



# Datasite Assist

Helping you seize your success





# Proactive in assisting your progress

Speed your deals, cut costs and risks, and seize success with Datasite Assist. Call on 50+ years of dealmaking expertise, available 24/7/365 in 20+ languages - all at no extra cost.

Proactive assistance from your Project Pro gives you a faster, smoother transaction. Get help with everything from optimizing your data room to meeting your deadlines.

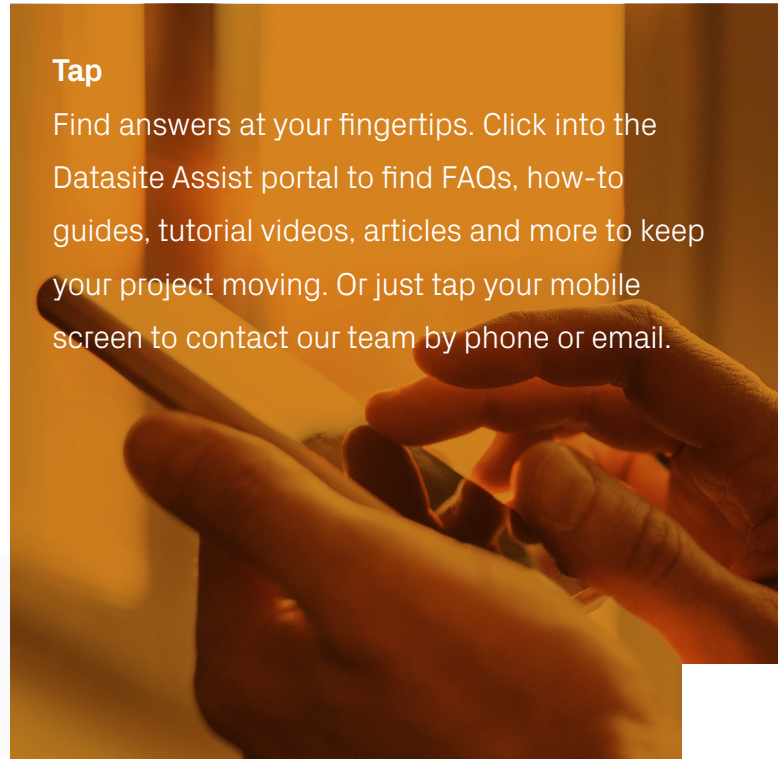


# Tap. Type. Talk.

We have you covered from every angle, all the time. If an issue is pressing, just contact us to take the pressure off.

## Tap

Find answers at your fingertips. Click into the Datasite Assist portal to find FAQs, how-to guides, tutorial videos, articles and more to keep your project moving. Or just tap your mobile screen to contact our team by phone or email.



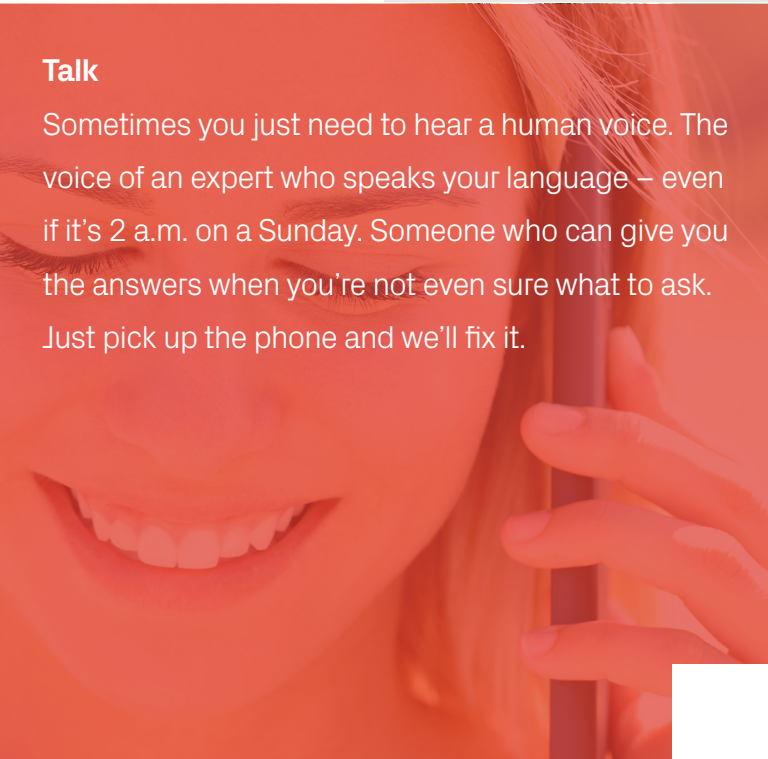
## Type

Got a quick question? Ask Lana the digital assistant. For bigger issues, open a live chat with one of our experts – or send an email. Day or night, you can depend on a rapid response and a quick solution, all without leaving your keyboard.



