

DealRoom Admin Pipeline Guide

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Navigation Bar

DealRoom

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Project Jules

Project Simil

Project WeddingDay

Sell Side

Project University

Project Spruce

Project Scholarship

Project NextMind

See all rooms

Notifications

Help

HD Hannah Delgado

Project Jules

0

Need my review 2

All Requests 5/253

Due Diligence Requests 1/182

Integration 4/71

Trash

Requests

Data Room

Permissions

OKR

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Settings

OVERVIEW

PROGRESS

TIMELINE

New Request

Import

Export All

ID	PR	Status	Request	Reply	Files	Updated
Due Diligence Requests \Legal \Corporate Organization						
1	PR	Green	Organizational Chart JR	Link		Oct 20
2	PR	Yellow	Joint Ventures (Nov 30)			Oct 18
3	PR	Yellow	Governing Documents	Link		Oct 26
4	PR	Yellow	Authorized Jurisdictions ★	Reply		Oct 20
5	PR	Grey	Board Minutes			Jul 13
6	PR	Grey	Past Transactions			Jul 13
Due Diligence Requests \Legal \Management						
7	PR	Grey	Related Party Transactions			Jul 13
8	PR	Grey	Management Bios			Jul 13
9	PR	Grey	Board Bios			Jul 13
Due Diligence Requests \Legal \Capital Structure						
10	PR	Grey	Capitalization Table			Jul 13
11	PR	Grey	Equity Issuances			Jul 13
12	PR	Grey	Options and Convertible Instruments			Jul 13

This is where you will see your **pipeline**.

See all the rooms under your **pipeline**.

Email Notifications Settings

The screenshot shows the 'Project Jules' interface. On the left is a navigation menu with a 'Profile icon' at the bottom. The main area is divided into 'LISTS' and 'Requests'. The 'Requests' section has an 'OVERVIEW' tab and a 'New Request' button. Below it is a table with columns 'ID', 'PR', and 'Status'. The table contains 12 rows of data, with the first row having ID '1', PR 'Due Diligence Requests', and a green status dot.

Access all your **user settings** such as updating your account information, email notification frequency, and reset your password from your **profile icon**.

Account Settings

Personal Info **Email Notifications** Security

Allow notifications from
 All rooms All rooms except... Only selected

Send me email notifications
Daily At 8 AM

Send separate email for each room

Notify me about
 New requests Documents uploading Requests due dates

Timezone
Detect America/Los_Angeles

Save changes

Choose which rooms you receive notifications from, the frequency of your email notifications, and what you are notified on. Each user sets their own **email notifications**.

Board View Overview

The screenshot shows a CRM interface in 'Board View' mode. At the top, there are navigation tabs for 'Pipeline', 'Board', 'Table', and 'Timeline', with 'All views' selected. A search bar and filters are visible, showing 'All filters' and '128 deals'. The main area contains several deal cards, each with a title, start date, deal type, status, and description. Callout boxes with green borders and arrows point to specific UI elements: 'All views', 'Open room', 'All filters', 'Three dots', 'Adjust view', 'New deal', 'Deal card', and 'Save view'.

Select all views to see all **custom, personal, or shared saved views**.

Select **open room** to access an individual room.

Select **all filters** to **filter all view by custom fields**.

Select the **three dots** to import or export a list of deals from Excel.

Select **adjust view** for different view options including view as a **list, table, or timeline**.

Select **new deal** to **create a new room and deal card**.

Click on the **deal card** for additional functionality.

Select **save view** to save a custom view with filters. Access all your saved views from **all views**.

Table View Overview



Pipeline Board **Table** Timeline All views Save view

Search... Phase Deal Type Status Description All filters | 128 deals Adjust view New deal

