



PHUNDEX GLOSSARY

At Phundex, we want to make things simple and streamlined. However, we know that getting to grips with the terminology for new tools and processes can sometimes be a bit challenging. Here we explain what we mean by some of the main terms you'll encounter as you use Phundex to manage your transactions and processes.

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WHAT IS PHUNDEX?

Phundex is a centralised collaboration, transaction, process and data management hub, accessible by all of your stakeholders across the investment lifecycle but permissioned just the way you want. Think of Phundex as a combination of Trello, a due diligence/data room and a document signing facility, all on one platform.

Your processes and transactions can be configured using our pathways, stages and tasks, all linked to the relevant data and documents for your particular use. You can invite internal and external team members to work on these together on the platform.

You determine user, data and document permissions, while version control, audit history and real time status dashboards are standard features.

Designed with co-creator clients over the past two years, we've leveraged our experience with feedback from our beta users and built Phundex 1.0 to streamline how you work

We're delighted to say that after 2 and a half years of research and development with clients using our beta platform and providing testing and feedback on our new platform at every stage of the way, Phundex 1.0 is here!

KEY ROLES & PRIMARY ACTIVITIES



Phundex Administrator

The Phundex Administrator is the person with access to all aspects of the Phundex platform and who has the tools to configure settings & templates for Admins & Managers



Phundex Administrator

- ✓ Set up Pathway Templates
- ✓ Manage platform settings
- ✓ Set up Subscription Plans
- ✓ Manage Clients



Administrator

The Administrator is responsible for bringing the team together within Phundex by inviting people required to oversee and perform activities within the live environment



Administrator

- ✓ Subscribe to a plan
- ✓ Invite users to their Network
- ✓ Activate/Deactivate users
- ✓ All Manager and Team Member functionalities



Manager

Managers are responsible for organising and managing activities / processes and transactions. Typically they are team leaders / business heads or transaction managers



Manager

- ✓ Create Pathways
- ✓ Add Team Members
- ✓ Assign Task/s
- ✓ All Team Member functionalities

KEY ROLES & PRIMARY ACTIVITIES



Team Member

Team Members can be either internal to your business or external from outside the organisation. Regardless, they will be associated with particular deal(s) and within those, allocated tasks to perform



Team Member

- ✓ Register to Phundex Platform
- ✓ Complete Tasks



Guest

Typically external to the organisation, Guests have more of an 'ad hoc' involvement in deals and tasks. Their input doesn't necessitate a permanent role in a team



