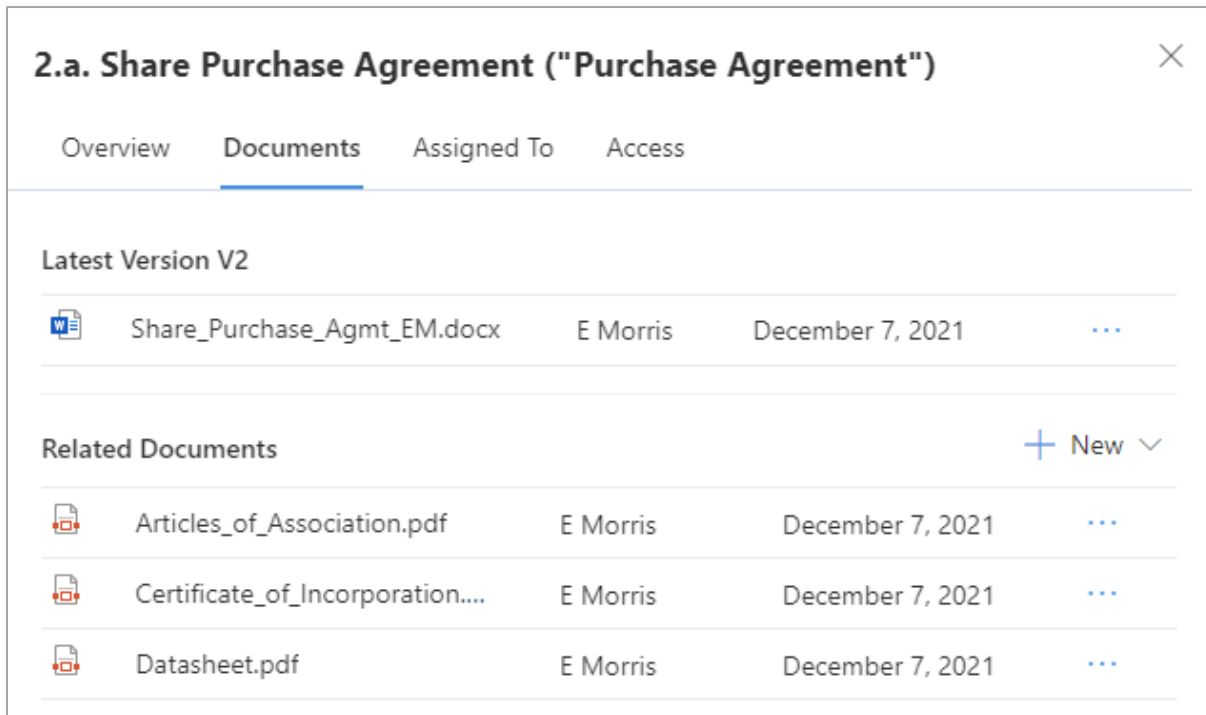


Enhancements

Multiple items attached to checklist item

Previously, a checklist item had a single document attached to it, often with multiple versions. Now users can add multiple documents to a checklist item so that the checklist item can include related documents as well as the versioned agreement.



There is a new **Documents** tab in the details panel in the checklist. The **Latest Version** area is where you add your primary document which can have multiple versions. The **Related Documents** area is where you add additional documents related to the checklist item. Related documents can't have multiple versions.

For this release, related documents are not included when collating documents or creating closing books. Additionally, when checklist items are sent for signature or approval, only the primary document is sent; related documents are not included in the signature or approval flow.

Exported checklist - formatting enhancements

To improve the user experience, the following enhancements have been made to the exported checklist:

- The reference number of a checklist item is displayed in its own column
- When there are multiple assignees, all names are shown

- The description is included below the item name in the Checklist Items column
- The column names reflect any name changes made in Deal Settings
- The front page includes the date and the footer includes page numbers
- The summary page includes legends to describe the items and summarize statistics about the checklist

LITERA TRANSACT

BEBBANBURGH M&A 1
PHIL WILLIAMSON1
Checklist generated on November 29, 2021

SUMMARY
49 CHECKLIST ITEMS
7 DOCUMENTS

Status	Number of Items
Complete ■	2 Items
Agreed form ■	1 Item
In progress ■	3 Items
Not started ■	43 Items

Ref.	Checklist Items	Assigned To	Signatories	Status Note	Item Status
1.	SIGNING DOCUMENTS	Aspen Holdings Legal Team			Not started ■
1.a.	Stock Purchase Agreement ("Purchase Agreement")		Investor		Agreed form ■
1.b.	Disclosure Schedules to Purchase Agreement	Richard Braxton, Will Shore			In progress ■
1.c.	Form of Seller Note		Investor		Complete ■
1.d.	Form of Release Agreement		Investor		Complete ■
2.	CLOSING DOCUMENTS AND DELIVERABLES				Not started ■
2.a.	Payment Spreadsheet	Richard Braxton			Not started ■
2.a.i.	Financial Year 2019-20				In progress ■

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Maintain original file names

Previously, when a user uploaded a document with special characters or spaces in the file name, Litera Transact converted the special characters and spaces to underscores. For example, **Deed of Release (copy).docx** would become **Deed_of_Release_copy_.docx**.

