

FirmRoom Platform Overview

Table of Contents

Notifications	03	Audit Log	12
Announcements	04	User Settings	13
Data Room	05	General Settings	14
Document Viewer	06	Watermark Setting	15
Permissions	07	Settings Non-disclosure Agreement	16
File Permissions	08	Room Template Settings	17
Reports	09	Help	18
Data Room Activity Reports	10		
Data Room Activity Reports Continued	11		

NOTIFICATIONS

All notifications

Unread 427

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

All rooms ▼

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

Nov 08, 2022

 [Julia Rollins](#) uploaded document [1.6 SaaS Agreement DealRoom Vinte...](#) to folder [1 Physical](#).

November 8 • 10:39AM

Nov 03, 2022

 [Kevin Bob](#) uploaded document [8.9.1 GWEC-Global-Wind-Report-2021....](#) to folder [8.9 Research Reports](#).

November 3 • 6:55PM


Oct 19, 2022

 [Kevin Bob](#) uploaded document [8.8.1 Sales Order Process - REV_06....](#) to folder [8.8 Sales Process](#).

October 19 • 7:26PM

▼ Show 3 similar notifications

Oct 17, 2022


 User [shyla@dealroom.com](#) has been invited to group [Administrator](#) in room .

October 17 • 5:16PM

 [Julia Rollins](#) uploaded document [3.3.2.2 M&A Science Product Portfolio...](#) to folder [3.3.2 Marketing Material](#).

October 17 • 5:00PM

▼ Show 8 similar notifications

 User [Marshall Smith](#) has been invited to group [Spicewood Partners](#) in room .

October 17 • 11:12AM

▼ Show 2 similar notifications

NOTIFICATIONS

All notifications

Unread 427

Mark all as read Create Announcement

All rooms

Create Announcement

Recipients*

Select users

Message*

Aa B I ... | :≡ ≡≡ | @ #

Send

Show 3 similar notifications

Oct 17, 2022

User **shyla@dealroom.com** has been invited to group **Administrator** in room . October 17 • 5:16PM

Julia Rollins uploaded document **3.3.2.2 M&A Science Product Portfolio...** to folder **3.3.2 Marketing Material** . October 17 • 5:00PM

Show 8 similar notifications

User **Marshall Smith** has been invited to group **Spicewood Partners** in room . October 17 • 11:12AM

Show 2 similar notifications

November 8 • 10:39AM

Reports . November 3 • 6:55PM

s . October 19 • 7:26PM

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

Project Demo | **Data Room** | Permissions | Reports | Settings

FOLDERS

- Recent Files
- Bookmarked Files
- Home
- 1. Physical
- 2. Financial Information
- 3. CIM
- 4. Labor & Employment
- 5. Tax
- 6. Material Contracts
- 7. Market Data
- 8. Corporate Records
- 9. Legal & Other
- 10. Legal Diligence
- 11.
- 13.
- Trash

Home

Upload **Download All** **New Folder** **Edit Index** **Export Index**

Search

COLUMNS

Access the most recently uploaded files.

Create new folders and upload documents. You can also upload documents using drag-and-drop.

Hover and click on the three dots for additional functionality.

Select a box for additional functionality and bulk actions.

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

<input type="checkbox"/>	2	Financial Information	4 docs
<input type="checkbox"/>	3	CIM	11 docs
<input type="checkbox"/>	4	Labor & Employment	0 docs
<input type="checkbox"/>	5	Tax	0 docs
<input type="checkbox"/>	6	Material Contracts	5 docs
<input type="checkbox"/>	7	Market Data	2 docs
<input type="checkbox"/>	8	Corporate Records	5 docs
<input type="checkbox"/>	9	Legal & Other	6 docs
<input type="checkbox"/>	10	Legal Diligence	0 docs
<input type="checkbox"/>	11	Staging (NO BUYER ACCESS)	0 docs
<input type="checkbox"/>	12	sfgmembers template.xlsx	16.25 ... Sep 09

Search for a word or phrase in a document.

See the past uploaded versions of the document.

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



Project Demo

GROUPS

- All groups 2/11 +
- Administrator 1/9
- Buyer 1
- Buyer 2
- Buyer 3
- Internal team
- Seller 1/2 ⋮
- Trash

Create a new group.

Copy the permissions set for this group to a new group.

