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Deployment Notes and Updates - Ark

January 18, 2023

Feature Enhancements:

- (4678) Custom fields can be added and defined on a Portfolio Company. Admin users can now configure custom fields that will apply to all Portfolio Companies within a Client on Ark. This will allow users to track additional data points that are not standard fields on their portfolio companies.

Bug fixes & incidentals:

- (4400) Fund can be added to a Team on Fund create - when a basic admin creates a fund, they can link it to an existing team & they do not have to request access to the fund immediately upon creating it for it to be visible within their view.
- (4428) A logo can now be uploaded to a portfolio company.
- (4493) Year Founded is no longer a required field on a portfolio company
- (4575) A quarter is no longer required to be published for the Contact & Investors pages to load on the client portal
- (4604) Commitment amounts are pulling into the Investor view on the client portal when the contact has a status of NEW
- (4608) The Contact delete button is no longer available for basic admin users. Previously this button was in view, but did not work for this admin user type.
- (4677) A back button has been implemented on the Investment transaction details pages, so users can easily flip between purchases & their linked transactions
- (4710) The View button on the client portal > Capital Calls & Distributions pages are now sticky & always in view for users
- (4811) Fund Admin users can now view Unpublished documents in the admin portal
- (4834) Invalid date on client portal Distributions are now returning the correct date on notice view & on the Distributions table