DealWIP Updated Scope for Patrick

DealWIP is a Legal matter management platform for legal transactions, allowing a more efficient and transparent process for the clients, their counsel, and other parties involved in the deal. The traditional processes underlying legal transactions are unnecessarily inefficient and opaque.

The build out of the initial version of DealWIP will focus on creating a main platform focusing on three principles - communication, deal management, and external coordination.

DealWIP Overview

Login/Signup

a. Overarching Firm Master Account
   i. Each firm has a master account that controls the status of each associate and the internal firm details.
      1. Dealwip is based off team based permissions. All associates inside a firm have the same "permissions" - they can all do the exact same things.
      2. Within a deal each team can only see your own teams internal deal information. An example is in the drafting room, you can only see your own team's internal versions of a document. Once that document is published however it is visible to all teams on a particular deal.
   ii. The Firm account will invite the firm associate accounts who, in turn, can invite more.
   iii. The Firm account now also serves as the name of teams being added in Add a Deal and should have access to every deal the firm is added on (this allows easy access if an associate goes haywire)
   iv. T*he firm account won't be able to perform any actions but adding and removing associates from deals (and eventually in version 1.1 payment).*
b. Associate Accounts (Users)
   i. Associate Accounts will add their personal information and be added to the firm. This is a referential add as associates can change firms anytime. They are, however, ONLY able to join one firm at a time and their access to deals can be revoked by the firm or other associate accounts.
      1. Associates can also connect their linkedIn and some information - whatever is available - will be automatically populated.

Inviting Other Associates

a. New associates can be added by email. An email will be automatically generated and sent to the new user to create an account and join the matter.

b. If associate already has an existing account, the invitation to the matter will be sent via email and via the platform as a notification.
   i. If the associate is a part of a different firm from the one that is inviting them, they will either have to create a different account or their firm reference will be replaced by the new firm and they should lose access to any deals they had previously.
   ii. From the notification (top right) they will be able to see they have been added to a matter.

Deals

Creating a Matter

https://zpl.io/2EPv6nb (main screen)
https://zpl.io/25emdxe (example of creating a new firm)
https://zpl.io/V1e4YkB (example of adding a team)
https://zpl.io/a8yqxGK (blank case)

a. Matters are the main meat and potatoes of the dealWIP platform. Creating a new matter is akin to creating a new slack channel, you are creating a new sub platform to run through the entire matter lifecycle.
b. Much of the Add a Deal was changed to simplify the deal process.
   i. Matter Name, Type, Admin, and Practice Area are the only fields needing information now.
   ii. Teams are based on firm. To add a new team you can tap on "Add a new Team" and a text field will appear (much like sections do in Zeplin). You can start to type the name of the firm you want to add. If the firm is not present on the platform, you can create the firm and an email will be sent to the firm master email to allow them to finish onboarding.

Features
- Adding associates will search the intra-associate ledger and suggest individuals to add. If that person does not exist on the platform yet, they can just add the email and an invite will be automatically sent when the deal is created.
- Add Matter fields are indexable for quick searching later on

Deal Storyboard

https://zpl.io/VqY3MJV (filled case)
https://zpl.io/bz8Ex6G (empty case)

The deal storyboard is the main landing page for the associate. Here they can quickly see their most recent deals and jump into the deal "house" quickly.

Cards are now just the name of the deal, the organization hosting the deal, and your internal deal members.

