



Elevate your M&A

Communications Overview

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**



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**



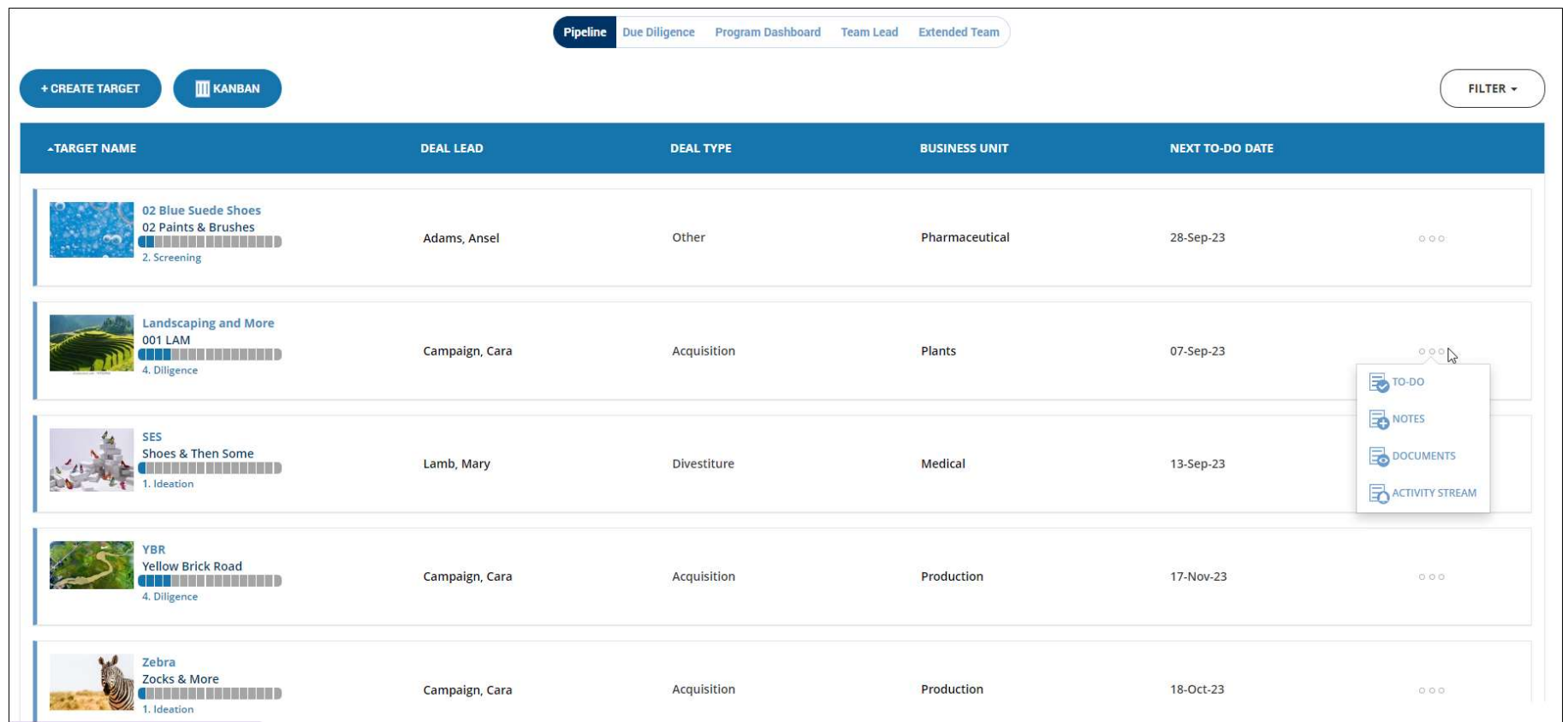
2

DASHBOARDS



PIPELINE DASHBOARD

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



The dashboard interface includes a top navigation bar with 'Pipeline' selected, and other options like 'Due Diligence', 'Program Dashboard', 'Team Lead', and 'Extended Team'. Below this are buttons for '+ CREATE TARGET' and 'KANBAN', and a 'FILTER' dropdown. The main table has the following data:

TARGET NAME	DEAL LEAD	DEAL TYPE	BUSINESS UNIT	NEXT TO-DO DATE
02 Blue Suede Shoes 02 Paints & Brushes 2. Screening	Adams, Ansel	Other	Pharmaceutical	28-Sep-23
Landscaping and More 001 LAM 4. Diligence	Campaign, Cara	Acquisition	Plants	07-Sep-23
SES Shoes & Then Some 1. Ideation	Lamb, Mary	Divestiture	Medical	13-Sep-23
YBR Yellow Brick Road 4. Diligence	Campaign, Cara	Acquisition	Production	17-Nov-23
Zebra Zocks & More 1. Ideation	Campaign, Cara	Acquisition	Production	18-Oct-23

DUE DILIGENCE DASHBOARD

Displays Targets that are in the Due Diligence phase.

