



Workshare 9

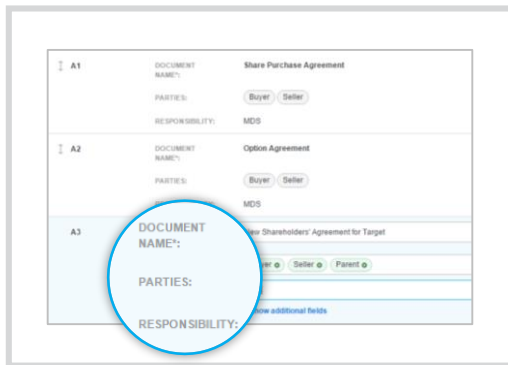
# Checklists and Closing Binders

Getting Started Guide

# Run deals the right way

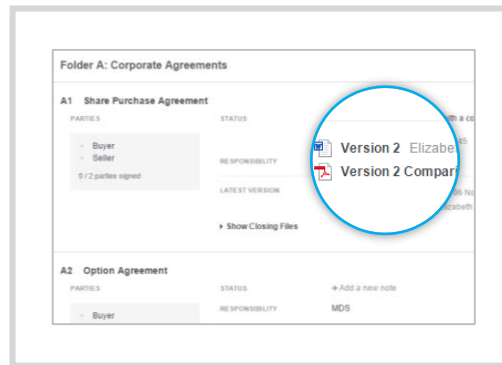
Automate the transaction process so your deals move faster and more securely.

## Create the deal



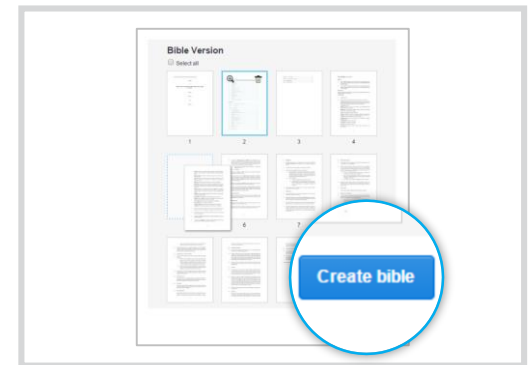
Set up an online workspace based on the documents checklist and invite participants.

## Exchange drafts



The workspace becomes the primary way to exchange deal files, eliminating email overload.

## Close the deal



Closing the deal is ordered and organized so you can prepare closing binders quickly.

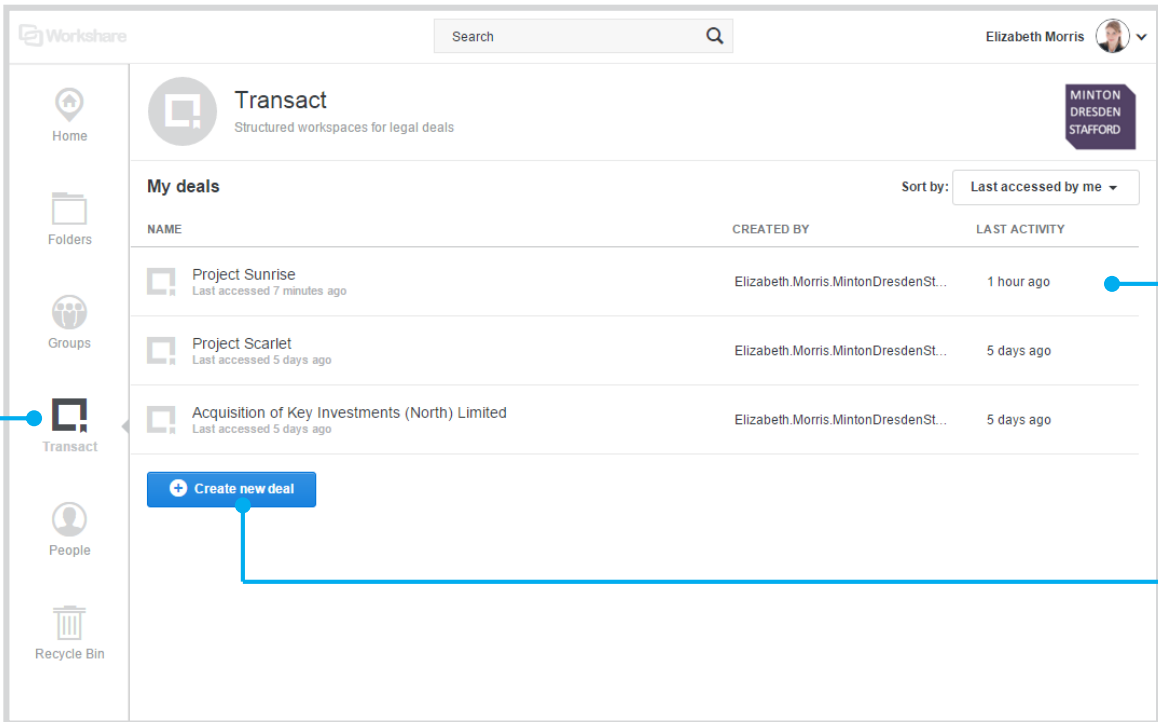
Get started...

# Create the deal




## Access the deals area

When you have an internet connection, you can access your deals – wherever you are.

Log in to [my.workshare.com](https://my.workshare.com) or open the Workshare desktop app and select **Transact**.



The screenshot shows the Workshare interface with the Transact section selected in the left sidebar. The main content area displays a table of deals under the heading 'My deals'. The table has columns for NAME, CREATED BY, and LAST ACTIVITY. Below the table is a blue button labeled 'Create new deal'. A search bar and user profile are visible at the top of the interface.

NAME	CREATED BY	LAST ACTIVITY
 Project Sunrise Last accessed 7 minutes ago	Elizabeth.Morris.MintonDresdenSt...	1 hour ago
 Project Scarlet Last accessed 5 days ago	Elizabeth.Morris.MintonDresdenSt...	5 days ago
 Acquisition of Key Investments (North) Limited Last accessed 5 days ago	Elizabeth.Morris.MintonDresdenSt...	5 days ago

Annotations:

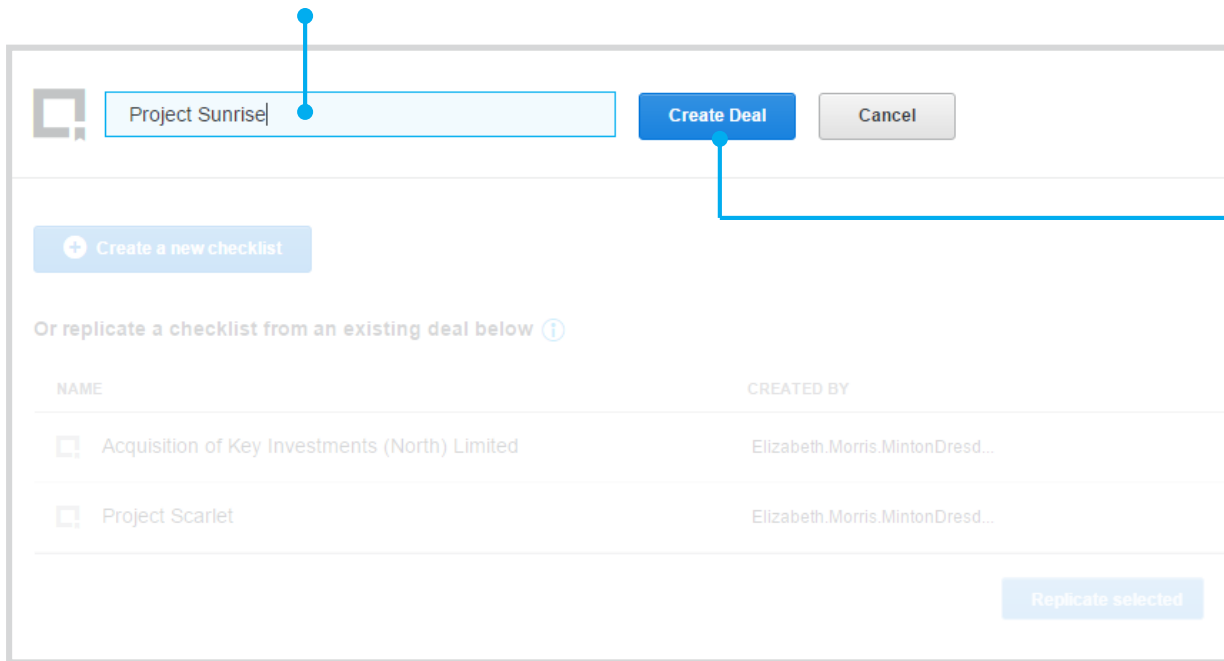
- A blue line points from the 'Transact' icon in the sidebar to the 'My deals' section.
- A blue line points from the 'Project Sunrise' deal to the text: "Your active deals are available here. Select a deal to work with it."
- A blue line points from the 'Create new deal' button to the text: "If you want to start a new deal, click here."

## Create the deal



### 1. Name the deal

When you create a new deal, you'll be asked to set up the deal's structure. This includes giving it a name and indicating which parties and documents will be involved.

The first step is to give the deal a name.



The screenshot shows a form for creating a deal. At the top left is a small icon. To its right is a text input field containing "Project Sunrise". To the right of the input field are two buttons: "Create Deal" (blue) and "Cancel" (grey). Below the input field is a blue button with a plus sign and the text "Create a new checklist". Below that is a section header "Or replicate a checklist from an existing deal below" followed by an information icon. Underneath is a table with two columns: "NAME" and "CREATED BY". The table contains two rows of data. At the bottom right of the form is a blue button labeled "Replicate selected".

NAME	CREATED BY
 Acquisition of Key Investments (North) Limited	Elizabeth.Morris.MintonDresd...
 Project Scarlet	Elizabeth.Morris.MintonDresd...

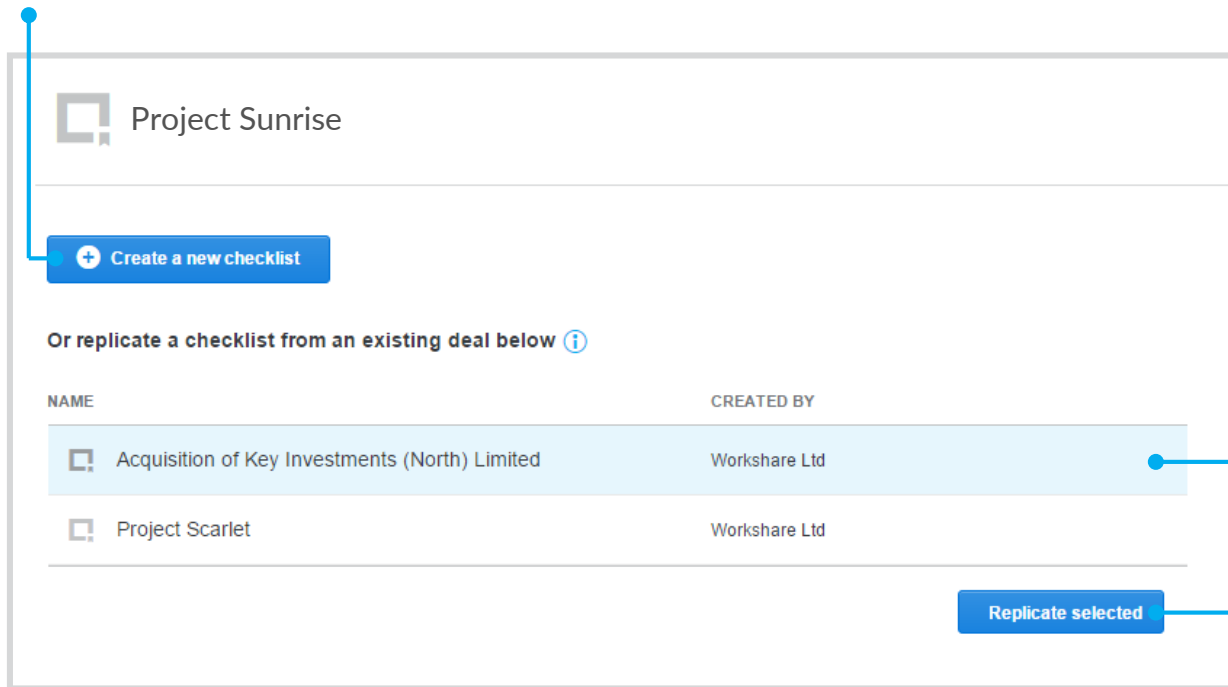
When you've given it a name, click **Create Deal**.

## Create the deal

# 2. Create a new checklist or replicate an existing one

After you've created your deal, you'll be asked whether you want to create a new checklist or replicate an existing checklist.

To create a checklist from scratch, click **Create a new checklist**.



The screenshot shows the 'Project Sunrise' interface. At the top left, there is a header with the 'Project Sunrise' logo and name. Below this, there is a blue button with a plus sign and the text 'Create a new checklist'. Underneath, there is a section titled 'Or replicate a checklist from an existing deal below' with an information icon. This section contains a table with two columns: 'NAME' and 'CREATED BY'. The first row is highlighted in light blue and contains the text 'Acquisition of Key Investments (North) Limited' and 'Workshare Ltd'. The second row contains 'Project Scarlet' and 'Workshare Ltd'. At the bottom right of the interface, there is a blue button labeled 'Replicate selected'. A blue line with a dot at the end points from the 'Replicate selected' button to the text on the right. Another blue line with a dot at the end points from the 'Create a new checklist' button to the text on the left.