MEMBERS FILE PERMISSIONS OTHER PERMISSIONS

- + Add Member**
- Export Contacts
- Export Permissions

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

Check the permissions set across all groups.

Click for bulk actions such as moving users to other groups or deleting users.

			Role	Group
<input type="checkbox"/>		chanisma@firmroom.com 7044332992	DealRoom Admin Assistant	Administrator ▼
<input type="checkbox"/>	HD	Hannah Delgado hannah@firmroom.com 1234567890	Firmroom Customer Success Manager	Administrator ▼
<input type="checkbox"/>	JS	Jen Silos jen@firmroom.com 09956153030	DealRoom Production Manager	Administrator ▼
<input type="checkbox"/>		Julia Rollins julia@firmroom.com 6087726875	FirmRoom Customer Success	Room Owner
<input type="checkbox"/>	JR	Julia Rollins jrollins@wisc.edu 6087726875	Rollins Co Manager	Seller ▼
<input type="checkbox"/>		Kans Husarevich kans@firmroom.com +36708506211	Firmroom QA	Administrator ▼
<input type="checkbox"/>	KA	Kyra Amundson kyra@dealroom.net 8479020171	DealRoom Marketing	Administrator ▼
<input type="checkbox"/>	ML	marsha@dealroom.net 3123443442	DealRoom director	Administrator ▼
<input type="checkbox"/>	RA	roxanne@firmroom.com 6014809592	DealRoom Executive Assistant	Administrator ▼
<input type="checkbox"/>		shyla@dealroom.com Resend ↻		Administrator ▼
<input type="checkbox"/>		testemail@company.com Resend ↻		Seller ▼

Project Demo | Data Room | **Permissions** | Reports | Settings

MEMBERS | **FILE PERMISSIONS** | OTHER PERMISSIONS

GROUPS (+)

- All groups (2/11)
- Administrator (1/9)
- Buyer 1
- Buyer 2
- Buyer 3
- Internal team
- Seller
- Trash

View Watermarked
Allows to view watermarked file(s)

Download Watermarked PDF
Allows view, download as PDF and print watermark 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

Search [] Save []

Index	Title	Buyer 1	Buyer 2	Buyer 3	Internal team	Seller
1	Physical	🔒	📄	👁️	✎	👁️
1.1	Enviro		📄	👁️	✎	👁️
1.2	Capita		📄	👁️	✎	👁️
1.3	Brand Standards.pdf	🔒	📄	👁️	✎	👁️
1.4	Property Condition Summary .pdf	🔒	📄	👁️	✎	👁️
1.5	DealRoom - Acquisition Evaluation Te...	🔒	📄	👁️	✎	👁️
1.6	SaaS_Agreement_DealRoom_Vinted_...	🔒	📄	👁️	✎	👁️

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.

Select the parent folder's permissions. You also have the ability to hide certain files and folders within the parent folder.

