Elevate your M&A
Communications Overview
DEVENSOFT
Powering Your Strategic Growth
Dashboards and Notifications

Learning **OBJECTIVES**

At the conclusion of the training, you will be able to:

- Access **Dashboards**
- Send **Emails**
- Use **Stream**
- **Request Updates**
- Automate **Email Notifications**

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Discussion **TOPICS**

Topics

Module 1 – Communications Overview

Module 2 – Dashboards

Module 3 – Managed Communications

Module 4 – Automated Communications

Module 5 – Email Samples

1 COMMUNICATIONS OVERVIEW

COMMUNICATING WITHIN DEVENSOFT

Devensoft offers **Dashboards**, **managed** and **automated** approaches to communicate with your M & A team.

- **Dashboards**
  - Pipeline
  - Due Diligence
  - Program
  - Team Lead
  - Extended Team

COMMUNICATING WITHIN DEVENSOFT

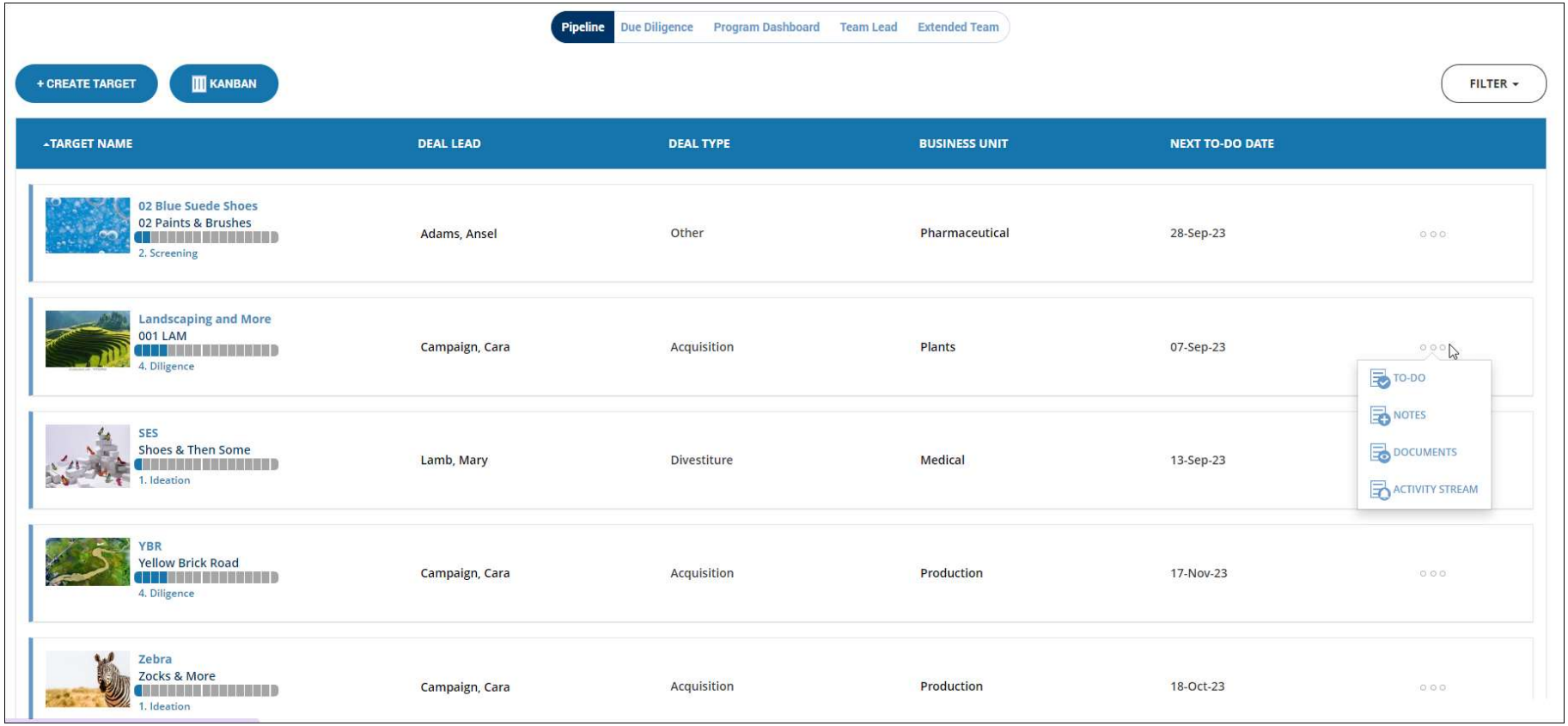
- **Managed Emails**
  - **Email Team** – this feature allows users to send system links to team members.
  - **Stream** – available on the Tab Bar, organized Target and Program related emails are available for the team.
  - **Request Update** (Programs)– one of Devensoft's salient features, allows IMO Leads an easy way to request Activity updates from their team members.
- **Automated Emails**
  - **Email Templates**
  - Target or Program **Settings**
  - Assign Owners in **Activity Map**
  - **User Profile**

2

DASHBOARDS

PIPELINE DASHBOARD

Displays a list of Targets, Deal Lead, Deal Type, and quick links to To-Do's, Notes, Documents and Activity Stream.



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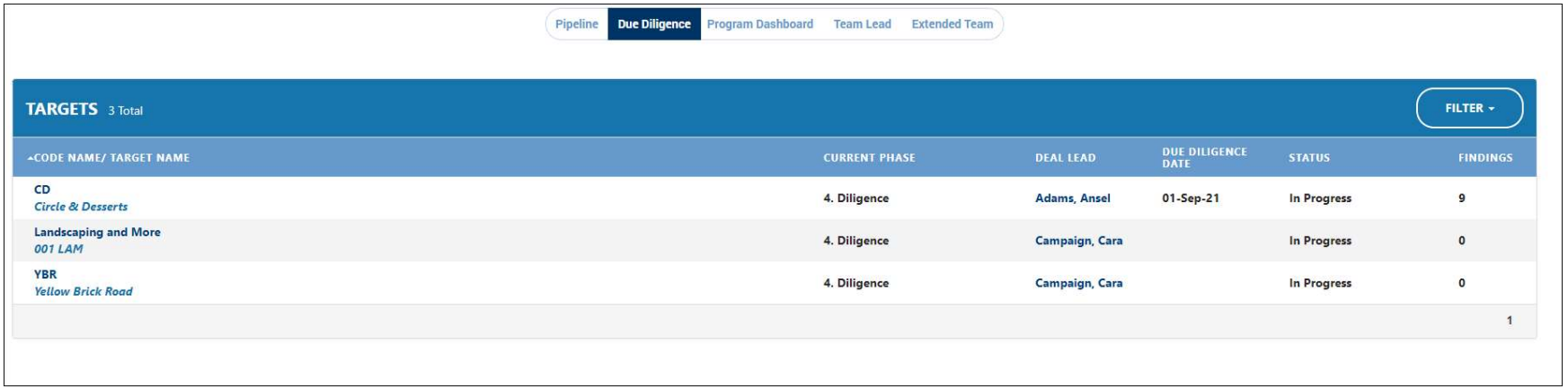
DUE DILIGENCE DASHBOARD

Displays Targets that are in the Due Diligence phase.



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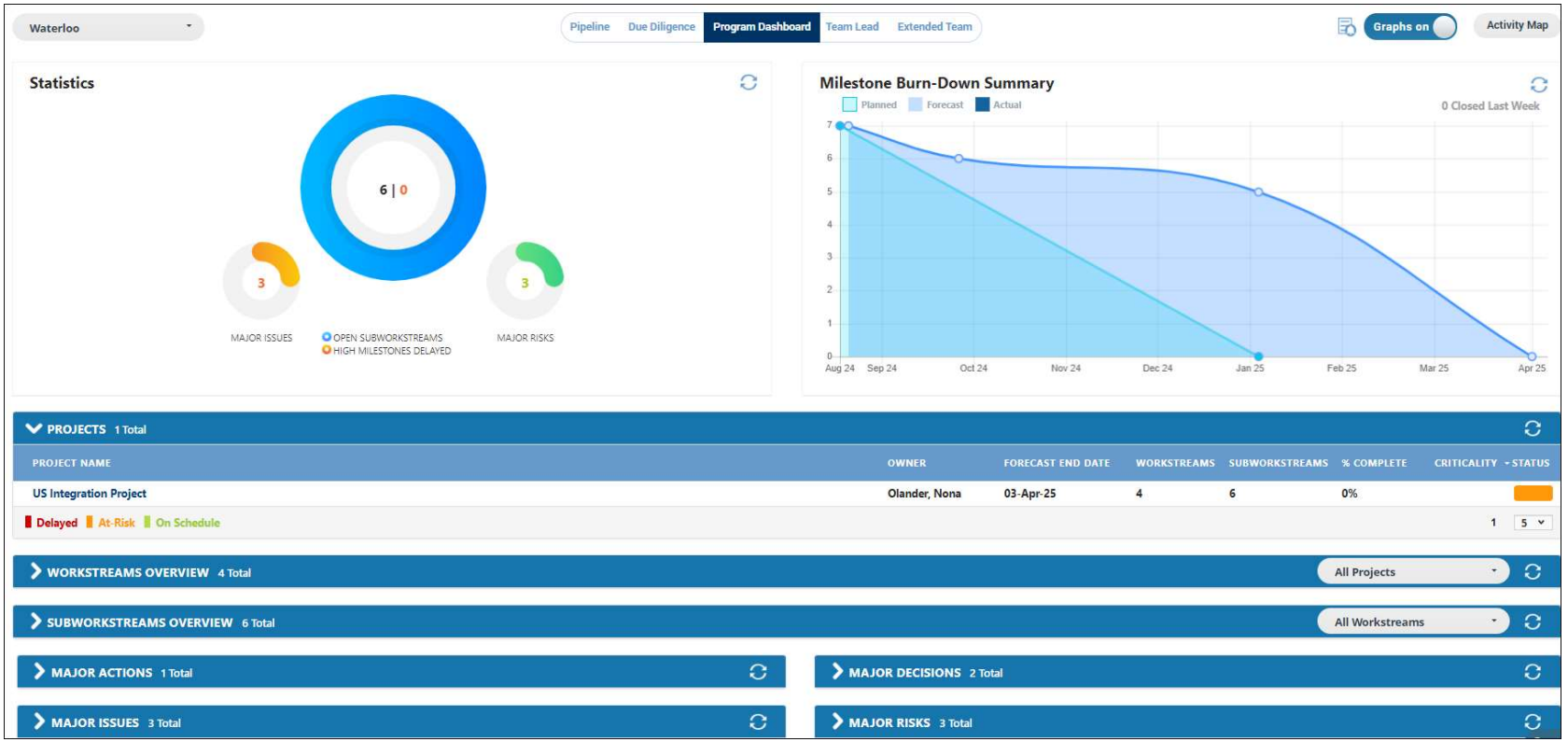
PROGRAM DASHBOARD

The **Program Dashboard** displays high-level Program data ranging from statistics to a Milestone Burn-Down Summary, along with an overview of several hierarchical levels, e.g., Activity Levels 1 – 3 and **major** RAID items.