Title	Phase	Start Date	Last Note	Last Note Date	Deal Type	Status	Description	M&A Ow
Project Lab3		Mar 29, 2022	-				Owns retail spa...	Richard
Project Merlot		Mar 29, 2022	-				Owns retail spa...	Judith
Project Mint	Open room →	● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	A manufacturin...	Parves
Project RedBrick		● 1. Target List...	Mar 29, 2022	-	Acquisition	Active	Database comp...	Henry
Project SafetyNet		● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	Self-service ma...	George
Project StyleAtlas		● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	A company focu...	Claren
Project SunTrust		● 1. Target List...	Oct 28, 2021	-	Acquisition	Active	Digital UX desig...	Richard
Project Titleist		● 1. Target List...	Mar 29, 2022	-	Acquisition	Active	Owns retail spa...	Judith
Project TurtleNeck		● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	A manufacturin...	Parves
Project Vinter		● 1. Target List...	Mar 29, 2022	-	Acquisition	Active	Software mana...	Claren
Project WhiteBottle		● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	Owns retail spa...	Parves
Project Yardarm		● 1. Target List...	Mar 29, 2022	-	Acquisition	On Hold	Holding compan...	Jonas

Select **open room** to access a room.

Select **all filters** to filter your pipeline by predetermined fields.

Select **adjust view** to sort by custom field columns, and create a custom view.

Update deal fields by clicking anywhere in the columns to go to a deal card.

Timeline View Overview

Pipeline Board Table **Timeline** All views Save view

Search... Phase Deal Type Status Description All filters 128 deals Adjust view New deal

	2016				2017				2018				2019				2020			2022						
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4																	
Project ExtraRoom																										
Project Trix																										
Project WD_Asbury																										
Project BlueNew																										
Project April																										
Project Capsula																										
Project Chardonnay																										
Project 19thGreen																										

● 1. Target Listing ● 2. Initial Discussions ● 3. Indication of Interest ● 4. Preliminary Due Diligence ● 5. Letter of Intent ● 6. Confirmatory Due Diligence ● 7. Negotiations ● 8. Close
● 9. First 100 Days ● 10. Integration ● 11. In Market ● Did Not Pursue ● Unknown

Select **adjust view** to change to **board, table, or timeline view.**

See the **deal's expected duration** (that is determined by the deal's start date). Select to see the **deal's start date** and **signing/closing date** if applicable.

Deal Card Notes View

The screenshot displays a software interface for managing deal cards. On the left, a sidebar shows a pipeline with deal cards for 'Company A', 'Company B', and 'Garmin test room'. The main area is titled 'Project Jules' and is divided into 'Deal details' and 'Notes' sections. The 'Notes' section shows a list of notes, with the most recent one from Julia Rollins. On the right, there are sections for 'Contacts' and 'Attachments'. Green callout boxes with arrows point to specific UI elements, providing instructions on how to use them.

Annotations:

- Search:** Use **search** to type in keywords from the deal's **notes**.
- Create notes:** Create **notes** for high-level updates. The latest note will appear on the main card deal view.
- Edit/Delete:** Select the **three dots** to **edit** or **delete** a note.
- Update Deal Details:** Select the deal **description** to update fields with deal details. Discard or save changes.
- Attachments:** Upload relevant **attachment/s** to a deal card.
- Contacts:** Add a **contact** to a deal for quick reference. Add the contact's **email, first name, last name, company, and role**, if applicable.

Deal Card Emails View

The screenshot displays a CRM interface with several components:

- Deal Cards (Left):** A list of deal cards including "Company A (sell-side)", "Company B (buy-side)", and "Garmin test room". Each card shows start dates, descriptions, M&A owners, and statuses.
- Deal Details (Middle-Left):** A detailed view for "Project Jules" under the "4. Preliminary Due Diligence" phase. It includes fields for Start date (Jun 18, 2021), Description (A dev shop with AI translation services...), M&A Owner (Julia R.), Status (On Hold), Rationale (Need to shore up our digital experience...), Size (\$ m) (792), and State / Province (Brittany).
- Emails View (Middle-Right):** A view of an email titled "Project Jules teaser" sent on Sep 16, 2022, at 12:34AM. The sender is Ilgiz Islamgulov and the recipient is julia@onday1.onmicrosoft.com. Attachments include "DealRoom BI reports Knowledge base .pdf" and "Dashboard reports.pdf". The email body contains the text: "Please see attached documents for Project Jules" and "If you have any questions please let me know! Ilgiz".
- Contacts (Right):** A list of contacts, including Andrew Talbot, Analyst at Baird, with email address andrewtalbotkummer@maili...
- Attachments (Bottom-Right):** A section titled "Attachments" with an "Upload" button. It lists the two PDF attachments from the email: "DealRoom BI reports Knowledge..." and "Dashboard reports.pdf".

