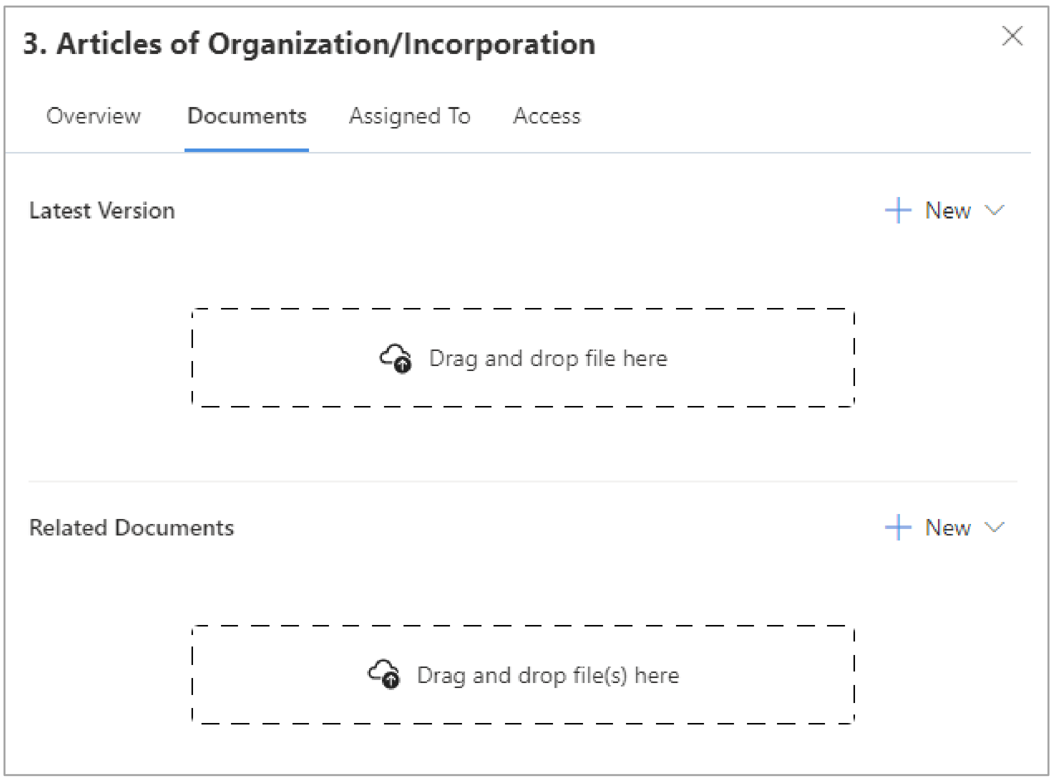
Enhancements

Drag and drop files into checklist

To simplify the way users can upload documents into the platform and reduce the steps required, users can now drag and drop documents into the checklist from their desktop or desktop email application.



In the **Documents** tab, users can drag and drop single files as document versions, and multiple files as related files. Once a document version has been added, dragging another file into the **Latest Version** area will add the new file as the latest version and keep the old file as a past version.

Note: Users can access all previous versions by opening the latest version in the Litera Transact document viewer.