Top Active Users

Data Room Activity

Audit log

USERS

Dates Range

2022-11-01 - 2022-11-08

Groups

All

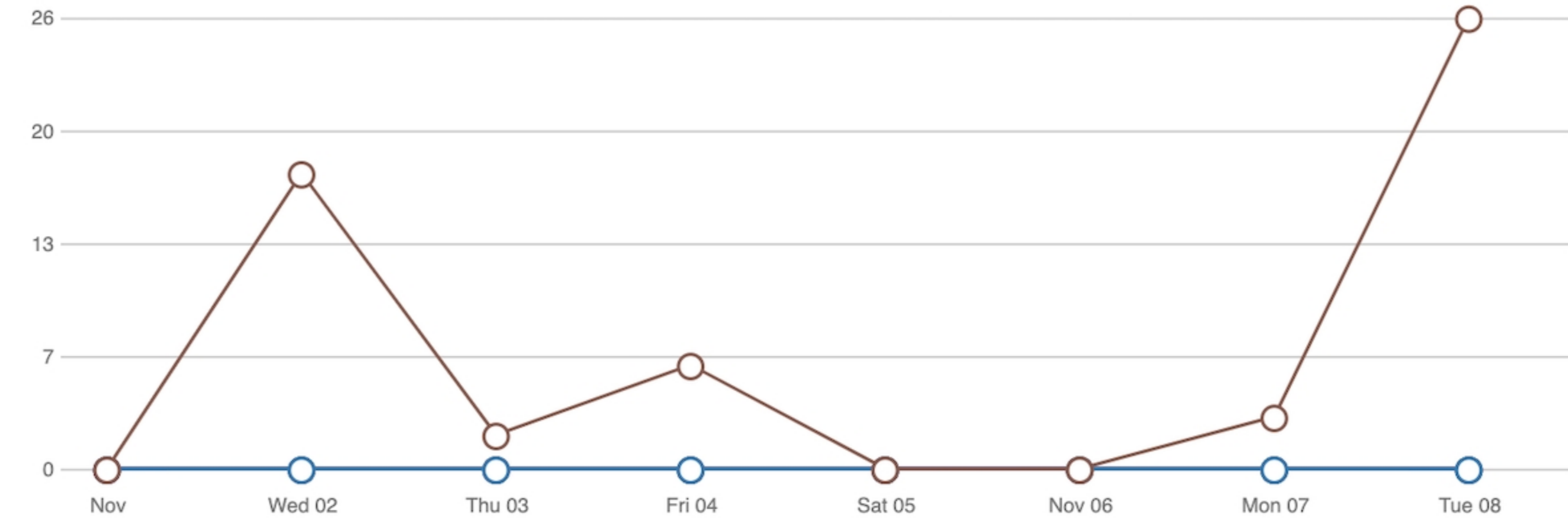
Export

Export reports to Excel.

GROUP ACTIVITY

Time Spent (Min)

- 1. Administrator - 54
- 2. Buyer 1 - 0
- 3. Buyer 2 - 0
- 4. Buyer 3 - 0
- 5. Internal team - 0
- 6. Seller - 0



Title	Documents Viewed		Documents Uploaded		Documents Downloaded	
	Unique	Total	Unique	Total	Unique	Total

