

Browser

https://www.navatargroup.com/DealRoom/MyDashboard

Navatar Deal Room

Home

Profiles

Logout

Alerts

Recent Documents

Note: Recent Documents Tab will be available only for Target Contact.

Recent Documents

▼ Filter

Show Documents Uploaded Within Past: 30 Days

☐ Only Show Unread Items

Apply

Date Ranges:
Today
Last 7 Days
Last 30 Days
Last 60 Days
Last 90 Days
Year To Date

Contents

Search from below documents

Document Name	Deal Room Name	Uploaded By	Firm	Uploaded On ▼
Alliance Partners NDA.pdf	Vertica Systems - 2015	John Anderson	Tequity	01/18/2015
Signed Capital Investors NDA.pdf	Project Alpha	Mark Trump	Capital Investors	01/08/2015

Note: Documents uploaded by the Target contact would not show in this list.

Records: 1999+ [Show All](#)

For Deal Room 1.3:

Action on Target Side:

- a) Whenever Target user will view document from Activity Alerts.
- b) Whenever Target User will view document from Recent Documents.
- c) Whenever Target user will view the Deal Room by switching to Deal Room from the view.

Update Date on CRM Side:

- Last login date field will get updated on CRM side based on access done on Target Side:
- a) Contact Access Popup (Last Login Date column).
 - b) Manage Email (Last Login Date column).
 - c) Recent Logins Report (Report link in Deal Room Statistics).
 - d) Recent Logins Popup (on contact workspace).

Firm Information - Tequity

Last Updated: 08/10/2012



Firm Contact: Mark Adamson
Phone: (555) 555-1111
E-mail: Mark.Adamson@Tequity.com
Website: www.TequityInc.com

Description:
Tequity – M&A Advisors to Software & Tech Companies
Tequity provides Merger & Acquisition services exclusively to high-tech companies in the Software, Telecom, Internet, Hardware, and Information Technology services market. M&A for software and tech companies is all we do.

Why Software & Technology Companies Choose Tequity:
With many years' experience as executives, consultants, and owners of software and telecom companies, Kevin Tribe and his team assist CEO's and shareholders with divestitures, acquisitions, valuations, and exit strategies. We are ... [Show More ...](#)

Browser

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Firm Logo

Vertivca Systems - 2015 (Tequity)

Profiles Logout

Alerts

Deal Room

Recent Documents

Deal Room: Vertivca Systems - 2015 (Tequity) (3 Unread Alerts)

If External Admin, Unread Alerts identifier would not show.