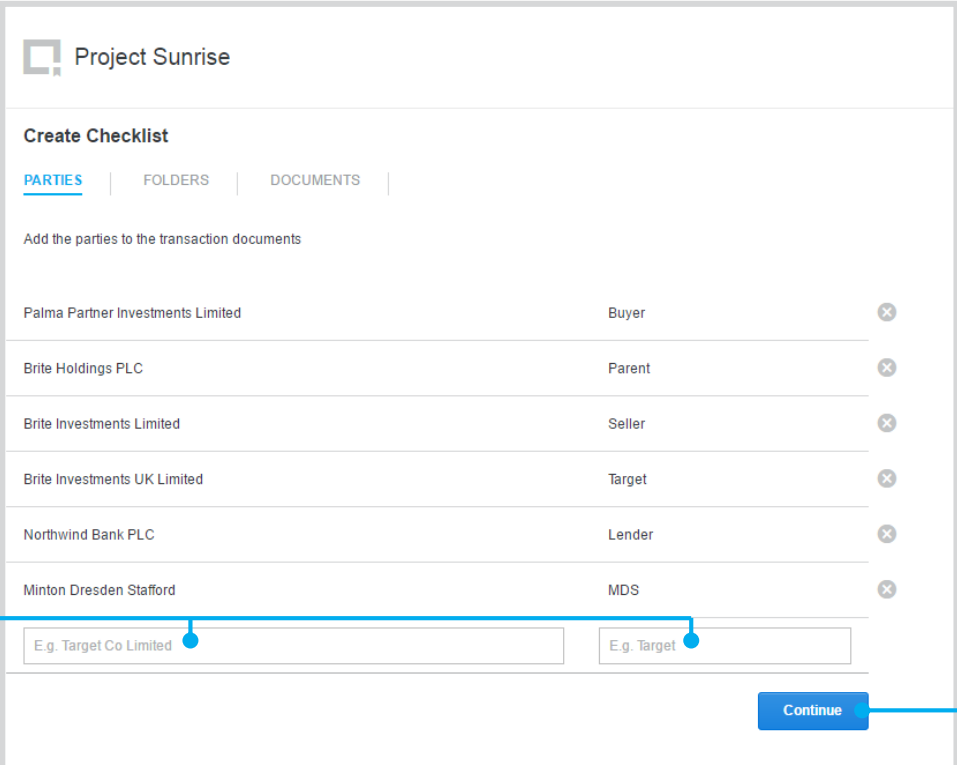
To replicate a checklist from another deal, select the deal, then click **Replicate selected**.

## Create the deal

### 3. Name the parties

The next step is to name the parties to the deal and give each one an abbreviation that will be used to identify it in the Documents Checklist.

Enter the names of each party to the deal. Give each party an appropriate abbreviation that the deal participants will recognize. Names and abbreviations must be unique.



The screenshot shows the 'Project Sunrise' interface for creating a checklist. The 'PARTIES' tab is selected. A table lists six parties with their names and roles. Below the table are two input fields for party names and abbreviations, and a 'Continue' button.

Party Name	Role	Action
Palma Partner Investments Limited	Buyer	✕
Brite Holdings PLC	Parent	✕
Brite Investments Limited	Seller	✕
Brite Investments UK Limited	Target	✕
Northwind Bank PLC	Lender	✕
Minton Dresden Stafford	MDS	✕

Input fields:

[Continue](#)

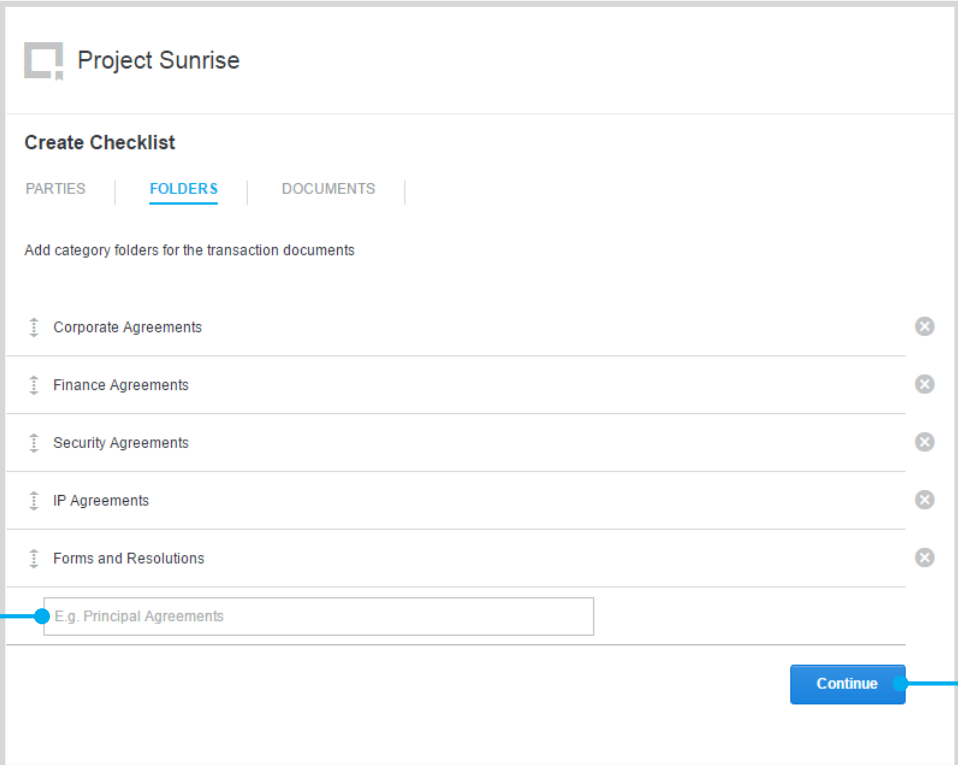
When you've finished adding the parties, click **Continue**.

## Create the deal

### 4. Name the document folders

Now create folders to contain the documents for the deal. Each folder should represent a different section of the Documents Checklist.

Enter unique folder names appropriate for the deal.



Project Sunrise

#### Create Checklist

PARTIES | **FOLDERS** | DOCUMENTS

Add category folders for the transaction documents

- Corporate Agreements
- Finance Agreements
- Security Agreements
- IP Agreements
- Forms and Resolutions

E.g. Principal Agreements

Continue

When you've added all your folders, click **Continue**.

## Create the deal

### 5. Enter the details of the documents

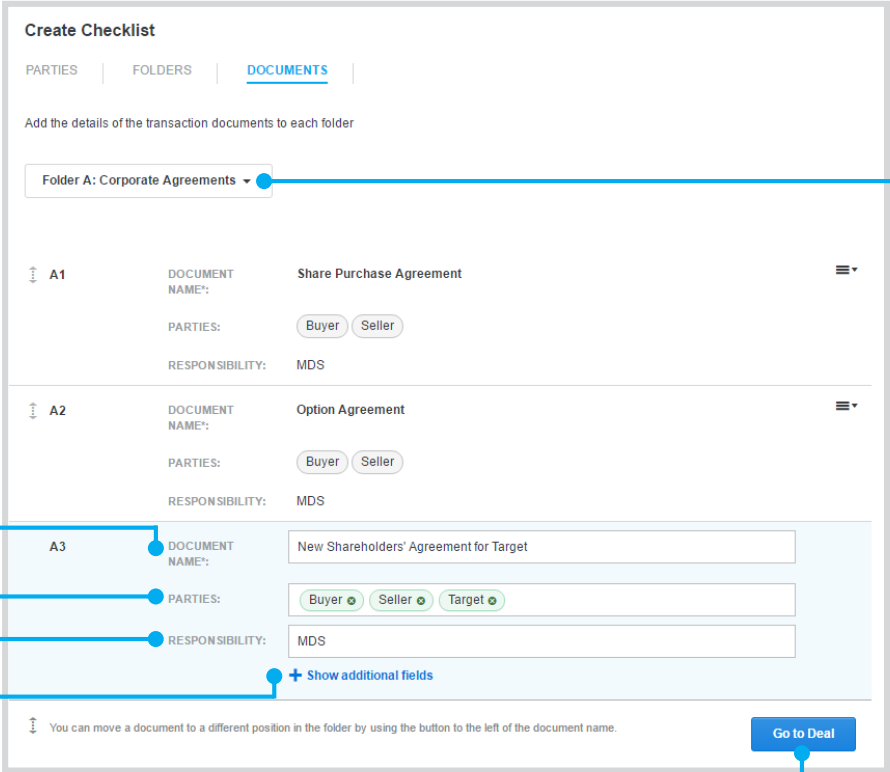
Now the folders are set up, name the documents that will go in them and indicate which parties will sign the documents.