>> Project Demo

J

- Top Active Users
- Data Room Activity**
- Audit log

RA

Data Room Permissions **Reports** Settings

DOCUMENTS

Dates Range

📅 2022-11-01 - 2022-11-08

Groups

All ▾

Export ▾

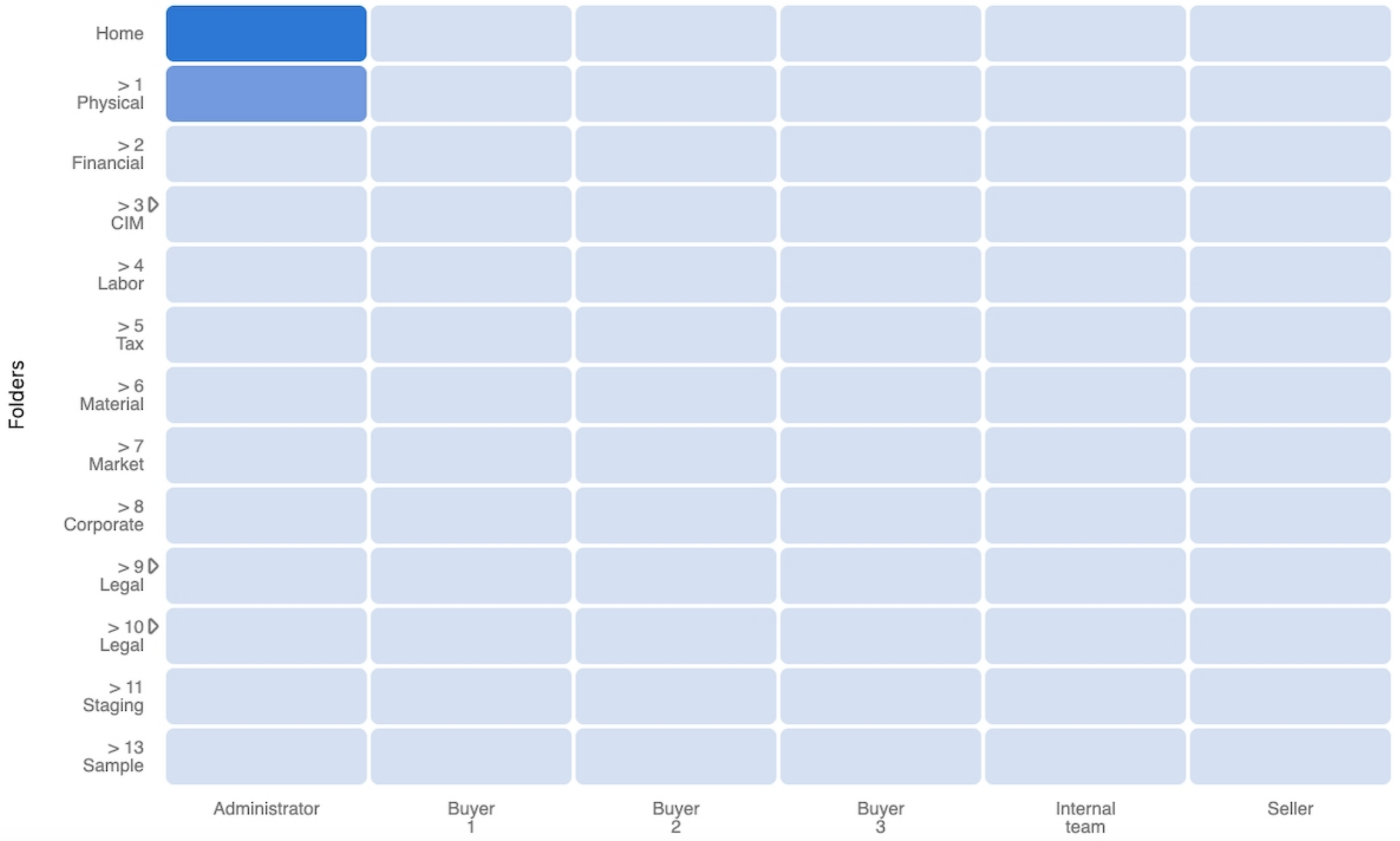
DOCUMENTS ACTIVITY

Metrics: Views ▾

Show Values



Track progress by groups and documents.



Data Room Activity Reports Continued

Project Demo

Top Active Users

Data Room Activity

Audit log

Track data room activity down to the document level.

Data Room Permissions Reports Settings

Title	Time (min)	Documents Views		Documents Uploaded		Documents Downloaded	
		Users	Total	Users	Total	Users	Total
1 Physical	1	1	1	1	1	0	0
1.1 Environmental Site Assess...	0	0	0	0	0	0	0
1.2 Capital Spending Items.pdf	0	0	0	0	0	0	0
1.3 Brand Standards.pdf	0	0	0	0	0	0	0
1.4 Property Condition Summ...	0	0	0	0	0	0	0
1.5 DealRoom - Acquisition Ev...	0	0	0	0	0	0	0
1.6 SaaS_Agreement_DealRoo...	1	1	1	1	1	0	0
2 Financial Information	0	0	0	0	0	0	0
3 CIM	0	0	0	0	0	0	0
4 Labor & Employment	0	0	0	0	0	0	0
5 Tax	0	0	0	0	0	0	0
6 Material Contracts	0	0	0	0	0	0	0
7 Market Data	0	0	0	0	0	0	0
8 Corporate Records	0	0	0	0	0	0	0

Project Demo

Data Room Permissions **Reports** Settings

Top Active Users

Data Room Activity

Audit log

Date: 2022-10-09 - 2022-11-08 Activity: All activities Users: All users Options: [Export to Excel](#)

Track all activity from the audit log.

Filter by specific users.

Export reports to Excel.

Time	Activity	Group	Item Type	Old value	New value
Nov 08 11:23 AM	Logged in	Roxanne Alexander roxanne@firmroom.com	Administrator		
Nov 08 10:41 AM	Document is viewed	Julia Rollins julia@firmroom.com	Administrator	Document	1.6 SaaS_Agreement_DealRoom_Vin... 11-03_EN_final_signed.docx.pdf
Nov 08 10:39 AM	Document is uploaded	Julia Rollins julia@firmroom.com	Administrator	Document	1.6 SaaS_Agreement_DealRoom_Vin... 11-03_EN_final_signed.docx.pdf
Nov 08 10:33 AM	Logged in	Julia Rollins julia@firmroom.com	Administrator		
Nov 07 03:23 PM	Logged in	Julia Rollins julia@firmroom.com	Administrator		
Nov 07 11:25 AM	Logged in	Roxanne Alexander roxanne@firmroom.com	Administrator		
Nov 07 11:20 AM	Logged in	Julia Rollins julia@firmroom.com	Administrator		
Nov 07 08:46 AM	Logged in	Julia Rollins julia@firmroom.com	Administrator		
Nov 07 07:18 AM	Logged in	Julia Rollins julia@firmroom.com	Administrator		
Nov 04 12:17 PM	Logged in	Julia Rollins julia@firmroom.com	Administrator		