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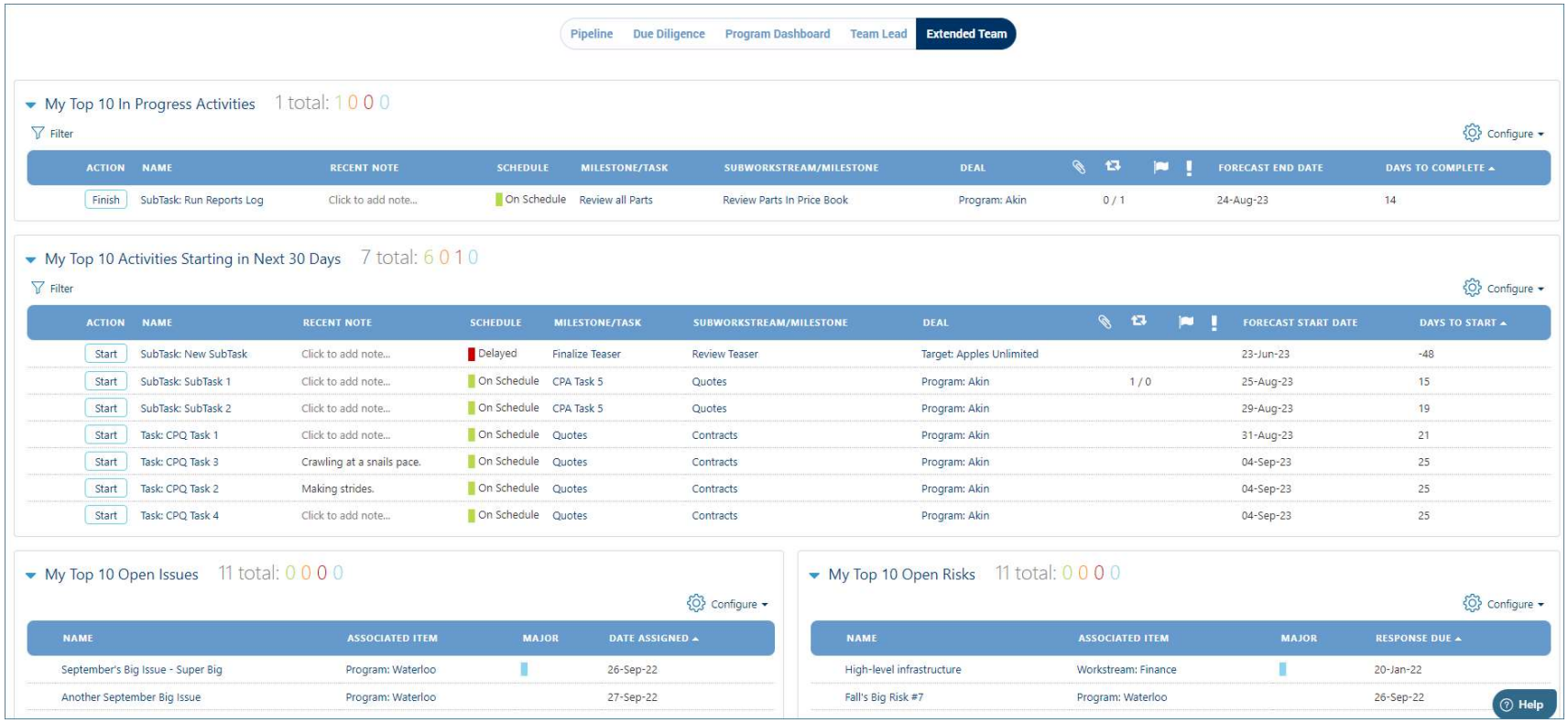
TEAM LEAD DASHBOARD

The **Team Lead** Dashboard displays the team's, e.g., HR's Top team Activities in progress, starting in the next 30 days and any open Issues and Risks.



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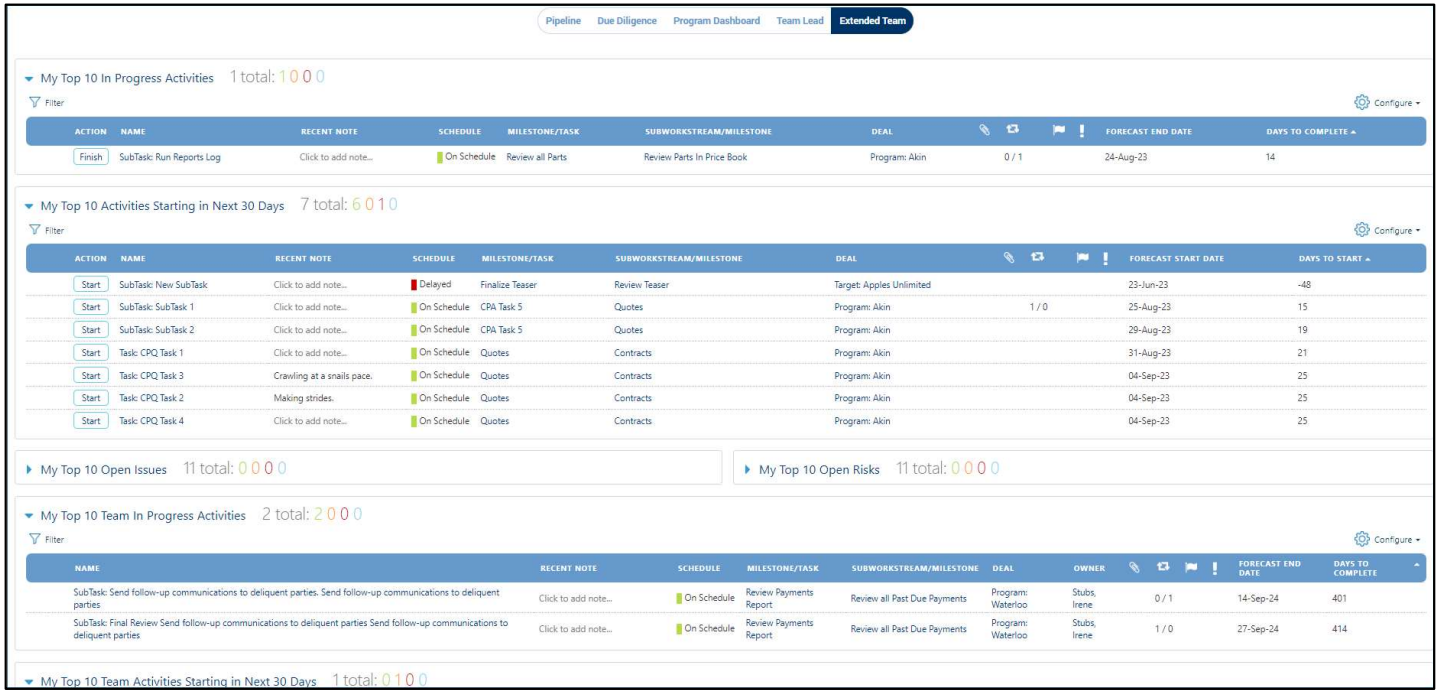
EXTENDED TEAM DASHBOARD

The **Extended Team** Dashboard displays the ***User's Activities***, (HR) AND the ***Extended Team's Activities*** (Legal, IT, etc.). ***User Activities*** that are in progress, starting in the next 30 days and open Issues and Risks are captured, followed by the ***Extended Teams*** in progress activities and those starting in the next 30 days.



