

DealRoom Platform Overview

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Requests

Your DealRoom

Requests Documents Groups Analytics



LISTS

- Assigned to me 1/1
- Needs Review 0
- All Requests 10/23
 - Due Diligence Requests 6/17
 - Integration Plan 4/6
 - Milestones
- Trash

Create or import a new list.

NEW REQUEST Import Export All

Search FILTER

Filter by data and other options.

Click comment bubble or paperclip icon to see what's associated with the request.

Click to drag to reorder tasks in priority.

Select for assigning bulk actions.

Hover over any request or list and click the three dots for additional functionality.

ID	PR	Status	Request	Reply	Files	Updated
Due Diligence Requests \Legal \Corporate Organization						
1546	Red flag	Yellow circle	Legal entity organizational chart	1	Paperclip	Apr 17
1525	Yellow flag	Green circle	All secrecy, confidentiality and nondisclosure agreements;		Paperclip	Apr 17
1526	Grey flag	Green circle	All documents, contracts or agreements to which directors, officers or related entities are parties;	1	Paperclip	Apr 17
Due Diligence Requests \Legal \Real Estate						
1528	Grey flag	Green circle	Leases			Apr 17
1527	Grey flag	Blue circle	Deeds		Paperclip	Apr 17
1529	Grey flag	Blue circle	Purchase and Sale Agreements			Apr 17
1530	Grey flag	Purple circle	Property Summary			Apr 17
Due Diligence Requests \Legal \Financial \Operations						
1537	Red flag	Yellow circle	Balance sheet, income statements, cash flow statements and detail level trial balances; balanc...	Star	Paperclip	Apr 17
1538	Yellow flag	Blue circle	Unusual, non-recurring and extraordinary revenue and expense			Feb 01
1539	Grey flag	Green circle	Summary of inventories by business units and broken down by finished goods, raw materials, ...	Star	Paperclip	Feb 01

Individual Request

Your DealRoom

Requests Documents Groups Analytics



LISTS

- Assigned to me
- Needs Review

- All Requests
- Due Diligence Requests
- Integration Plan
- Milestones

Trash

Due Diligence Requests / Legal / Corporate Organization

All secrecy, confidentiality and nondisclosure agreements;

Add request d

Documents

- 6.12.1.2 Certificate...
- 6.12.1.7 Confid...
- 6.12.1.8 Nondi...

Dependencies

Upload

Attach documents that have been uploaded to the Documents tab.

Upload directly to the request by clicking here or dragging and dropping. The document will be attached to a request and stored in the correct folder under the Documents tab.

Show Activity

Add comment...

My Group

COMMENT

Add comments or ask questions about this request. Leave open for everyone to see your comments.

Kanstantsin Husarevich here your files, please check!

Edit Delete



Priority Medium

Status Resolved

Start Date Apr 17, 2019

Due Date

Labels

Assignees

Kanstantsin Husarevi...

Reviewers

Ilgiz I

Remind

Assign people who need to work on or receive notifications regarding this request as Assignees, Reviewers or Followers.



Update status and priority.

Search FILTER

1538 Unusual, non-recurring and extraordinary revenue and expense

1539 Summary of inventories by business units and broken down by finished goods, raw materials...

FOLDERS

- Recent Files
- Bookmark
- Home
- 1. Due Diligence Legal
 - 1.1. Corporate Officers
 - 1.2. Corporate Ownership
 - 1.3. Corporate Structure
 - 1.3.1. Articles of Incorporation
 - 1.3.2. Bylaws
 - 1.3.3. Corporate Restructure Closing Bo...
 - 1.3.4. Corporate Structure Chart
 - 1.3.5. Stock Certificates
 - 1.3.6. Manuals
 - 2. Due Diligence Commercial
 - 3. Due Diligence Financial
 - 4. Due Diligence HR
 - 5. Due Diligence IT
 - 6. Due Diligence Tax
 - 7. Integration planning

Create new folders and upload documents or drag and drop into them.

Sort by most recently uploaded and search by data.

Search for documents by title or by documents containing specific keywords.

Hover and click on the three dots for more functionality.

Select gray box for more functionality and bulk actions.