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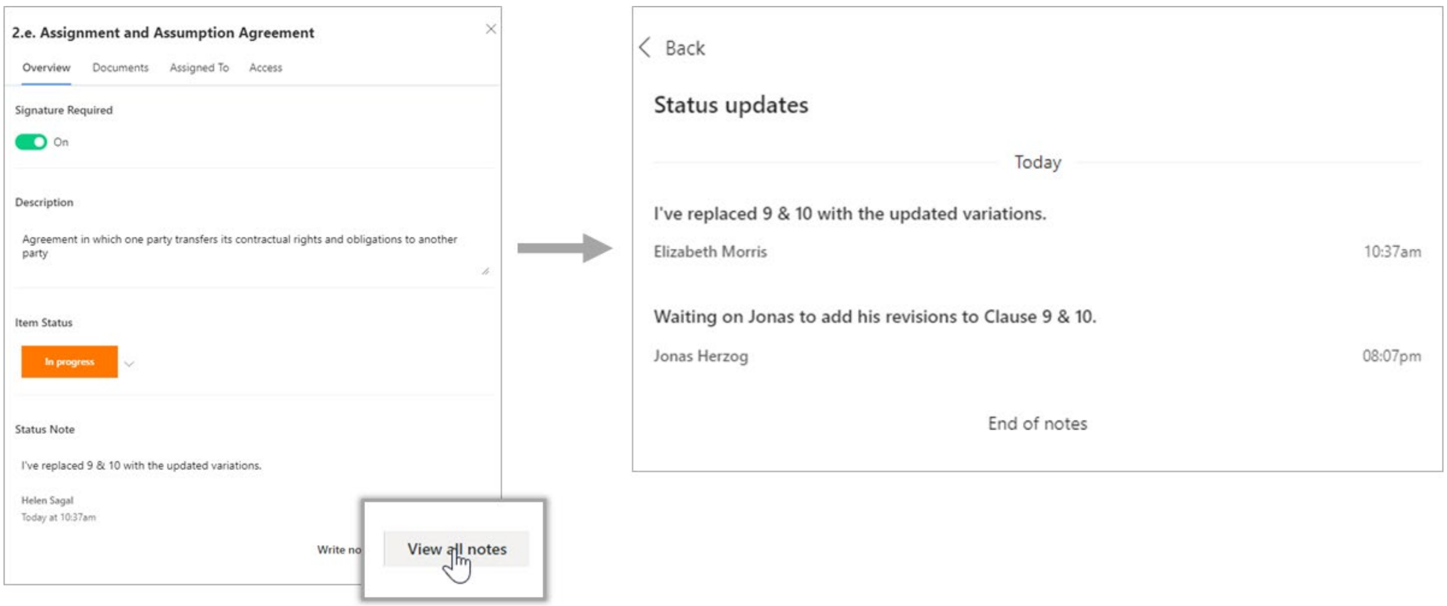
Historical record of status notes

To track progress of checklist items and allow collaborative commenting among users, all status notes are now accessible in Litera Transact. Users can see a full history of status notes for each checklist item with author details and time stamps.

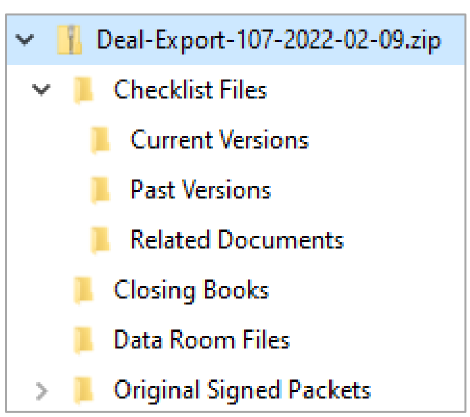


The latest status note for a document is always displayed in the checklist.

Note: The exported checklist only includes the latest status note.