Deal Playbook

The deal playbook is the overall view of the deal and the landing page of the deal. The left side panel shows all the deal information and is always visible. The right 2/3rds of the screen has 6 sections that contain the details of the deal.

    a. **Activity**
        i. https://zpl.io/b6Nd54q
        ii. An expanded notifications section, very similar to your personal deal feed - except with just this deals activity.

    b. **Roster**
    https://zpl.io/VYYg0rE
        i. Working group list of all the people connected to the deal (All Teams - just like on the Add a Deal)
        ii. You can add members by tapping the plus button that will bring up a popover to either add a new email or a member already on the platform.
        iii. Team members can add other team members on their own side
        iv. Tapping on a cell will bring up their profile

    c. **Term Sheet**
    https://zpl.io/aMdJoGo
        i. This is just an upload section for the terms sheet of the matter. It's literally just an upload and show section.

    d. **Structure Chart**
        i. Exactly the same as the terms sheet just for the structure chart. Apparently these two things are super important so they get their own tabs.

    e. **Matter Info**
    https://zpl.io/br1QJ5r
        i. Very simply, a location for the information associated with the matter/deal. The couple of items that they added in the add a matter (Name, Type, etc.) can be changed here. The current version has a lot more info - it's been drastically simplified from then.

    a. **Add an Event**
    https://zpl.io/2EmQONy
        i. This is a the absolute last priority tab to be created. Don't worry about this at all for now. Once we finish everything, we can double back.
        ii. Basically, each associate should link their outlook and the system should be able to plot their available times. You can then click into a cell and schedule a meeting or event during any time that works.
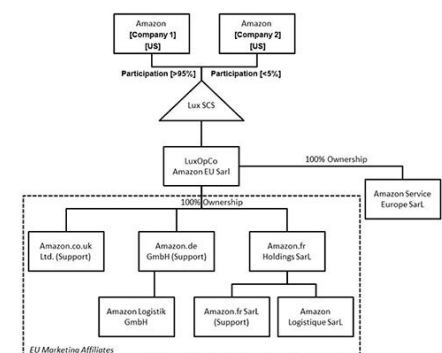
Example Structure Chart

Diligence Room

The diligence room is used to:
   (1) review and flag documents
   (2) delegate document internally for due diligence review
   (3) manage the process of "action items": identifying contracts requiring prior written notice, consent or government approval and track consent/notice/approval communications.
The main section will consist of a file management system, showing the folders and files in a similar type system to a regular OS.

Note: Any team can upload files to the main repository here. Folders and organization is "public" - any team and any associate in that team can view and change. Flags and Action Items, are only shown to the internal team. "My Action Items", "My Tagged", and "My Assigned" folders are only shown to that individual associate.

1. **Folder/File Organization**
   a. On initial load, a folder/file organization system will show all information in an organized and searchable list.
   b. A segmented control will show either all documents, flagged documents, or assigned members.
      i. Assigned members will show all documents assigned to that person and the actions they have taken (be it viewed or commented/flagged)
      ii. This can also be shown from a document level (as opposed to a member level) in the main file management section.
   c. Clicking into a folder will show its contents in the right panel.
   d. Clicking into a file will bring you to the file detail

2. **File Detail**
   a. The left 2/3rds of the detail screen is a document viewer with integrated flagging/commenting system similar to Invision's click to comment system.
   b. The right 1/3rd panel has two tabs to it:
      i. Flags
         1. Flags are collapsed accordion style cells that contain the "flag" information. Basically a way for attorneys to alert to their team that there is an issue with a document (like they owe a bunch of money or something)
         2. When collapsed they show the title, who and when it was created, the number (which associates with the flag number on the document) and a brief flag description. When

unfurled, it also shows comments, and tagged people.

       3. With the "more" button (three stacked dots) you can collapse the accordian, tag a new member, or resolve the flag which would make it disappear.

  ii. Add a Flag

https://zpl.io/VO0wyDY

     1. When add a flag tab is active, the document allows flags to be created by tapping anywhere on the document. Flags can be dragged after placed.

     2. Users will have to choose whether its a flag or action, its title, description, and if they want to tag an associate.

     3. Flags are orange, actions are white

Drafting Room

https://zpl.io/2pM7mJV (closing checklist)

The war room is used to create, edit, and import documents related to this specific deal (e.g. the purchase agreement, bill of sale, etc.).