UPLOAD DOWNLOAD ALL New Request Edit Index Export Index

Index	Title	Size	Date
1.1	Corporate Officers	0 docs	
	Corporate Ownership	0 docs	
1.3	Corporate Structure	18 docs	
1.4	CEO M&A emails.xlsx	23 KB	Jan 31
1.5	Certificate of Limited Liability Company.pdf	42.5 KB	Jan 31
	Report Filings.pdf	42.4 KB	Jan 31
	ation for Admission.pdf	42.4 KB	Jan 31
1.8	Secrecy.pdf	45.6 KB	Apr 17

See past versions of the document that have been uploaded.

ADD REQUEST

Due Diligence Requests / Legal / Corporat...
#1525 All secrecy, confidentiality and nondisclosure agreements;

See the requests this document has been attached to and create a new request from this view of the document to add to an existing list.

Test Document for the Purpose of Demonstrating.

Your information security/privacy is important to us, here at DealRoom.

Lorem ipsum dolor sit amet, recusabo mnesarchum voluptatum mea ne, augue latine euismod eu has. In eam saepe doctus adipiscing, ut porro oporteat per. Malorum veritus postulant vix ut. Quo at ornatus graecis petentium, zril qualisque ea est, justo partiendo abhorreant vix id. Atqui laboramus scribentur sed ne.

Pri ea tota tibi que, eu persius invenire quaerendum pri, admodum accusam no pro. Usu quando definitiones in, cum eu vero virtute civibus, dico quodsi per ne. An nec perpetua moderatius. An cum eripuit reprehendunt comprehensam, eam ex reque harum evertitur. Mentitum signiferumque ad est.

Mei agam veniam expetenda ad. Eam ea mentitum voluptaria. Et stet mentitum ius. Ei saepe habemus has. Mei partem meliore ea, vel et viris occurreret persequeris. Id laudem graeco duo, hinc solum necessitatibus et vis.

Enim menandri ex his. Stet sonet interesset an sea, ferri causae per ad, delectus disputando adversarium ea usu. Populo quaestio ei eum, eu dissentiunt contentiones disputationi quo. Wisi recusabo abhorreant qui ne, fugit denique sit ex.

Ut vis velit quidam accusamus. Sit doming constituam an, ei sit porro lobortis, has duis eligendi ut. Te natum sanctus praesent est, nam ad magna soluta doctus. Vel cu dolores periculis. Nullam repudiandae cu sea, in usu iisque cotidieque.

Uploaded Files Permission Confirmation

Your DealRoom

Requests Documents Groups Analytics



- FOLDERS
- Recent Files
- Bookmarked Files
- Home
 - 1. Due Diligence Legal
 - 2. Due Diligence Commercial
 - 3. Due Diligence Financial
 - 4. Due Diligence HR
 - 5. Due Diligence IT
 - 6. Due Diligence Tax
 - 7. Integration planning

Uploading files (4)

Set File Permissions:

Cooley LLP				
Google				
Apple				
Intel				
Amazon				
Oath, formerly Yahoo				
Ernst n Young				
Management team				

Notify selected groups

BACK CONFIRM

When uploading new files, the system will ask you to confirm the permission you have set for the file you are uploading. Groups that have permission will receive an email about the upload.

Groups

Your DealRoom

Requests Documents **Groups** Analytics



- GROUPS**
- All groups 1/63
- Administrator 0/8
- Cooley LLP 0/5
- Google 0/9
- Apple
- Intel
- Amazon 0/9
- Oath, formerly Yahoo 0/5
- Ernst n Young 0/6
- Management team 1/9
- Trash

Create new groups.

Copy permissions set to another group.

MEMBERS FILE PERMISSIONS

Check permissions set across all groups.

+ ADD MEMBER

Add members by typing in their email address to send an invite.

- Copy
- Rename
- Delete

Click for bulk actions and moving people to other groups.