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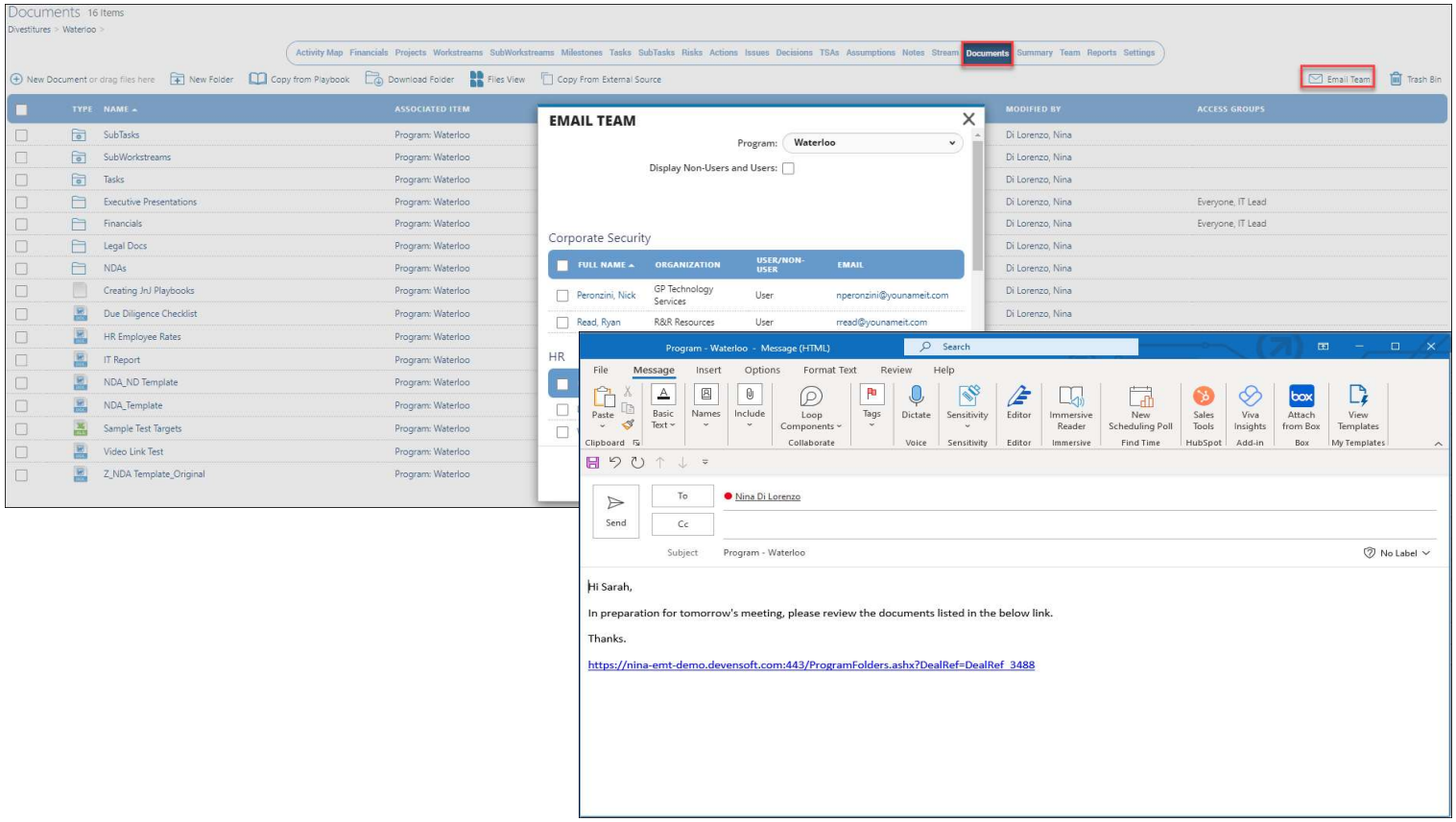
3 MANAGED COMMUNICATIONS

EMAIL TEAM

The **Email Team** button is accessible throughout the Devensoft platform, in the upper right corner, allowing users to send system links to team members.



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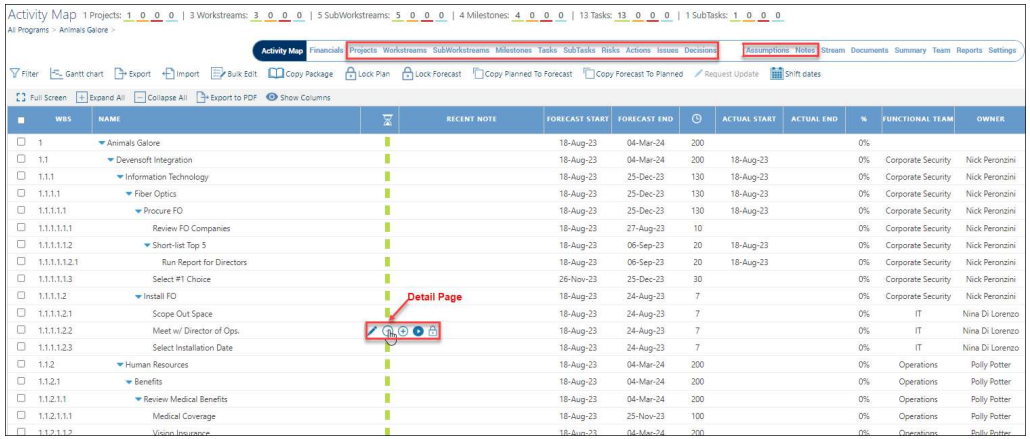
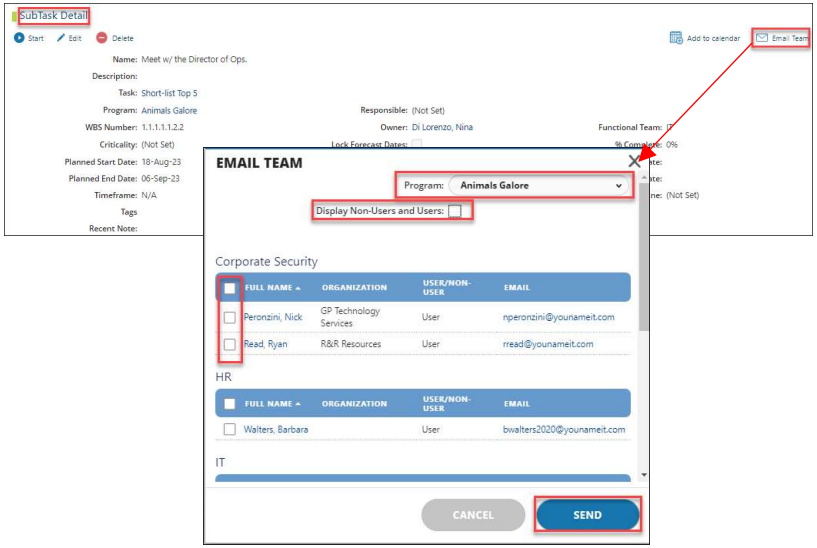
Sending an Email

a. Navigate to a hierarchical view, e.g., Projects, Workstreams, SubWorkstreams, Milestones, Tasks, SubTasks, RAID, Assumptions, Notes link **OR** the Detail Page of an Activity located on the Activity Map page.



b. In the Detail Page or View, click on the Email Team icon.

c. The Email Team window opens.
   i. Confirm the name of the **Program**.
   ii. Select the checkbox to display **Non-Users** and **Users**.
   iii. Select the **names** of the recipients.
   iv. Press **Send**.



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Sending an Email (cont'd)

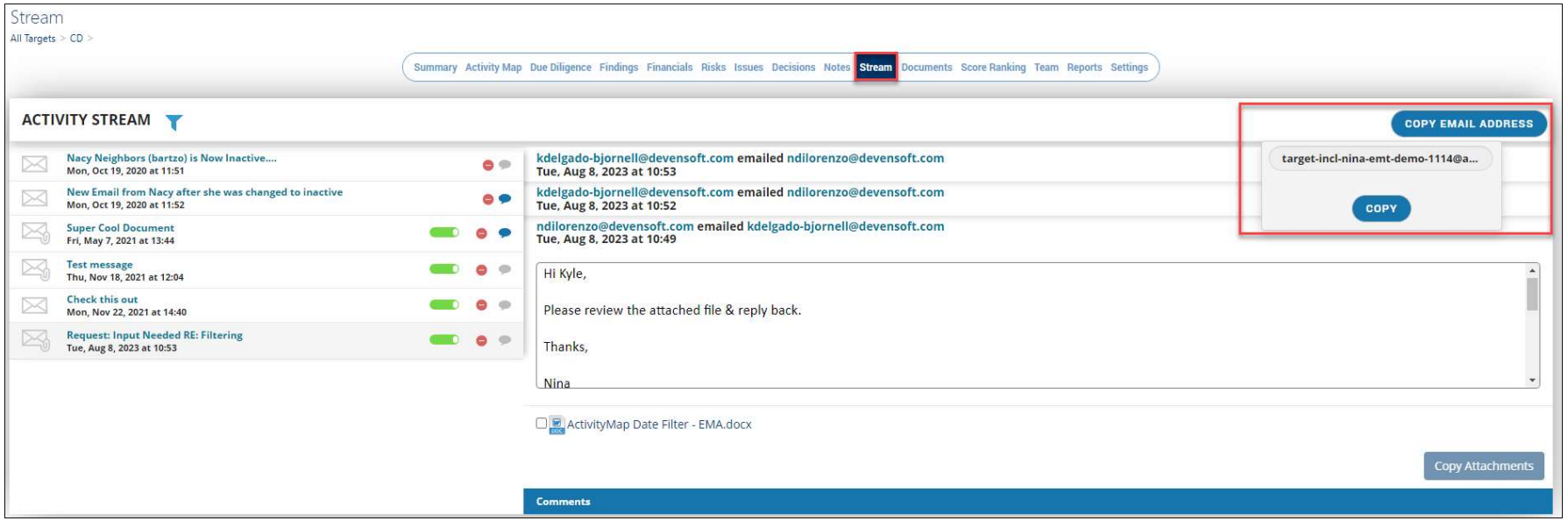
d. The sender's email opens, allowing additional text to be added.

e. When done press **Send**.

f. The recipient receives the email, clicks on the link, logs into Devensoft (if they are not already logged in) and updates the Activity.

STREAM

Like many CRM tools, the **Stream** functionality organizes Target and Program related emails, using a unique email address.