1 Enter a unique document name.

2 Add parties to the document.

If you want to allocate responsibility for producing drafts of the document, use the **Responsibility** field. Responsibility is optional.

3 You can add a description or requirements for the document. These are optional fields that are available under **Show additional fields**.



**Create Checklist**

PARTIES | FOLDERS | DOCUMENTS

Add the details of the transaction documents to each folder

Folder A: Corporate Agreements

A1	DOCUMENT NAME:	Share Purchase Agreement	≡
	PARTIES:	Buyer Seller	
	RESPONSIBILITY:	MDS	
A2	DOCUMENT NAME:	Option Agreement	≡
	PARTIES:	Buyer Seller	
	RESPONSIBILITY:	MDS	
A3	DOCUMENT NAME:	<input type="text" value="New Shareholders' Agreement for Target"/>	
	PARTIES:	<input type="text" value="Buyer"/> <input type="text" value="Seller"/> <input type="text" value="Target"/>	
	RESPONSIBILITY:	<input type="text" value="MDS"/>	

[+ Show additional fields](#)

↓ You can move a document to a different position in the folder by using the button to the left of the document name.

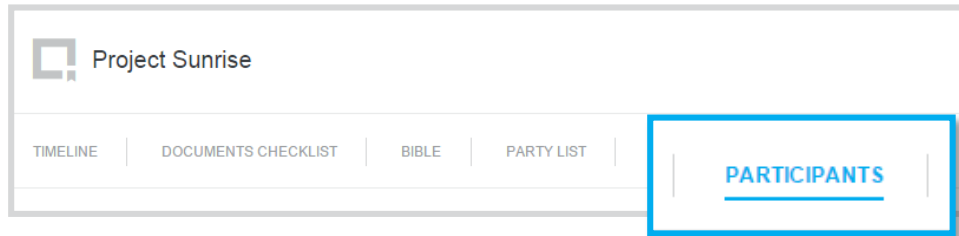
[Go to Deal](#)

4 Select the next folder and add its document names and parties.

5 When you've completed all the folders, click **Go to Deal**. Your Documents Checklist is finished. You can start inviting participants and uploading files.

# Create the deal

## Invite participants

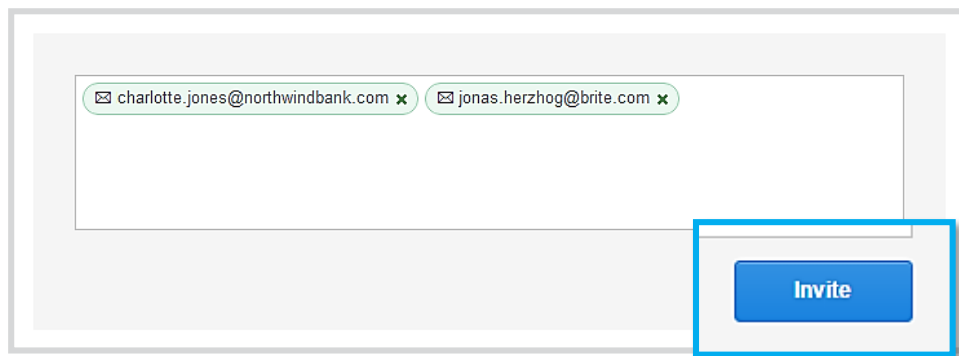


1 To invite others to join your deal, click **Participants**.



2 You'll see a list of those who currently have access to the deal. Click **Invite new participants**.

**i** Only users with Admin status can send invitations.



3 Add the email addresses and click **Invite**.

An email invitation will be sent to each of the addresses.

**Pending invitations** will be shown below the **Current Participants**. You can cancel invitations.

# Exchange drafts

## The Documents Checklist

The Documents Checklist is the principal screen lawyers use to exchange and organize draft agreements throughout the course of the transaction.

Navigate between folders.

View a document's status and who's responsible for it.

The screenshot displays the 'Project Sunrise' interface. At the top left is the logo and name 'Project Sunrise'. On the top right is the user profile 'MINTON DRESDEN STAFFORD'. Below the header is a navigation bar with tabs: 'TIMELINE', 'DOCUMENTS CHECKLIST' (active), 'BIBLE', 'PARTY LIST', and 'PARTICIPANTS'. An 'ACTIONS' menu is on the far right. The main content area is divided into a left sidebar and a main panel. The sidebar, titled 'Checklist Folders', lists: 'A: Corporate Agreements' (selected), 'B: Finance Agreements', 'C: Security Agreements', 'D: Commercial Agreements', 'E: IP Agreements', and 'F: Forms & Resolutions'. The main panel is titled 'Folder A: Corporate Agreements' and shows 'A1 Share Purchase Agreement'. It features a 'PARTIES' section with 'Buyer' and 'Seller' (0 / 2 parties signed), a 'STATUS' section with a comment: 'Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please. Elizabeth Morris, 06 Nov 2015, 15:45', a 'RESPONSIBILITY' section with 'MDS', and a 'LATEST VERSION' section with two entries: 'Version 2' and 'Version 2 Compari...'. A 'Show Closing Files' link is at the bottom.

See who's signed the document.

View a file by clicking its name. From the file view, you can save the file or print it.

# Exchange drafts

## Upload draft documents

The Documents Checklist initially appears without any status notes or versions.

Folder A: Corporate Agreements

**A1 Share Purchase Agreement**

PARTIES: Buyer, Seller (0 / 2 parties signed)

STATUS: + Add a new note

RESPONSIBILITY: MDS

LATEST VERSION: No version added

Show Closing Files

**A2 Option Agreement**

PARTIES: [Redacted]

STATUS: + Add a new note

RESPONSIBILITY: MDS

Add New

- Draft Version
- Execution Version
- Bible Version

Upload the first version of a document.

Add a status note to a document.

**A1 Share Purchase Agreement**

PARTIES: Buyer, Seller (0 / 2 parties signed)

STATUS: Comment by close Wednesday please. Elizabeth Morris, 06 Nov 2015, 15:19

RESPONSIBILITY: MDS

LATEST VERSION: Version 1 Elizabeth Morris, 06 Nov 2015, 15:17

Show Closing Files

Everyone participating in your deal will be able to see the document version and the status note.

# Exchange drafts

## Upload new versions

Once the first draft document is uploaded, you can continue updating it.

Folder A: Corporate Agreements

**A1 Share Purchase Agreement**

**PARTIES**

- Buyer
- Seller

0 / 2 parties signed

**STATUS**

Comment by close Wednesday please.  
Elizabeth Morris, 06 Nov 2015, 15:19

**RESPONSIBILITY**

MDS

**LATEST VERSION**

Version 1 Elizabeth Morris, 06 Nov 2015, 15:17

**DRAFT FILE**

Drag and drop a single file

+ or select a file from your desktop

**COMPARISON**

Automatically generate a comparison against previous version added

Drag and drop a single file

+ or select a file from your desktop

Upload Cancel

► Show Closing Files

To update the status, select **New note** from the menu.