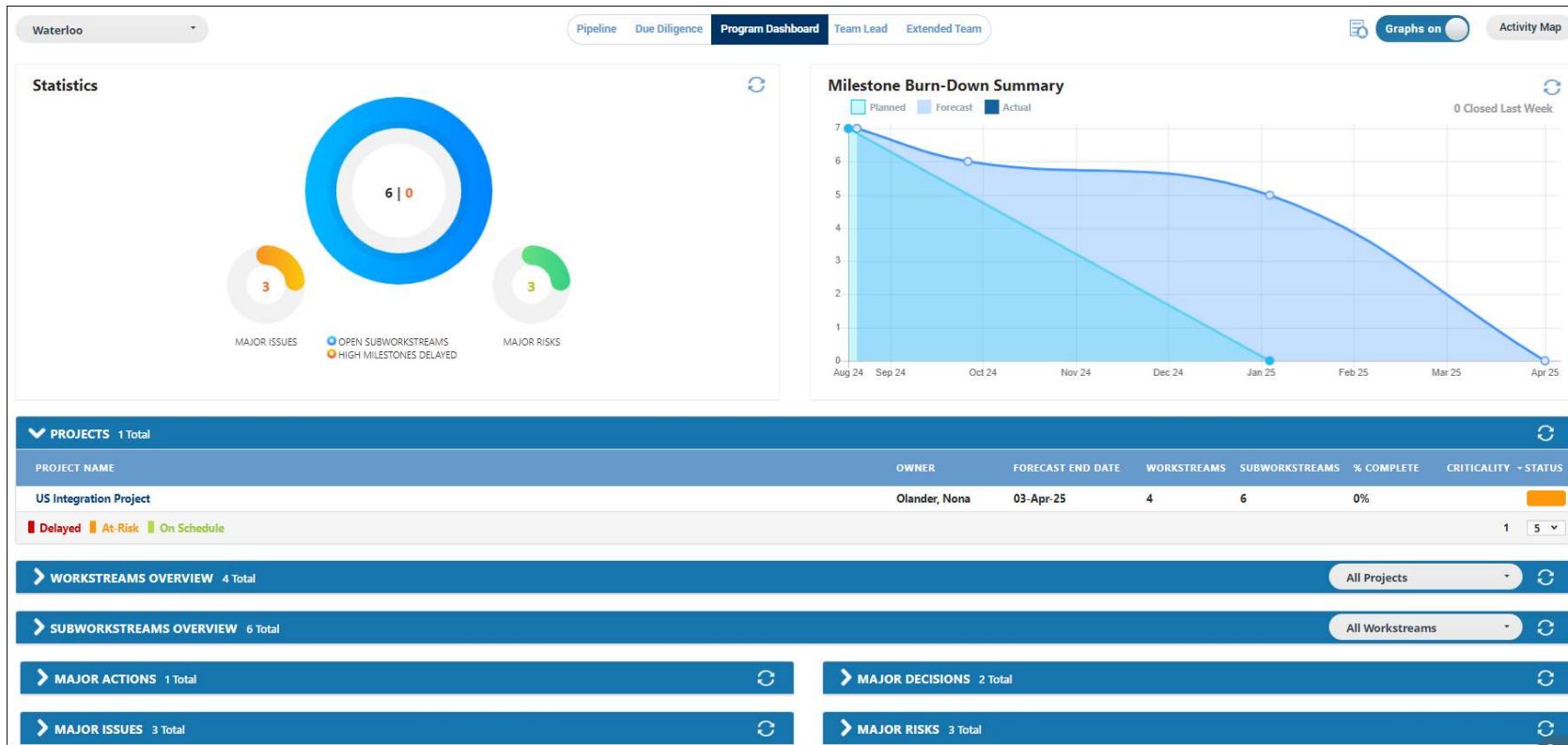
Pipeline **Due Diligence** Program Dashboard Team Lead Extended Team

TARGETS 3 Total FILTER ▾

←CODE NAME/ TARGET NAME	CURRENT PHASE	DEAL LEAD	DUE DILIGENCE DATE	STATUS	FINDINGS
CD <i>Circle & Desserts</i>	4. Diligence	Adams, Ansel	01-Sep-21	In Progress	9
Landscaping and More <i>001 LAM</i>	4. Diligence	Campaign, Cara		In Progress	0
YBR <i>Yellow Brick Road</i>	4. Diligence	Campaign, Cara		In Progress	0
					1

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.



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.

Pipeline
Due Diligence
Program Dashboard
Team Lead
Extended Team

▼ My Top 10 In Progress Activities 1 total: 1 0 0 0

Filter Configure

ACTION	NAME	RECENT NOTE	SCHEDULE	MILESTONE/TASK	SUBWORKSTREAM/MILESTONE	DEAL	FORECAST END DATE	DAYS TO COMPLETE
Finish	SubTask: Run Reports Log	Click to add note...	On Schedule	Review all Parts	Review Parts In Price Book	Program: Akin	24-Aug-23	14

▼ My Top 10 Activities Starting in Next 30 Days 7 total: 6 0 1 0

Filter Configure

ACTION	NAME	RECENT NOTE	SCHEDULE	MILESTONE/TASK	SUBWORKSTREAM/MILESTONE	DEAL	FORECAST START DATE	DAYS TO START
Start	SubTask: New SubTask	Click to add note...	Delayed	Finalize Teaser	Review Teaser	Target: Apples Unlimited	23-Jun-23	-48
Start	SubTask: SubTask 1	Click to add note...	On Schedule	CPA Task 5	Quotes	Program: Akin	25-Aug-23	15
Start	SubTask: SubTask 2	Click to add note...	On Schedule	CPA Task 5	Quotes	Program: Akin	29-Aug-23	19
Start	Task: CPQ Task 1	Click to add note...	On Schedule	Quotes	Contracts	Program: Akin	31-Aug-23	21
Start	Task: CPQ Task 3	Crawling at a snails pace.	On Schedule	Quotes	Contracts	Program: Akin	04-Sep-23	25
Start	Task: CPQ Task 2	Making strides.	On Schedule	Quotes	Contracts	Program: Akin	04-Sep-23	25
Start	Task: CPQ Task 4	Click to add note...	On Schedule	Quotes	Contracts	Program: Akin	04-Sep-23	25

▼ My Top 10 Open Issues 11 total: 0 0 0 0

Configure

NAME	ASSOCIATED ITEM	MAJOR	DATE ASSIGNED
September's Big Issue - Super Big	Program: Waterloo	■	26-Sep-22
Another September Big Issue	Program: Waterloo		27-Sep-22

▼ My Top 10 Open Risks 11 total: 0 0 0 0

Configure

NAME	ASSOCIATED ITEM	MAJOR	RESPONSE DUE
High-level infrastructure	Workstream: Finance	■	20-Jan-22
Fall's Big Risk #7	Program: Waterloo		26-Sep-22

Help

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.