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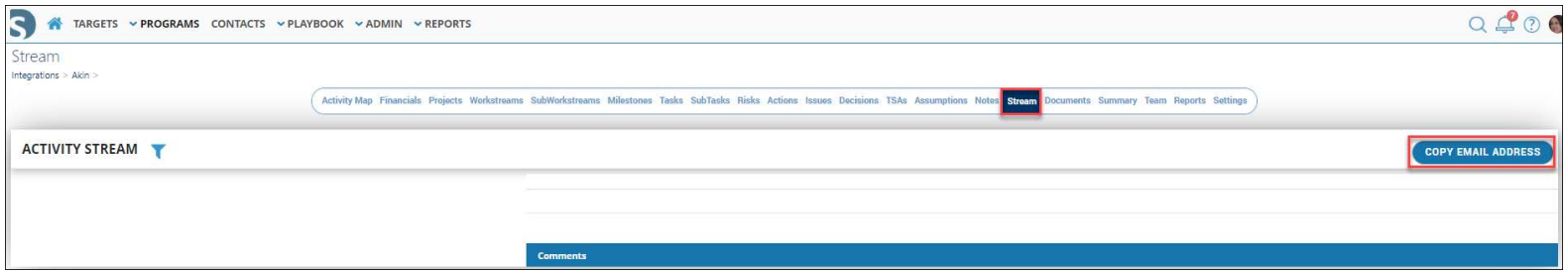
Sending a Stream

a. Open a **Target** or **Program**.

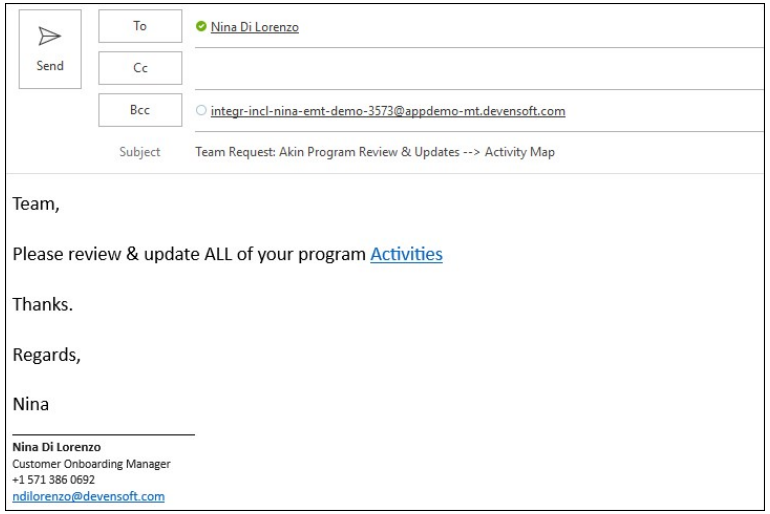
b. Navigate to the **Stream** tab.

c. Click on the **Copy Email Address**.



d. Open your Email client and paste the address into the bcc field.

e. Complete the rest of the message and send.



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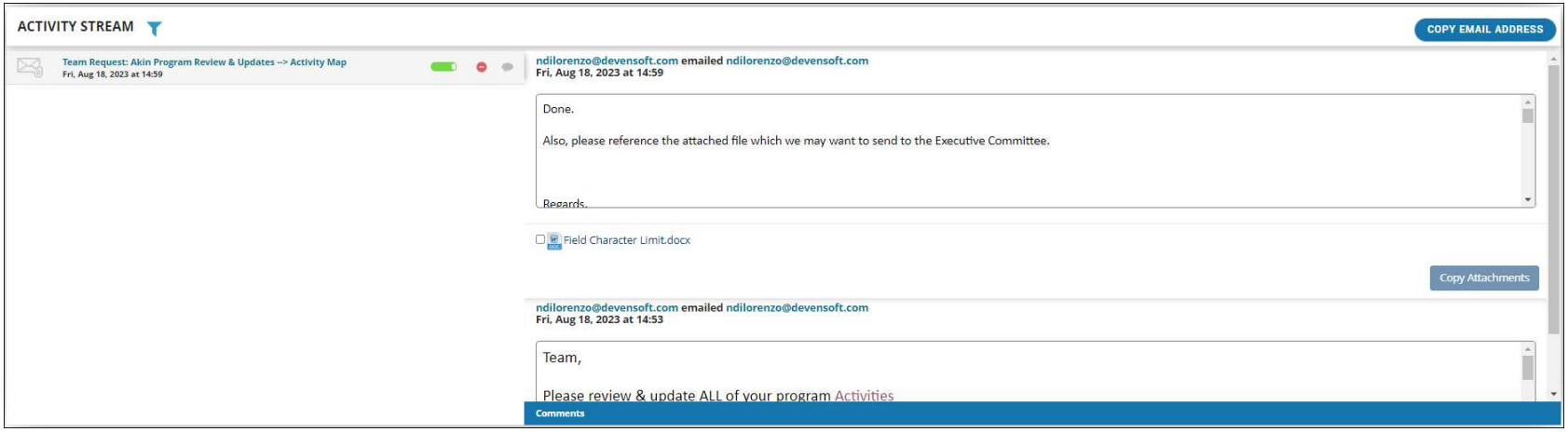
Sending a Stream (cont'd)

f. Return to the **Stream** tab where the email will be listed. You may need to press the **Refresh** button or F5 to view the emails in Stream.

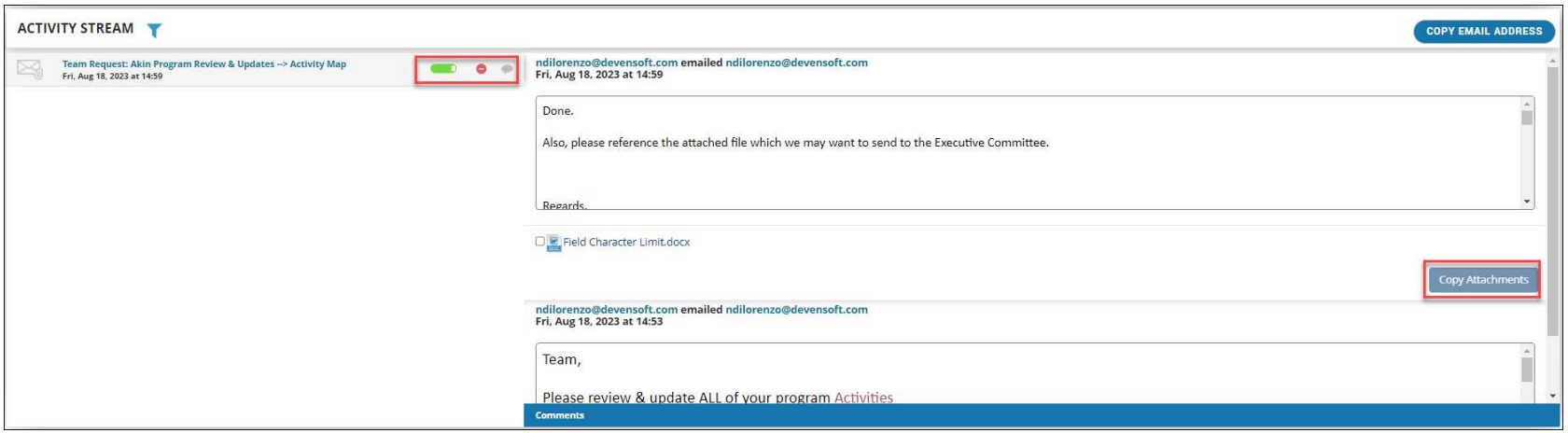
Screen Capture #1: Activity Stream in Collapsed Mode



Screen Capture #2: Activity Stream in Expanded Mode

Sending a Stream (cont'd)

g. Several features within Stream are outlined below:



- **Unshare** – to unshare an email listed in Activity Stream, press the green slide and click **Yes**.
- **Delete** – press the **delete** icon (red circle) to delete the email from Stream.
- **Comment** - Enter and post a comment to an email.
- **Copy Attachments** – select the attachment(s) to copy it to a new or existing folder within the Documents tab.

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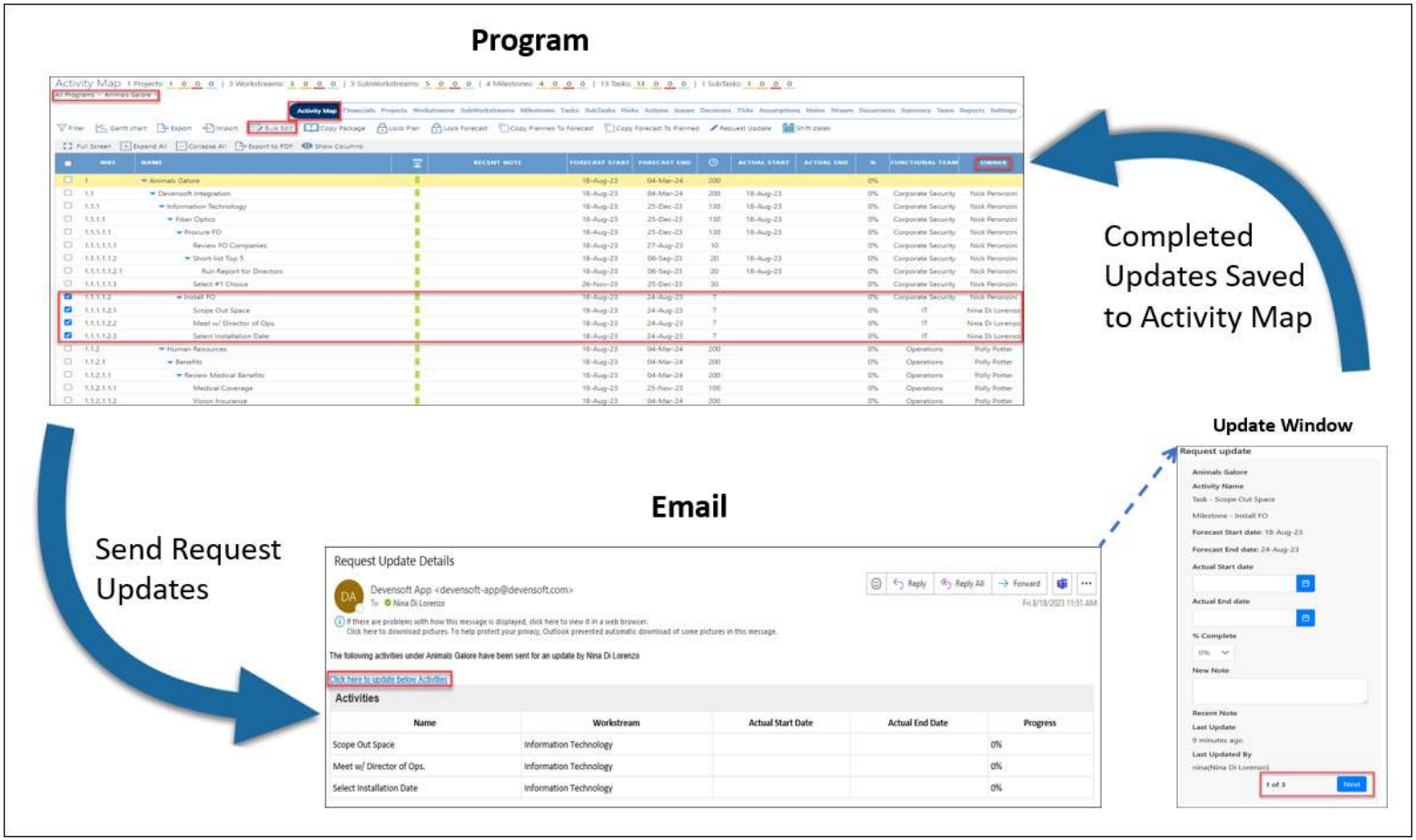
REQUEST UPDATES (Programs)