To upload a new version of the document, select **Draft Version** from the menu.

You may also want to include a comparison of the new version against the previous version.

To automatically create a DeltaView comparison, select **Automatically generate a comparison against previous version added**.

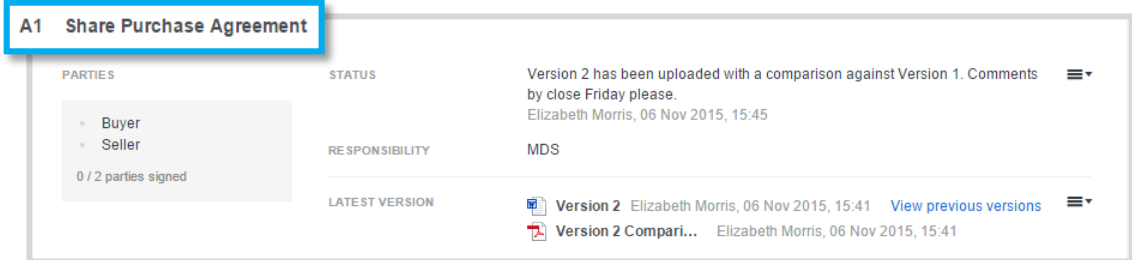
To upload a comparison, drag and drop it from your desktop.

## Exchange drafts



# View previous versions

You can see all the related documents, comment files and previous versions and status updates at any time.

To view all the information relating to a document, click the document's name.



**A1 Share Purchase Agreement**

<b>PARTIES</b>	<b>STATUS</b>	Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please. Elizabeth Morris, 06 Nov 2015, 15:45
• Buyer • Seller 0 / 2 parties signed	<b>RESPONSIBILITY</b>	MDS
	<b>LATEST VERSION</b>	 <b>Version 2</b> Elizabeth Morris, 06 Nov 2015, 15:41 <a href="#">View previous versions</a>  <b>Version 2 Compari...</b> Elizabeth Morris, 06 Nov 2015, 15:41

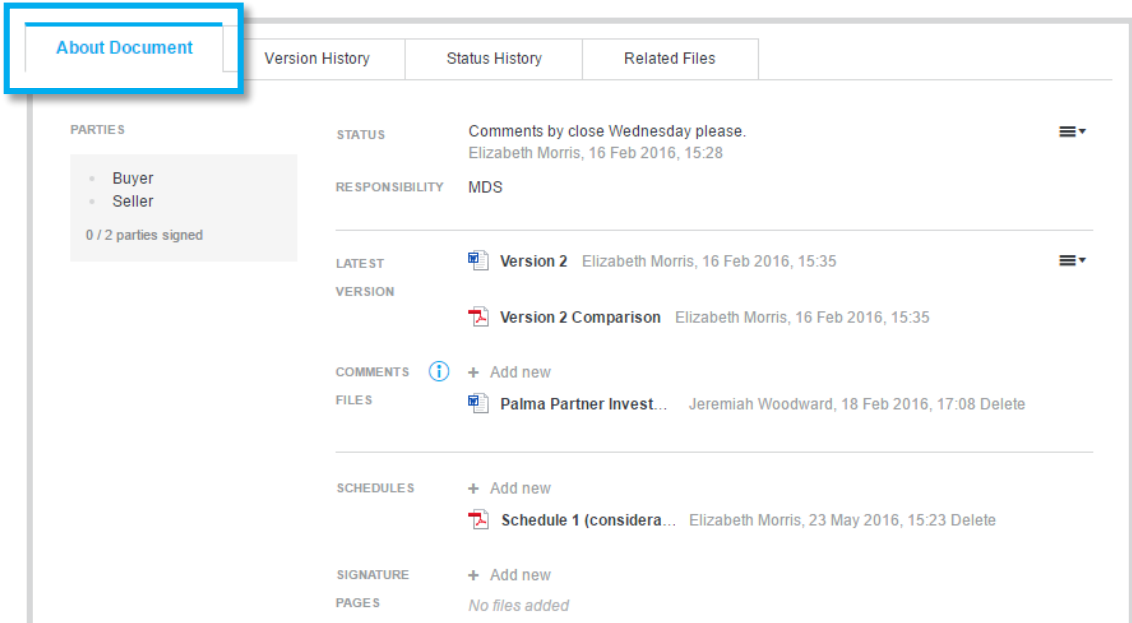


The **About Document** tab summarizes the latest information about the document. From here, you can also upload new versions, comment files, schedules and signature pages to the document.

The **Version History** tab lists all historical versions of the document.






The **Status History** tab lists all historical status notes for the document.

The **Related Files** tab provides a place for you to upload and access any related files.



**About Document**

Version History | Status History | Related Files



<b>PARTIES</b>	<b>STATUS</b>	Comments by close Wednesday please. Elizabeth Morris, 16 Feb 2016, 15:28
• Buyer • Seller 0 / 2 parties signed	<b>RESPONSIBILITY</b>	MDS
	<b>LATEST VERSION</b>	 <b>Version 2</b> Elizabeth Morris, 16 Feb 2016, 15:35  <b>Version 2 Comparison</b> Elizabeth Morris, 16 Feb 2016, 15:35
	<b>COMMENTS</b>	 + Add new
	<b>FILES</b>	 <b>Palma Partner Invest...</b> Jeremiah Woodward, 18 Feb 2016, 17:08 Delete
	<b>SCHEDULES</b>	+ Add new  <b>Schedule 1 (considera...</b> Elizabeth Morris, 23 May 2016, 15:23 Delete
	<b>SIGNATURE</b>	+ Add new
	<b>PAGES</b>	No files added

## Exchange drafts

# The Timeline





The Timeline provides a chronological feed of every activity within the deal. It records file uploads and deletions, status note additions, and participants joining or leaving the deal.

Email notifications are sent to all participants in respect of each activity (unless they are turned off by the individual participant).

 Project Sunrise 

[TIMELINE](#) | [DOCUMENTS CHECKLIST](#) | [BIBLE](#) | [PARTY LIST](#) | [PARTICIPANTS](#) ≡ ACTIONS

### Timeline

Date/Time	Document	Activity
06 Nov 2015, 15:45	A1 Share Purchase Agreement	New status note added by Elizabeth Morris: "Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please."
06 Nov 2015, 15:41	A1 Share Purchase Agreement	 Version 2 Comparison added by Elizabeth Morris
06 Nov 2015, 15:41	A1 Share Purchase Agreement	 Version 2 added by Elizabeth Morris
06 Nov 2015, 15:41	A1 Share Purchase Agreement	 Version 2 Comparison added by Elizabeth Morris
06 Nov 2015, 15:19	A1 Share Purchase Agreement	New status note added by Elizabeth Morris: "Comment by close Wednesday please."
06 Nov 2015, 15:17	A1 Share Purchase Agreement	 Version 1 added by Elizabeth Morris
04 Nov 2015, 10:52		Project Sunrise created by Elizabeth Morris