Log emails to a deal card using the Outlook plug-in.

Any attachments on logged emails will be stored here.

Deal Card Groups View

The screenshot displays the Deal Card Groups View interface. On the left, a sidebar shows deal details for 'Project Jules', including its start date (Jun 18, 2021), description, and M&A owner (Julia R.). The main area is divided into tabs: Notes, Emails, Groups, and Phases. The Groups tab is active, showing a list of groups with columns for Group Reporting (toggle), Members count, and Invites. A green callout box points to the 'Members count' column, stating 'See a room's groups, members, and invites.' Another green callout box points to the 'Group Reporting' toggle for the 'Finance' group, stating 'Enable room group reporting per group.' On the right, a 'Contacts (1)' section shows Andrew Talbot, and an 'Attachments' section lists two documents: 'DealRoom BI reports Knowledg...' and 'Dashboard reports.pdf'.

Group	Group Reporting	Members count	Invites
Administrator	<input type="checkbox"/>	17	0
Target Company	<input type="checkbox"/>	2	0
External	<input type="checkbox"/>	4	0
Legal	<input type="checkbox"/>	2	0
Finance	<input type="checkbox"/>	4	1
HR	<input type="checkbox"/>	2	0
IT	<input type="checkbox"/>		

Deal Card Phases View

The screenshot displays the Deal Card Phases View interface. On the left, a sidebar shows deal details for 'Project Jules', including start date (Jun 18, 2021), description (A dev shop with AI translation services...), M&A Owner (Julia R.), status (On Hold), and rationale (Need to shore up our digital experience...). The main area shows a 'Phases' tab with a sequence of 11 phases. The current phase is '4. Preliminary Due Diligence', which is highlighted in grey and includes a pencil icon for editing. The table below shows the phase sequence, planned start, and actual start dates for each phase. On the right, there are sections for 'Contacts (1)' (Andrew Talbot) and 'Attachments' (DealRoom BI reports, Dashboard reports.pdf).

Phase sequence	Planned Start	Actual Start
● 1. Target Listing		Jun 21, 2021 Actual Duration: 123 days
● 2. Initial Discussions		Oct 22, 2021 Actual Duration: 244 days
● 3. Indication of Interest		Jun 23, 2022 Actual Duration: 61 days
● 4. Preliminary Due Diligence		Aug 23, 2022 Actual Duration: 70 days
● 5. Letter of Intent		
● 6. Confirmatory Due Diligence		
● 7. Negotiations		
● 8. Close		
● 9. First 100 Days		
● 10. Integration		
● 11. In Market		
● Templates		
● Did Not Pursue		
● Unknown		

Select the **pencil icon** to **edit dates** or **leave a comment**.

Track each **set phases'** **actual duration**.

People Overview

DealRoom

Major Airline

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- Project Jules
- Project Simil
- Project WeddingDay
- Sell Side
- Project University
- Project Spruce
- Project Scholarship
- Project NextMind

See all rooms

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People

Search Filters | 36 records

Export Create announcement New person

Name	Rooms & Deals	Company	Title	Email	Phone	Organization
KG Konstantin Gusarevich	Project Damascu...			ka...		This is a new or...
Kans Husarevich	Project Periscope...			ka...		-
kison@dealroom.net	Project Frost & 2 ...			kison@dealroom...		
DG Denis Gonchar	Project Denim & ...	DealRoom	Tzar	denis@dealroom...		
JR Julia Rollins	Project RanchCo...	DealRoom	Account Executive	julia@dealroom.net		-
ilgiz+outlook	Project SunTrust ...	ilgiz+outlook@de...	ilgiz+outlook@de...	ilgiz+outlook@de...	123123123	-
Pavel Afanasievich	Project Frost & 6 ...	Dealroom ic	Director of Ops	testfundology7@...		
Jane Oliver	Project 4iron & 3 ...	DealRoom	QA	jane@dealroom.net		
QG Qakonstantin Gmail	Project Frost & 2 ...	Dealroom	QA	qakonstantin@g...	23234234	-
SZ Shisha Zal	Project Couture &...	DealRoom	QA	shishazal@yahoo...	213123123123	-
KG Kans Gusarevich	Project Damascu...	DealRoom	QA	kans_gusarevich...	123123123123	-
Notif Notif	Project Damascu...	DealRoom	Quality Assurance	notifications@de...		
Hannah Delgado	Project Lab3 & 1...	Dealroom	Customer Succes...	hannah@dealroo...	1234567890	-
Andrev Shtangev	No rooms	DealRoom	Senior Software	ftvkun@dealroom	+79272313618	-

Search for a specific person.

