

# The ultimate VDR checklist:

Top 8 features for choosing a VDR solution



## 1. SECURITY & COMPLIANCE

Verify robust security features (e.g., virus/malware scanning, multifactor authentication, advanced encryption)

Confirm compliance with third-party standards (e.g., SOC, ISO 27001, GDPR)

Ensure detailed audit logs and real-time activity monitoring are available

Check for regular data backups and documented disaster recovery plans

Verify clear data retention and secure deletion policies

Confirm role-based access controls and authentication mechanisms

Confirm provider's industry reputation and availability of independent security audits or penetration testing



## 2. DOCUMENT MANAGEMENT

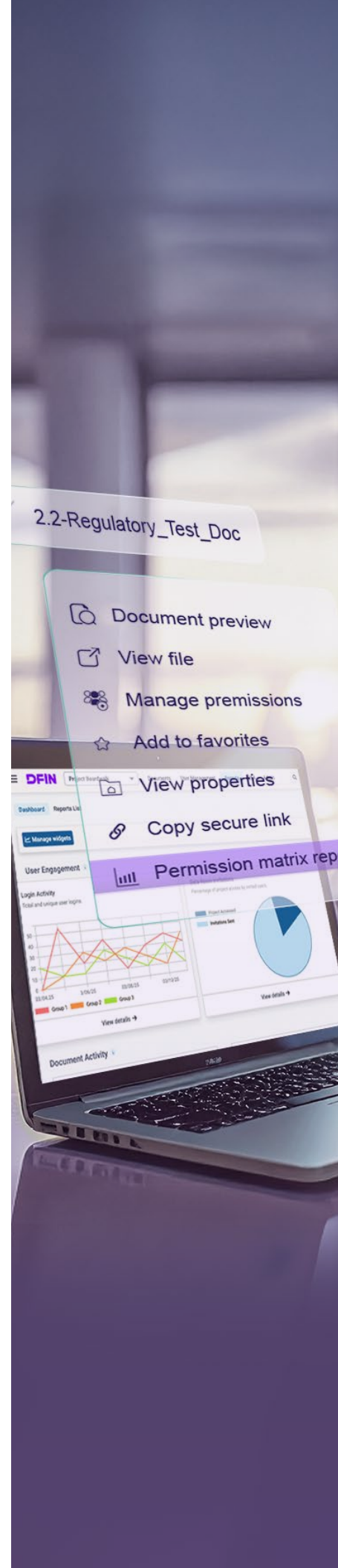
Ensure drag-and-drop and bulk upload features

Confirm robust search capability

Verify tagging, labeling or categorization options

Check support for multiple file formats

Staging content





### 3. COLLABORATION TOOLS AND WORKFLOW SUPPORT

Confirm access control features (permissions by role/responsibility)

Check ability to track document views, downloads and prints

Ensure redaction and watermarking options are available to protect privacy and IP

Ability to set up folder structures to represent deal structure

Robust permission management and feature control let you configure your room to meet your specific use cases



### 4. PERFORMANCE & RELIABILITY

Evaluate uptime statistics, history of interruptions and delays

Compare reliability data across VDR providers

File size restrictions



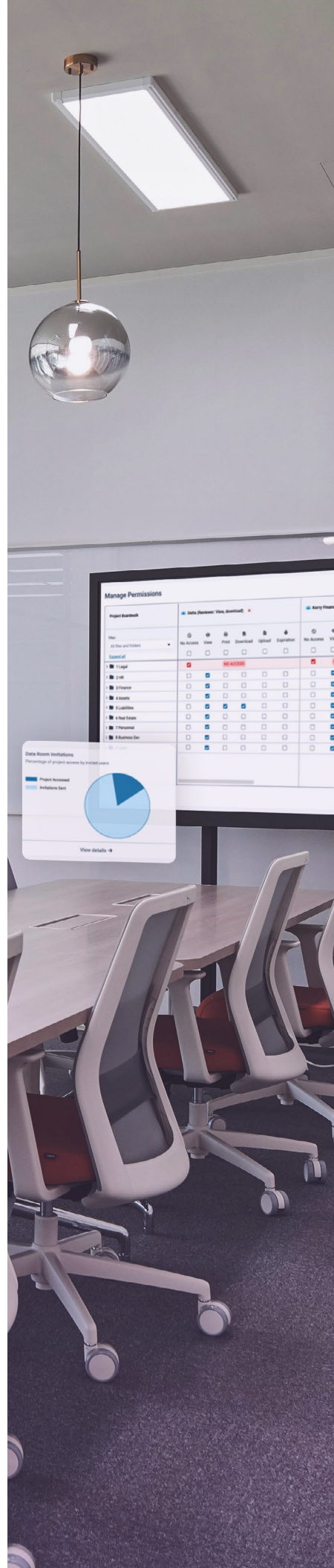
### 5. EASE OF USE/ACCESSIBILITY

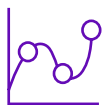
Assess user interface for intuitiveness and learning curve

Ensure accessibility across desktops, laptops, tablets and mobile devices

Check for multilingual support for all needed languages

Request and participate in a workflow demo





## 6. REPORTING & ANALYTICS

Verify real-time analytics and configurable reporting options

Ensure access to project engagement, buyer behavior, download/print statistics and track-changes reports

Check for report customization features: color coding, varied formats, at-a-glance summaries



## 7. CUSTOMIZATION & BRANDING

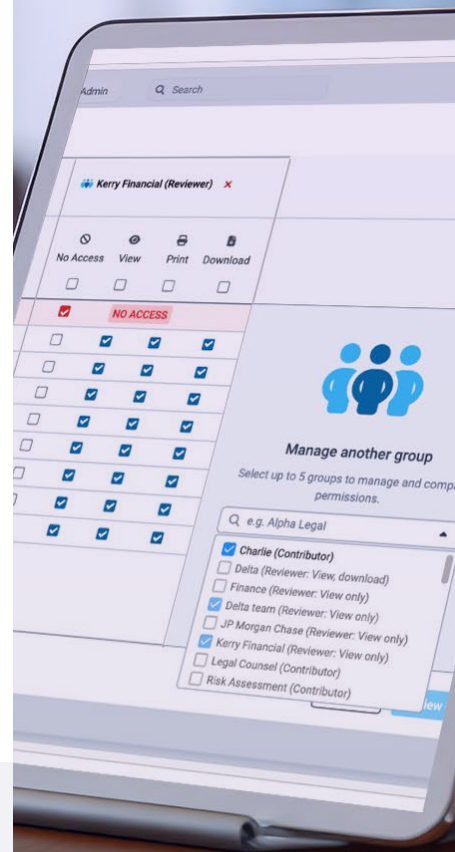
Confirm options for branding (logo, color palette) to personalize the experience



## 8. EXPERT SUPPORT

Confirm availability of 24/7 multilingual support

Check for the provision of a dedicated project manager



## THE REIMAGINED DATA ROOM

DFIN's Venue virtual data room was intentionally built for how deals actually get done with a **clean design, customer-informed features and modern architecture** that adapts to your workflow, not the other way around. [Ready to learn more?](#)

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