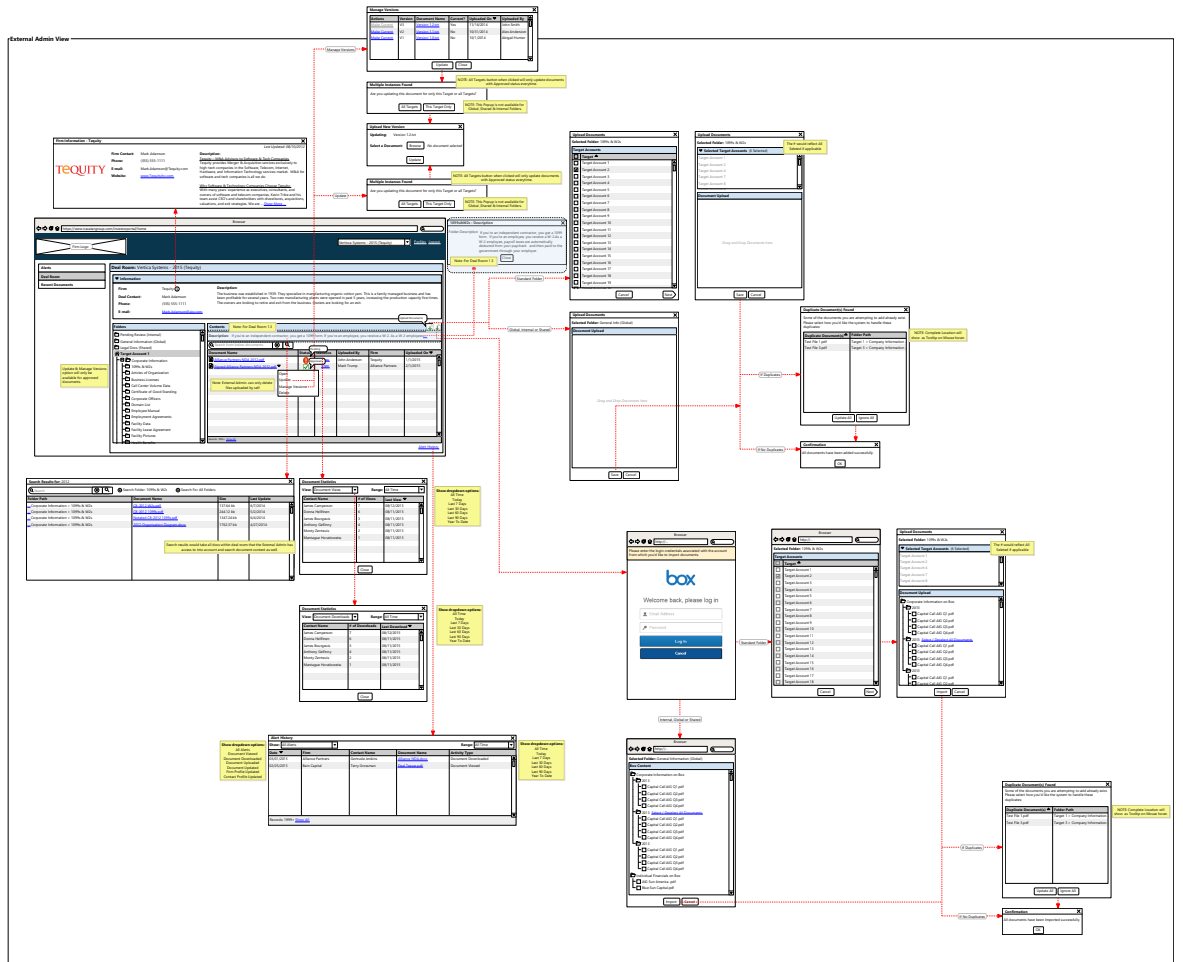
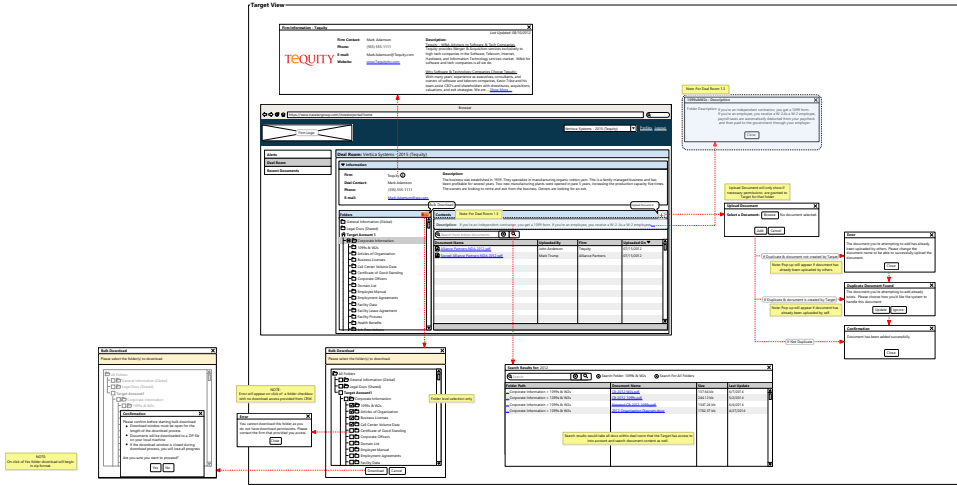
Activity Alerts

☒ Only Show Unread

Mark as Read	Date ▼	Firm	Contact Name	Document Name	Activity Type
<input type="checkbox"/>	01/22/2015	Tequity	Mark Trump	Vertivca 2015 NDA.pdf	Document Viewed

Note: If External Admin, they would not see the Mark as Read column or the Only Show Unread checkbox.

Records: 1999+ [Show All](#)





Vertica Systems - 2015 (Tequity)

Profiles

Logout

- Alerts
- Deal Room
- Recent Documents

Note: Recent Documents Tab will be available only for Target Contact.

Recent Documents: Vertica Systems - 2015 (Tequity)

▼ Filter

Show Documents Uploaded Within Past: 30 Days

☐ Only Show Unread Items

Apply

Date Ranges:

Today

Last 7 Days

Last 30 Days

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Year To Date

Contents

Q Search from below documents

Q X

Document Name	Deal Room Name	Uploaded By	Firm	Uploaded On ▼
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Signed Capital Investors NDA.pdf	Project Alpha	Mark Trump	Capital Investors	01/08/2015
<div>Note: Documents uploaded by the Target contact would not show in this list.</div>				

Records: 1999+ [Show All](#)

Browser

https://www.navatargroup.com/DealRoom/MyDashboard

Navatar Deal Room

Profiles Logout

My Profile

My Firm's Profile

Basic Information

Name: John Anderson

Phone: 555-555-1234

Title: Vice President

LinkedIn: [www.linkedin.com/alliance](#)

E-mail: [Info@alliance.com](#)

Address: 24 M&A Way
Building 2, Floor 4
Madison, WI 25871

Login Information

Username: JohnAnderson@alliance.com

Password: *****

Notification Preferences

How should you be notified of new activity?