## Talk

Sometimes you just need to hear a human voice. The voice of an expert who speaks your language – even if it's 2 a.m. on a Sunday. Someone who can give you the answers when you're not even sure what to ask. Just pick up the phone and we'll fix it.



# How can we assist?

Datasite Assist goes far beyond service. We work at multiple levels to enable you to deliver your project. Call on us for:

## Hands-on support

Depend on 24/7/365 availability, plus proactive assistance throughout from your Project Pro.



## Practical help

Let us handle the most time-consuming tasks to help you move faster.



## Effortless technology

Solve queries, arrange training, and manage billing in the Datasite Assist portal.



## Strategic consulting

Go Elite to unleash the full potential of Datasite Cloud.





# Hands-on support

## Meet your Project Pro

Providing answers. Solving problems. Checking up on progress. Expect all this and more from the expert always looking out for you: your Project Pro.

Together, our team is standing by to help you 24/7/365. Your Project Pro is the individual expert assigned to work proactively on your behalf, to ensure you have all that you need.



**Caleb**  
Datasite Assist team member since 2019

### Kickoff

Receive an invite to your project

### Research

Your Project Pro will research and prep to better understand your needs

### Introduction

Expect a call from your Project Pro within 24 hours of opening your project

### Onboarding

Your Project Pro will schedule an onboarding call to ensure you can take advantage of all features at your disposal

### Support

Your Project Pro will conduct additional calls and trainings as needed to support you throughout your deal.

**Plus you have a team of experts standing by 24/7/365 to provide additional support.**

# Practical help

Lighten your load to move faster

We can speed your project forward by handling the most time-consuming tasks.

## Folder structures

Building the structure to fit your project – or reorganizing existing content as needed.

## Trackers

Creating one central checklist for all users and tasks, linked to your index.

## Importing contacts

Uploading your contacts for your deal marketing or acquisition targeting.

## Managing content

Importing, moving, and copying content for you – or transferring it from a physical device.

## Setting up Q&A

Creating a central hub in which you can answer all your seller's questions quickly and securely.

## Creating tear sheets

Want to create and export tear sheets in Pipeline? We'll make your templates for you.

## Renaming in bulk

Renaming thousands of files for you as required, to save you precious hours.

## Customized dashboards

Building your ideal analytics dashboards and report formats.

## Roles & permissions

Setting roles and permitted access levels for all the users required on your project.

## Draft user invitations

Creating the invitations to the data room, for you to approve and send out.

Now you can focus on key tasks such as:

- ✓ Redacting sensitive content
- ✓ Maintaining and managing your trackers
- ✓ Setting up/managing findings (in Acquire)

**Datasite's tools make these quick and easy.**





# Effortless technology

Answers at your fingertips

Solve most queries quickly in the Datasite Assist portal. Here you'll find:

## FAQs

Fast fixes to the most common issues you might face.

## How-to articles and videos

Clear explanations & walk-throughs let you master applications in moments.

## The billing center

View invoices, make payments, and manage all your billing.

## Lana

Lana, our friendly chatbot, is ready to answer your questions in seconds.



# Strategic consulting

Hit new heights in Datasite Cloud with Elite

Make the most of your Datasite Cloud subscription with our premium offering: **Datasite Assist Elite**.

If your focus is on strategic goals to drive active growth, then Elite is for you.

An expert from our Elite team will be your strategic consultant. With their help, you can:

## Fine-tune your process

Make sure you're using Datasite's full potential. We'll analyze your usage to identify areas where you can improve your processes and achieve greater value.

## Navigate the deal

Be ready to overcome challenges before they become problems. Draw on our depth of industry expertise to achieve best practices and optimal results.

## Drive your platform's development

Evolve your dealmaking on a platform that adapts to your needs. Are there ways we could enhance your experience? Talk directly to our software developers and we'll get on it.

It's all in addition to the benefits of Datasite Assist, available 24/7/365.





# Success starts with Datasite Assist

Included with every project, expert assistance is provided for you by our award-winning team. Just tap, type, or talk.







The Datasite team are great, and absolutely bend over backwards when it comes to requests. They are a joy to work with and always seem to have the same urgency on matters that I have.

- Alan Blockley CEO, Glanty



Diana  
Datasite Assist team member since 2019

    #Wheredealsaremade

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