Pipeline Due Diligence Program Dashboard Team Lead **Extended Team**

▼ My Top 10 In Progress Activities 1 total: 1 0 0 0

Filter Configure

ACTION	NAME	RECENT NOTE	SCHEDULE	MILESTONE/TASK	SUBWORKSTREAM/MILESTONE	DEAL	FORECAST END DATE	DAYS TO COMPLETE
Finish	SubTask: Run Reports Log	Click to add note...	On Schedule	Review all Parts	Review Parts In Price Book	Program: Akin	0 / 1	24-Aug-23

▼ My Top 10 Activities Starting in Next 30 Days 7 total: 6 0 1 0

Filter Configure

ACTION	NAME	RECENT NOTE	SCHEDULE	MILESTONE/TASK	SUBWORKSTREAM/MILESTONE	DEAL	FORECAST START DATE	DAYS TO START
Start	SubTask: New SubTask	Click to add note...	Delayed	Finalize Teaser	Review Teaser	Target Apples Unlimited		23-Jun-23
Start	SubTask: SubTask 1	Click to add note...	On Schedule	CPA Task 5	Quotes	Program: Akin	1 / 0	25-Aug-23
Start	SubTask: SubTask 2	Click to add note...	On Schedule	CPA Task 5	Quotes	Program: Akin		29-Aug-23
Start	Task: CPQ Task 1	Click to add note...	On Schedule	Quotes	Contracts	Program: Akin		31-Aug-23
Start	Task: CPQ Task 3	Crawling at a snails pace.	On Schedule	Quotes	Contracts	Program: Akin		04-Sep-23
Start	Task: CPQ Task 2	Making strides.	On Schedule	Quotes	Contracts	Program: Akin		04-Sep-23
Start	Task: CPQ Task 4	Click to add note...	On Schedule	Quotes	Contracts	Program: Akin		04-Sep-23

▶ My Top 10 Open Issues 11 total: 0 0 0 0

▶ My Top 10 Open Risks 11 total: 0 0 0 0

▼ My Top 10 Team In Progress Activities 2 total: 2 0 0 0

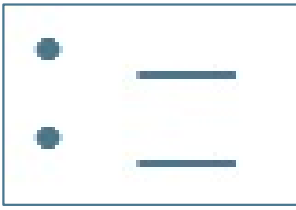
Filter Configure

NAME	RECENT NOTE	SCHEDULE	MILESTONE/TASK	SUBWORKSTREAM/MILESTONE	DEAL	OWNER	FORECAST END DATE	DAYS TO COMPLETE
SubTask: Send follow-up communications to delinquent parties. Send follow-up communications to delinquent parties	Click to add note...	On Schedule	Review Payments Report	Review all Past Due Payments	Program: Waterloo	Stubs Irene	0 / 1	14-Sep-24
SubTask: Final Review Send follow-up communications to delinquent parties Send follow-up communications to delinquent parties	Click to add note...	On Schedule	Review Payments Report	Review all Past Due Payments	Program: Waterloo	Stubs Irene	1 / 0	27-Sep-24

▼ My Top 10 Team Activities Starting in Next 30 Days 1 total: 0 1 0 0

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.

The screenshot displays the Devensoft platform interface. In the top right corner, the 'Email Team' button is highlighted with a red box. Below it, a table lists documents with columns for 'TYPE', 'NAME', and 'ASSOCIATED ITEM'. A modal window titled 'EMAIL TEAM' is open, showing a dropdown for 'Program: Waterloo' and a checkbox for 'Display Non-Users and Users:'. Below this is a table of users:

FULL NAME	ORGANIZATION	USER/NON-USER	EMAIL
Peronzi, Nick	GP Technology Services	User	nperonzi@younameit.com
Read, Ryan	R&R Resources	User	rread@younameit.com

The email composition window below shows the 'To' field populated with 'Nina Di Lorenzo', the subject as 'Program - Waterloo', and the body text: 'Hi Sarah, In preparation for tomorrow's meeting, please review the documents listed in the below link. Thanks. https://nina-emt-demo.devensoft.com:443/ProgramFolders.ashx?DealRef=DealRef_3488'.

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.

Activity Map 1 Projects: 1 0 0 0 | 3 Workstreams: 3 0 0 0 | 5 SubWorkstreams: 5 0 0 0 | 4 Milestones: 4 0 0 0 | 13 Tasks: 13 0 0 0 | 1 SubTasks: 1 0 0 0

Activity Map | Financials | Projects | Workstreams | SubWorkstreams | Milestones | Tasks | SubTasks | Risks | Actions | Issues | Decisions | Assumptions | Notes | Stream | Documents | Summary | Team | Reports | Settings

Full Screen | Expand All | Collapse All | Export to PDF | Show Columns

WBS	NAME	RECENT NOTE	FORECAST START	FORECAST END	ACTUAL START	ACTUAL END	%	FUNCTIONAL TEAM	OWNER
1	Animals Galore		18-Aug-23	04-Mar-24	200		0%		
1.1	Devensoft Integration		18-Aug-23	04-Mar-24	200	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1	Information Technology		18-Aug-23	25-Dec-23	130	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1.1	Fiber Optics		18-Aug-23	25-Dec-23	130	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1.1.1	Procure FO		18-Aug-23	25-Dec-23	130	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1.1.1.1	Review FO Companies		18-Aug-23	27-Aug-23	10		0%	Corporate Security	Nick Peronzi
1.1.1.1.1.2	Short-list Top 5		18-Aug-23	06-Sep-23	20	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1.1.1.2.1	Run Report for Directors		18-Aug-23	06-Sep-23	20	18-Aug-23	0%	Corporate Security	Nick Peronzi
1.1.1.1.1.3	Select #1 Choice		26-Nov-23	25-Dec-23	30		0%	Corporate Security	Nick Peronzi
1.1.1.1.2	Install FO		18-Aug-23	24-Aug-23	7		0%	Corporate Security	Nick Peronzi
1.1.1.2.1	Scope Out Space		18-Aug-23	24-Aug-23	7		0%	IT	Nina Di Lorenzo
1.1.1.2.2	Meet w/ Director of Ops.		18-Aug-23	24-Aug-23	7		0%	IT	Nina Di Lorenzo
1.1.1.2.3	Select Installation Date		18-Aug-23	24-Aug-23	7		0%	IT	Nina Di Lorenzo
1.2	Human Resources		18-Aug-23	04-Mar-24	200		0%	Operations	Polly Potter
1.2.1	Benefits		18-Aug-23	04-Mar-24	200		0%	Operations	Polly Potter
1.2.1.1	Review Medical Benefits		18-Aug-23	04-Mar-24	200		0%	Operations	Polly Potter
1.2.1.1.1	Medical Coverage		18-Aug-23	25-Nov-23	100		0%	Operations	Polly Potter
1.2.1.1.2	Vision Insurance		18-Aug-23	04-Mar-24	200		0%	Operations	Polly Potter

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

c. The Email Team window opens.