- The war room will default to a "Closing Checklist" - a standard sheet inside deals like this that lists the documents
- Checklist items have various information associated such as a checklist item number, name, responsible party (a firm level account instead of an individual associate), a status indicator, assignment, and the last "turn" - the most recent time a document was published.

Document Detail
https://zpl.io/29NJgjB (empty)
https://zpl.io/Vqg7xmb (editing)
https://zpl.io/29lZLYz (comparison)

  a. Tapping into a document will bring the user into a 2 part document detail screen
  Note: Right now you have to upload an initial version. This is not correct - you should be able to hit "Add a new document" in the closing checklist and go to the empty screen. From there, you should be able to upload an initial version (or start from scratch if you want in the editor).

  i. Document Edit/ Viewer

     1. Connected to an in browser edit software

     2. Changes are tracked and versions must be committed. Documents can be saved, however, without being committed. These save documents as whatever the version number was plus ".x". For example, if I edited off of version 1.1, my saved version would be 1.1.x.

     3. COMMITTED VERSION CANNOT BE DIRECTLY EDITED

       a. Any committed version - whether from you or another team member - cannot be directly edited. You can edit it by clicking into the document editor and saving a new version (similar to git - I can't "edit" a committed version but I can commit my local

version) Please call Ian 7605047701 or slack him if you have ANY questions. I want to make sure i'm crystal clear because I don't know if Charles totally understood that portion.
4. Initial new versions uploaded will automatically have to be committed.
5. Commits have a version number, a timestamp, a brief description, and who committed them.

ii. Left Drawer
1. Version Control
   a. Versions can be committed by any member of the team and can only be seen by the members of the same team.
   b. If a version is ready to be "published", they can through the three dot button on the right side of any version. That will "publish" that version to the rest of the people on the deal regardless if they are on your team or not.
   c. You may edit a published version but if you commit it, it will commit to your internal team. You will have to republish it then after editing and committing.
      i. https://zpl.io/bPLNyxl (example of published)
      ii. Published versions can be marked as final and the document will transfer to the signature room as a non-editable PDF.

Signature Room

https://zpl.io/aND5kN2 (closing checklist)
The signature room is primarily for gathering signatures on the approved documents from the drafting room and other uploaded documents. If coming from the drafting room, a document is marked as "Final" in the published section and it is transferred (this should work in the current version).

The default view is again the closing checklist as seen in the drafting room.

Tapping on any of the documents in the closing checklist will bring the user to the closing checklist detail screen.

Closing Checklist Detail Screen
https://zpl.io/aNjN4ka (detail)
https://zpl.io/VYWRgge (date)
https://zpl.io/2Z0Q6vG (signatures add filled)
https://zpl.io/2ykvKQL (signatures add not filled)
https://zpl.io/bPXZPkb (signature matrix)

1. The closing checklist detail screen will allow the associate to tag (just like the flag system - click and drag) signatures inside of non-editable finalized documents. These tags will consist of what type signature is needed (initials, e-signature, wet signature, etc.), a description of the signature, the email of the signee, and the name of the signee. Once tagged, an email is sent to the specific person.
   a. Note: Since everything is referential based on email address, the signature collection view (https://zpl.io/29lyXwl) will list all signatures that that one person will have on that document.

2. The right 1/3rds pane will list all signatures.
3. The left 2/3rds pane will be a document preview screen with the signature tags overlaid.

Closing Checklist Signature Matrix
https://zpl.io/bPXZPkb (signature matrix)
The signature matrix will list all the documents that need signatures in the left pane and in the right series of columns list who needs to sign and their status. (Most of this works - just the cells need to be formatted)

- Grey boxes means that person is not listed in that document,
- Yellow is for signatures that have yet to be viewed
- Red is for signatures that have been viewed but not signed
- Green for signatures that have been signed.

Note: Clicking on any red or yellow box will send another email.

The signatures matrix also has an important "Release Signatures" button. Once all signatures have been signed, the button will be enabled. Every team has to click the release signatures button for the matter to be "closed" and the binder room to populate and become enabled.