Name	Contact Info	Role	Group
<input type="checkbox"/> Adam Cahari	adamcahan@mailinator.com 202-555-0131	Yahoo Senior Vice President of Mo...	Oath, formerly Yahoo
<input type="checkbox"/> lopshire	allishaklopshire@gmail.com 2605802120	DealRoom Marketing Designer	Management team
<input type="checkbox"/> tar	drotar.ally@gmail.com 931-542-2068	Day1/ Dealroom Webflow Designer	Management team
<input type="checkbox"/> Amit Singhal	amitsinghal@mailinator.com 202-555-0154	Google Former Senior Vice President	Google
<input type="checkbox"/> andy bryant	andybryant@mailinator.com 202-555-0169	Intel Chief Financial Officer	Intel
<input type="checkbox"/> andrew jassy	andrewjassy@mailinator.com 202-555-0131	Amazon CEO	Amazon
<input type="checkbox"/> Brian Krzanich	briankrzanich@mailinator.com 202-555-0129	Intel Chief Executive Officer	Intel
<input type="checkbox"/> Bruce Sewell	brucesewell@mailinator.com 202-555-0186	Apple Senior Vice President and G...	Apple
<input type="checkbox"/> Carol Bartz	carolbartz@mailinator.com 202-555-0121	Yahoo CEO of Internet Services	Oath, formerly Yahoo
<input type="checkbox"/> Clay Bavor	claybavor@mailinator.com 202-555-0121	Google VP, Virtual Reality at Google	Google
<input type="checkbox"/> Craig Barratt	craigbarratt@mailinator.com 202-555-0113	Google Senior Vice President	Google
<input type="checkbox"/> Craig Federighi	craigfederighi@mailinator.com 202-555-0128	Apple Senior Vice President Softwa...	Apple
<input type="checkbox"/> Dan Riccio	danriccio@mailinator.com	Apple	Apple

File Permissions

Your DealRoom

Requests Documents **Groups** Analytics



- GROUPS (+)
- All groups 1/63
- Administrator 0/8
- Cooley LLP 0/5
- Google
- Apple
- Intel
- Amazon
- Oath, formerly Yahoo 0/5
- Ernst n Young 0/6
- Management team 1/9
- Trash

MEMBERS **FILE PERMISSIONS** REQUESTS PERMISSIONS OTHER PERMISSIONS



View
Allows to view watermarked file(s)



Download
Allows to download and print watermarked file(s)



Download Original
Allows to view, download and print original unwatermarked file(s)



Edit
Allows to move, upload, overwrite, delete, edit index and rename files and folders

Select which group you want to set permissions for and match the icons to the amount of permissions you want to set for each file and folder.

Search **SAVE**

		View	Download	Download Original	Edit
1	▶ Due Diligence Legal	View	Download	Download Original	Edit
2	▶ Due Diligence Commercial	View	Download	Download Original	Edit
3	▶ Due Diligence Financial	View	Download	Download Original	Edit
4	▼ Due Diligence HR	View	Download	Download Original	Edit
4.1	HR Agreements	View	Download	Download Original	Edit
4.2	HR Benefits	View	Download	Download Original	Edit
4.3	General HR	View	Download	Download Original	Edit
4.4	HR Policies	View	Download	Download Original	Edit
4.5	▼ Other Contracts and Agreement	View	Download	Download Original	Edit

Give permission to the parent folder and then hide certain files and folders within it.

- GROUPS** +
- All groups 1/63
 - Administrator 0/8
 - Cooley LLP 0/5
 - Google** 0/9 ⋮
 - Apple 0/5
 - Intel 0/7
 - Amazon 0/9
 - Oath, formerly Yahoo 0/5
 - Ernst n Young 0/6
 - Management team 1/9
 - Trash

SAVE

Request management

- Allow members to:
- Create new categories and add requests
 - Assign and be set as a request reviewer/assignee/follower
 - Manage all requests parameters
 - Post private comments

Approve Public Comments

Admin have ability to edit and approve public comments made by this group

Allow admins to approve public comments made by this group.

Requests lists +

Allow members from this group to view requests lists

Title	Select all
Due Diligence Requests	<input checked="" type="checkbox"/>
Integration Plan	<input type="checkbox"/>
Milestones	<input type="checkbox"/>

Select the lists you want a group to have access too.

