

What's New (April 22, 2019)

Bulk add doc names: When setting up Standard Document Names, paste in your list of doc names to save time and minimize errors.

[Learn how to bulk add doc names here →](#)

Agent communication of task completion: Agents can indicate to admins that they have completed a task by checking the task's checkbox. Tasks checked by agents will display a special indicator which lets both agents and admins know when a task has been completed.

Share checklists with a single action Need to send a list of all the tasks on a checklist instead of just one or two? Drag and drop a transaction's entire checklist onto the message area of a note or email to share its tasks.

[Learn how to drag and drop checklists here →](#)