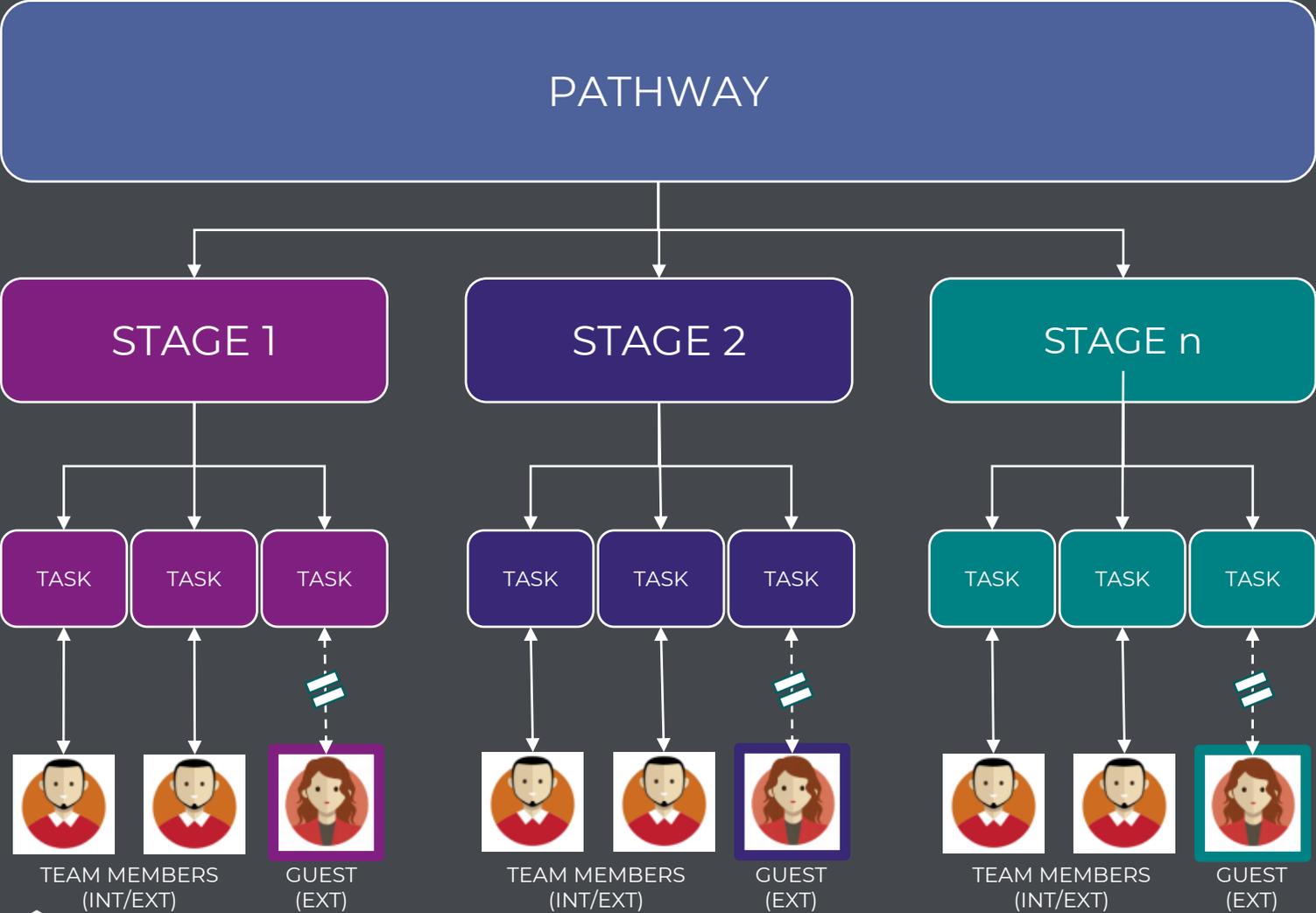
Guest

- ✓ Complete Tasks (without the need to login to Phundex)

KEY TERMS & DEFINITIONS

Term	Definition
Internal User	Users from within the license holding organisation who are likely to have the same email domain suffix (e.g. ANOther@phundex.com). Can be created as Client Administrator, Deal Manager or Team Members
External User	Users from outside the license holding organisation. Can only be created as a Team Members or Guests
Approver	A user able to edit and approve forms that are in either draft or final status (Task Level)
Contributor	A user only able to edit a form draft status (Task Level)
Participant Role	This allows a user to view all transaction details, documents & forms regardless of status (All Transactions)
Published View Role	This role only allows a user to view documents & forms that have a status of published (All Transactions)
Transaction	A transaction can be either a deal or an end-to-end process . We define a transaction as any series of activities that a team / group or department performs to complete its workload or undertake distinct projects
Stage	A step is a way to break down sections of the broader transactions and group tasks together, helping to organise, coordinate and manage workloads in more contained, bite size chunks
Task	A task refers to a unique piece of work that needs to be performed in order to complete a given process end to end
Data Room	An secure area, with access limited to only those associated with the transaction / deal, where all information pertaining to that particular traction / deal is stored. Information can be stored in a variety of forms (documents, spreadsheets, electronic forms, and PDFs, with other formats being assed and added as deemed necessary)
Document Management	Generates documents based on user defined templates and completing fillable fields via data mapping. Document signing via integration with third party
Data Management	Collect user-defined data required for document generation that is not part of the structured data managed by Venture, Deal and Party Management

PATHWAY HIERARCHY



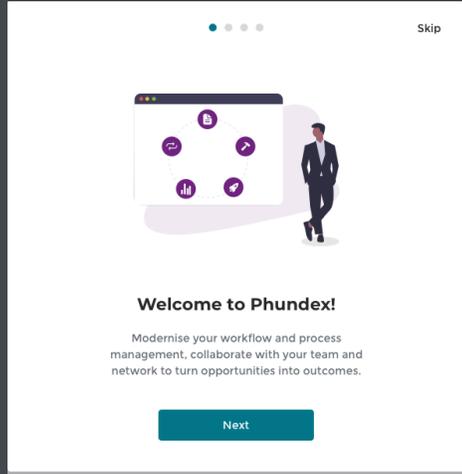
- ✓ Define the end to end pathway
- ✓ Assign network members to the Team
- ✓ Assign roles to those team members

- ✓ Break the transaction down into distinguishable stages
- ✓ Define tasks within each of the stages

- ✓ Identify each of the key tasks within each stage
- ✓ Order the tasks into a logical sequence
- ✓ Define the requirements of each task & allocate to team members

- ✓ Tasks are assigned to Team Members (internal / external) and Guests (external)
- ✓ Guests don't log into Phundex
- ✓ Tasks are performed and marked as complete for Approval

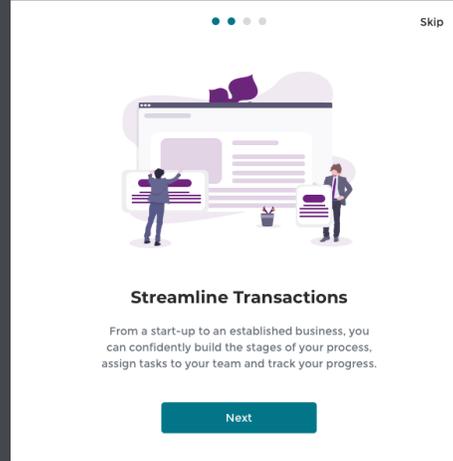
ONLINE USER SUPPORT



Welcome to Phundex!

