

CoCounsel Release Notes: 3/14/24

Resources:

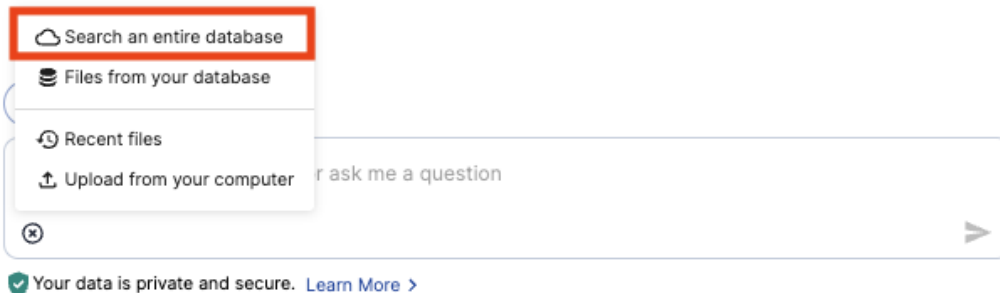
Our Help Articles provide robust resources on how to optimize CoCounsel. We strongly encourage users to read these articles, as they provide detailed information with video walkthroughs and more step-by-step guidance. **You can access Help Articles [here](#). You can also access video tutorials [here](#).**

Released: “Search a Database” – Select documents for follow-up

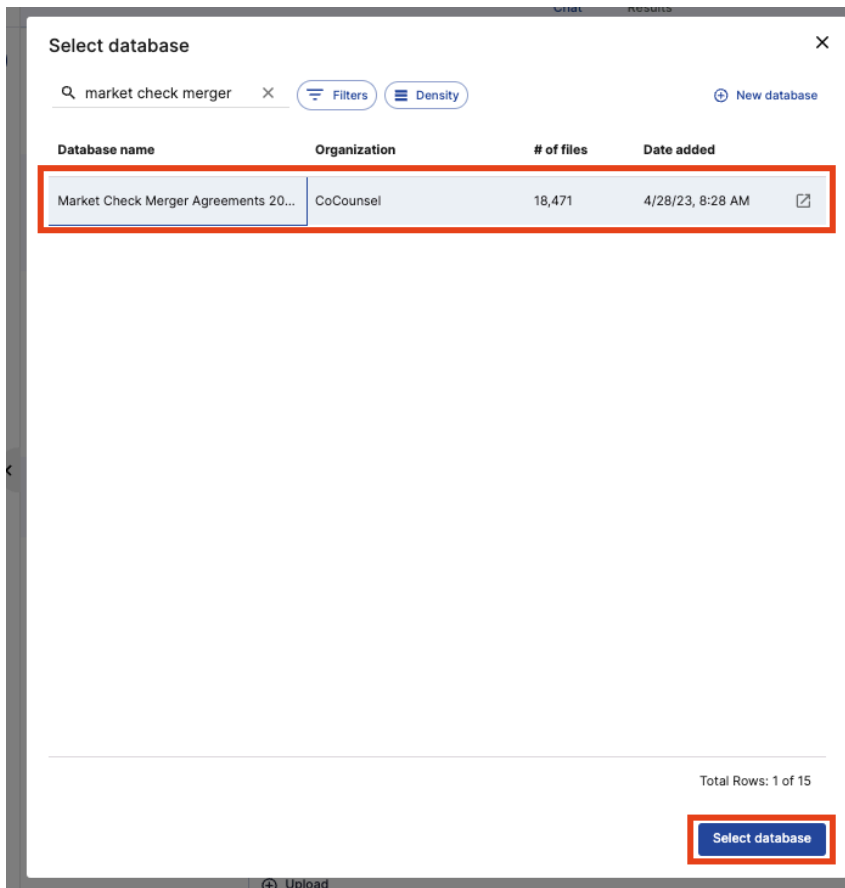
Following the execution of the "Search a Database" skill, you can proceed to handpick pertinent documents from your search outcomes to utilize in another skill for more comprehensive results. By bypassing the need to rerun the "Search a Database" function, sift through and upload previously obtained documents, this improvement streamlines the process of pinpointing and expanding upon relevant documents.