Filter people by room.

Export all contacts to Excel.

Create an announcement to send an email notification to specific groups or users.

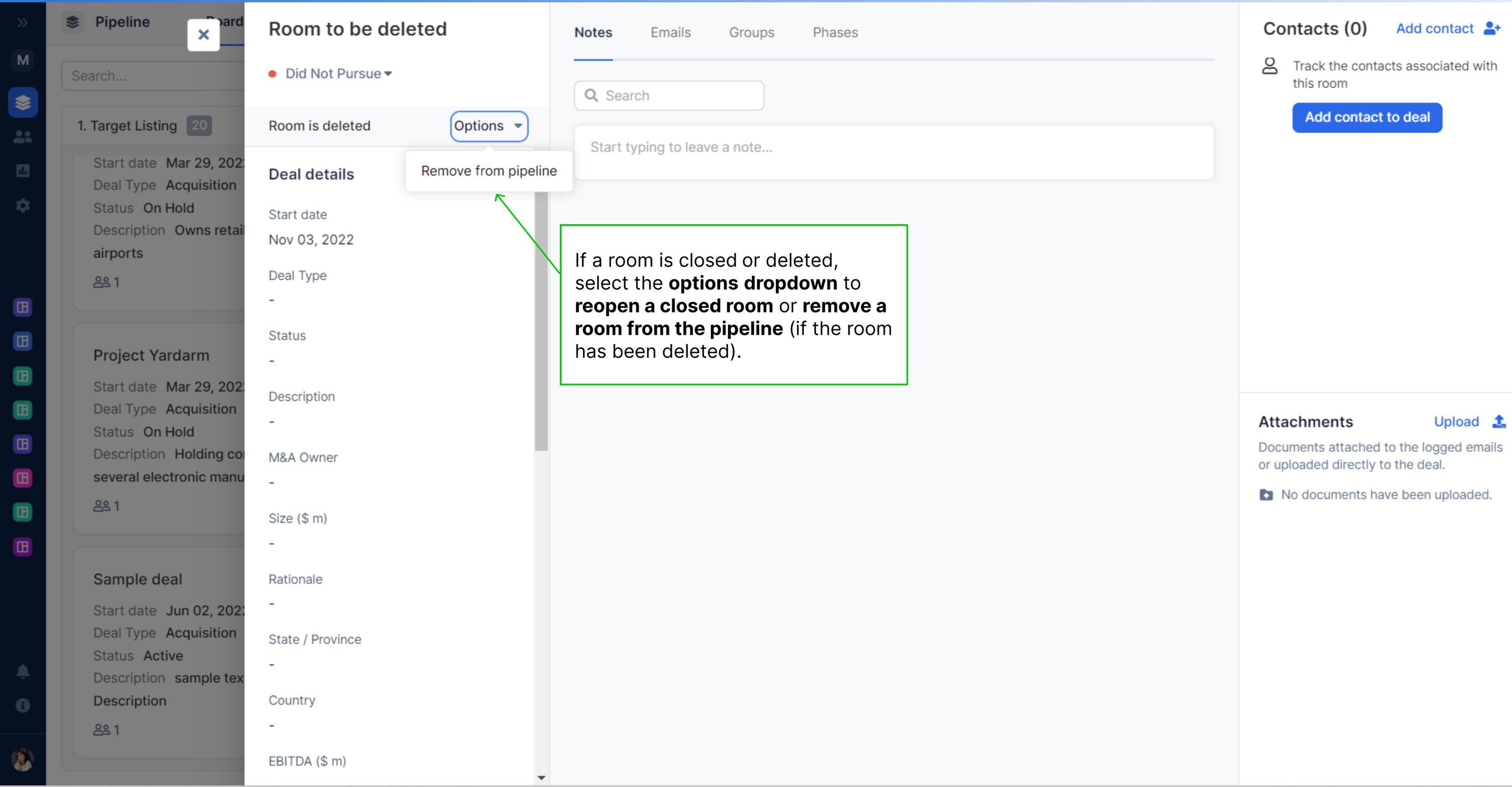
Add an existing person or invite a new person to a room.