- GROUPS** +
- All groups 1/63
- Administrator 0/8
- Cooley LLP 0/5
- Google** 0/9 ⋮
- Apple 0/5
- Intel 0/7
- Amazon 0/9
- Oath, formerly Yahoo 0/5
- Ernst n Young 0/6
- Management team 1/9
- Trash

SAVE

Grant this group administrator permissions

Create, delete and change other groups permissions and view analytics

Give a certain group administrator access.

Mask original document upload dates

Substitute upload dates with date(s) of initial access granted

Manage Group Membership

Hide members from each other

Allow members to view each other

Allow members to view each other and invite new members to their group

Allow members of a group to view each other and invite other members to their group.

Permissions of files uploaded or moved by other groups

Inherit folder's permissions

Set no permissions if there is conflict between permissions of folder and any of its existing items

Deny access entirely

- Administrator 0/8
- Cooley LLP 0/5
- Google 0/9 ...
- Apple 0/5
- Intel 0/7
- Amazon 0/9
- Oath, formerly Yahoo 0/5
- Ernst n Young 0/6
- Management team 1/9
- Trash

Grant this group administrator permissions

Create, delete and change other groups permissions and view analytics

Mask original document upload dates

Substitute upload dates with date(s) of initial access granted

Manage Group Membership

Hide members from each other

Allow members to view each other

Allow members to view each other and invite new members to their group

Permissions of files uploaded or moved by other groups

Inherit folder's permissions

Set no permissions if there is conflict between permissions of folder and any of its existing items

Deny access entirely

Other Groups

Allow members from this group to view other groups

Title Select all

Administrator

Have files imported into rooms inherit the parent folder's permissions, unless there is a conflict. Change to override this here.

Allow groups to see other groups. The default setting is for members to see their own group and administrators.

- Requests Overview
- Requests Progress**
- Requests Activity
- Top Active Users
- Document Activity
- Audit log

REQUESTS PROGRESS

Dates Range: Last 30 Days
Groups: All
Lists: All
Priority: All
Statuses: All

Filter to compare groups against each other and sort by data.

EXPORT

Export reports into PDF or Excel.

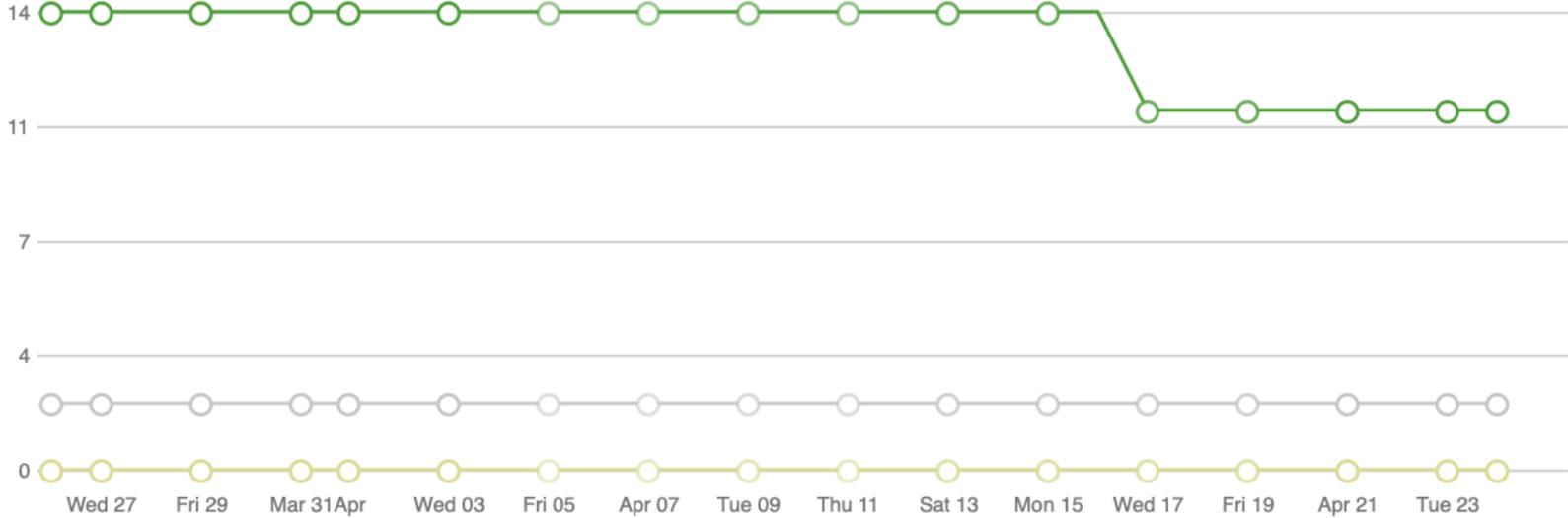
REQUESTS BURNDOWN

Aggregate Values
Amount of not resolved requests

Change metrics shown in graph.