Step 1: Run “Search a Database”

At the bottom of the CoCounsel chat window, select the “Search an entire database” document upload option:



The database pop-up will appear. Select the database you want to search:



CoCounsel chat will acknowledge your database selection. Enter your question, and “Search a Database” will be triggered:

Christine Byon 8:47 PM
Find me filings from the year 2009

CoCounsel 8:50 PM
Searching your database now...

Search a Database

✔ Your results are ready!

REQUEST

What are the filings from the year 2009 in the Market Check Merger Agreements database?

View results >

Helpful answer? 👍 🗨

Step 2: Select documents for follow-up

After your “Search a Database” skill is completed, open the results pane, and click on: “Select documents for follow-up:”

>> Search a Database Search A Database

100% Complete

REQUEST Hide original research request ^

What are the filings from the year 2009 in the Market Check Merger Agreements database?

RESPONSE Answer from Market Check Merger Agreements 2009-2024

There are several filings from 2009 in the Market Check Merger Agreements database. The first result, /2010-08-17_v194406_ex2-1.pdf, references audited and unaudited balance sheets and statements from 2009. The second result, /2013-04-17_v341407_ex2-1.pdf, lists a number of agreements from 2009, including a settlement agreement, novation agreement, and consent to assignment agreement. The third result, /2022-02-24_d948152dex21.pdf, references a number of trusts established in January 2009. Finally, the fourth result, /2009-06-22_2009-06-22_1_dex21.pdf, contains an agreement and plan of reorganization that was made effective in March 2009.

Documents Select documents for follow-up

/2010-08-17_v194406_ex2-1.pdf ^

You can either select all or individual documents from your “Search a Database” results by checking the boxes. Once your documents are selected, you can click the blue “Submit” button:

Documents Select all Submit Cancel

/2010-08-17_v194406_ex2-1.pdf
"(i) the audited balance sheet of Merger Partner for each of the two years ended October 31, 2009 (the "Merger Partner Audited Balance Sheet") and the related audited statement of operations, statement of stockholders' equity and statement of cash flows of Merger Partner for the two years ended October 31, 2009, together with the notes thereto and the report and opinion of PricewaterhouseCoopers LLP relating thereto; and (ii) the unaudited balance sheet of Merger Partner as of April 30, 2010 (the "Merger Partner Balance Sheet") and the related unaudited statement of operations and statement of cash flows of Merger Partner for the six (6) months then ended."
Page 11

/2013-04-17_v341407_ex2-1.pdf
"Business Payment Systems, LLC and National Processing Company (NPC) Settlement Agreement (August 27, 2009); Business Payment Systems, LLC and Merchant Capital Portfolios, LLC Novation Agreement (October 26, 2009); RBL Group, LLC, Business Payment Systems and Merchant Capital Portfolios, LLC Settlement and Consent to Assignment Agreement (October 26, 2009); Financial Transaction Services, LLC ("FTS") Independent Contractor Agreement - FTS and First Business Solutions (June 8, 2009); Global eTelecom, Inc. ("GETI") Check Processing Services Marketing Agreement - GETI and First Business Solutions (September 9, 2009); MerchantWarehouse.com Affiliate Merchant Services & Credit Card Processing Agreement - MerchantWarehouse.com and First Business Solutions (August 8, 2003);"
Page 166

Step 3: Run another skill

After selecting documents and clicking "Submit" from your "Search a Database" results, these documents will appear in the CoCounsel chat feed.

From here, **you can trigger another skill for more details on these documents.** In this example, "Summarize" was triggered:

Christine Byon 9:04 PM
2 files added
 /2010-08-17_v194406_ex2-1.pdf /2013-04-17_v341407_ex2-1.pdf

CoCounsel 9:04 PM
You've uploaded two files from the Market Check Merger Agreements 2009-2024 database:
1. /2010-08-17_v194406_ex2-1.pdf
2. /2013-04-17_v341407_ex2-1.pdf
How would you like to proceed with these files? Would you like to analyze or extract specific information from them?