☒ Daily Digest Email

☐ No Email

NOTE: Daily Digest email template will be different for both Target & External Admin.

Target:

Activity alert from all Deal rooms (which Target has access) will be sent as one Daily Digest email to Target contact.

External Admin:

Activity alert from each Deal room (which External Admin. has access) will be sent as a separate Daily Digest email to External Admin. contact.

Browser

https://www.navatargroup.com/DealRoom/MyDashboard

Navatar Deal Room

Profiles Logout

My Profile

My Firm's Profile

Basic Info

To change your email address, please contact the M&A firm that invited you to Navatar Deal Room

First Name:

Title:

E-mail: Info@AIG.com

Mailing Street: 24 AIG Way
Building 2, Floor 4

Mailing City: Madison

Mailing State/Province: WI

Mailing ZIP/Postal Code: 25871

Mailing Country: USA

Last Name: Anderson

Phone: 555-555-1234

LinkedIn: www.linkedin.com/aig

Login Information

Username: JohnAnderson@aig.com

Password: [Change Password](#)

Notification Preferences

How should you be notified of new activity?

☒ Daily Digest Email

☐ No Email

Save

Cancel

Change Password

Old Password:

New Password:

Confirm Password:

Save

Cancel

First and Last Name required

Confirmation

110 contacts will not be included in email distribution list and not receive emails as they have either opted out of receiving emails or don't have a valid email address.

Are you sure you want to proceed?

Yes

No

Contacts

Contacts

Tom Cruise

Mark Trump

Jennifer Lopez

Michael Douglas

Maria Jennison

Yen Valdez

Tana Johnstorn

Norman Golden

Sigourney Blankenship

Wylie Morgan

Close

Browser

https://www.navatargroup.com/DealRoom/MyDashboard

Navatar Deal Room

Profiles Logout

My Profile

My Firm's Profile

Basic Information

Firm Name:

Alliance Partners

Firm Type:

Private Equity

Website:

<http://www.Tequity.com>

Address:

24 Alliance Way

Building 4, Floor 2

Madison, WI 25781

Description:

Our Mission

Alliance Partners is a leading asset management and advisory firm focused on helping financial institutions optimize their asset strategies and build profitable and balanced loan and investment portfolios.

Our Capabilities

Alliance Partners was formed by a team of professionals with considerable experience designing successful asset strategies, advising financial institutions of all sizes, navigating complex regulatory environments, and building and managing large scale lending and investment operations. Alliance Partners also benefits from the support of key investors and strategic partners including Blackrock, Inc., the world's largest asset management firm, and BlueMountain Capital, an asset manager focused on the credit and equity derivatives markets.

Browser

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Navatar Deal Room

Home Profiles Logout

My Profile

My Firm's Profile

Basic Information

Firm Name:

Alliance Partners

Firm Type:

Private Equity

Website:

www.Alliance.com

Mailing Street:

24 AIG Way

Building 2, Floor 4

Mailing City:

Madison

Mailing State/Province:

WI

Mailing ZIP/Postal Code:

25871

Mailing Country:

USA

Description:

Our Mission

Alliance Partners is a leading asset management and advisory firm focused on helping financial institutions optimize their asset strategies and build profitable and balanced loan and investment portfolios.

Our Capabilities

Alliance Partners was formed by a team of professionals with considerable experience designing successful asset strategies, advising financial institutions of all sizes, navigating complex regulatory environments, and building and managing large scale lending and investment operations. Alliance Partners also benefits from the support of key investors and strategic partners including Blackrock, Inc., the world's largest asset management firm, and

Firm Type will be a picklist and reflect the M&A CRM options for this field.

Save

Cancel

Registration Sign In?

Personal Information

First Name:

Last Name:

Nick Name:

E-mail (Username):

Account Information

Firm Name:

Password: (Use at least 8 character)

Confirm Password:

Sign up

Cancel

Alerts

Recent Documents

- Deal Room: [Infosys](#) (3 Unread Alerts) tequity12
- Deal Room: [Majesco](#) (0 Unread Alerts) tequity12
- Deal Room: [Mastek](#) (0 Unread Alerts) tequity12
- Deal Room: [Newtech Inc111](#) (1998 Unread Alerts) tequity12