Metrics: Absolute Numbers

- 1. Due Diligence Requests - 11
- 2. Integration Plan - 2
- 3. Milestones - 0



Title Views

Top Active Users Analytics

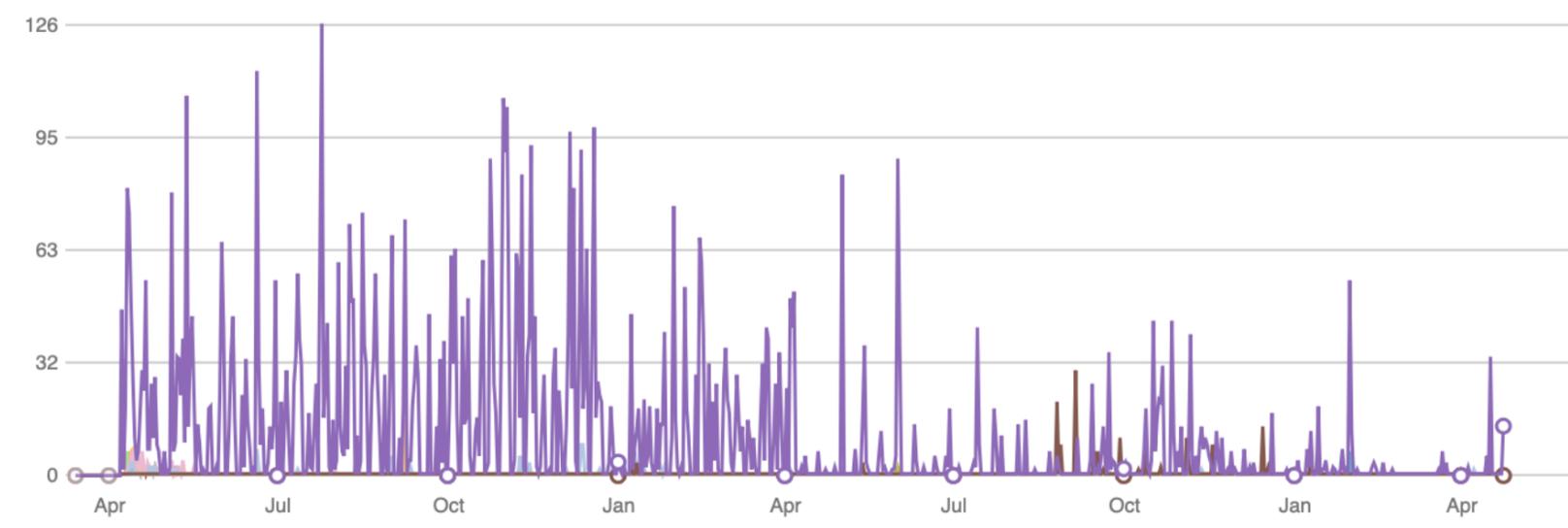
Your DealRoom ▾

Requests Documents Groups **Analytics**



- Requests Overview
- Requests Progress
- Requests Activity
- Top Active Users**
- Document Activity
- Audit log

- 3. **Apple** - 81
- 4. **Amazon** - 54
- 5. **Oath, formerly Yahoo** - 45
- 6. **Ernst n Young** - 32
- 7. **Google** - 27
- 8. **Cooley LLP** - 26
- 9. **Intel** - 24



Title	Logins	Time (min)	Requests Viewed	
			Unique	Total
▶ Management team	44	158	0	0
▼ Ernst n Young	25	34	0	0
▼ David M. Christens Financial Services Partner	4	4	0	0
▼ Sat April 01, 2017	1	0	0	0

Get detailed information about each user and their daily actions by expanding the toggle.