Christine Byon 9:04 PM
Please provide a comprehensive summary

CoCounsel 9:04 PM Summarize
I understand you want to generate a comprehensive summary for the uploaded documents.
Please confirm the summary type ⓘ

Brief Detailed Comprehensive

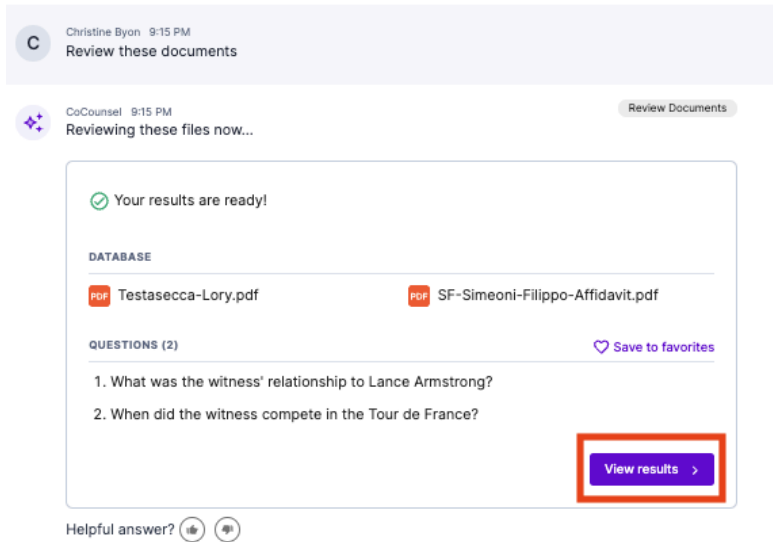
Cancel Submit request

Released: “Review Documents” – Dual Window View

After running the “Review Documents” skill, you are now able to view results and the documents side-by-side in a dual window for a more user-friendly experience.

Step 1: Run “Review Documents” skill, Open Results

After running the “Review Documents” skill, select the purple “View results” button:



Here you will see the table view for “Review Documents”:

The screenshot shows a "Review Overview" section with the subtitle "Pulled from tour de france usps | March 14, 2024". It includes a search bar and controls for Filters, Columns, and Density. Below is a table with the following data:

Documents	Witness relation to Armstrong	Witness Tour de France date
Testasecca-Lory.pdf	Indirect	—
SF-Simeoni-Filippo-Affidavit.pdf	Contentious relationship	2004-00-00

At the bottom right of the table, it says "Rows per page: 20" and "1-2 of 2".

Step 2: Click on documents in “Review Documents” table

In the “Documents” column of the “Review Documents” results table, click on a document of your choosing:

Review Overview

Pulled from tour de france usps | March 14, 2024

Search... Filters Columns Density

Documents	Witness relation to Armstrong
Testasecca-Lory.pdf	Indirect
SF-Simeoni-Filippo-Affidavit.pdf	Contentious relationship

Step 3: Utilize Dual Window View Capabilities

After selecting documents from the “Review Documents” table, you will see the dual window view of CoCounsel’s results on the left, and the uploaded document on the right:

In the dual window view there are various functions available to:

- The double-arrow slider allows you to minimize/maximize the size of CoCounsel results or the document,
- The triple-bar menu button enables you to Save, Print, or Download the document,
- These buttons permit you to customize how you view the document by rotating, panning, and zooming in and out of the documents,
- The magnifying glass supports searches for text in the document.

Released: “Timeline” – Readable Events

You can now hover over cells with too much text from events contained in your “Timeline” results. After running the “Timeline” skill, open your results and hover over cells in the results table with cut-off text:

100% Complete

Search... Filters Download Filtered Results Add File(s) to Timeline Actions

<input type="checkbox"/> Date	↑ Event Description	Source(s)
<input type="checkbox"/> June 7, 1960	Valerie Belliveau was born.	Belliveau,... (page 136)
<input type="checkbox"/> July 6, 1960	Valerie Belliveau was born.	Belliveau,... (page 117) Belliveau,... page 819 ☆ ✎ 🗑
<input type="checkbox"/> July 6, 1960	Valerie Joy Belliveau was born.	Belliveau, V - ADDv3 Compiled (from Sabrina).pdf (page 819)
<input type="checkbox"/> 2006	National guidelines for the management of dyslipidemia and the prevention of cardiovascular disease updated.	Belliveau,... (page 498)