- Confirm the name of the **Program**.
- Select the checkbox to display **Non-Users** and **Users**.
- Select the **names** of the recipients.
- Press **Send**.

SubTask Detail

Name: Meet w/ the Director of Ops.

Description: Task: Short-list Top 5

Program: Animals Galore

WBS Number: 1.1.1.1.2.2

Planned Start Date: 18-Aug-23

Planned End Date: 06-Sep-23

Timeframe: N/A

Tags

Recent Note:

Responsible: (Not Set)

Owner: Di Lorenzo, Nina

Functional Team: IT

Lock Forecast Dates: []

% Complete: 0%

Rec: (Not Set)

Rate: (Not Set)

EMAIL TEAM

Program: Animals Galore

Display Non-Users and Users: []

FULL NAME	ORGANIZATION	USER/NON-USER	EMAIL	
<input type="checkbox"/>	Peronzi, Nick	GP Technology Services	User	nperonzi@younameit.com
<input type="checkbox"/>	Read, Ryan	R&R Resources	User	rread@younameit.com

HR

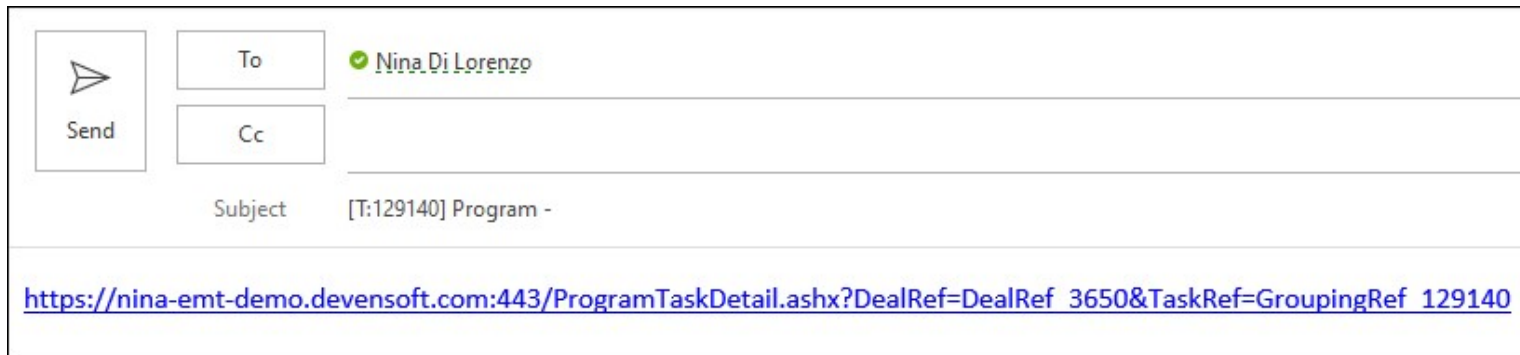
FULL NAME	ORGANIZATION	USER/NON-USER	EMAIL	
<input type="checkbox"/>	Walters, Barbara		User	bwalters2020@younameit.com

IT

CANCEL SEND

Sending an Email (cont'd)

- d. The sender's email opens, allowing additional text to be added.
- e. When done press **Send**.



The screenshot shows an email composition interface. On the left, there is a 'Send' button with a paper plane icon. To its right are input fields for 'To' and 'Cc'. The 'To' field contains the name 'Nina Di Lorenzo' with a green checkmark icon to its left. Below the 'To' and 'Cc' fields is a 'Subject' field containing the text '[T:129140] Program -'. At the bottom of the form, there is a blue hyperlink: https://nina-emt-demo.devensoft.com:443/ProgramTaskDetail.ashx?DealRef=DealRef_3650&TaskRef=GroupingRef_129140