- Requests Overview
- Requests Progress
- Requests Activity
- Top Active Users
- Document Activity**
- Audit log

DOCUMENTS

Dates Range

Groups

Any Date ▾

All ▾

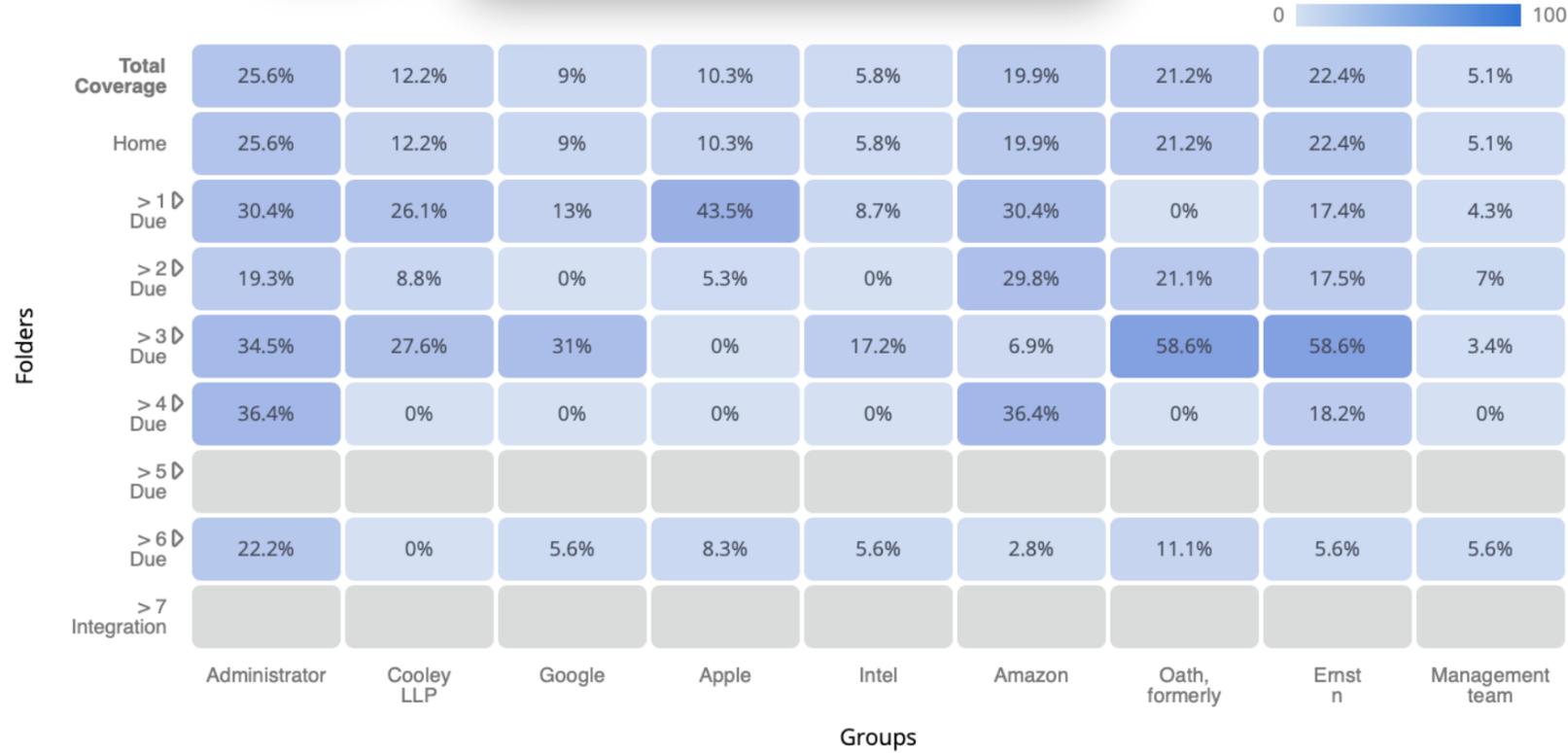
EXPORT ▾

DOCUMENTS ACTIVITY

Compare document activity, percentage of documents viewed, and other metrics.