Allows the IMO Leads an easy way to request Activity updates from team members.



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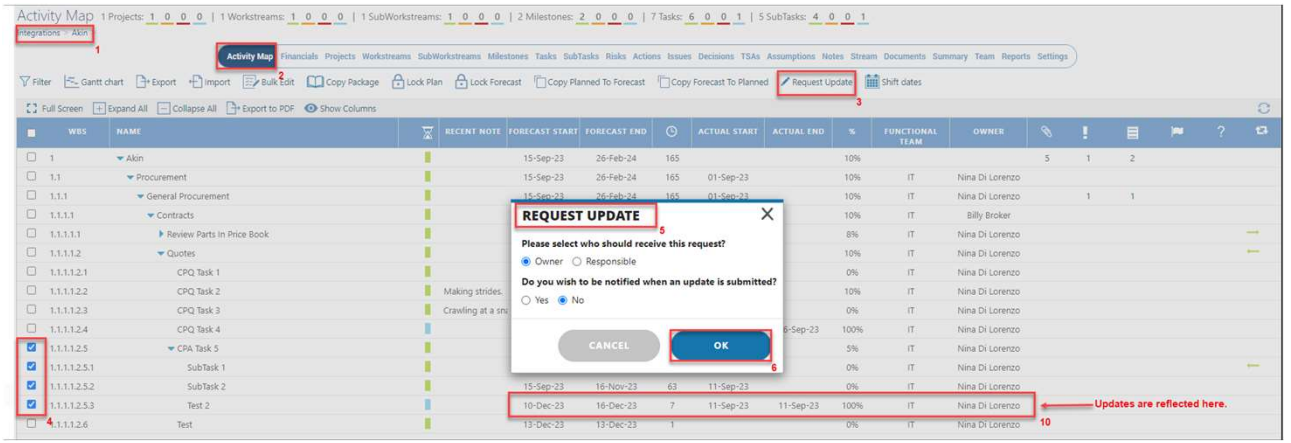
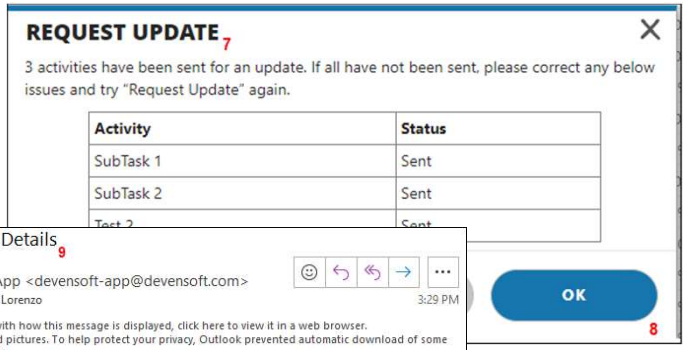
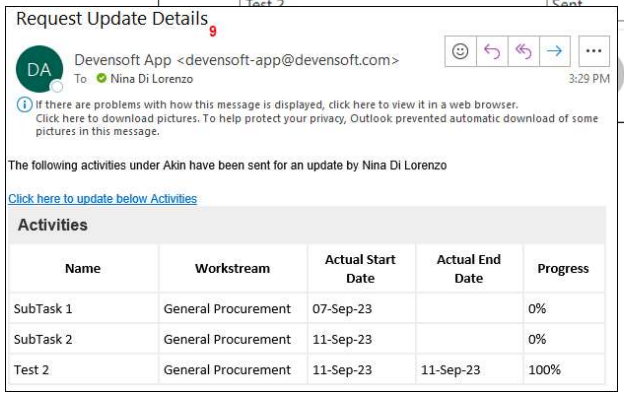
Request Updates – Sending to Team Members

1. Open a **Program**.
2. Navigate to the **Activity Map**.
3. Select Milestones, Tasks and/or SubTasks aka, Activity Levels 4, 5 and/or 6.
4. Click the **Request Update** button.
5. The Request Update window appears.
6. Click **OK**.
7. The Request Update Confirmation window appears indicating that the activities have been sent.
8. Click **OK**.
9. The Owner receives the **Request Update Details** email, similar to the email to the right. It includes a link to update the activities.
10. These updates are immediately reflected in the Activity Map.







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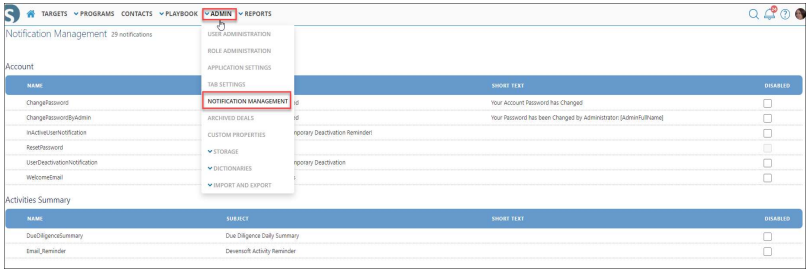
4