Modernise your workflow and process management, collaborate with your team and network to turn opportunities into outcomes.

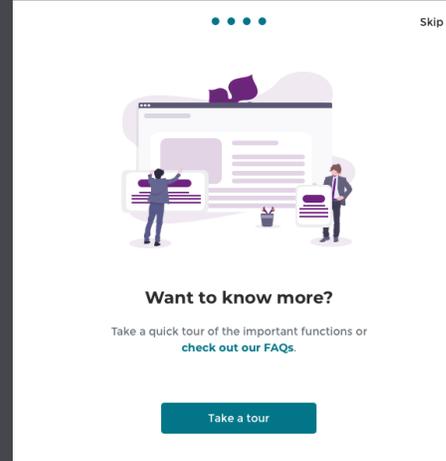
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Streamline Transactions

From a start-up to an established business, you can confidently build the stages of your process, assign tasks to your team and track your progress.

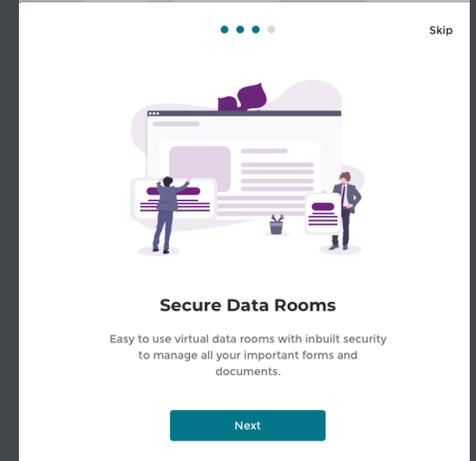
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Want to know more?

Take a quick tour of the important functions or [check out our FAQs](#).

Take a tour

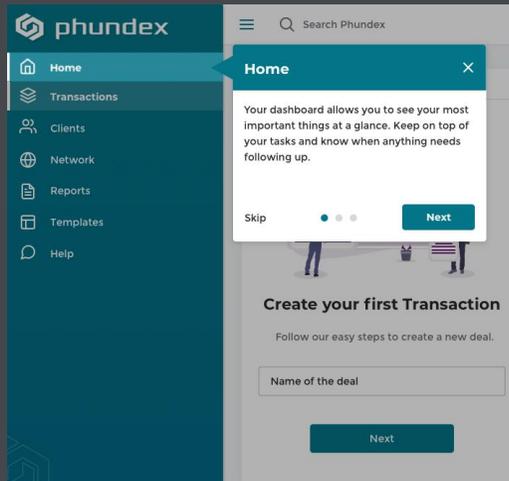


Secure Data Rooms

Easy to use virtual data rooms with inbuilt security to manage all your important forms and documents.

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The platform has built in hints & tips to help new users familiarise themselves with the tool and its functionality

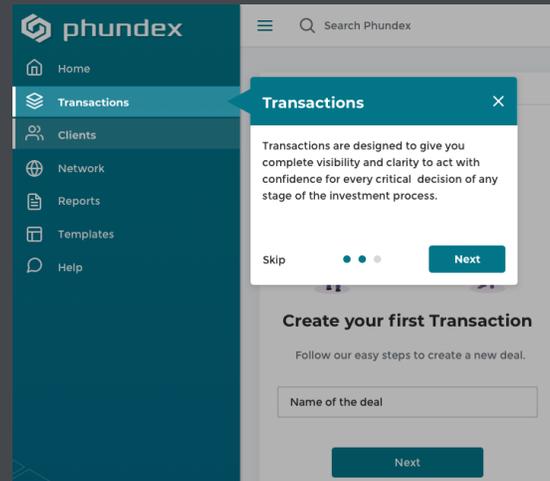


Home

Your dashboard allows you to see your most important things at a glance. Keep on top of your tasks and know when anything needs following up.

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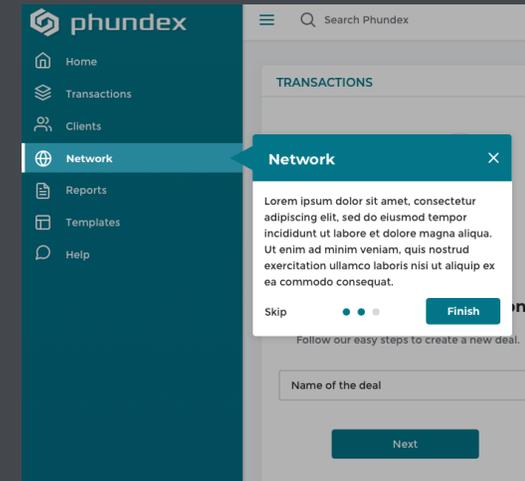


Transactions

Transactions are designed to give you complete visibility and clarity to act with confidence for every critical decision of any stage of the investment process.

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Network

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APPENDICES



phundex

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