Metrics: Views Coverage ▾

Show Values



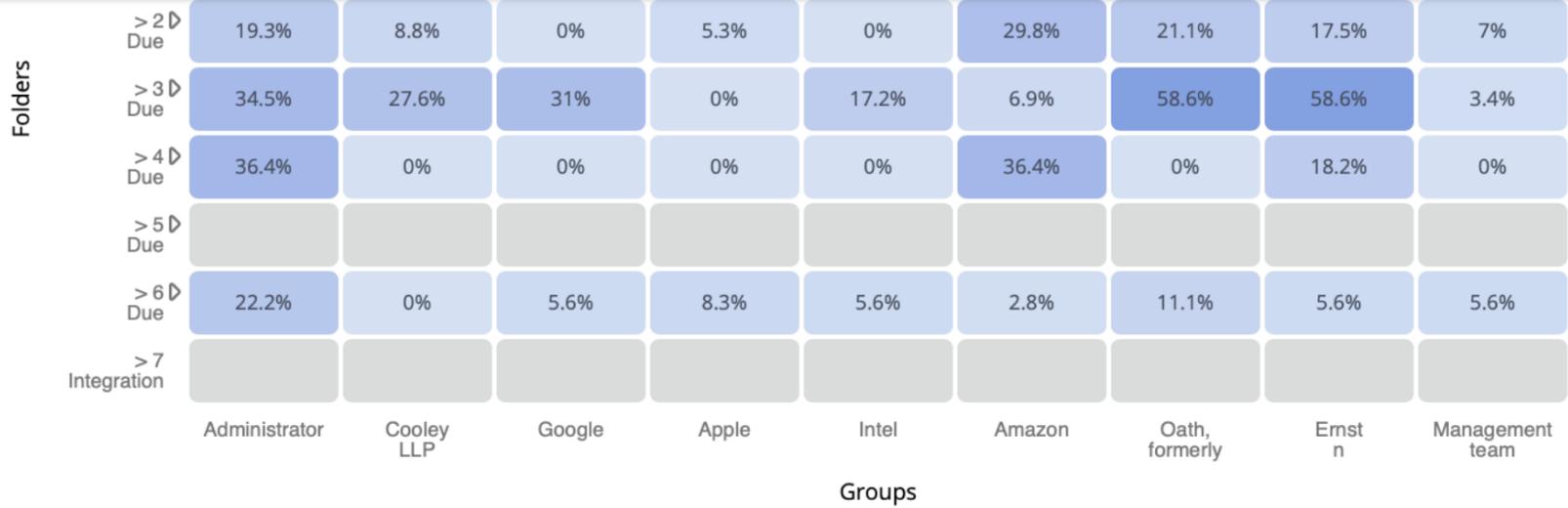
Document Activity Analytics Continued

Your DealRoom ▼

Requests Documents Groups **Analytics**



- Requests Overview
- Requests Progress
- Requests Activity
- Top Active Users
- Document Activity**
- Audit log



Title	Time (min)	Documents Views		Documents Uploaded		Documents Downloaded	
		Users	Total	Users	Total	Users	Total
▼ 1 Due Diligence Legal	251	18	409	3	23	12	245
1.1 Corporate Officers	0	0	0	0	0	0	0
1.2 Corporate Ownership	0	0	0	0	0	0	0
▶ 1.3 Corporate Structure	247	18	404	1	18	12	215
▶ 1.4 CEO M&A emails.xlsx	0	2	2	1	1	3	7
▶ 1.5 Certificate of Limited Liabi...	3	1	3	1	1	4	8
▼ Thu October 05, 2017	0	0	0	1	1	0	0

Compare document activity, percentage of documents viewed, and other metrics.

7:19 PM Unloaded document Julia Rollins Administrator

Email Notifications Settings

USER

Email Notifications

Profile

Profile Photo

Security

ROOM

Settings

Watermark

Non-disclosure agreement

Statuses

Slack integration

Room template

Immediately ▾

Anytime ▾

- Notify me about documents uploading
- Notify me about new requests
- Remind me about requests due dates

Timezone

DETECT

Europe/Berlin ▾

SAVE

Set email notifications, update profile email address / name, and reset your password. User settings are available to all users.