Signature Collection
https://zpl.io/29lyXwl
The only portion of the dealWip platform that is accessible without an account, the signature collection screen is for users who receive an email that they have a signature box they must sign (think Docusign). The person will click on the link and will be directed to this screen. On the left panel a text field for their name and a signature box. The signature box will allow them to - with their cursor - draw a signature. Clicking "Save Signature" will automatically populate ALL of that user's signature boxes. For example if Michael Scott is requested to sign in three places, he can draw his signature and click save. All three boxes will be signed and saved immediately.

Signature boxes are specific to that users email. There may be multiple people who need to sign one document. For example, Michael Scott has 2 signature boxes, Jim Halpert has 1, and Pam Beasley has 1 for a total of 4. Only Jim can see his 1 signature box, Pam can see her 1, etc.

The UX also allows you to upload a signed version of the document, however this is back-burned for now.

Binder Room

https://zpl.io/am9QXQa

The binder room is for putting together finalized and/or signed documents into "Binders", combined PDF's for printing or digital storage. The binder room is not available until the signatures have been released.

The binder room is broken into 3 sections:
   a. Top Binder Header
      i. This top header row panel allows the associate to create as many binders as they want and flip between them with a click. If binders exceed the width of the screen, you can scroll horzontally to see more binders.
      ii. The current binder is highlighted with additional binders being added as needed.
      iii. Associates can see the client library on the top right that will bring them to a series of finalized binders.
   b. Left Organization Panel
      i. Underneath the top binder header, the left org panel will list all the finalized and signed documents with their closing checklist number.
      ii. On the left of each, a checkbox allows simple adding or removing documents from that specific binder.
      iii. Each row can be reordered and the resulting exportable file will be reorder as well.
   c. Right Document Panel
      i. The preview document panel on the right brings together all the checked documents into a document preview.
      ii. Two buttons on top
         1. Archive
            a. Archive that binder
         2. Download
            a. Will create a PDF and download to your machine

Search

https://zpl.io/2ZDm9qa (main)
https://zpl.io/2vMeYjP (results)

Search will be present on the dark sidebar when outside a deal. The main search screen will have a handful of recent searches (maybe 6-10). Searching dynamically queries various items throughout the matters and organizational items such as people, events, deals, documents, etc.

You can limit your search to specific categories by tapping any of the "limit my search" buttons on the right panel. This panel disappears when searching but reappears when back at the main screen (when search text is empty).

Search Details

https://invis.io/E5CLVAYTS#/245415910_Search_Results
Search needs to be as dynamic as possible. If you type in "Converse" for example, you may return the company "Converse Shoes" that you are currently doing a deal with, the deal "Project Star" that is a deal owned by Converse, or the document, "Converse Bill of Sale" that is a specific document inside that

deal.

You can click on any of the results to take you straight to the item. For example, if it is a deal, it will take you to that deal's playbook. If it is a document, it will take you to the most recent version of that document.

Dealfeed

https://zpl.io/25G7OJa (full)
https://zpl.io/VDlJLnJ (empty case)

The deal feed is the backbone of all activity going on in your deals within your firm at a time. This feed, much like a Facebook newsfeed, will automatically update with new, automatically generated notifications.

The deal feed is sorted by timestamp by default for all global notifications on all the deals you are a part of. You can alternatively sort in the right panel by a specific deal and see just updates/activity from that deal.

Each activity feed item row has three options:
   a. Generate Message Thread
      i. Again, just like everything on the platform, a message thread can be generated based off this notification. It will automatically add in the person who created the activity. You can add/remove people before sending a message in the message screen (see message screen)
   b. Jump to
      i. Most of the time, the activity will be paired to a document so most of the time the icon will jump to the document in question. I'm assuming it will be the same as the search functionality where it will jump straight to that specific item and position in the platform/deal.
      ii. Sometimes I'm assuming the activity may be on a checklist item or a calendar event. In these cases, the correct page should appear.
   c. Hide
      i. Pretty self explanatory, this will hide the feed item. You can access hidden feed items in the sort at the top right.