Custom user fields, if any, are displayed here.

Hover to see a user's associated rooms and deals.

Select the prohibit sign icon to remove a member from all rooms.

Deleted or Closed Deal Card



Room to be deleted

● Did Not Pursue ▾

Room is deleted **Options** ▾

Deal details

- Start date: Nov 03, 2022
- Deal Type: -
- Status: -
- Description: -
- M&A Owner: -
- Size (\$ m): -
- Rationale: -
- State / Province: -
- Country: -
- EBITDA (\$ m): -

Notes | Emails | Groups | Phases

Search

Start typing to leave a note...

Contacts (0) [Add contact](#)

Track the contacts associated with this room

[Add contact to deal](#)

Attachments [Upload](#)

Documents attached to the logged emails or uploaded directly to the deal.

No documents have been uploaded.

Reports History Tab

DealRoom <<

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Project 4iron

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Reports BI Reports **BETA** History Phases Dashboard

Export History

Export **report history** to Excel.

See the **fields** from a specific date and time.

Title	Phase	Start Date	Description	M&A Owner	Status	Rationale	Size (\$ m)	Stat
BossMove	Unknown	Oct 22, 2022	-	-	-	-	-	-
Buy Side Due Diligence	Templates	Aug 30, 2022	-	Pamela Eysie	-	-	600	Ct
Capital Raise	Did Not Pursue	Oct 24, 2022	-	-	-	-	-	-
Company A (sell-side)	1. Target List...	Aug 17, 2022	Regional Midwe...	Pamela Eysie	Active	-	600	Ct
Company B (buy-side)	1. Target List...	Aug 17, 2022	Regional South...	Pamela Eysie	Active	-	400	Ta
Demo Room	2. Initial Disc...	Aug 11, 2022	-	Pamela Eysie	-	-	500	Ct
Garmin test room	1. Target List...	Aug 22, 2022	-	-	-	-	600	Ct
New Deal	Unknown	Sep 13, 2022	-	-	-	-	-	-
Project 105HDv	Did Not Pursue	Mar 11, 2020	Database comp...	Judith G.	Dropped	Capital project t...	100	Ot
Project 123	1. Target List...	Oct 14, 2022	-	-	-	-	-	-
Project 18Holes	2. Initial Disc...	Sep 17, 2021	Owens retail spa...	Judith G.	Active	Global, capital p...	600	Wi
Project 19thGreen	Did Not Pursue	Oct 27, 2021	A digital travel p...	Parvesh R.	Dropped	Partnering with ...	100	SC
Project 4iron	2. Initial Disc...	Aug 01, 2022	Clothing manuf...	John M	Active	Growing our flig...	70	Lc

Reports Phases Tab

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Reports BI Reports **BETA** History **Phases** Dashboard

● 1. Target Listing ● 2. Initial Discussions ● 3. Indication of Interest ● 4. Preliminary Due Dili... ● 5. Letter of Intent ● 6. Confirmatory Due

