

Managing transactions that involve multiple parties, agreements and supporting documents can be a frustrating, time-consuming experience. Banks, credit unions, private equity and wealth management firms that use lengthy, manual processes create operational inefficiencies that translate to negative client experiences, costly rework or even lost business.

DocuSign Transaction Rooms helps you complete multi-document agreements faster with more efficient information sharing in a secure digital space. Digital interactions allow you to remove communication barriers and increase document visibility, accuracy and auditability. With Transaction Rooms, you can streamline new account openings, manage lending activities, conduct mergers and acquisitions, onboard independent advisors and more.

Used by many of the world's largest financial institutions, DocuSign is the leading secure, reliable and trusted service for global transactions. Transaction Rooms is seamlessly integrated with DocuSign Signature – and the only transaction room with the leading eSignature solution – so you can more efficiently coordinate, centralize and complete critical transactions.

### Accelerate multi-document agreements from one secure location

When documents contain highly sensitive information, you can't afford to take risks. Transaction Rooms allows you to bring key stakeholders together in a secure, centralized location to review, share and retain all the documents associated with financial transactions. Agreements are protected with the industry's strongest encryption standard and DocuSign's bank-grade security. DocuSign is PCI compliant, ISO/IEC 27001:20013 and TRUSTe certified. Always available, Transaction Rooms delivers consistent high-peak load performance with zero maintenance downtime.

### Control the entire process while maintaining transparency

Transaction Rooms allows you to control every step of the agreement process. Participants are authenticated when accessing Transaction Rooms and DocuSign Signature offers additional levels of authentication for documents that are sent

out for signature. You can set permissions for document access to achieve the desired level of confidentiality. The ability to post comments about specific documents or the project itself provides context and drives momentum. A complete history of all the activity in the Transaction Room, including the status of documents out for signature, allows you to track progress, ensure documents are in good order and maintain transparency.

### Simplify the customer experience

Transaction Rooms improves the multi-document agreement experience for your organization and clients. Users receive a single email notice that takes them to a custom-branded, task-based pre-signing page, which includes a summary of all documents that require action – reducing inbox clutter and enabling a phased approach to the completion of multiple agreements. A clean user interface makes it easy to get started and move through agreements quickly. You can even use Transaction Rooms to retain client documents over the life cycle of your relationship.

## Keep business moving forward

DocuSign makes any workflow or approval simple, secure and fully digital, so you can get on with your business, and your life. With Transaction Rooms, you can use DocuSign to streamline even more stages of the agreement process than ever before. It supports diverse workflows and

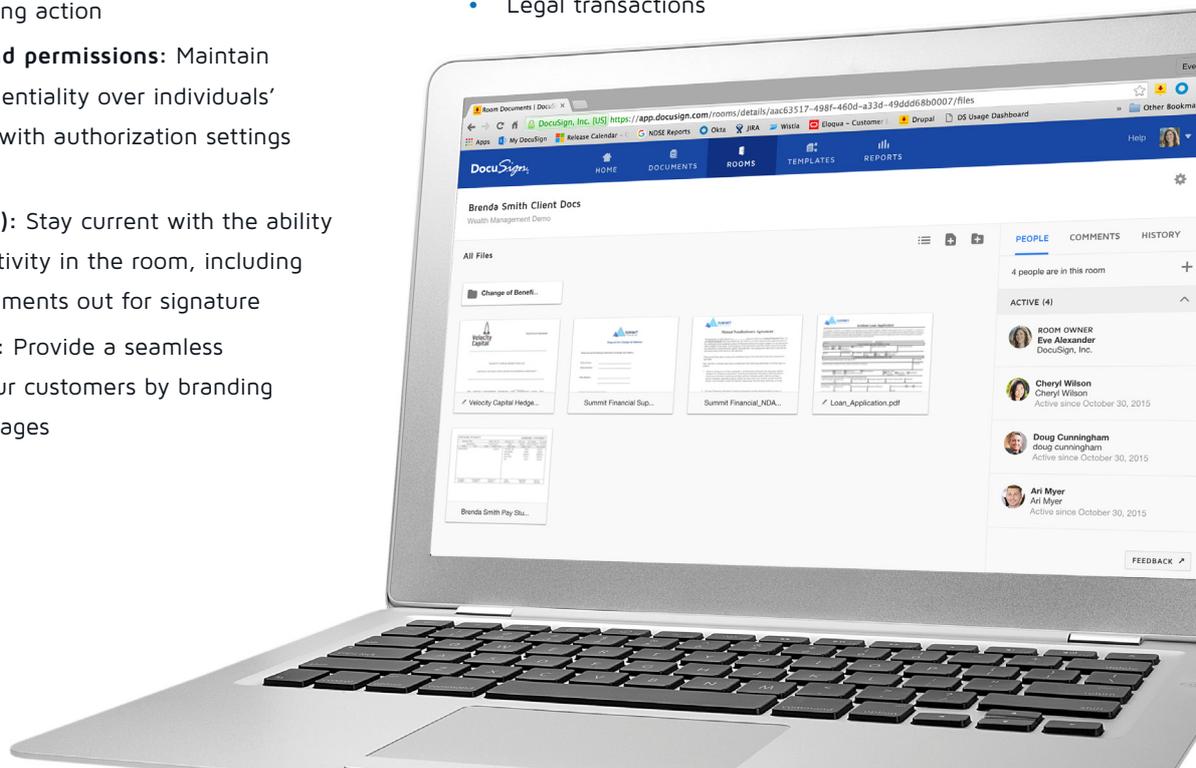
integrates with existing systems. Always available, Transaction Rooms delivers consistent high-peak load performance with zero maintenance downtime. Your most important agreements are protected with the industry's strongest encryption standard and backed by the best-in-class customer satisfaction that you've come to expect from DocuSign.

## Key capabilities

- **Virtual data rooms:** Securely review, share and retain all of the documents associated with an agreement or transaction process in one location
- **Conversations:** Coordinate with team members on document status and revisions with conversations and room history
- **eSignature integration:** Send documents for electronic signature with all of the functionality of DocuSign Signature
- **Task-based signing:** Reduce inbox clutter with a dynamic pre-signing page that summarizes documents requiring action
- **Access control and permissions:** Maintain control and confidentiality over individuals' document access with authorization settings and prompts
- **History (audit log):** Stay current with the ability to track all the activity in the room, including the status of documents out for signature
- **Custom branding:** Provide a seamless experience for your customers by branding emails and Web pages

## Use cases

- New client account openings
- Client onboarding
- Client service documents
- Loan application processing
- Mergers and acquisitions
- Onboarding independent advisors (letters of understanding)
- Fund management
- Policy revisions
- Internal document approvals
- Legal transactions



## For more information

To learn more about how DocuSign can help you streamline multi-document agreements contact your account executive or email [sales@docusign.com](mailto:sales@docusign.com).

DocuSign is changing how business gets done. DocuSign empowers anyone to transact anytime, anywhere, on any device with trust and confidence. Our eSignature software and Digital Transaction Management platform enable organizations of every size, industry and geography to accelerate contracts, approvals and workflows. DocuSign keeps life and business moving forward.