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

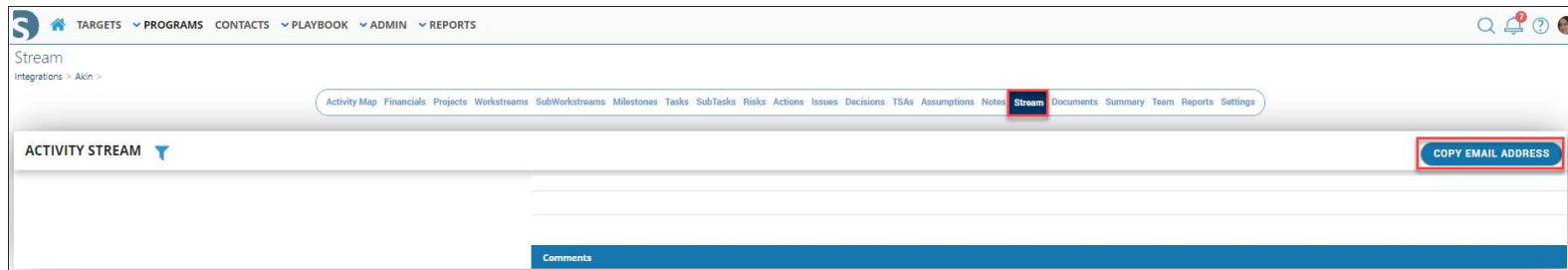
STREAM

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

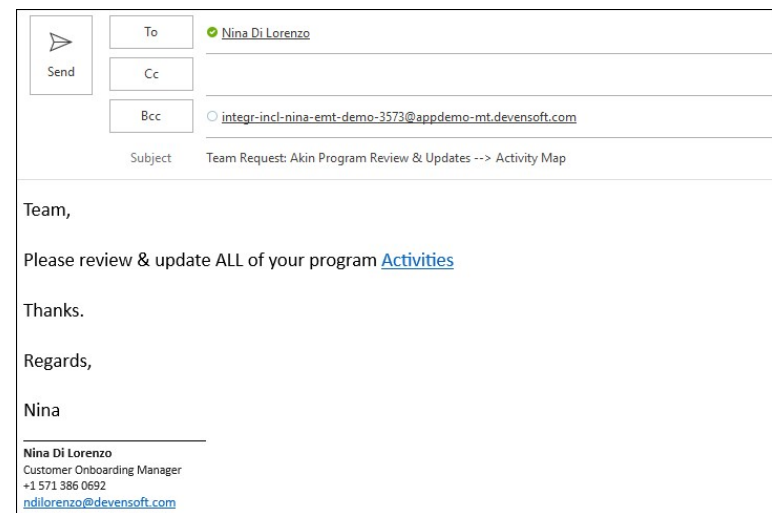
The screenshot displays the 'Stream' interface within a CRM tool. At the top, there is a navigation bar with tabs for 'Summary', 'Activity Map', 'Due Diligence', 'Findings', 'Financials', 'Risks', 'Issues', 'Decisions', 'Notes', 'Stream' (highlighted), 'Documents', 'Score Ranking', 'Team', 'Reports', and 'Settings'. Below the navigation bar, the 'ACTIVITY STREAM' section is visible, listing several activities with status indicators (green, red, blue). The main content area shows an email preview from 'kdelgado-bjornell@devensoft.com' to 'ndilorenzo@devensoft.com' dated 'Tue, Aug 8, 2023 at 10:53'. The email body contains the text: 'Hi Kyle, Please review the attached file & reply back. Thanks, Nina'. A red box highlights a 'COPY EMAIL ADDRESS' button and a text field containing 'target-incl-nina-emt-demo-1114@a...'. Below the email preview, there is a 'Copy Attachments' button and a 'Comments' section.

Sending a Stream

- a. Open a **Target** or **Program**.
- b. Navigate to the **Stream** tab.
- c. Click on the **Copy Email Address**.

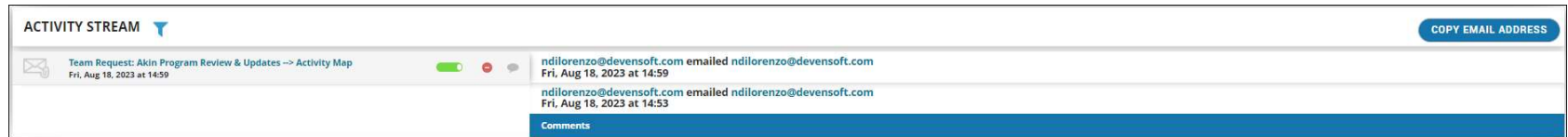


- d. Open your Email client and paste the address into the bcc field.
- e. Complete the rest of the message and send.

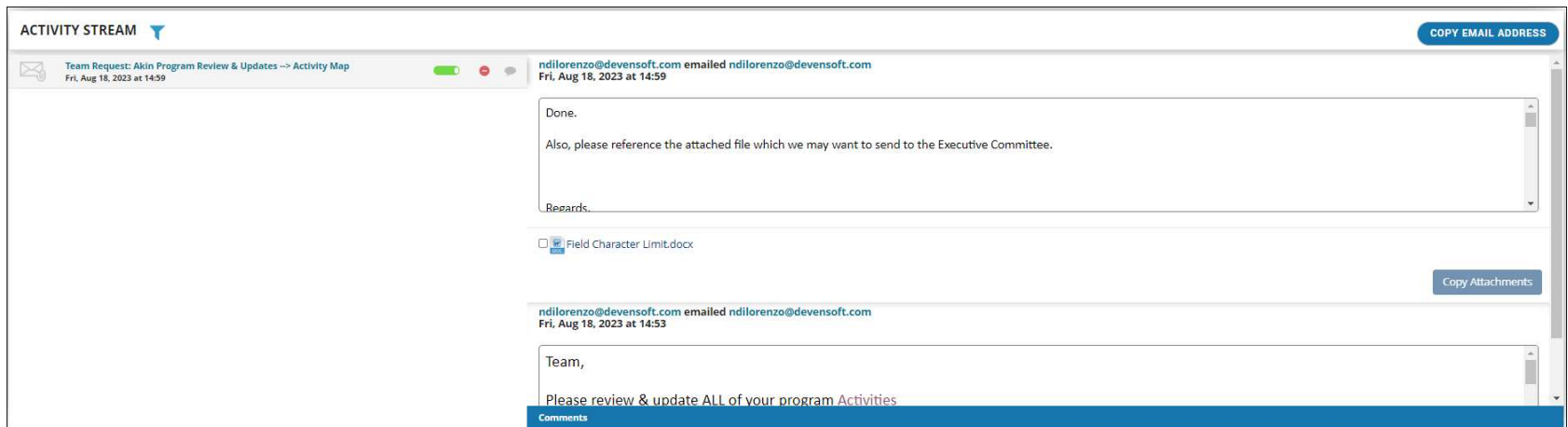


Sending a Stream (cont'd)

- 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.