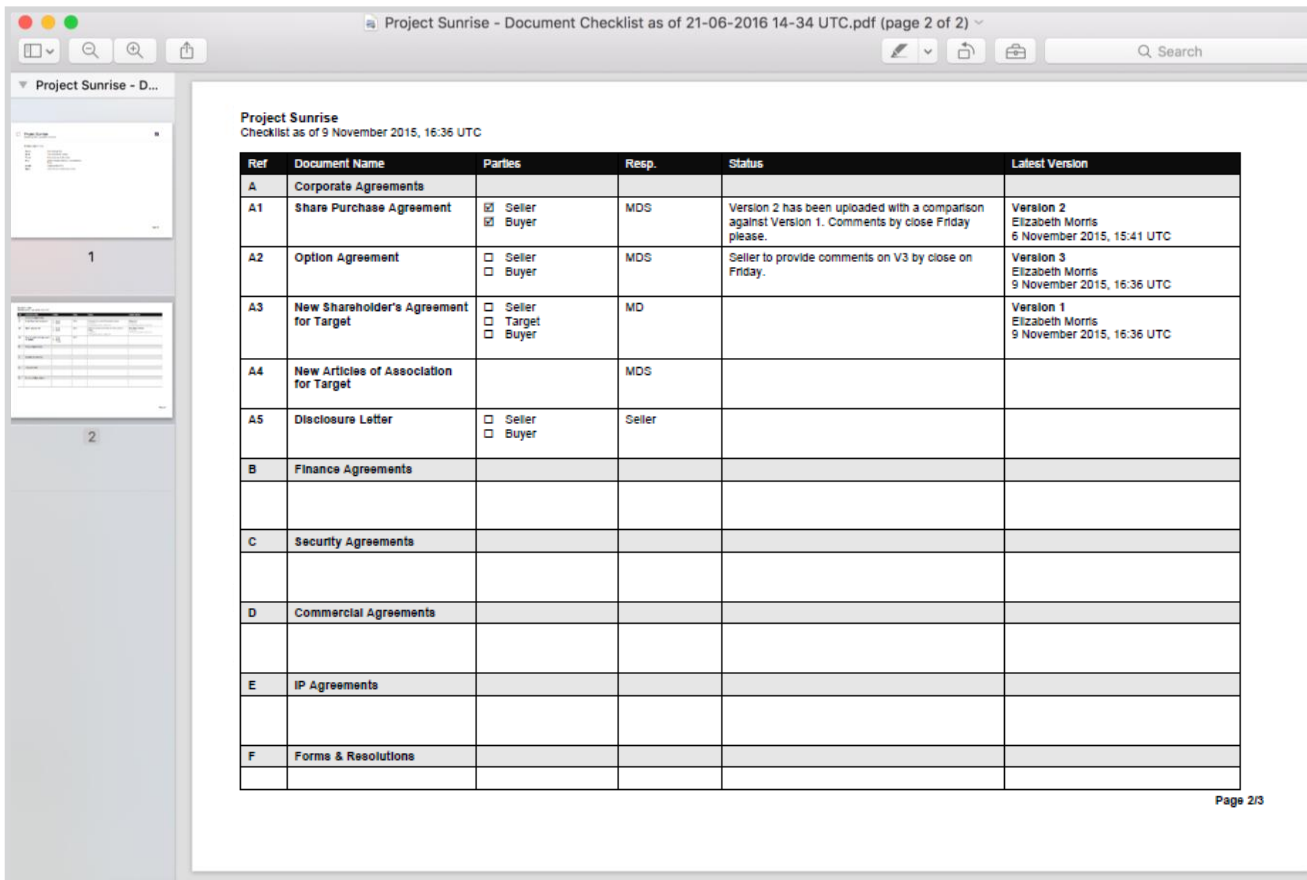
« < 1 > »

## Exchange drafts

# Export the Documents Checklist

You can export a copy of the Documents Checklist as a PDF or Word file at any time. Simply select **Export Checklist** from the **Actions** menu on the right-hand side of any screen and choose your preferred file format.

More information about the **Actions** menu is available at the end of this guide.



Project Sunrise - Document Checklist as of 21-06-2016 14:34 UTC.pdf (page 2 of 2)

Project Sunrise  
Checklist as of 9 November 2015, 16:36 UTC

Ref	Document Name	Parties	Resp.	Status	Latest Version
A	Corporate Agreements				
A1	Share Purchase Agreement	<input checked="" type="checkbox"/> Seller <input checked="" type="checkbox"/> Buyer	MDS	Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please.	Version 2 Elizabeth Morris 6 November 2015, 15:41 UTC
A2	Option Agreement	<input type="checkbox"/> Seller <input type="checkbox"/> Buyer	MDS	Seller to provide comments on V3 by close on Friday.	Version 3 Elizabeth Morris 9 November 2015, 16:36 UTC
A3	New Shareholder's Agreement for Target	<input type="checkbox"/> Seller <input type="checkbox"/> Target <input type="checkbox"/> Buyer	MD		Version 1 Elizabeth Morris 9 November 2015, 16:36 UTC
A4	New Articles of Association for Target		MDS		
A5	Disclosure Letter	<input type="checkbox"/> Seller <input type="checkbox"/> Buyer	Seller		
B	Finance Agreements				
C	Security Agreements				
D	Commercial Agreements				
E	IP Agreements				
F	Forms & Resolutions				

Page 2/3

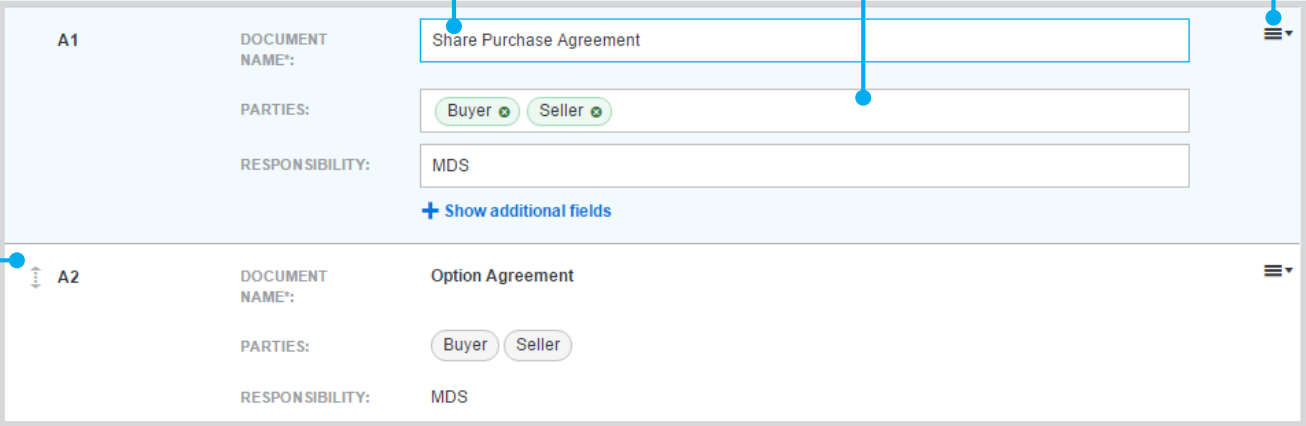
## Exchange drafts








# Edit the Documents Checklist

As someone with Admin status, you can edit the Documents Checklist at any time. Simply click the **Actions** menu available on every screen and select **Edit Checklist**. You can then edit the parties, folders and documents of the deal by selecting the appropriate option from the top of the page.