The activity feed item row expansion contains the recent activity list of that specific document or item and any attachment that may be related. If the item is a document, the document would appear here.

Task List

https://zpl.io/bL4zZZB
Internal task list for associates to log their personal tasks in a list style.

- Lists can be created ad infinitum. List names have absolutely no functionality other than segmentation. I can click on the list name and change it at will.
- Similar to Slack - the "@" and/or "#" symbols will bring up popover views that will allow connections to internal documents (with the # symbol), people (with the @ symbol).
- If possible, i'd like to add dates with a "\". Typing a \ would bring up a date picker. Right now we just have a date picker.

Messaging

https://invis.io/E5CLVAYTS#/243964187_All_Messages_Tab

The lifeblood of the dealWIP platform, the messaging portion will serve as the main communications platform. Almost any item in the platform can generate a message thread that will have a permalink to the specific document or activity item.

- Conversations can contain a host of people. If the conversation includes clients, the message thread will be sorted into the client pool. If the thread includes external counsel or other external people, it will be filtered into external.
- All messages are searchable by text, person, or item name (document, activity, etc.)

The messaging platform is broken into three main sections:
   a. Left Message Lists
      i. Similar to most chat apps, the left panel will house the conversations you're currently having.
      ii. The conversation can include one person or many people talking about one topic or a general thread (with no specific topic listed/permalinked)
      iii. Each group conversation will show a few faces then how many other people are a part of the conversation.
      iv. If a conversation is about a specific document, the document will be tagged with the primary deal the document is contained under.
   b. Center Conversation Detail
      i. The center conversation is a very typical messaging service. Timestamp will be shown on groups of messages.

later.

Document right panel example.

Profile

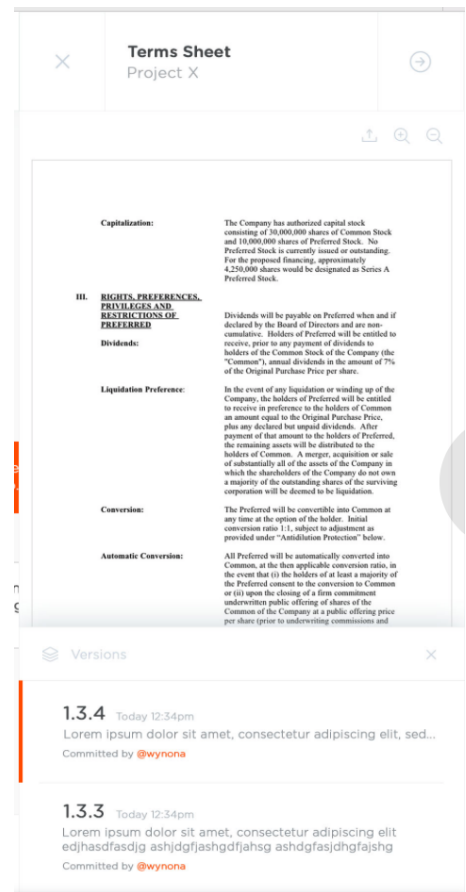https://zpl.io/Vk0AWMa (resume)

https://zpl.io/bWEZXxV (dealwip Experience)

The associate profile is the main source of information on each of the associates. It contains the:

1. General Information
    a. The information connected from LinkedIn or collected during sign up. Can be edited on the fly.
2. Resume
    a. An editable resume with experience and education. A parsed down version of the linked in Profile.
3. "dealWIP Experience" Card
    a. A searchable list of the matters that this user has been a part of.
4. Settings
    a. Whatever is needed. Logout.

Notifications Panel

The top right on every page is devoted to YOUR notifications. Activity that you have either tagged as you want all updates or activity that specifically concerns you. Again, all completely auto generated but with links to specific content as needed. A list of notification items can be found here: +DealWIP Notifications and Feed Items