

CHECKLIST FOR VARIOUS CORPORATE ACTION

Dear users,

Greetings of the Day!

We are excited to announce a new feature on ComplyRelax that puts you in control: Custom Checklists. Now you can tailor checklists to match your specific standards and efficiently track the progress of various corporate actions.

How It Works:

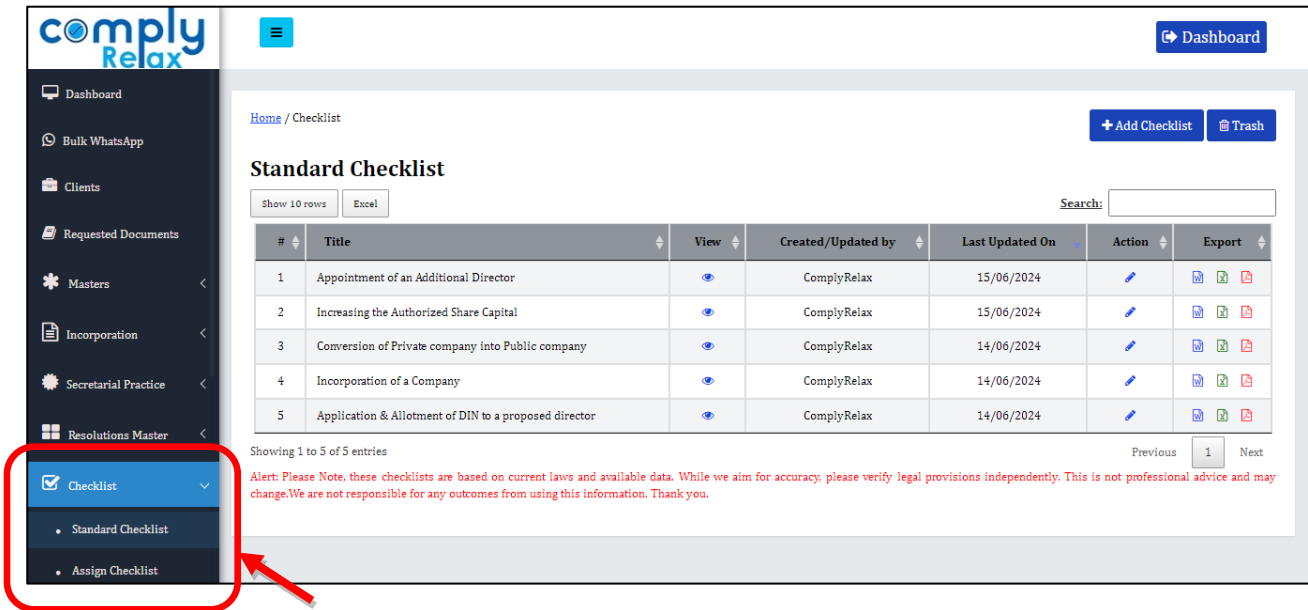
Create Your Checklist: Begin by defining the checklist items that are essential for each corporate action you manage.

Track Progress: Monitor the completion of tasks and compliance with checkpoints directly within ComplyRelax, providing transparency and accountability.

Enhance Oversight: Gain insights into the status of each action, identify bottlenecks, and ensure timely completion of tasks with real-time updates.

Steps to be followed:

Dashboard ⇨ Checklist



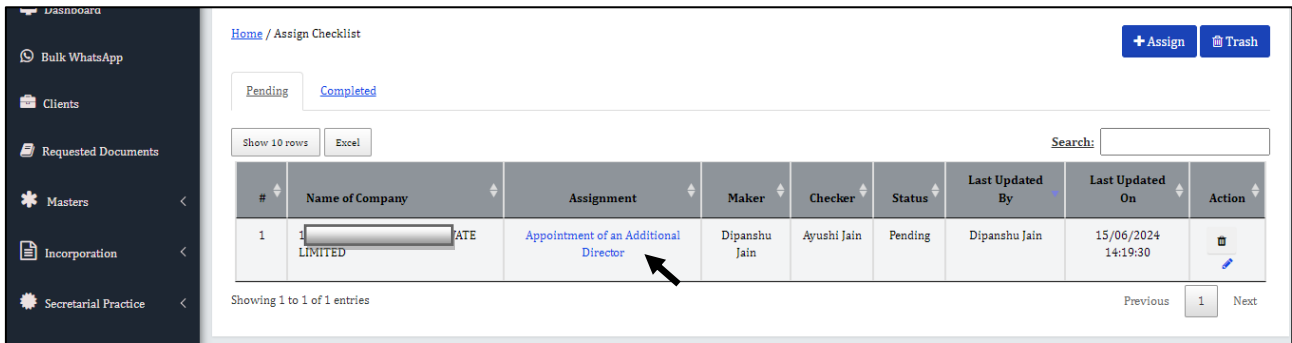
Here, you can review the existing standard checklists available in the software. You have the flexibility to edit these checklists to suit your specific requirements. Additionally, you can seamlessly add new checklists using the 'Add Checklist' button located above.

Assigning Checklists

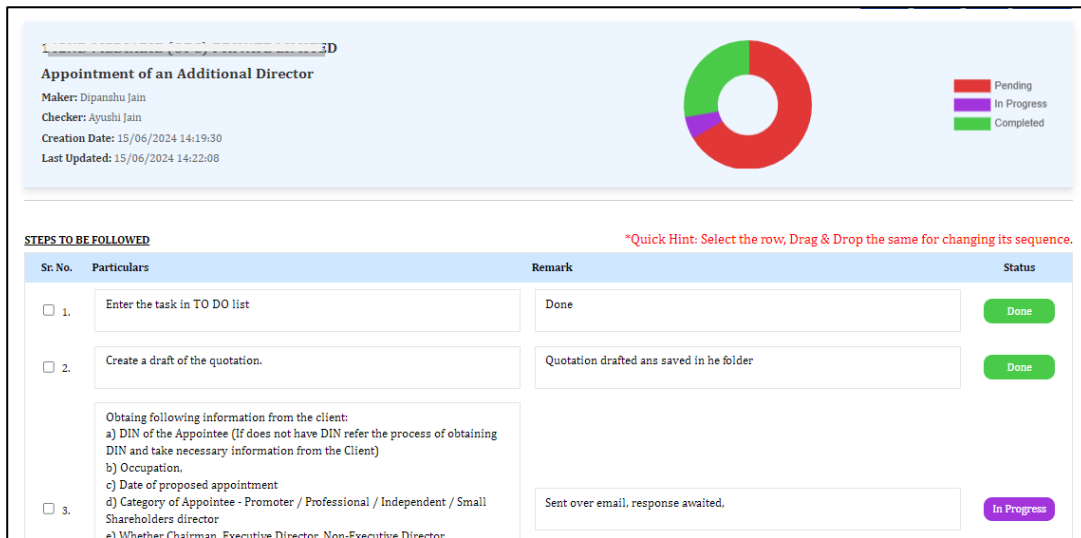
To assign a checklist, navigate to the "Assign Checklist" option.

1. Click on the "Assign" button.
2. Select the team members and the checklist you wish to assign.
3. Save your selections.

Once assigned, you can monitor the progress of the task as team members update the status of each checkpoint.



For checking the status of any existing assigned checklist, click on the checklist name as shown in the image above.



As shown here, the admin can review the steps performed by the team and their progress.

Please reach out to us if you need any assistance:

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