



# 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.

26 July 2021

# 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 Administrators & Managers



## Phundex Administrator

- ✓ Set up Template Pathway
- ✓ 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 and manage plan
- ✓ Invite users to their network
- ✓ Activate/Deactivate user access as required
- ✓ All Manager 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 your organisation. Regardless, they will be associated with particular pathways and within those, allocated tasks to perform



## Team Member

- ✓ Register on Phundex Platform
- ✓ Complete Tasks
- ✓ Update documents



## Guest

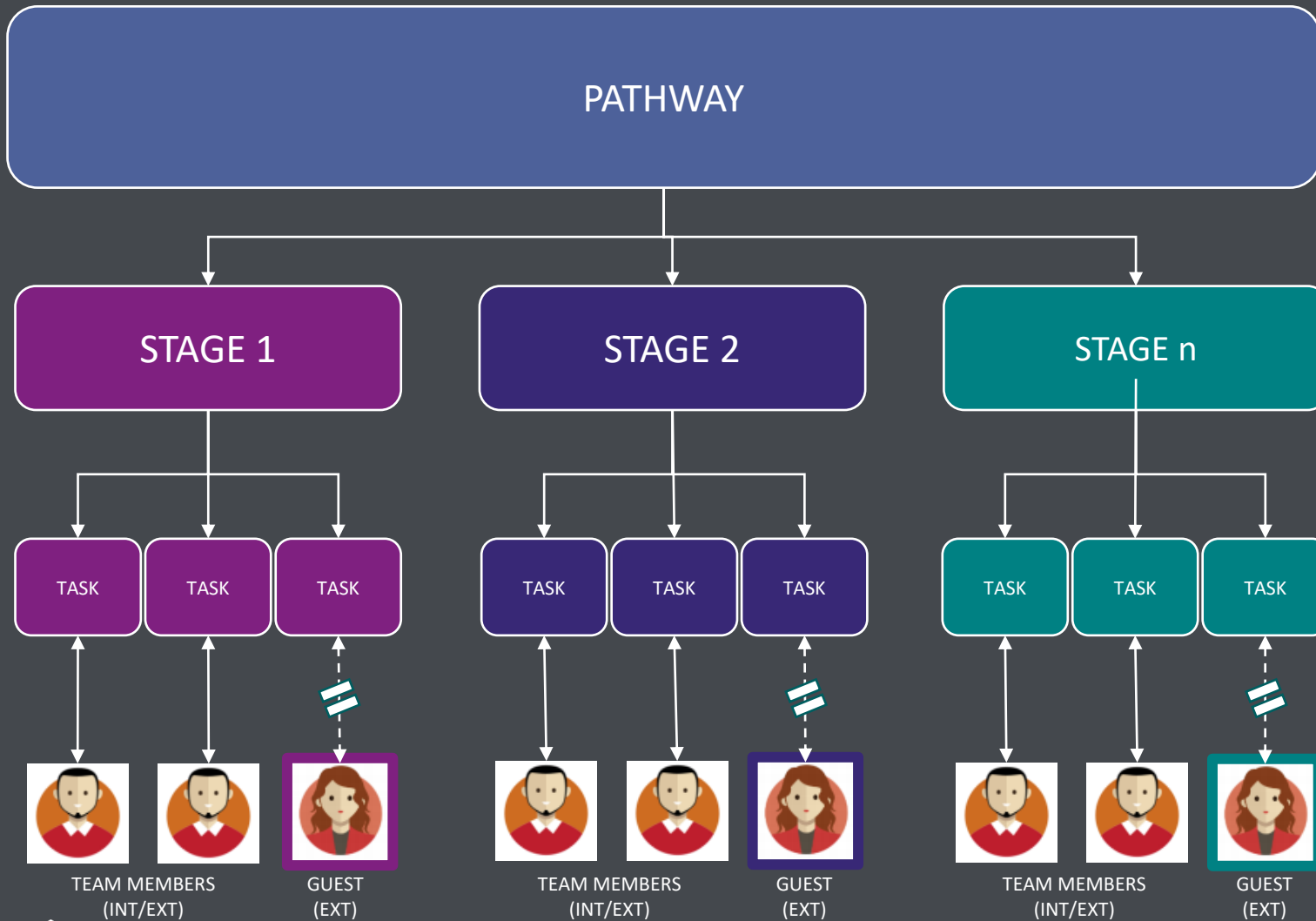
Typically external to the organisation, Guests are invited to provide specific information on an "as required" basis and do not require access to the Phundex platform



## Guest

- ✓ Complete Tasks (without the need to login to Phundex)- these are received by email and typically involve providing information into an electronic form, which is then fed back into Phundex

# TRANSACTION & PROCESS HIERARCHY



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

- ✓ Break the pathway 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

# KEY TERMS & DEFINITIONS

Term	Definition
<b>Internal User</b>	Users from <b>within</b> the license holding organisation who are likely to have the same email domain suffix (e.g. <a href="mailto:ANOther@phundex.com">ANOther@phundex.com</a> ). Can be created as Client Administrator, Deal Manager or Team Members
<b>External User</b>	Users from <b>outside</b> the license holding organisation. Can only be created as a Team Members or Guests
<b>Approver</b>	A user able to <b>edit</b> and <b>approve</b> forms that are in either <b>draft</b> or <b>final</b> status ( <b>Task Level</b> )
<b>Contributor</b>	A user only able to <b>edit</b> a form <b>draft</b> status ( <b>Task Level</b> )
<b>Participant Role</b>	This allows a user to <b>view</b> all pathway details, documents & forms regardless of status ( <b>All Pathways</b> )
<b>Published View Role</b>	This role only allows a user to <b>view</b> documents & forms that have a status of <b>published</b> ( <b>All Pathways</b> )
<b>Pathway</b>	A pathway can be a <b>deal/transaction</b> or an <b>end-to-end process</b> . We define a pathway as any series of activities that a team / group or department performs to complete its workload or undertake distinct projects
<b>Stage</b>	A stage is a way to break down sections of the broader transaction or process and group tasks together, helping to organise, coordinate and manage workloads in more contained, bite size chunks
<b>Task</b>	A task refers to a unique piece of work that needs to be performed in order to complete a given process end to end
<b>Data Room</b>	An secure area, with access limited to only those associated with the process/ transaction / deal, where all information pertaining to that particular process/transaction / deal is stored. Information can be stored in a variety of forms (documents, spreadsheets, PowerPoint slides, electronic forms, jpeg's and PDFs, with other formats being assessed and added as deemed necessary)
<b>Document Management</b>	Generates documents based on user defined templates and completing fillable fields via drag and drop from data obtained in the related tasks. Document signing via integration with third party Docu-sign
<b>Data Management</b>	Collect user-defined data required for document generation that is part of the structured data managed by the Pathway Manager

