DEVENSOFT IMPROVEMENTS 2022.Q4

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!

	Project Integration	ts 3 Projec ns > A New De	ts : 0 0 3 (0				_									
(Activity M	lap Financial	Projects Works	treams SubV	Workstreams M	tilestones	Tasks SubTasks	Risks	Actions	Issues	Decisions	TSAs	Assumptions	Notes	Statuses	Stream	Documents
	7 Filter	Create	e 🔅 Edit all	Delet	e 🛄 Copy	/ Package		· .									Ę
		ID	WBS 🛧 NA	ME			SCHEDULI	8			CRITICALIT	Y	ow	NER			FUNCT

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*

fr	(1
Central African Republic	
France	
France, Metropolitan	
French Guiana	
French Polynesia	
French Southern Territories	
South Africa	

NEW PRIORITY FILTER:

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

All Targets 10 Targets	-					
🔽 Filter 💿 Create 🔟 Kanban 🕒 Export	t • • • • • • • • • • • • • • • • • • •					Configure •
Target Status	•	Current Phase		Deal Type	v	APPLY FILTER
Deal Lead	×	Priority	•	Code/Target Name		
Business Unit	¥					RESET FILTER
CODE NAME TARGET NAME .	SCORE PRIORITY	TARGET STATUS VALUATION	TARGET VALUATION DEAL TYPE	DEAL CLOSURE DATE CURRENT PHASE DEAL	LEAD TARGET LEAD COUNTRY	CREATED DATE LAST MODIFIED



DEAL LEAD FILTERING:

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

Filter (+) Create	Kanban 📑 Export	 Import
Target Status		•
Deal Lead	Adams, Ansel	~
TARGET NAME 🔺	Bartz, Betty Black, Betty	TE
01 July Four 1776	Di Lorenzo, Nina	Lcom
02 Paints & Brushes	Light, Leslie	-b.com
Arts & Crafts Circle & Desserts	Peronzini, Nick Pitt, Brad Special, Sally	d.com



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 v)
Target: Arts & Crafts <mark>(Arca)</mark>	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

Users						
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.

NDA settings	
NAME	VALUE
NDAName	NDA
	Welcome to the Non Disclosure Agreement automated review process
	You are here because you have been invited to join a deal team. In order to comply with certain legal and regulatory requirements, you are required to review and acce
NDAIntroduction	The review process gives you the opportunity to read each section and acknowledge your understanding and obligations as they pertain to this deal. You must choose Next button until you have completed review of the entire Non Disclosure Agreement. At the end of the review process, click the Done button. If you experience an can click on the Close button at any time and you can come back to resume your review at a later time. If you are unclear about certain sections of the Non Disclosure Agreement, you may request clarification from the legal counsel by selecting the appropriate option a be generated to the appropriate individual and you will be contacted to address your questions. Even if you select the option for clarification you should make ever access to the deal. Once you have accepted all sections you will automatically be granted access to the deal. If you have any questions before you begin the review pro Thank you
NDAAfterSignedMessage	You have successfully signed the NDA:
	is X

	Hoventrood																			
		Underline	~	в	I	F	Ξ	3	=	₫	æ									
	Welcome	to the Non Dis	closure	Agree	ement	autom	ated	l revi	ew p	rocess										Î
/alue:		re because you review and ac										ain leg	al and	regi	ulatory	requir	ement	ts, you	u are	
								9			,									
															CAN				SAVE	



NOTIFICATION MANAGEMENT:

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

✓ ADMIN	✓ REPORTS
USER ADM	IINISTRATION
ROLE ADN	IINISTRATION
APPLICATI	ON SETTINGS
TAB SETTI	NGS
NOTIFICAT	ION MANAGEMENT
NOTIFICAT ARCHIVED	
ARCHIVED	



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.*

ount			
NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
ChangePassword	Devensoft password changed		
ChangePasswordByAdmin	Devensoft password changed		
InActiveUserNotification	Devensoft User Access - Temporary Deactivation Reminder!		
ResetPassword	Devensoft Reset password		
UserDeactivationNotification	Devensoft User Access - Temporary Deactivation		
WelcomeEmail	Welcome to Devensoft!		
ities Commence			
ivities Summary			
NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
DueDiligenceSummary	Due Diligence Daily Summary		
Email_Reminder	Devensoft Activity Reminder		
lit			
NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
rization			
NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
Colorization_AtRisk_Task,SubTask	Devensoft Notification: Your Task is At Risk		
Colorization_Delayed_Milestone	Devensoft Notification: Your milestone is past due		
Diligence			
NAME	SUBJECT	DISABLED	DEFAULT RECIPIENTS
CommentAssignedTo	Comment has been assigned to you		
CommentTaggedUsers	You have been mentioned in a comment		
DdResetPassword	Due Diligence Reset password		

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.