Project Demo

FOLDERS (+)

- Recent Files
- Bookmarked Files
- Home ...
- 1. Physical
- 2. Financial Information
- 3. CIM
- 4. Labor & Employment
- 5. Tax
- 6. Material Contracts
- 7. Market Data
- 8. Corporate Records
- 9. Legal & Other
- 10. Legal Diligence
- 11. Staging (NO BUYER ACCESS)
- Trash

Data Room Permissions Reports Settings

Home

COLUMNS

[Upload](#) [Download All](#) [New Folder](#) [Edit Index](#) [Export Index](#)

<input type="checkbox"/>	Index ▲	Title	Size	Date
<input type="checkbox"/>	1	Physical	6 docs	
<input type="checkbox"/>	2	Financial Information	4 docs	
<input type="checkbox"/>	3	CIM	11 docs	
<input type="checkbox"/>	4	Labor & Employment	0 docs	
<input type="checkbox"/>	5	Tax	0 docs	
<input type="checkbox"/>	6	Material Contracts	5 docs	
<input type="checkbox"/>	7	Market Data	2 docs	...
<input type="checkbox"/>	8	Corporate Records	5 docs	
<input type="checkbox"/>	9	Legal & Other	6 docs	
<input type="checkbox"/>	10	Legal Diligence	0 docs	
<input type="checkbox"/>	11	Staging (NO BUYER ACCESS)	0 docs	
<input type="checkbox"/>	12	sfgmembers template.xlsx	16.25 ...	Sep 09

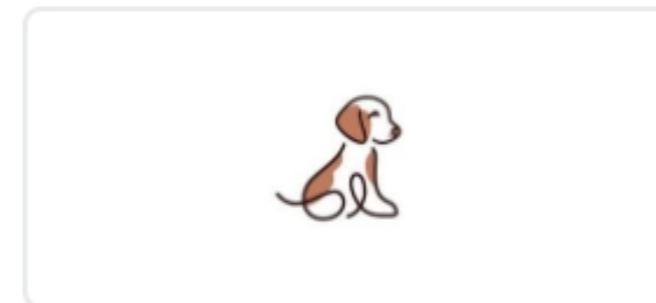
Access your user settings such as account information, email notification frequency, and password resetting from the profile icon.

- General
- Watermark
- Non-disclosure agreement
- Room template

Room Name*

Project Demo

Logo



[Remove logo](#)