USER

- Email Notifications
- Profile
- Profile Photo
- Security

ROOM

- Settings
- Watermark
- Non-disclosure agreement
- Statuses
- Slack integration
- Room template

Room Name*

Logo



[Remove logo](#)

Background Color

Default Menu

Administrators Default Comment

Non-Administrators Default Comment

- Show the number of documents in folders
- Allow members to create bulk downloads

SAVE

Change the room's name, background color, and default comment types posted on requests.

Create list keys for request sequencing (e.g. 'BUYER 100')

- Profile Photo
- Security
- ROOM**
- Settings**
- Watermark
- Non-disclosure agreement
- Statuses
- Slack integration
- Room template

Administrators Default Comment

Non-Administrators Default Comment

- Show the number of documents in folders
- Allow members to create bulk downloads

SAVE

Create list keys for request sequencing (e.g. 'BUYER-100')

ENABLE

Create list keys so the value of each request starts at one.

Reset documents and files indexes

RESET

Delete room

Deleting will remove this room and all room files and tasks.

⚠ DELETE

Shut down the room for no further access and also view data usage.

Get data usage

VIEW DATA USAGE

NOTIFICATIONS

🔔 All notifications

✉️ Unread

Create mass notification messages that will be emailed to selected groups.

📅 MARK ALL AS READ

Apr 17, 2019

-  [Kanstantsin Husarevich](#) uploaded document [6.12.1.8 Nondisclosure agreements.pdf](#) to folder [6.12.1 Corporate Records](#). April 17 • 12:59AM
▼ Show 1 similar notification
-  [Kanstantsin Husarevich](#) assigned you to request [#1546 Legal entity organizational chart](#). April 17 • 12:46AM
-  [Kanstantsin Husarevich](#) assigned you to request [#1527 Deeds](#). April 17 • 12:46AM
-  [Kanstantsin Husarevich](#) assigned you to request [#1526 All documents, contracts or agreements to which...](#). April 17 • 12:46AM
-  [Kanstantsin Husarevich](#) uploaded document [1.8 Secrecy.pdf](#) to folder [1 Due Diligence Legal](#). April 17 • 12:22AM

Feb 01, 2019

-  [Kanstantsin Husarevich](#) assigned you to request [#1537 Balance sheet, income statements, cash flow sta...](#). February 1 • 8:39PM

Jan 10, 2019

-  [Nick Dreps](#) is now a member of group [Administrator](#) in room [Your DealRoom](#). January 10 • 11:01PM

Dec 08, 2018

-  [Kipon Patel](#) uploaded document [6.12.5.1 DD check sheet - new power flat](#) to folder [6.12.5 Market Data](#). December 8

- LISTS (+)
- Assigned to me 1/1
- Needs Review 0
- All Requests 10/23
 - Due Diligence Requests 6/17
 - Integration Plan 4/6
 - Milestones
- Trash

Help



START LIVE CHAT
Recommended



1-800-340-9749
Give us a call to speak with our support team



TUTORIAL
Watch quick training materials



GIVE FEEDBACK
Submit your idea and give feedback

FREQUENTLY ASKED QUESTIONS

I am getting too many/not enough emails from DealRoom about my transaction.
Every user can dictate their preferred timetable for email notifications from the DealRoom system. You can do so by selecting the **Settings** tab from navigation bar across the top of the screen, and then **Email Notifications** from the menu on the left. Here you will find a variety of options that will allow you to customize when and what emails you receive from us. Don't forget to hit **SAVE** when you're done!

Where can I find the template to make sure my diligence spreadsheet is in the correct format?
First you will have to be granted access to the Requests tab by an administrator of the room. You will need to contact them directly to do so. If you already have access, you can find this by selecting the "Import" button and you will notice a "Download Template" button next to the confirmation of Import. If you need further assistance please feel free to reach out to us at support@dealroom.net. Remember where this is, as when you're done you can import your properly formatted template here too!

Click on your profile icon and select Help to bring up live chat, 24/7 support number, video tutorials and FAQs.

Request history list with icons for chat, attachments, and dates (Apr 17, Feb 01).