

Trackers for sell side

Set up your sell-side project faster by embedding your checklist into the data room. In either Datasite Diligence or Prepare, use the trackers tool to ensure you have all the necessary files uploaded by launch time. Your deal team can build a due diligence checklist and collaborate with clients to provide a single source of truth.

Assign views to teams

Set permissions to restrict tracker access to the people you choose. You can also build custom views of your tracker, assigned by person or team. Make sure everyone sees what they need to – and no more.

Upload and re-use

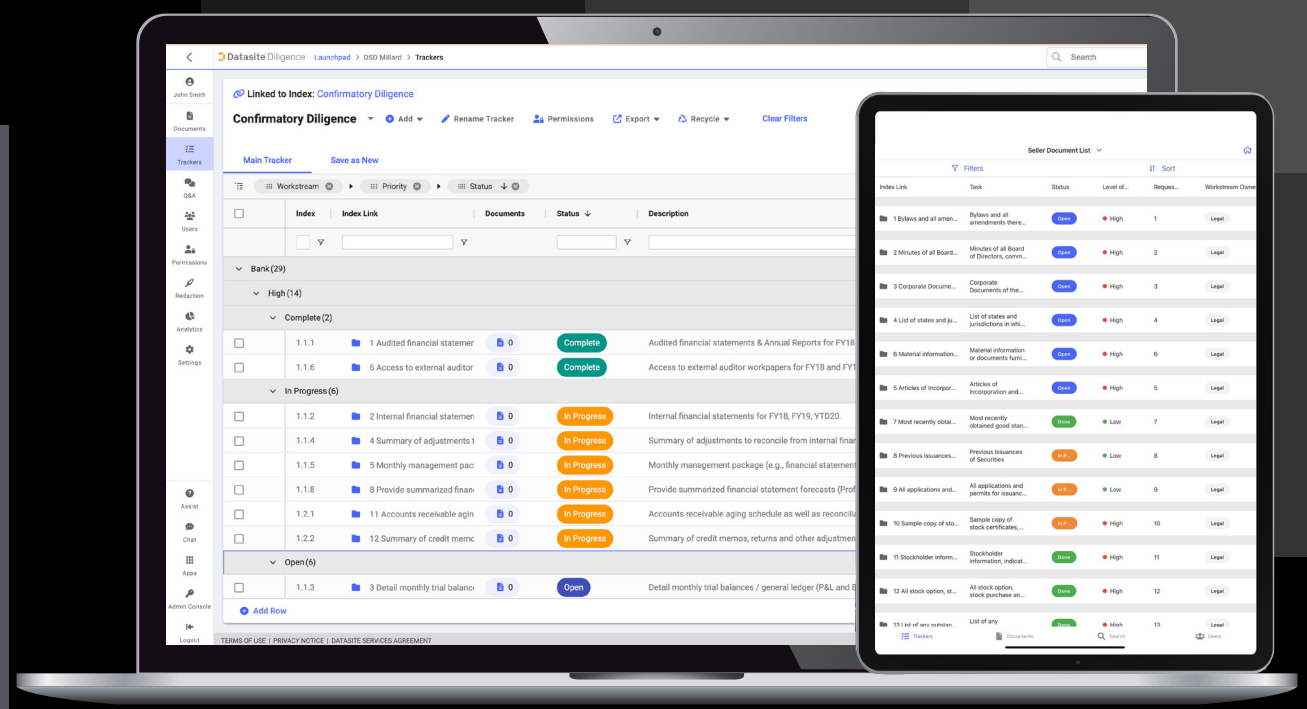
Simply import an Excel file to build your customized tracker. You can also copy and adapt existing trackers from other open projects. In-line editing makes it easy to update your tracker as needed.

Link to index

Within Datasite Diligence, create your fileroom directly from your Tracker for 1:1 parity. Major time-saver; your folder structure will be paired to your Tracker and ready to populate.

Customize for your needs

Perfect your process by designing the ultimate tracker for you. Show and hide columns, create custom columns with dropdowns, and build your own specially filtered views using a simple drag-and-drop.



in @ #Wheredealsaremade

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