Background Color

#FE90D9

Default Menu

Data Room

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

Save

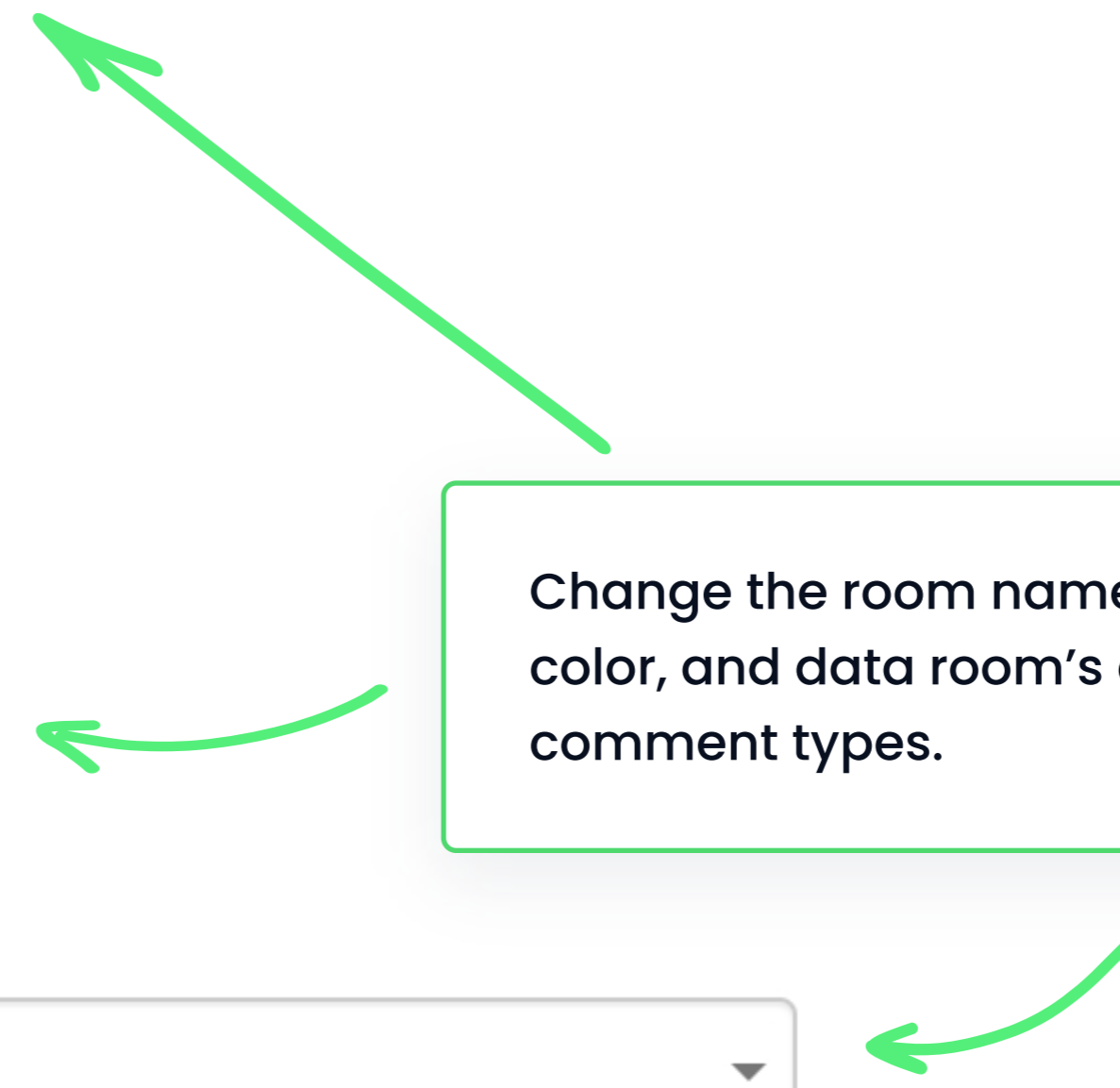
Create list keys for request sequencing (e.g. 'BUYER-100')

Enable

Reset documents and files indexes

Reset

Change the room name/background color, and data room's default comment types.



Project Demo

Data Room Permissions Reports **Settings**

General

Watermark

Non-disclosure agreement

Room template

Type

Dynamic

User Name Date Time

Email IP-address

Opacity intensity with which watermark text will be displayed on documents

30%

Position

Fill

Save

Change a document's watermark type, opacity, and position.

>> Project Demo | Data Room | Permissions | Reports | **Settings**

General

Watermark

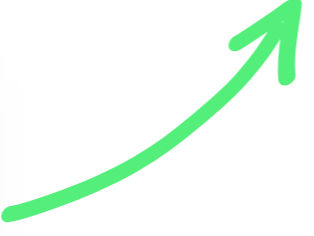
Non-disclosure agreement

Room template

Enable Non-disclosure agreement

Save

Enable non-disclosure agreements.



- General
- Watermark
- Non-disclosure agreement
- Room template**

Room template is useful when you want to reuse your structure of folders and requests in new rooms.

Export this room

Choose File No file chosen

Import template

[Download Template Example](#)

Reuse a room's folder/request structure for a new room.

NOTIFICATIONS

All notifications

Unread 427

Help



START LIVE CHAT

Recommended, 24/7 Support



GIVE US A CALL +1-800-340-9749

US business hours (8am-6pm CST)



HELP CENTER

Learn how to use and configure your FirmRoom



HELP GUIDE VIDEOS

Videos to Quickly Learn and Navigate the VDR



TUTORIAL

Watch quick training materials



FREQUENTLY ASKED QUESTIONS

I am getting too many/not enough emails from FirmRoom about my transaction. >

I can't see any documents, or a user has notified me that s/he can't see any documents. >

I just bookmarked a page, and it's not showing up in "My Bookmarks." >

Moving a document >

I uploaded my documents/folder structure, but I need to change the order of the folders. >

Click on the help icon to bring up live chat, 24/7 support number, video tutorials, and FAQs.



All rooms

November 8 • 10:39AM

November 3 • 6:55PM

October 19 • 7:26PM

October 17 • 5:16PM

October 17 • 5:00PM

October 17 • 11:12AM