AUTOMATED COMMUNICATIONS

AUTOMATED NOTIFICATION PROCESS

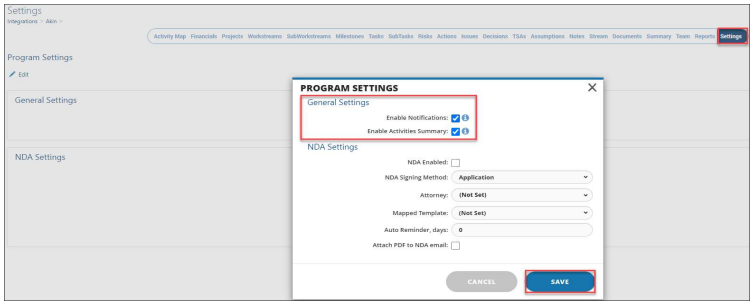
1

Admin/Notification Management

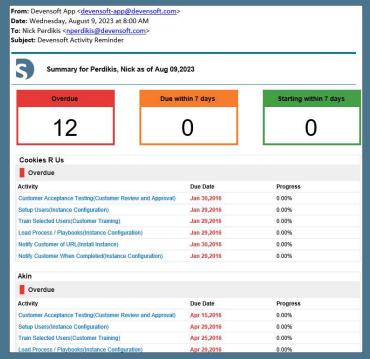


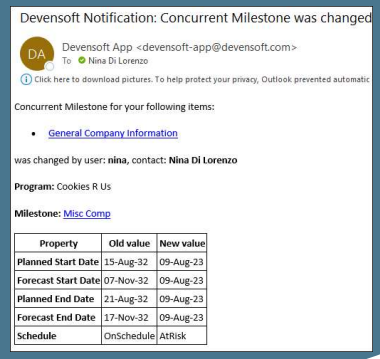
2

Program Settings

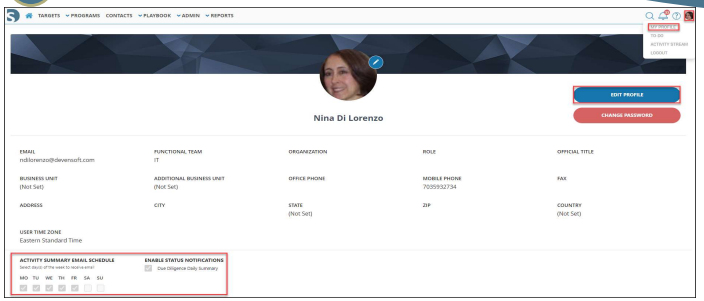


Emails



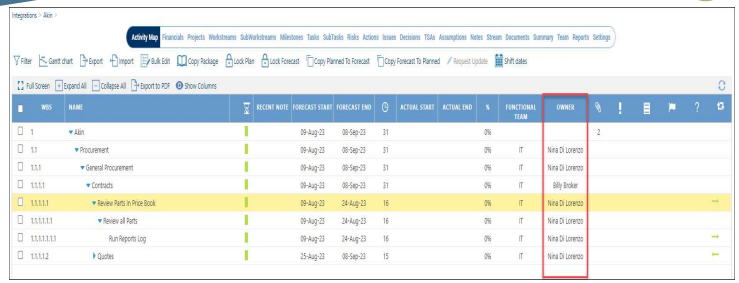


4



User Profile

3



Assigning Owners in Activity Map

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NOTIFICATION MANAGEMENT

1. Steps for Enabling **Email Notifications**

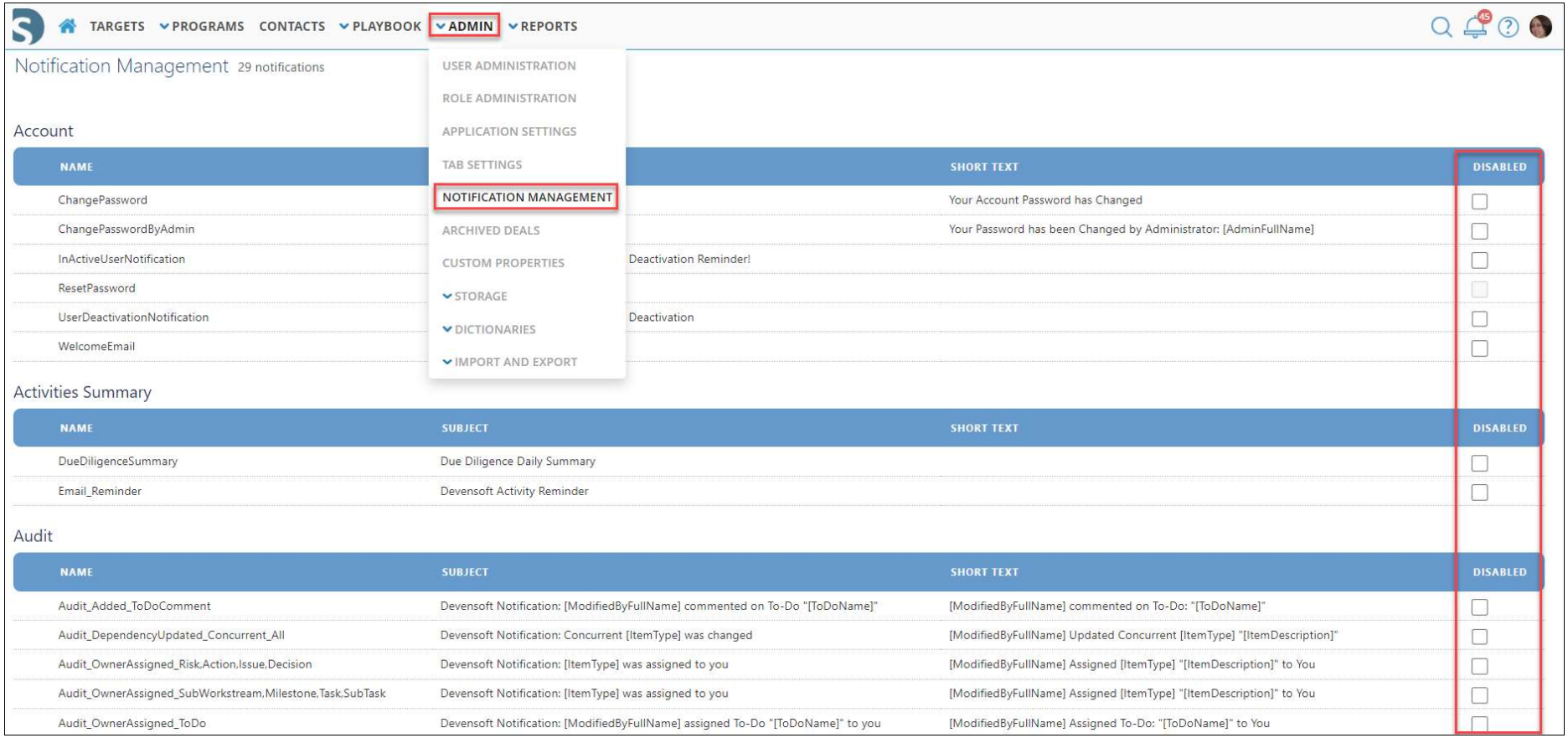
a. From the Main Menu select **Admin/Email Notifications**.

b. The most frequently used Notifications include:
   i. Account/Welcome Email
   ii. Activities Summary
      i. Due Diligence Summary
      ii. Email Reminder
   iii. Audit
   iv. Colorization
   v. Due Diligence
   vi. Request Update

c. In the Disabled column, no checkmark signifies that the notification is **enabled**. If there **IS** a checkmark, the notification is **disabled** and emails **will not** be sent.

d. Proceed to the next step.

NOTIFICATION MANAGEMENT



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SETTINGS

2. Steps for enabling Target or Program **Settings**

a. From the Main Menu navigate to a **Target** or **Program** to enable notifications.

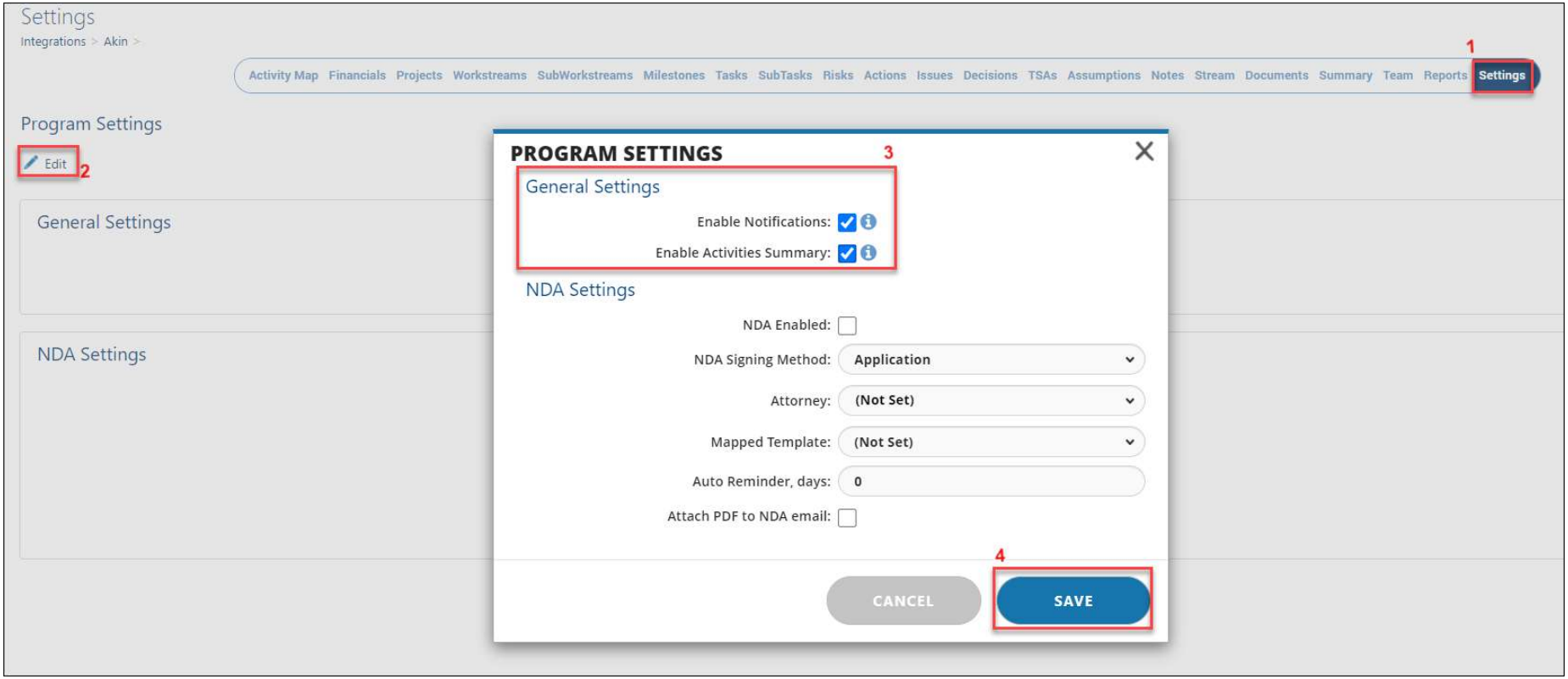
b. On the Tab Bar, click on the **Settings** tab.

c. Click on the **Edit** icon. The Program Settings window opens.

d. Under General Settings:
   a. Select the **Enable Notifications** checkbox.
   b. Select the **Enable Activities Summary** checkbox.

e. Press **Save**.

SETTINGS



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OWNERS

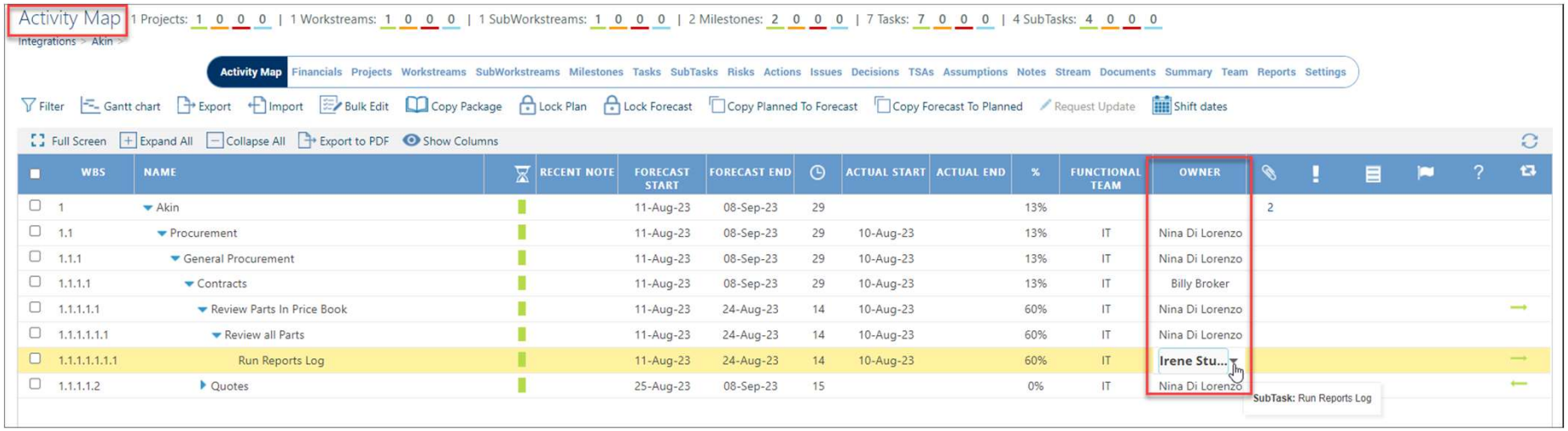
3. Steps for Assigning **Owners**

a. From the Main Menu navigate to the **Target** or **Program**

b. Navigate to the **Activity Map**.

c. In the Owner column, double-click in the Owner field to add or edit the name from the picklist.