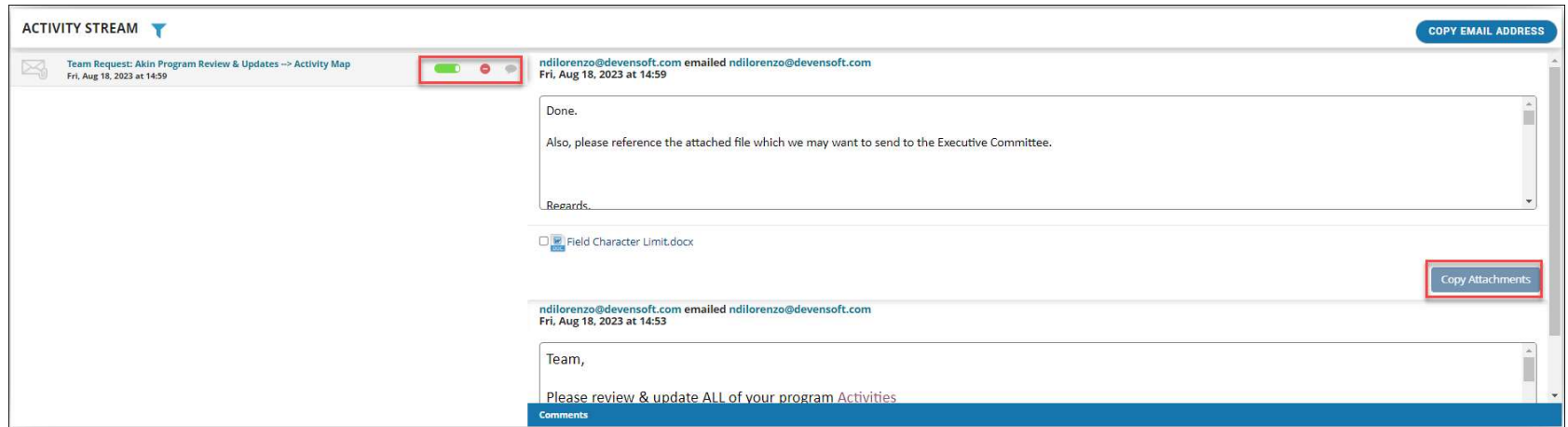
Screen Capture #1: Activity Stream in Collapsed Mode



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.

REQUEST UPDATES (Programs)

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

Program

↶

Completed Updates Saved to Activity Map

↷

Send Request Updates

Email

Request Update Details

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

The following activities under Animals Galore have been sent for an update by Nina Di Lorenzo

[Click here to update below Activities](#)

Name	Workstream	Actual Start Date	Actual End Date	Progress
Scope Out Space	Information Technology			0%
Meet w/ Director of Ops.	Information Technology			0%
Select Installation Date	Information Technology			0%

↷

Update Window

Request update

Animals Galore

Activity Name

Task - Scope Out Space

Milestone - Install FO

Forecast Start date: 18-Aug-23

Forecast End date: 24-Aug-23

Actual Start date

Actual End date

% Complete

0%

New Note

Recent Note

Last Update

0 minutes ago

Last Updated By

nina/Nina Di Lorenzo

1 of 3 Next

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.

The screenshot shows the 'Activity Map' interface with a 'Request Update' dialog box open. The dialog box asks 'Please select who should receive this request?' with radio buttons for 'Owner' (selected) and 'Responsible'. It also asks 'Do you wish to be notified when an update is submitted?' with radio buttons for 'Yes' (selected) and 'No'. Below the dialog box, a table of activities is visible, with a red box highlighting a row for 'Test 2' and a red arrow pointing to it with the text 'Updates are reflected here.'.

The screenshot shows a 'REQUEST UPDATE' confirmation window with the text: '3 activities have been sent for an update. If all have not been sent, please correct any below issues and try "Request Update" again.' Below the text is a table with columns 'Activity' and 'Status'.

Activity	Status
SubTask 1	Sent
SubTask 2	Sent
Test 2	Sent

The screenshot shows an email titled 'Request Update Details' from 'Devensoft App <devensoft-app@devensoft.com>' to 'Nina Di Lorenzo'. The email body contains the following text: 'The following activities under Akin have been sent for an update by Nina Di Lorenzo' and a link 'Click here to update below Activities'. Below the text is a table with columns 'Name', 'Workstream', 'Actual Start Date', 'Actual End Date', and 'Progress'.

Name	Workstream	Actual Start Date	Actual End Date	Progress
SubTask 1	General Procurement	07-Sep-23		0%
SubTask 2	General Procurement	11-Sep-23		0%
Test 2	General Procurement	11-Sep-23	11-Sep-23	100%

4

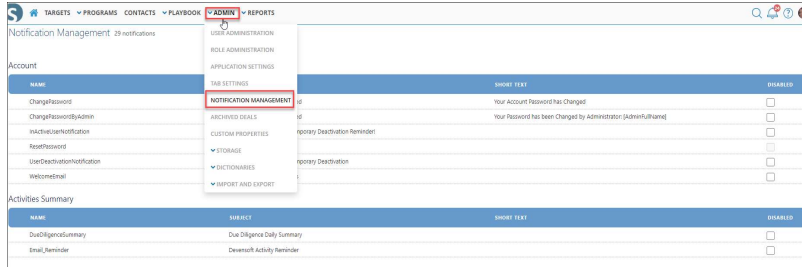
AUTOMATED COMMUNICATIONS



AUTOMATED NOTIFICATION PROCESS

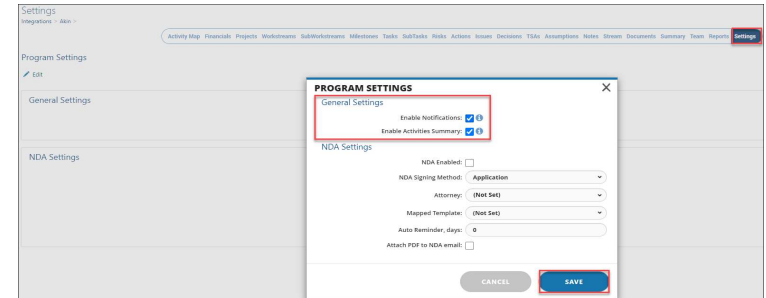
1

Admin/Notification Management

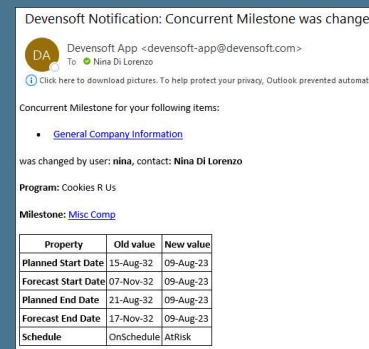
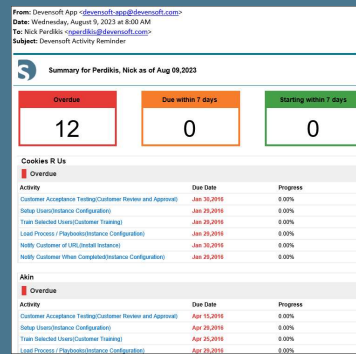