For example, you can make the following changes to **documents** in the checklist:

Amend a document's name.      Add or remove parties.      Delete a document, or move it to another folder.



A1	DOCUMENT NAME:	Share Purchase Agreement	
	PARTIES:	Buyer  Seller 	
	RESPONSIBILITY:	MDS	
		<a href="#">+ Show additional fields</a>	
 A2	DOCUMENT NAME:	Option Agreement	
	PARTIES:	Buyer  Seller 	
	RESPONSIBILITY:	MDS	

Change the order of a document within a folder. Use the handle to pick up the document and drop it in the correct place.

 Removing a document also removes related versions and related files. If you may need this content later, instead of deleting the document, create a folder named “Deleted Documents” and move the document there.

# Close the deal

## Execution versions

You can use the Documents Checklist to organize and exchange execution versions.

The screenshot displays a document management interface for 'Folder A: Corporate Agreements'. It features three document entries:

- A1 Share Purchase Agreement:** Status: 'Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please. Elizabeth Morris, 06 Nov 2015, 15:45'. Responsibility: MDS. Latest Version: 'Version 2 Elizabeth Morris, 06 Nov 2015, 15:41' and 'Version 2 Compari... Elizabeth Morris, 06 Nov 2015'. A context menu is open over the 'Version 2 Compari...' entry, showing options: 'This Version', 'Edit files', 'Delete Version', 'Designate as' (highlighted), 'Add New', 'Draft Version', 'Execution Version', 'Bible Version', 'Create Bible Version', and 'View document details'. A blue arrow points from the 'Designate as' option to the right.
- A2 Option Agreement:** Status: 'Seller to provide comments on V3 Elizabeth Morris, 09 Nov 2015, 16:36'. Responsibility: MDS. Latest Version: 'Version 3 Elizabeth Morris, 09 Nov 2015, 16:36' with the note 'No comparison uploaded'. A blue arrow points from the 'Execution Version' option in the context menu to the right.
- A3 New Shareholder's Agreement for Target:** No details are visible.

Designate the current version of the document as the execution version.

Upload a new version of the document, which will be designated as the execution version.

# Close the deal

## Closing files

Each document has its own closing files section to organize schedules and signature pages.

To see the closing files, go to a document and select **Show Closing Files**. When you do, the option name will change to **Hide Closing Files**.

The screenshot displays a document interface for 'Folder A: Corporate Agreements' and 'A1 Share Purchase Agreement'. The interface includes a sidebar with 'PARTIES' (Buyer, Seller) and '1 / 2 parties signed'. The main content area shows a 'Closing files' section with a toggle set to 'Show all'. Below this, there are sections for 'STATUS', 'RESPONSIBILITY', 'LATEST VERSION', 'SCHEDULES', and 'SIGNATURE PAGES'. A modal window titled 'SIGNATURE FILE' is open, showing a file named 'Seller signature.pdf' and an 'ASSIGNED PARTY' section with checkboxes for 'Buyer' and 'Seller' (checked). The modal has 'Upload' and 'Cancel' buttons. A blue box highlights the 'PARTIES' section in the sidebar. A blue box highlights the 'ASSIGNED PARTY' section in the modal. Blue lines connect the text above to the 'Hide Closing Files' toggle and the 'Upload' buttons in the modal.

Upload schedules.

Upload signature pages.

When a participant uploads a signed agreement or signature page, they can indicate which party signatures are contained in the file by selecting the relevant assigned party.

If they do, the relevant parties are ticked off automatically so at a glance you can see which signatures have been uploaded.

# Close the deal

## Bible versions

When you're ready to post the bible version (or fully executed version), you can choose whether you'd like to use Workshare's bespoke PDF tool to create a new bible version or whether you'd like to upload a pre-existing version from your computer.

The screenshot displays two document cards, A1 and A2, in a list view. Card A1, titled 'Share Purchase Agreement', shows a status of 'Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please.' and is marked as an 'Execution Version'. Card A2, titled 'Option Agreement', shows a status of 'Seller to provide comment' and is marked as 'Version 3'. A context menu is open over the 'Execution Version' of card A1, with the 'Designate as' option highlighted. The menu also includes options for 'Delete Execution Version', 'Add New', 'Bible Version', 'Create Bible Version', and 'View document details'. Blue lines connect the 'Designate as' option to the first callout and the 'Create Bible Version' option to the third callout.

Document ID	Title	Status	Responsibility	Latest Version
A1	Share Purchase Agreement	Version 2 has been uploaded with a comparison against Version 1. Comments by close Friday please.	MDS	Execution Version Elizabeth Morris, 09 Nov 2015, 17:14
A2	Option Agreement	Seller to provide comment	MDS	Version 3 Elizabeth Morris, 09 Nov 2015, 16:36

- Designate the current version of the document as the bible version.
- Upload a new version of the document, which will be designated as the bible version.
- Create a new bible version with Workshare (see next page).

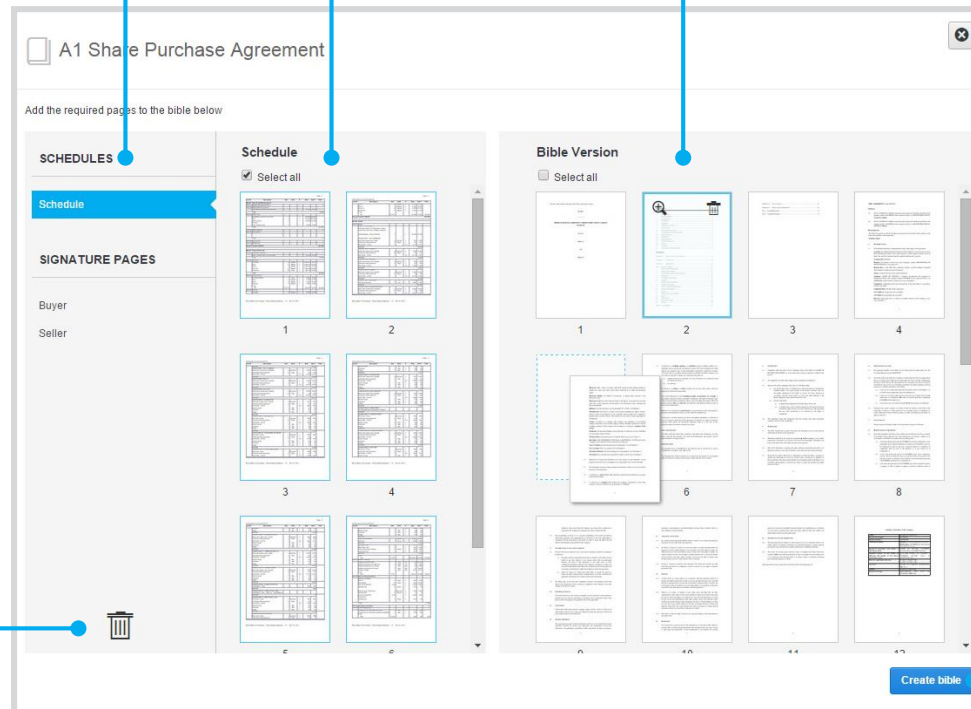
## Close the deal

# Create bible versions

You can create bible versions of documents using Workshare's bespoke PDF tool. Select the menu next to any document in the Documents Checklist and click **Create Bible Version**. You'll be redirected to the screen below. The execution version of the document automatically forms the basis of the bible version, and individual pages from the signature pages and schedule files can be inserted.