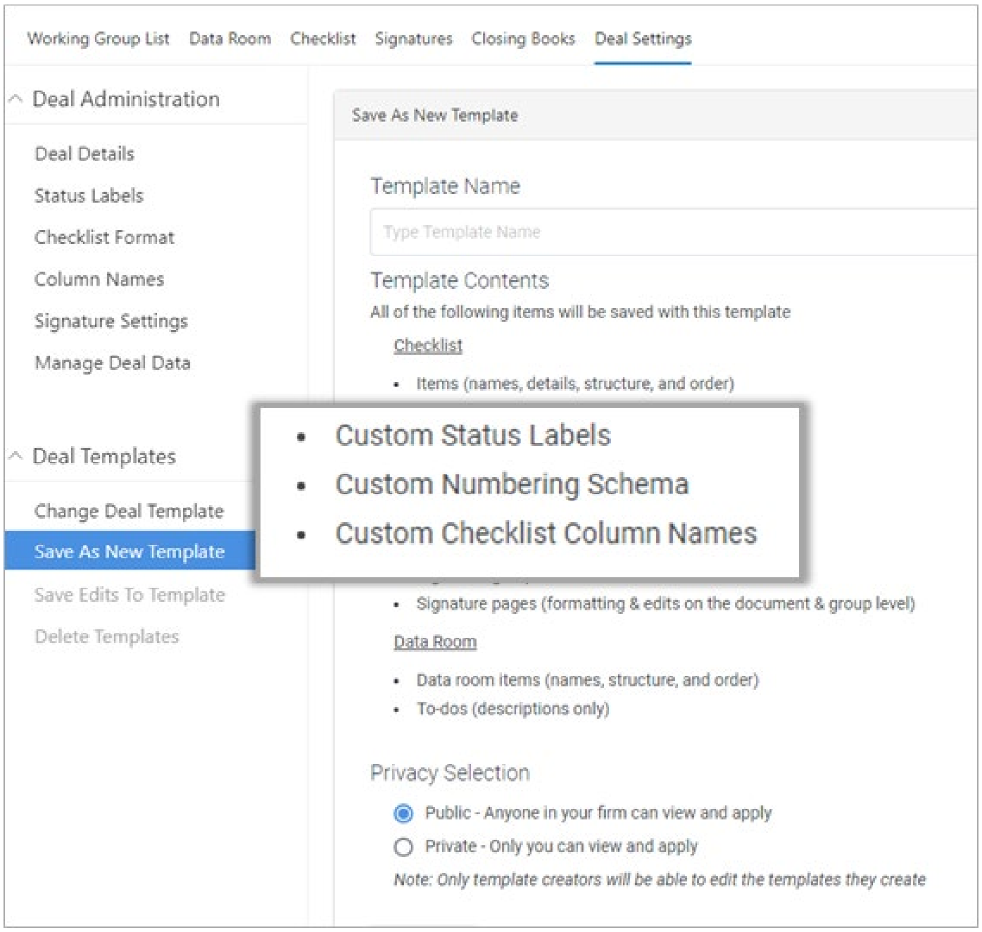
Related documents in deal export

After a deal closes or is terminated, firms can export all deal data, including checklist and data room documents, signed signature pages, and closing books. With this release, the exported deal data also includes all related documents added to the checklist.



Custom settings saved in template

When creating a deal, it can save time to use a template to provide a starting structure. Templates include checklist and data room items, including the names, details, structure and order, as well as the first versions of documents. With this release, customized status labels, customized checklist numbering, and customized checklist column names are also saved to templates.



All custom and renamed status labels are saved in the template and will be available in any deal created using the template. The checklist numbering and column names will also be applied by default to any new deal created using the template.

Additional audit log events

Users can export the Litera Transact checklist to help with collaboration off-platform. As of this release, checklist exports will be added to the audit log, so firms can track this history of activity.

Improvements for exported checklist

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

- System admins can upload a specific logo to appear in the exported checklist. Previously, the exported checklist used the logo that was uploaded for use on the platform, which did not necessarily translate to the size and background of the export. Now system admins can upload a logo specifically for the exported checklist from the **Profile** page in the Admin Portal.
- Exported checklists are given more useful names: [deal name] - Document Checklist as of [date time].docx. For example, “Project Monday - Document Checklist as of 10-02-2022 16-30 UTC.docx”.
- Minor improvements to the spacing on the exported checklist.

Issues Fixed

- Customized support email details were not included in the daily digest emails. This issue is now fixed and the support email address in all emails sent from Litera Transact reflects any custom support email added by admins in the Profile page of the Admin Portal.
- When adding multiple files to the checklist, the capitalization of the file names was sometimes changed. This issue is now fixed and file names remain the same when uploaded to the checklist.
- The closing date in the deals list was sometimes showing a day earlier than the closing date entered in Deal Settings. This issue is now fixed and when a projected close date is entered in Deal Settings, the same date is shown as the projected close date in the deals list.
- When justifying alignment on paragraphs in signature pages, the alignment wasn’t showing in the downloaded signature packet. This issue is now fixed and the alignment in downloaded signature pages shows correctly as formatted.
- When creating a closing book, currency signs in document names were not displaying correctly in the TOC. This issue is now fixed and the TOC shows all document names correctly, even when the names include currency symbols.
- Team members were sometimes receiving a registration email even though SSO was set up for the organization. This issue is now fixed and internal team members receive an invitation to the deal that links them to the SSO login page. Only external invitees are required to register with Litera Transact.
- Various performance and stability improvements.