Deal Name	Start Date	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
Project SunTrust	Oct 28	Oct 29 368 days					
Project NextMind	Oct 28	Oct 29 - Dec 29 61 days	Dec 29 - Apr 2 121 days		Aug 1	Aug 1 - Aug 23 22 days	Aug 23 70 days
Project Core	May 11	Mar 11 - May 11 61 days	May 11 - Jul 12 62 days	Jul 12 - Sep 13 63 days	Sep 13 - Oct 13 30 days	Oct 13 - Oct 25 12 days	Oct 25 - Dec 9 45 days
Project DuneCapital	Oct 6	Oct 6 - Dec 7 62 days	Dec 7 - Feb 8 63 days	Feb 8 - Apr 8 59 days	Apr 8 - May 10 32 days	May 10 - May 25 15 days	May 25 - Jul 9 45 days
Project Raise	Jan 21	Jan 21 - Mar 22 61 days	Mar 22 - May 22 61 days	May 22 - Jul 22 61 days	Jul 22 - Aug 24 33 days	Aug 24 - Sep 8 380 days	Sep 8 - Nov 1 54 days
Project Trix	Dec 19	Dec 21 - Feb 22 63 days	Feb 22 - Apr 21 58 days	Apr 21 - Jun 21 61 days	Jun 21 - Jul 21 30 days	Jul 21 - Aug 5 15 days	Aug 5 - Sep 20 46 days
Project WD_Asbury	Aug 18	Aug 18 - Oct 19 62 days	Oct 19 - Dec 21 63 days	Dec 21 - Feb 22 63 days	Feb 22 - Mar 23 29 days	Mar 23 - Apr 7 15 days	Apr 7 - Jun 18 72 days
Project ExtraRoom	Nov 29	Nov 30 - Mar 2 92 days	Mar 2 - May 3 62 days	May 3 - Jul 5 63 days	Jul 5 - Aug 5 31 days	Aug 5 - Aug 20 15 days	Aug 20 - Oct 4 45 days
Project BlueNew	Feb 13	Feb 13 - Apr 13 60 days	Apr 13 - Jun 15 63 days	Jun 15 - Aug 17 63 days	Aug 17 - Sep 17 31 days	Sep 17 - Oct 1 14 days	Oct 1 - Nov 16 46 days
Project UpWheels	Sep 14	Sep 14 - Nov 16 63 days	Nov 16 - Jan 18 63 days	Jan 18 - Mar 18 59 days	Mar 18 - Apr 19 32 days	Apr 19 - May 4 15 days	May 4 - Jun 18 45 days

The **timeline view** shows how long each deal spends in each phase. The **color bar** indicates a deal's current phase.

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Reports BI Reports **BETA** History Phases **Dashboard**

+ ADD VIEW ← Select **add view** to create a custom chart or add a report to the dashboard view.

Select the **calendar icon** to see what reports looked like on a certain date. → 2022-11-01

Chart

Deal Type	Acquisition	Alliance	Divestiture	JV	Minority Equity Stake	null	Totals
Totals	96	12	4	7	6	21	146

Deals by Country

Country	Totals
Australia	5
Croatia	2
England	15
France	7
Germany	4
Japan	6
Netherlands	3

Test Deals by Country

Country	Totals
Australia	5
Croatia	2
England	15

Drag the arrow to **adjust the chart size**. **Drag-and-drop** to re-order a chart on the dashboard. ←

Reports Dashboard Add View

The image shows a screenshot of the DealRoom Reports Dashboard with an 'Add View' dialog box open. The dialog box contains a form for creating a new chart. The form includes a 'Title' field, a 'Table' dropdown menu, and a 'Count' dropdown menu. A 'Totals' box shows a value of 146. The background shows a list of reports with various filters and a legend at the bottom.

Give a new chart a title.

Select the chart type and calculation preference.

Click on the horizontal or vertical double-ended arrows to change the sort order of each axis.

Drag-and-drop custom fields into a pivot table to create a chart.

Add **Cancel**

Legend: Philippines, Singapore, Thailand, US, USA, United States, null

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Settings **General** Custom Fields Authentication Pipeline access Deals trash

Determine the **organization's public name.**

Organization

Set the name you would like displayed for all users when they access your organizations account with DealRoom.

Organization name *

Update

Phases

Drag to order

New phase +

Customize the phases you use to move perspective deals through, from sourcing to integration.

● 1. Target Listing Edit

Phase Name *

Phase Color *

● 3. Indication of Interest

Select **new phase** to add a new phase or edit an existing phase.

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 - Project Appalachian
 - Project GigTour
 - Test Small Business
 - Project WindowSeat
 - Project Stable
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Settings **General** Custom Fields Authentication Pipeline access Deals trash

Deals ordering

Apply default deals ordering criteria for your pipeline. When this is set up deals in all pipeline views will be ordered accordingly.

Drag to order [New criteria +](#)

Determine the deal orders in each phase using custom fields.

Status - Ascending

Request lists as tabs

Move the request lists you have on the left hand side to the top menu bar as an additional new.

[Enable Lists as tabs feature](#)

Inside the room, **enable lists under the request tab** to be a tab displayed at the top of the main header.

Login page color

Customize the login and registration screen background color for all users.

NULL

Customize the login screen background color.