2

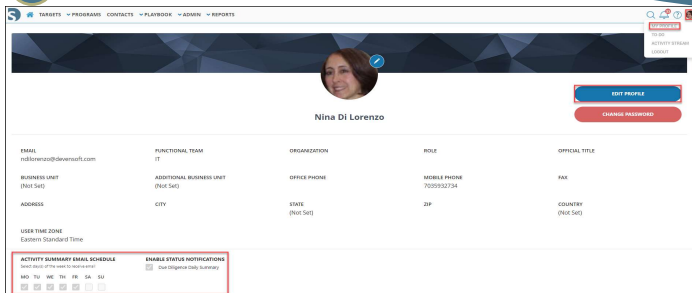
Program Settings



Emails

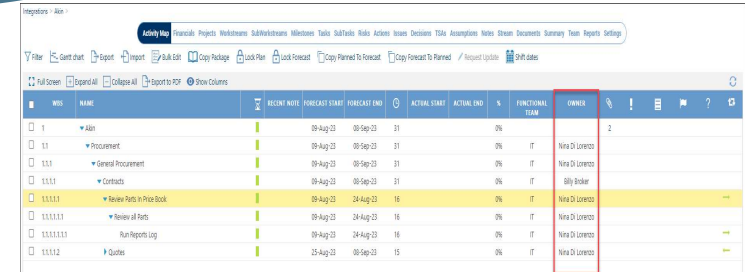


4



User Profile

3



Assigning Owners in Activity Map



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

Notification Management 29 notifications

Account

NAME	SHORT TEXT	DISABLED
ChangePassword	Your Account Password has Changed	<input type="checkbox"/>
ChangePasswordByAdmin	Your Password has been Changed by Administrator: [AdminFullName]	<input type="checkbox"/>
InActiveUserNotification	Deactivation Reminder!	<input type="checkbox"/>
ResetPassword		<input type="checkbox"/>
UserDeactivationNotification	Deactivation	<input type="checkbox"/>
WelcomeEmail		<input type="checkbox"/>

Activities Summary

NAME	SUBJECT	SHORT TEXT	DISABLED
DueDiligenceSummary	Due Diligence Daily Summary		<input type="checkbox"/>
Email_Reminder	Devensoft Activity Reminder		<input type="checkbox"/>

Audit

NAME	SUBJECT	SHORT TEXT	DISABLED
Audit_Added_ToDoComment	Devensoft Notification: [ModifiedByFullName] commented on To-Do "[ToDoName]"	[ModifiedByFullName] commented on To-Do: "[ToDoName]"	<input type="checkbox"/>
Audit_DependencyUpdated_Concurrent_All	Devensoft Notification: Concurrent [ItemType] was changed	[ModifiedByFullName] Updated Concurrent [ItemType] "[ItemDescription]"	<input type="checkbox"/>
Audit_OwnerAssigned_Risk.Action.Issue.Decision	Devensoft Notification: [ItemType] was assigned to you	[ModifiedByFullName] Assigned [ItemType] "[ItemDescription]" to You	<input type="checkbox"/>
Audit_OwnerAssigned_SubWorkstream.Milestone.Task.SubTask	Devensoft Notification: [ItemType] was assigned to you	[ModifiedByFullName] Assigned [ItemType] "[ItemDescription]" to You	<input type="checkbox"/>
Audit_OwnerAssigned_ToDo	Devensoft Notification: [ModifiedByFullName] assigned To-Do "[ToDoName]" to you	[ModifiedByFullName] Assigned To-Do: "[ToDoName]" to You	<input type="checkbox"/>



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

The screenshot displays the 'Settings' page for 'Integrations > Akin >'. A navigation bar at the top contains various menu items, with 'Settings' highlighted and marked with a red '1'. On the left, under 'Program Settings', an 'Edit' button is marked with a red '2'. A modal dialog titled 'PROGRAM SETTINGS' is open, with a red '3' above its title bar. The dialog is divided into two sections: 'General Settings' and 'NDA Settings'. The 'General Settings' section includes 'Enable Notifications' and 'Enable Activities Summary', both checked and marked with a red '3'. The 'NDA Settings' section includes 'NDA Enabled' (unchecked), 'NDA Signing Method' (Application), 'Attorney' (Not Set), 'Mapped Template' (Not Set), 'Auto Reminder, days' (0), and 'Attach PDF to NDA email' (unchecked). At the bottom of the dialog, a 'SAVE' button is highlighted with a red '4' and a red box, while the 'CANCEL' button is greyed out.

