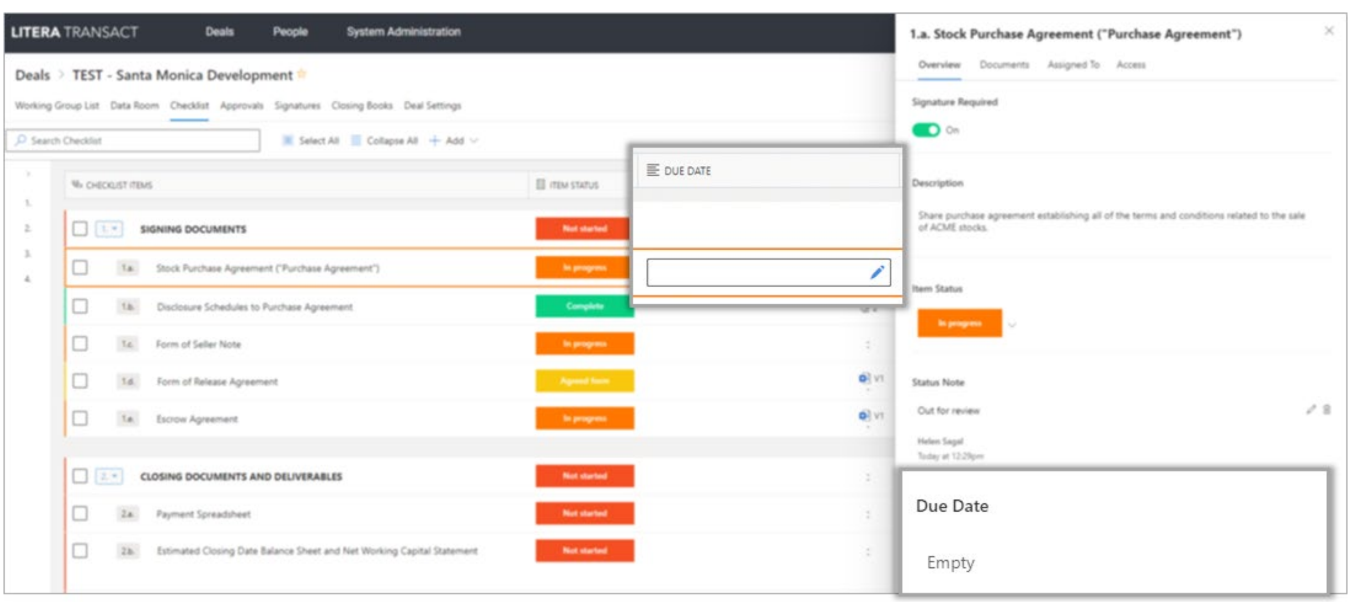
Add custom checklist columns

To continue to create maximum flexibility in checklists, and allow firms to define exactly how their checklists look and feel, we've added the ability to add customizable columns to the checklist.

With this release, owning firm users (except for Associate users) can add up to two columns to the checklist and add any text, for example, additional details for an item, names of signatories, dates for completion, etc.



Once a new column is added, users can rename it, delete it, select whether to show or hide it and change the order of where it appears in the checklist. Users can then enter text into the column field directly in the checklist or in the right panel



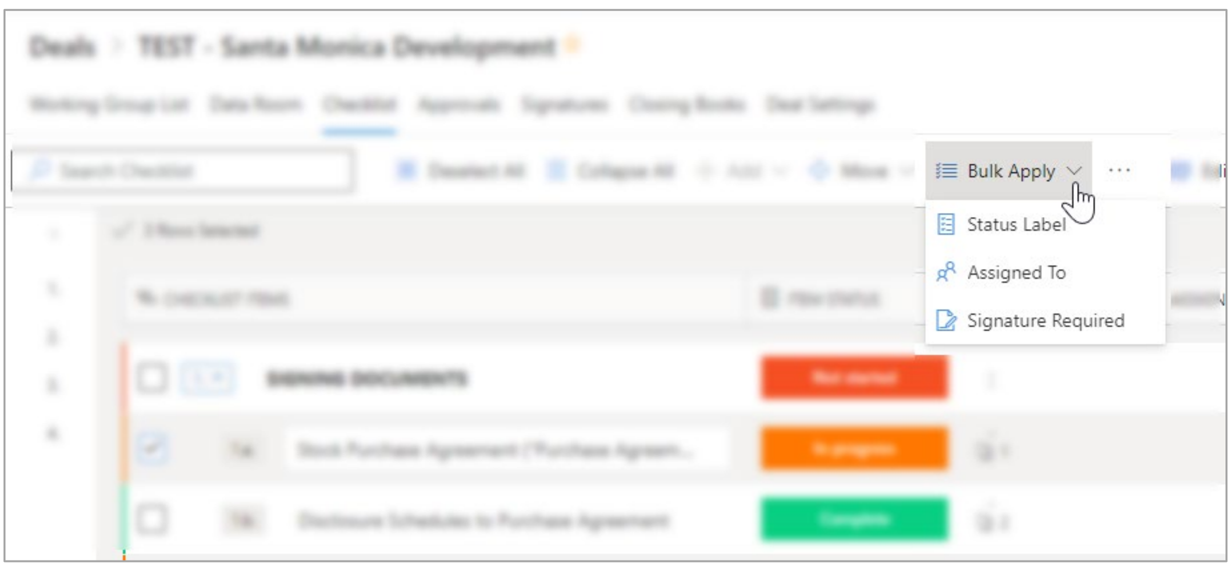
Any customizations made to checklist columns are saved for the deal, and are visible to owning firm users. They are also included when owning firm users export the checklist. External users cannot see custom columns and will not see them in the exported checklist.

Points to note:

- Owning firm users (except for Associate users) can add custom checklist columns; external users cannot.
- Any checklist column customizations will be copied over if the deal is cloned to create a new deal.

Bulk application of assigned to

Previously, assigning a checklist item to an individual, organization or role 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.



With edit mode on, users can select multiple items in the checklist, then use the **Bulk Apply > Assigned To** option to assign those items to a selected individual, organization or role.

Owning firm users (except for Associate users) and external users with permission can bulk assign items.

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

Performance improvements

We've refactored permissions to improve performance and loading times. There are no user-facing changes although you may notice an entry in the audit log.

Issues Fixed

- Some specific templates could not be seen, modified, or deleted. This issue has been fixed and the templates are available to edit or delete in the same way as all other templates.
- Various performance and stability improvements.