Deals Timeline Fields

Close date

Choose a custom field to indicate what dates should show up for a deal in the pipeline timeline view.

Storage Usage

[View storage usage](#)

View data storage usage across all deals.

BI Reports

[Update BI Reports fields](#)

Update to **sync phases and fields** with the BI reporting.

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 - Project Appalachian
 - Project GigTour
 - Test Small Business
 - Project WindowSeat
 - Project Stable
 - Project Magnets
 - Project Solano

Deal Custom Fields

Drag to order **Add Field +**

Description	text
M&A Owner	text
Status	select
Rationale	text
Size (\$ m)	number
State / Province	text
Country	text
Deal Type	select
Industry	multiselect
Contry code	select
EBITDA (\$ m)	number
NDA Signed	date
LOI Submission	date

Create **custom fields** to determine which deal metrics will appear on deal cards. This also determines which deal metrics are used for filtering and reporting.

Settings Custom Field Tab Continued

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User Custom Fields

Drag to order

Add Field +

Create custom fields to track **user information**.

Group Report Custom Fields

Drag to order

Add Field +

Create **custom fields for group reports**. These fields will show up for users inside a room if group reporting is enabled.

Test Group Custom Field	number
-------------------------	--------

Data Room Custom Fields

Drag to order

Add Field +

Create **custom fields to track data room document information** (for the data room tab).

Description	text
-------------	------

Synergies Custom Fields

Drag to order

Add Field +

Create **custom fields to track synergy data** (for the synergy tab).

Actual Value	number
Budgeted Value	number
Forecasted Value	number
Achieve Date	date
Associated Tasks	text

OKR Custom Fields

Drag to order

Add Field +

Create **custom fields to track OKR data** (for the OKR tab).

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- Settings
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- Custom Fields
- Authentication**
- Pipeline access
- Deals trash

Two-Factor Authentication

Requiring 2FA for all members adds another level of security for your rooms.

Require 2FA

Require **two-factor authentication** for all users to log in.

Settings Deal Pipeline Access Tab

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- Project Jules
- Project Simil
- Project WeddingDay
- Sell Side
- Project University
- Project Spruce
- Project Scholarship
- Project NextMind

See all rooms

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User access

Allows viewing deals when the user is a room admin, viewing/changing reports, tracking phases history, and viewing activity.

Manager access

Allows creating new deals in addition to User access capability.

Admin access

Allows viewing all organization deals, editing deal pipeline settings, managing pipeline access in addition to Manager access capability.

Grant pipeline access

Grant users access to the pipeline. Determine if access should be user access, manager access, or admin access.

Select a user to make access changes, see pipeline access, and access level.

Search

Name	Reports A...	Company	Title	Email	Phone
Alex McGregor	disabled	JP Morgan	Test Analytics	[Email]	[Phone]
Alexander Ilyin	editor	Dealroom.net	Alex	[Email]	[Phone]
Andrey Shtangeyev	disabled	DealRoom	Senior Software Engin...	[Email]	[Phone]
Anton Sokol	disabled	Dealroom	UI/UX Designer	[Email]	[Phone]
Charisma Nuqui	Admin	full (auto)	disabled	DealRoom	Program Manager
Denis Gonchar	Admin	full (auto)	editor	DealRoom	Tzar
Hannah Delgado	Admin	full (auto)	editor	Dealroom	Customer Success M...
Ilgiz I	Admin	full (auto)	editor	DealRoom	Dev
ilgiz+outlook@dealroo...	Admin	full (auto)	disabled	ilgiz+outlook@de...	ilgiz+outlook@dealro...
james@dealroo... Resend	Admin	full (auto)	disabled	[Email]	[Phone]
Jessica Zivotovsky	Admin	full (auto)	editor	DealRoom	Sales Ops

Grant Access to Deal Pipeline

DealRoom

Major Airline

Pipeline

People

Reports

Settings

Rooms

- Project Jules
- Project Simil
- Project WeddingDay
- Sell Side
- Project University
- Project Spruce
- Project Scholarship
- Project NextMind

See all rooms

Notifications

Help

Hannah Delgado

Settings

General Custom Fields Authentication Pipeline access Deals trash

User access

Allows viewing deals when the user is a room admin, viewing/changing reports, tracking pipeline activity.