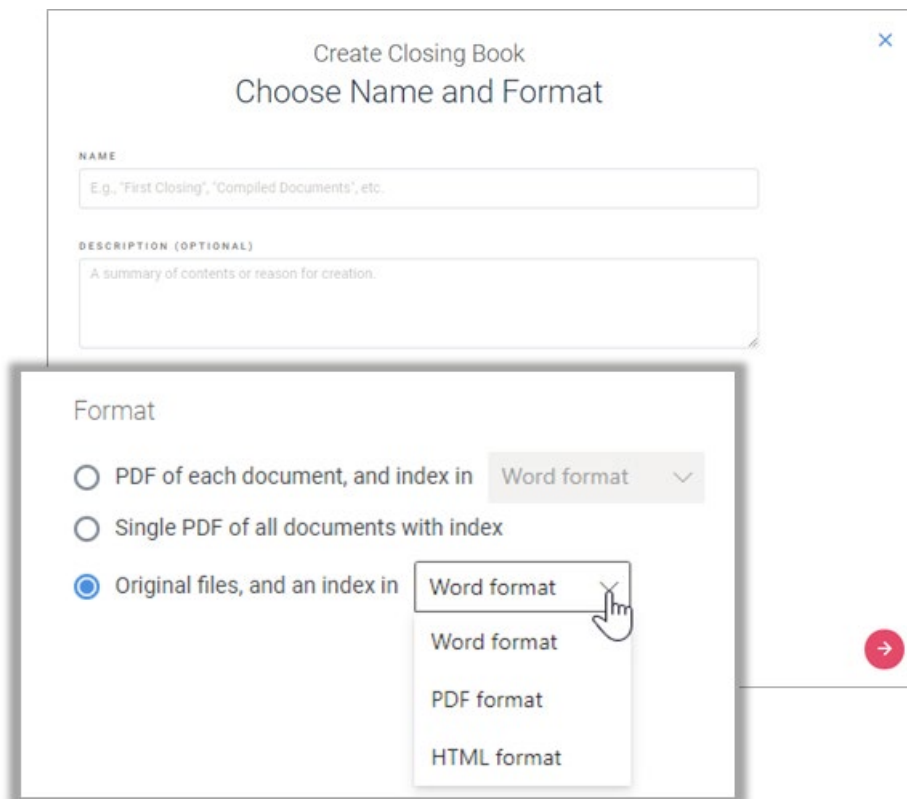
Now Litera Transact no longer converts spaces and special characters, such as parentheses, to underscores, so the user will see the original file name.

The following special characters are still converted to underscores: [: * ? < > | # " ' \ /]

Note: This only applies to new documents uploaded to Litera Transact; previously uploaded documents may still include underscores.

Closing books include files in their native format

Previously, the closing book was made up of the latest versions of checklist documents as individual PDFs or combined into a single PDF. With this release, users can choose to download the documents in their native file format so the closing book files match the format of the original uploaded versions. For example, If a user uploads a cryptographically sealed signature document, the cryptographically sealed document is in the closing book.



Signing with DocuSign (on-prem customers)

This release includes a new signing process specifically for customers who have Litera Transact deployed on-premise through Reynen Court, and not in the cloud. Signature packets are created, sent and tracked from Litera Transact. However, signers do not interact with the Litera Transact platform; they receive notifications and requests from DocuSign and their workflow is within DocuSign.

This process is for on-prem customers who want to collect and monitor signatures using DocuSign, but don't want external collaborators to engage with their on-prem Litera Transact.

Issues Fixed

- The table entry view was not always loading fully in the Signatures module. This issue is now fixed and table entry view displays signer information correctly.
- After placing signature tabs in custom signature pages, the signature statistics in the tracker were sometimes inconsistent. This issue has now been fixed and the signature tracking statistics shown in the tracker tooltip correctly match the number of signers.
- Address lines were occasionally missing in the signature page preview. This issue is now fixed and the signature page preview correctly shows complete details.
- Footers in collated documents were sometimes partially blocked by the QR code Litera Transact adds to signature pages to automatically match signature pages to signers and update the tracker. This issue has now been fixed and Litera Transact removes QR codes during the collation process.
- Folders without documents attached were still sometimes hyperlinked in the closing book. This issue is now fixed and folders in the closing book with no documents are not hyperlinked.
- Various performance and stability improvements.