

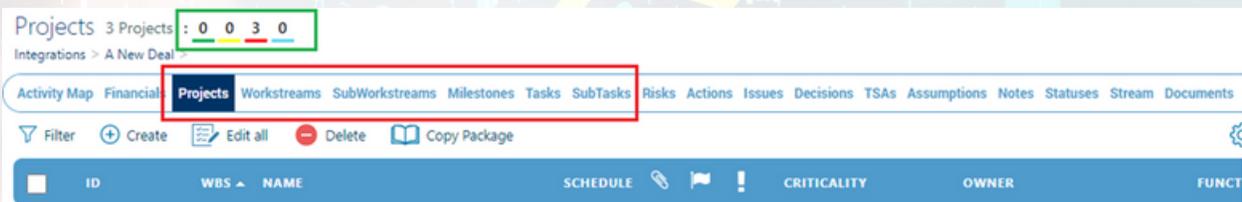
Tuning Up the Engine that Powers  
Your Strategic Growth



## ENHANCEMENTS

### AUTOMATICALLY UPDATED BREADCRUMBS:

**Changes** to your hierarchy items status' are now **updated** in **real-time**. No need to refresh the page to see the updates!



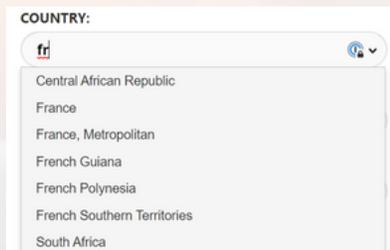
### TYPEAHEAD:

Added **Typeahead** to a multitude of fields. Simply start typing the name of desired option from a pick-list and your options will narrow and populate automatically.

**Target Create** fields: *Deal Lead* and *Country*

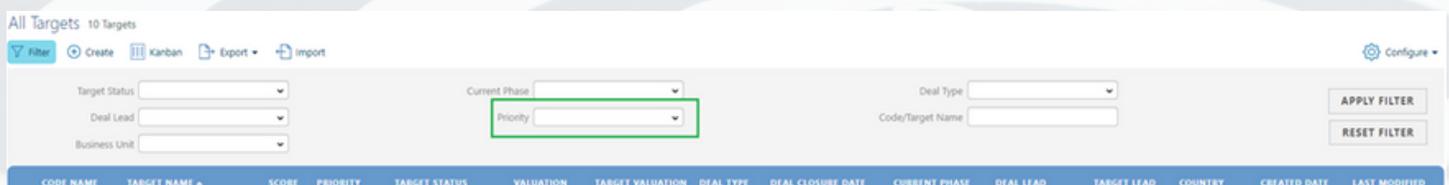
**Target Summary** fields: *Created By*, *Parent Company*, *Country*, *State*, *Deal Lead*, *Target Lead*, *Broker*, *Accountant*, *Advisor*, *Attorney*

**Task Create** (Activity Level 5) fields: *Milestone*, *Responsible*, *Owner*



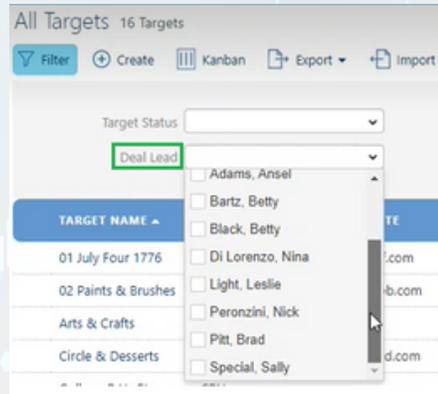
### NEW PRIORITY FILTER:

We have added a new filter labeled "**Priority**" to the 'All Targets' List View page.



DEAL LEAD FILTERING:

On the All Targets Page, only **Active Users** are available under "Deal Lead" filter to reduce clutter, and improve efficiency.



 **ADMIN ENHANCEMENTS**

CODE NAMES IN USER PERMISSIONS

Admin -> User Administration -> User Detail: In the User Profile, **Code Names** for Targets have been added to the **Deal/Access Role** section.

DEAL	Reset	ACCESS ROLE
Target: 02 Paints & Brushes (02 Blue Suede Shoes)		Full Rights
Target: Arts & Crafts (Arca)		Full Rights
Target: Circle & Desserts (CD)		DD No Access to Create Tar...
Target: College R Us Etc (CRU)		N/A

USER EXPORT FIELDS:

**Mass updates to User permissions are simplified** via Admin -> User Administration:

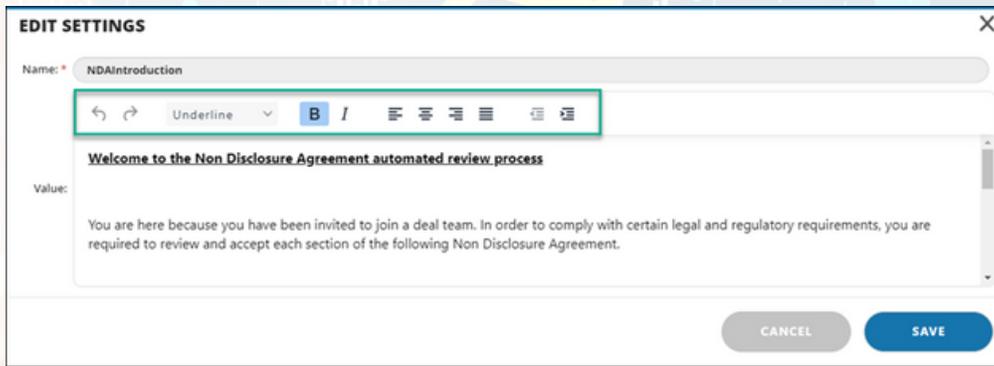
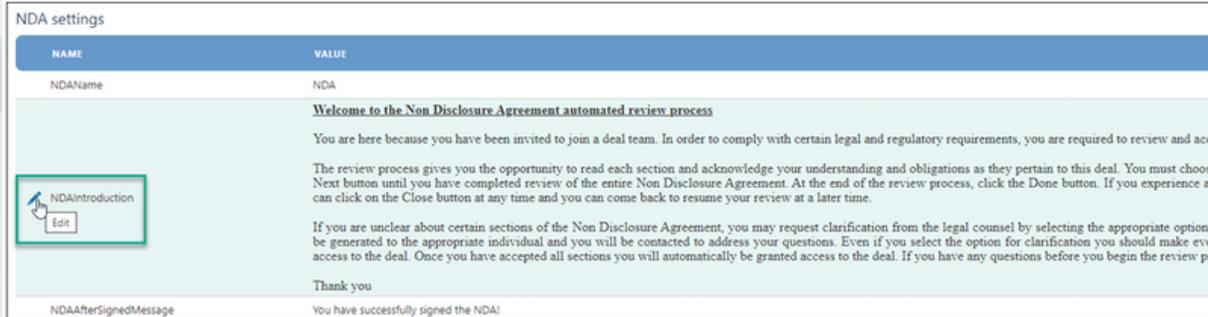
The User Administration export/import template includes six (6) new fields:

1. Deal Manager
2. Can Send Diligence Requests
3. Target Access
4. Target Access Role
5. Program Access
6. Program Access Role
7. Comments

Deal Manager	Can Send Diligence Request	Target Access	Target Access Role	Program Access	Program Access Role	Comments
FALSE	FALSE	Please set value in UI	Custom	Please set value in UI	Custom	
FALSE	FALSE	Business Unit	Legal Consultant	Corp Dev/Strategy	Full Rights	
FALSE	FALSE	Project Specific	IT Lead	No Access	No Access	
FALSE	FALSE	Please set value in UI	Custom	Please set value in UI	Custom	
FALSE	FALSE	Please set value in UI	Custom	Please set value in UI	Custom	
FALSE	TRUE	Admin(FullRights)	Admin(FullRights)	Admin(FullRights)	Admin(FullRights)	

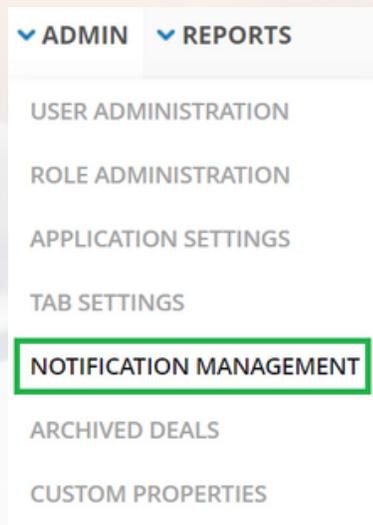
**NDA INTRODUCTION TEMPLATE IMPROVEMENT:**

We now support **HTML** in the **NDAIntroduction** template via *Application Settings/ NDA settings/ NDAIntroduction* field.



**NOTIFICATION MANAGEMENT:**

Under the **Admin Menu**: We have changed the name of Email Templates to "**Notification Management**."





NOTIFICATION MANAGEMENT CATALOG:

Templates are easier to find with our newly **organized** library of **Notification Templates**. Easy to navigate categories for improved productivity and ease of use. *Enable/Disable and view your templates.*

Notification Management 35 notifications

**Account**

NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
ChangePassword	Devensoft password changed	<input type="checkbox"/>	
ChangePasswordByAdmin	Devensoft password changed	<input type="checkbox"/>	
InActiveUserNotification	Devensoft User Access - Temporary Deactivation Reminder!	<input type="checkbox"/>	
ResetPassword	Devensoft Reset password	<input type="checkbox"/>	
UserDeactivationNotification	Devensoft User Access - Temporary Deactivation	<input type="checkbox"/>	
WelcomeEmail	Welcome to Devensoft!	<input type="checkbox"/>	

**Activities Summary**

NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
DueDiligenceSummary	Due Diligence Daily Summary	<input type="checkbox"/>	
Email_Reminder	Devensoft Activity Reminder	<input type="checkbox"/>	

**Audit**

NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
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**Colorization**

NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
Colorization_AtRisk_TaskSubTask	Devensoft Notification: Your Task is At Risk	<input type="checkbox"/>	
Colorization_Deayed_Milestone	Devensoft Notification: Your milestone is past due	<input type="checkbox"/>	

**Due Diligence**

NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
CommentAssignedTo	Comment has been assigned to you	<input type="checkbox"/>	
CommentTaggedUsers	You have been mentioned in a comment	<input type="checkbox"/>	
DdResetPassword	Due Diligence Reset password	<input type="checkbox"/>	
RegisterDdUser	Due Diligence Registrat on link	<input type="checkbox"/>	
ResendRoundNotificationDeUser	Due Diligence Additional Request Items	<input type="checkbox"/>	

CUSTOM PROPERTY VALIDATION CHECKS:

Added **Validation Checks** to *Custom Properties*: **Decimal** and **Integer** values. Checks make sure you can only enter numbers and no text.