Settings
Integrations > Akin >

Activity Map Financials Projects Workstreams SubWorkstreams Milestones Tasks SubTasks Risks Actions Issues Decisions TSAs Assumptions Notes Stream Documents Summary Team Reports **Settings**

Program Settings

Edit

General Settings

NDA Settings

PROGRAM SETTINGS

General Settings

Enable Notifications: **3**

Enable Activities Summary: **3**

NDA Settings

NDA Enabled:

NDA Signing Method: Application

Attorney: (Not Set)

Mapped Template: (Not Set)

Auto Reminder, days: 0

Attach PDF to NDA email:

CANCEL **SAVE**



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

Activity Map | 1 Projects: 1 0 0 0 | 1 Workstreams: 1 0 0 0 | 1 SubWorkstreams: 1 0 0 0 | 2 Milestones: 2 0 0 0 | 7 Tasks: 7 0 0 0 | 4 SubTasks: 4 0 0 0

Integrations > Akin

Activity Map | Financials | Projects | Workstreams | SubWorkstreams | Milestones | Tasks | SubTasks | Risks | Actions | Issues | Decisions | TSAs | Assumptions | Notes | Stream | Documents | Summary | Team | Reports | Settings

Filter | Gantt chart | Export | Import | Bulk Edit | Copy Package | Lock Plan | Lock Forecast | Copy Planned To Forecast | Copy Forecast To Planned | Request Update | Shift dates

Full Screen | Expand All | Collapse All | Export to PDF | Show Columns

WBS	NAME	RECENT NOTE	FORECAST START	FORECAST END	ACTUAL START	ACTUAL END	%	FUNCTIONAL TEAM	OWNER	
1	Akin		11-Aug-23	08-Sep-23	29		13%			2
1.1	Procurement		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Nina Di Lorenzo	
1.1.1	General Procurement		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Nina Di Lorenzo	
1.1.1.1	Contracts		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Billy Broker	
1.1.1.1.1	Review Parts In Price Book		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Nina Di Lorenzo	→
1.1.1.1.1.1	Review all Parts		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Nina Di Lorenzo	
1.1.1.1.1.1.1	Run Reports Log		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Irene Stu...	→
1.1.1.1.2	Quotes		25-Aug-23	08-Sep-23	15		0%	IT	Nina Di Lorenzo	←

SubTask: Run Reports Log

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.

Activity Map 1 Projects: 1 0 0 0 | 1 Workstreams: 1 0 0 0 | 1 SubWorkstreams: 1 0 0 0 | 2 Milestones: 2 0 0 0 | 7 Tasks: 7 0 0 0 | 4 SubTasks: 4 0 0 0

Integrations > Akin >

Activity Map Financials Projects Workstreams SubWorkstreams Milestones Tasks SubTasks Risks Actions Issues Decisions TSAs Assumptions Notes Stream Documents Summary Team Reports Settings

Filter Gantt chart Export Import Bulk Edit Copy Package Lock Plan Lock Forecast Copy Planned To Forecast Copy Forecast To Planned Request Update Shift dates

Full Screen Expand All Collapse All Export to PDF Show Columns

WBS	NAME	RECENT NOTE	FORECAST START	FORECAST END	ACTUAL START	ACTUAL END	%	FUNCTIONAL TEAM	OWNER	
1	Akin		11-Aug-23	08-Sep-23	29		13%			2
1.1	Procurement		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Nina Di Lorenzo	
1.1.1	General Procurement		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Nina Di Lorenzo	
1.1.1.1	Contracts		11-Aug-23	08-Sep-23	29	10-Aug-23	13%	IT	Billy Broker	
1.1.1.1.1	Review Parts In Price Book		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Nina Di Lorenzo	→
1.1.1.1.1.1	Review all Parts		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Nina Di Lorenzo	
1.1.1.1.1.1.1	Run Reports Log		11-Aug-23	24-Aug-23	14	10-Aug-23	60%	IT	Irene Stubs	→
1.1.1.1.2	Quotes		11-Aug-23	08-Sep-23	15		0%	IT	Nina Di Lorenzo	→

Go to subtask detail page

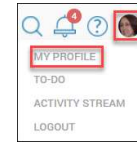
ADD TO CALENDAR

The screenshot shows a task detail page for 'Review all Parts' with a navigation bar at the top containing 'Activity Map', 'Financials', 'Projects', 'Workstreams', 'SubWorkstreams', 'Milestones', 'Tasks', 'SubTasks', 'Risks', 'Actions', 'Issues', 'Decisions', 'TSAs', 'Assumptions', 'Notes', 'Stream', 'Documents', 'Summary', 'Team', 'Reports', and 'Settings'. The 'Tasks' tab is active. On the left, a 'Task Detail' tab is highlighted. Below the navigation bar are buttons for 'Finish', 'Edit', and 'Delete'. The task information includes: Name: Review all Parts, Description: (empty), Milestone: Review Parts In Price Book, Program: Akin, Responsible: (Not Set), WBS Number: 1.1.1.1.1.1, Owner: Di Lorenzo, Nina, and Functional Team: (Not Set). A red box highlights the 'Add to calendar' button in the top right. A red arrow points from this button to a dialog box titled 'ADD TO' which lists 'Outlook', 'Google', and 'iCal'. Another red arrow points from the 'Add to calendar' button to the 'Event' window. The 'Event' window has a title bar 'Review all Parts - Event' and a search bar. The ribbon includes 'File', 'Event', 'Scheduling Assistant', 'Insert', 'Format Text', 'Review', and 'Help'. The 'Event' ribbon has buttons for 'Delete', 'Teams Meeting', 'Invite Attendees', 'Options', 'Tags', 'Dictate', 'Sensitivity', 'Immersive Reader', 'New Scheduling Poll', 'Meeting Notes', 'Zoom', 'Viva Insights', 'Attach from Box', and 'View Templates'. The 'Event' window shows: Title: Review all Parts, Start time: Fri 8/11/2023 12:00 AM, End time: Thu 8/24/2023 12:00 AM, Location: (empty), and options for 'All day' (checked) and 'Time zones'. The background task detail page also shows 'Custom Properties', 'Audit', and 'SubTasks' (1 total, 1 On Schedule).

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.





Nina Di Lorenzo

3 [EDIT PROFILE](#)

[CHANGE PASSWORD](#)

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
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ENABLE STATUS NOTIFICATIONS

Due Diligence Daily Summary

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

S 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 prevented automatic download of some pictures in this message.

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 download of some pictures in this message.

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 download of some pictures in this message.

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

More Information

Contact us today or visit
our website to learn
more!

Devensoft.com

support@devensoft.com

1-855-DEVENSOF
(US Toll Free)



DEVENSOF
Powering Your Strategic Growth