Grant pipeline access

Manager access

Allows creating new deals in addition to User access capability.

Admin access

Allows viewing all organization deals, editing deal pipeline settings, managing pipeline access in addition to Manager access capability.

Search

Name	Email	Phone
Alex McGregor		
Alexander Ilyin		
Andrey Shtangeyev		
Anton Sokol		
Charisma Nuqui		
Denis Gonchar		
Hannah Delgado		123456
Ilgiz I		123123
ilgiz+outlook@dealro...		123123
james@dealro... Resend		
Jessica Zivotovsky		

Grant pipeline access

Email: *

User email

Access:

User Manager Admin

Access to basic pipeline settings

Allows managing custom fields and general pipeline settings

Grant access

Type the email address of the user you would like to **give access to and choose their access level.**

Settings Deals Trash Tab

DealRoom <<

Demo-Major Airlines ▾

Pipeline

People

Reports

Settings

Rooms

Project Jules

Project Stay

Demo Room

Project 4iron

Project Badger

New Deal

Project Studio54

Test

See all rooms

Notifications

Help

Hannah Delgado ▾

Settings General Custom Fields Authentication Pipeline access **Deals trash**

Title	Phase	Start Date	
Project Strong	● Unknown		Restore Delete
Finance example	● Unknown		Restore Delete
PE example	● Unknown		Restore Delete
Kison demo room2	● Unknown		Restore Delete
PMI Example	● Unknown		Restore Delete
Master template ...	● Unknown		Restore Delete
test	● Unknown		Restore Delete
test	● Unknown		Restore Delete
Demo Major Airli...	● 2. Initial Disc...		Restore Delete
Post Merger Tem...	● Unknown		Restore Delete
Day 1 Readiness	● Unknown		Restore Delete
Project Drophall	● Unknown		Restore Delete
Kison Test Room	● Unknown		Restore Delete
Day 1 Template	● Unknown		Restore Delete

Restore or permanently delete deal cards that have been deleted from the pipeline. If a room has been deleted, the data inside the room cannot be restored from the pipeline. If assistance is needed, **please contact your DealRoom Client Success Manager**, as data can be restored for up to two weeks after deletion from the backend.

- DealRoom <<
- Demo-Major Airlines ▾
- Pipeline
- People
- Reports
- Settings**
- Rooms
- Project Jules
- Project Badger
- Garmin test room
- See all rooms
- Notifications
- Management
- Help
- Julia Rollins ▾

- Settings
- General
- Custom Fields
- Authentication
- Pipeline access
- Billing**
- Deals trash

Professional Annually 2500/mo 20GB subscription is active [Cancel](#)

Cancel your current subscription. Access will be available until the end of the billing cycle.

Billing Information

You are set to receive invoices.
Email address: julia@dealroom.net
Have a coupon?

Invoices

NUMBER	BILLED ON	DESCRIPTION	TOTAL	STATUS	
8737E033-0001	Nov 3, 2022	1 × DealRoom (at \$30,000.00 / year) Nov 3, 2022 - Nov 3, 2023 1 GB × Storage (Tier 1 at \$0.00 / year) Nov 3, 2022 - Nov 3, 2023	30000.00	draft	View

Select view to **pay a current invoice or download a receipt.**

DealRoom

- Major Airline
- Pipeline
- People
- Reports
- Settings

Rooms

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See all rooms

Notifications

Help

Hannah Delgado

NOTIFICATIONS

- All notifications
- Unread 433

[Mark all as read](#) [Create Announcement](#)

All rooms

Oct 25, 2022

- [Kans Husarevich](#) uploaded document [2_product](#) October 25 • 10:22PM
- Show 1 similar notification
- You were invited to a new DealRoom by [Kans Husarevich](#). You now have access to room . er 25 • 11:18PM

Oct 24, 2022

- [Kans Husarevich](#) added request [#2 req2](#). October 24 • 11:18PM
- Show 1 similar notification

Oct 19, 2022

- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM
- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM
- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM
- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM
- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM
- User [restie@dealroom.net](#) has been invited to group [Administrator](#) in room . October 19 • 12:10AM

Create mass notification messages (announcements). The announcement will be emailed to selected group(s).

See all the notifications across all of your rooms or filter the notifications by room.