- 1 Select signature pages and schedule files from the Documents Checklist.
- 2 Drag pages from the signature/schedule preview into the bible to the right.  
To drag the whole file into the bible version, choose **Select all**. To select multiple pages, hold down **Ctrl** as you click them.
- 3 Rearrange pages in the bible version as needed.  
Hover over a page to zoom in on it or delete it.

You can drag unwanted pages from the bible version into the trash.  
To recover pages you've deleted, click the trash.






The screenshot shows a web interface for creating a bible version of a document titled "A1 Share Purchase Agreement". On the left, there are two main sections: "SCHEDULES" and "SIGNATURE PAGES". Under "SCHEDULES", there is a "Schedule" section with a "Select all" checkbox and a grid of 8 page thumbnails. Under "SIGNATURE PAGES", there are "Buyer" and "Seller" sections. On the right, the "Bible Version" section has a "Select all" checkbox and a grid of 8 page thumbnails. A trash icon is visible in the bottom right of the "Bible Version" grid. A "Create bible" button is located at the bottom right of the interface.

- 4 When you're happy with the bible version, click **Create bible**. It will appear in the Bible screen.

## Close the deal

# The Bible screen

The Bible screen provides a place for users to view the bible versions of the transaction documents following the closing of the deal. All bible versions uploaded to or created in the Documents Checklist appear here.

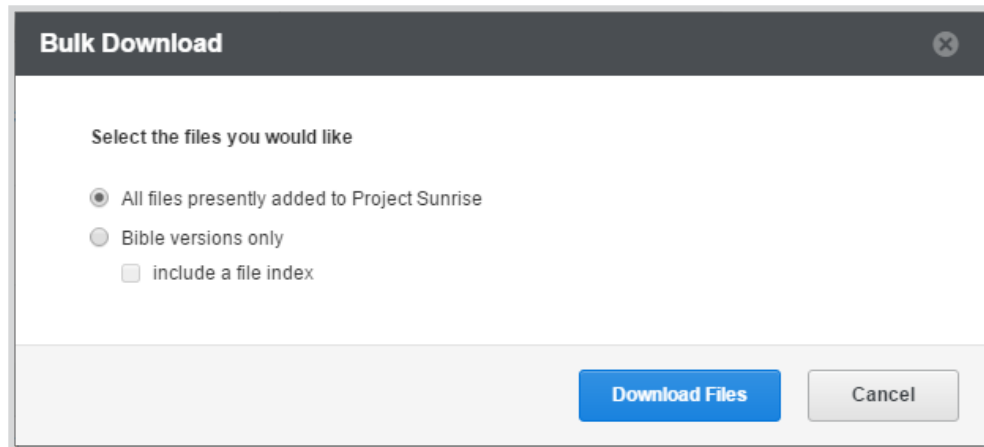
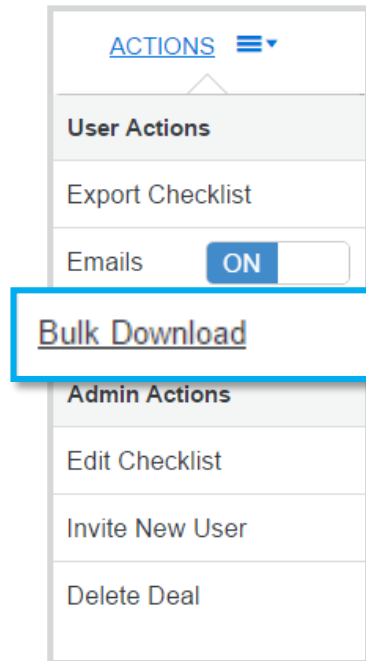
TIMELINE	DOCUMENTS CHECKLIST	<u>BIBLE</u>	PARTY LIST	PARTICIPANTS
<b>Checklist Folders</b>	<b>Folder A: Corporate Agreements</b>			
<b>A: Corporate Agreements</b>	<b>Document</b>	<b>Parties</b>	<b>Bible Version</b>	
B: Finance Agreements	<b>A1 Share Purchase Agreement</b>	(1) Buyer (2) Seller	 Bible Version	Elizabeth Morris, 09 Nov 2015, 17:29
C: Security Agreements	<b>A2 Option Agreement</b>	(1) Buyer (2) Seller	 Bible Version	Elizabeth Morris, 09 Nov 2015, 17:29
D: Commercial Agreements	<b>A3 New Shareholder's Agreement for Target</b>	(1) Buyer (2) Seller (3) Target	 Bible Version	Elizabeth Morris, 09 Nov 2015, 17:29
E: IP Agreements	<b>A4 New Articles of Association for Target</b>			
F: Forms & Resolutions	<b>A5 Disclosure Letter</b>	(1) Buyer (2) Seller		

## Close the deal

# Download all files

When the deal has closed, participants may want to download the deal files from Workshare to store locally.

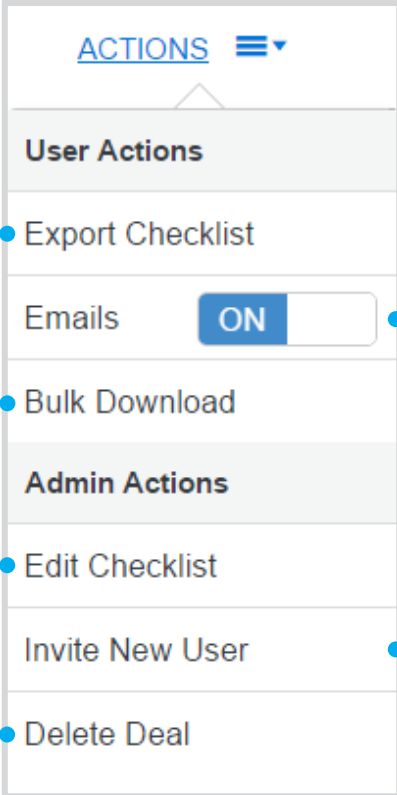
Selecting **Bulk Download** from the **Actions** menu provides the option to download all files uploaded to the deal or all bible versions with the option to include a hyperlinked index to each file.



## Getting around

# The Actions menu

The **Actions** menu appears in the top right-hand corner of each screen. It provides User Actions (available to all deal participants) and Admin Actions (available only to Admins).



The screenshot shows the 'ACTIONS' menu with a dropdown arrow. The menu is divided into two sections: 'User Actions' and 'Admin Actions'. The 'User Actions' section includes 'Export Checklist', 'Emails' (with a toggle switch set to 'ON'), and 'Bulk Download'. The 'Admin Actions' section includes 'Edit Checklist', 'Invite New User', and 'Delete Deal'. Blue callout lines connect text boxes to specific menu items.

Download a Word or PDF version of the Documents Checklist that can be printed. ● ● Export Checklist

Download a zip folder of all files in the Documents Checklist or all the bible versions. ● ● Bulk Download

Edit the Documents Checklist. ● ● Edit Checklist

Delete the deal. All files will be deleted and the deal will not be recoverable. ● ● Delete Deal

Each user can turn email notifications on or off for each deal. By default, email notifications are turned on. ● ● Emails ON

Shortcut to **Invite new participants**. ● ● Invite New User