ACTIVITY MAP



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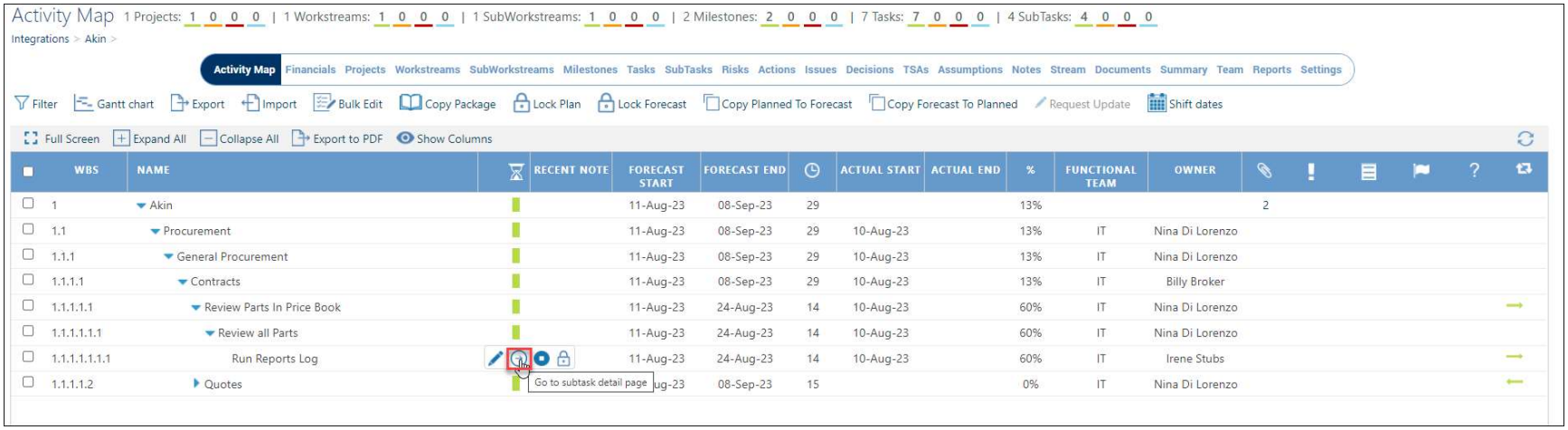
ADD TO CALENDAR

Using the Activity Map, the **Add to Calendar** feature, accessible from the **Activity Detail page**, adds Milestones, Tasks and SubTasks to one's **Outlook** or **Google** calendar.



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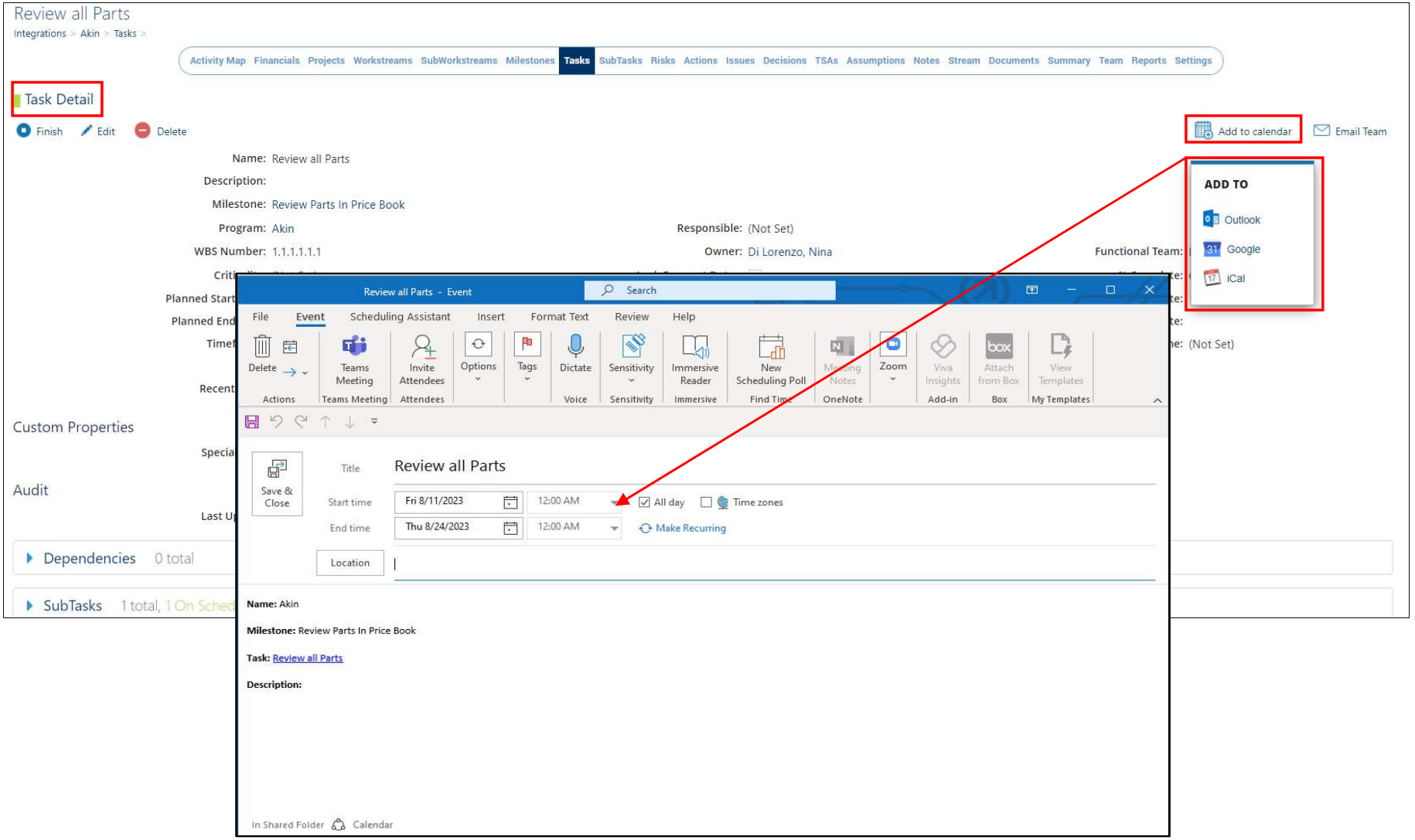
ADD TO CALENDAR



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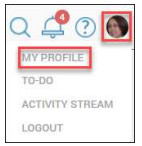
USER PROFILE

4. Configure **User Profile**

a. Navigate to the upper, right corner of your screen and click on your **Avatar/My Profile**.

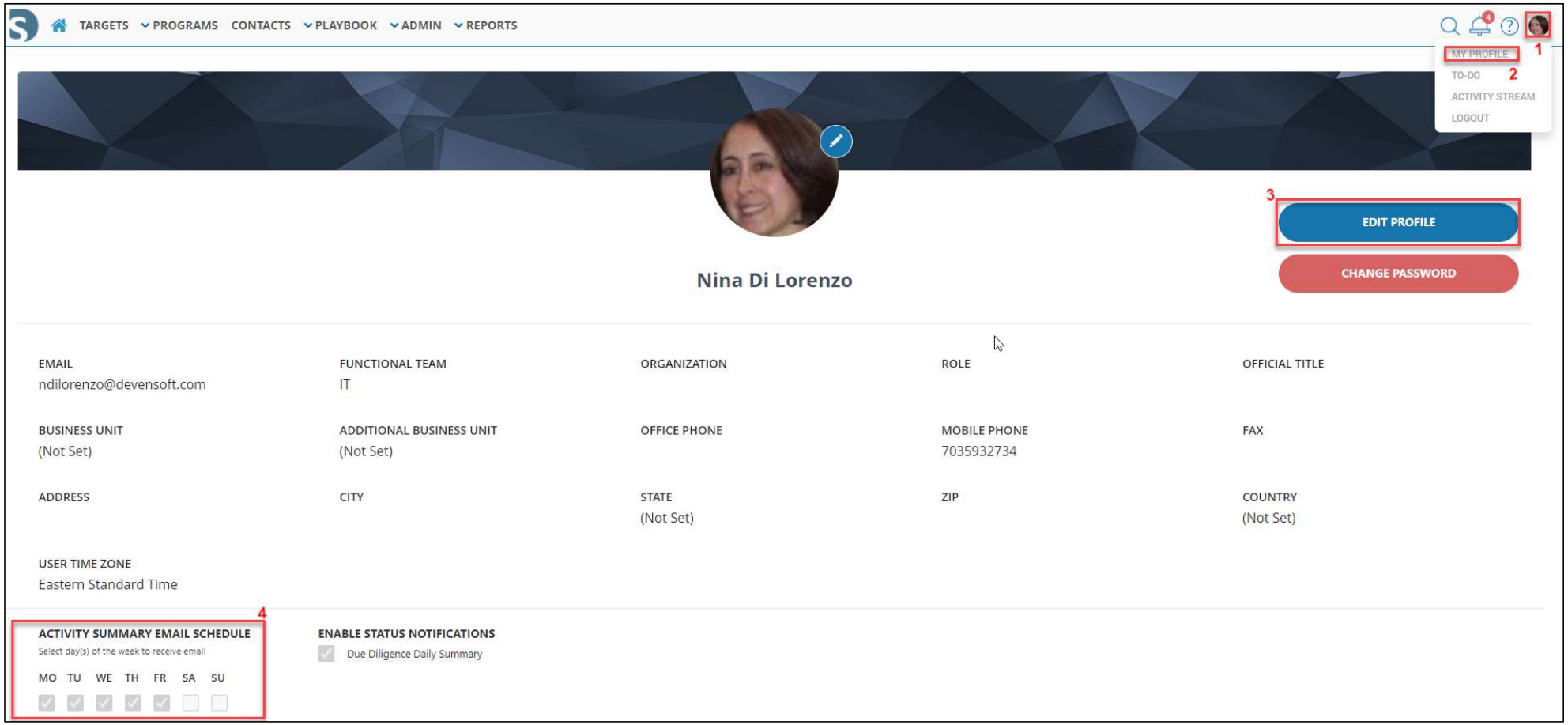


b. Click on **Edit Profile**.

c. Complete any missing information followed by selecting the days of the week in the Activity Summary Email Schedule section.

d. When done, press **Update Profile**.

e. Automated emails from the system are delivered to the Owner between 8:00 – 8:30 a.m. EST based on the email schedule defined on the **My Profile** page.


TARGETS
PROGRAMS
CONTACTS
PLAYBOOK
ADMIN
REPORTS
MY PROFILE
1
TO-DO
2
ACTIVITY STREAM
LOGOUT
3
EDIT PROFILE
CHANGE PASSWORD
Nina Di Lorenzo
EMAIL
ndilorenzo@devensoft.com
FUNCTIONAL TEAM
IT
ORGANIZATION
ROLE
OFFICIAL TITLE
BUSINESS UNIT
(Not Set)
ADDITIONAL BUSINESS UNIT
(Not Set)
OFFICE PHONE
MOBILE PHONE
7035932734
FAX
ADDRESS
CITY
STATE
(Not Set)
ZIP
COUNTRY
(Not Set)
USER TIME ZONE
Eastern Standard Time
4
ACTIVITY SUMMARY EMAIL SCHEDULE
Select day(s) of the week to receive email
MO TU WE TH FR SA SU
ENABLE STATUS NOTIFICATIONS
Due Diligence Daily Summary

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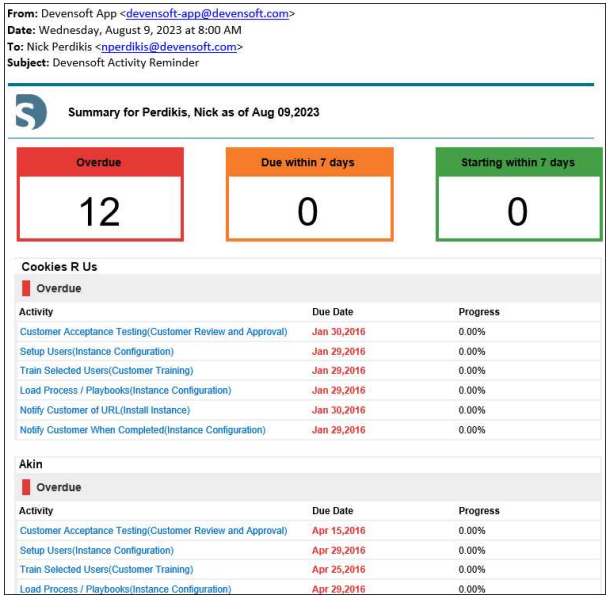
5 EMAIL SAMPLES

EMAIL SAMPLES



From: Devensoft App <devensoft-app@devensoft.com>
Date: Wednesday, August 9, 2023 at 8:00 AM
To: Nick Perdikis <nperdikis@devensoft.com>
Subject: Devensoft Activity Reminder

Summary for Perdikis, Nick as of Aug 09,2023

Overdue	Due within 7 days	Starting within 7 days
12	0	0

Cookies R Us

Overdue

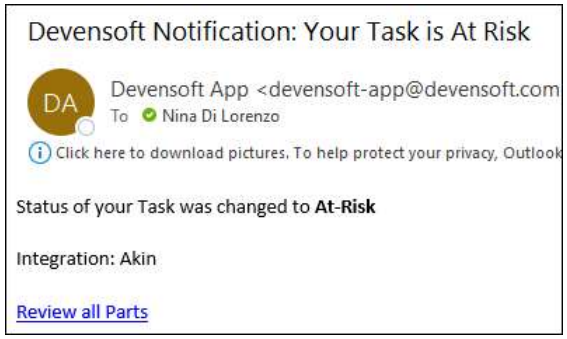
Activity	Due Date	Progress
Customer Acceptance Testing(Customer Review and Approval)	Jan 30,2016	0.00%
Setup Users(Instance Configuration)	Jan 29,2016	0.00%
Train Selected Users(Customer Training)	Jan 29,2016	0.00%
Load Process / Playbooks(Instance Configuration)	Jan 29,2016	0.00%
Notify Customer of URL(Install Instance)	Jan 30,2016	0.00%
Notify Customer When Completed(Instance Configuration)	Jan 29,2016	0.00%

Akin

Overdue

Activity	Due Date	Progress
Customer Acceptance Testing(Customer Review and Approval)	Apr 15,2016	0.00%
Setup Users(Instance Configuration)	Apr 29,2016	0.00%
Train Selected Users(Customer Training)	Apr 25,2016	0.00%
Load Process / Playbooks(Instance Configuration)	Apr 29,2016	0.00%

Email 1: Devensoft Activity Reminder



Devensoft Notification: Your Task is At Risk

DA Devensoft App <devensoft-app@devensoft.com>
To Nina Di Lorenzo

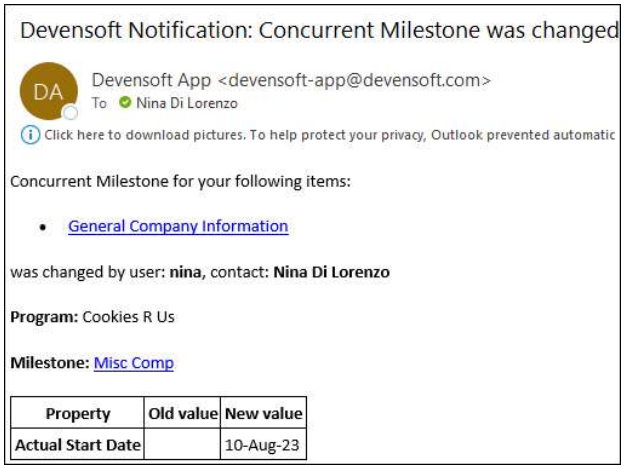
Click here to download pictures. To help protect your privacy, Outlook

Status of your Task was changed to **At-Risk**

Integration: Akin

Review all Parts

Email 2: Devensoft Notification: Your [Activity] is At Risk



Devensoft Notification: Concurrent Milestone was changed

DA Devensoft App <devensoft-app@devensoft.com>
To Nina Di Lorenzo

Click here to download pictures. To help protect your privacy, Outlook prevented automatic

Concurrent Milestone for your following items:

- General Company Information

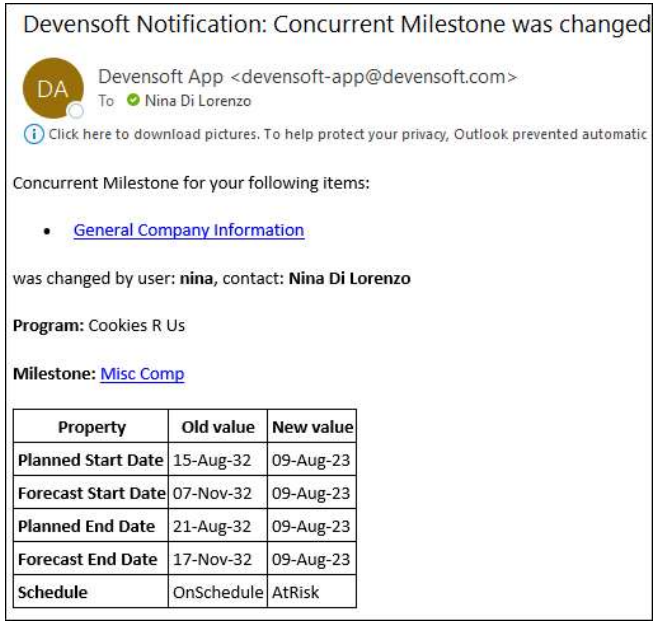
was changed by user: **nina**, contact: **Nina Di Lorenzo**

Program: Cookies R Us

Milestone: Misc Comp

Property	Old value	New value
Actual Start Date		10-Aug-23

Email 4: Devensoft Notification: Concurrent [Activity] was changed



Devensoft Notification: Concurrent Milestone was changed

DA Devensoft App <devensoft-app@devensoft.com>
To Nina Di Lorenzo

Click here to download pictures. To help protect your privacy, Outlook prevented automatic

Concurrent Milestone for your following items:

- General Company Information

was changed by user: **nina**, contact: **Nina Di Lorenzo**

Program: Cookies R Us

Milestone: Misc Comp

Property	Old value	New value
Planned Start Date	15-Aug-32	09-Aug-23
Forecast Start Date	07-Nov-32	09-Aug-23
Planned End Date	21-Aug-32	09-Aug-23
Forecast End Date	17-Nov-32	09-Aug-23
Schedule	OnSchedule	AtRisk

Email 3: Devensoft Notification: Your [Activity] is At Risk

DEVENSOFT

More Information

Contact us today or visit our website to learn more!

Devensoft.com

support@devensoft.com

1-855-DEVENSOFT
(US Toll Free)

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