

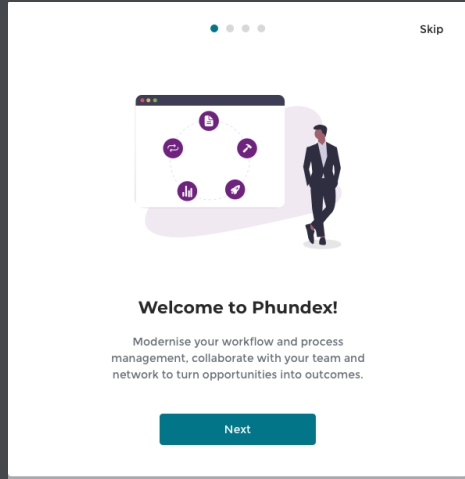


Tips & Tricks

To make it easier, we've added tips and suggestions along the way on the platform- some of them are listed here as sneak preview for you

July 2021

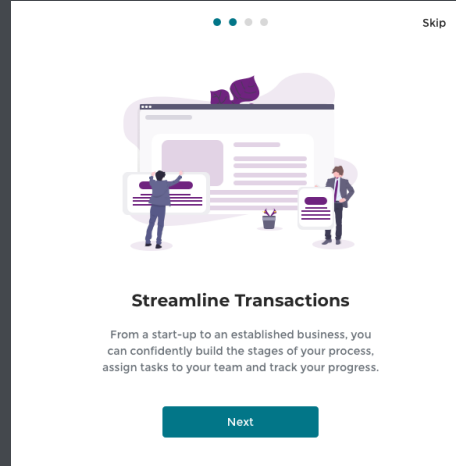
ONLINE USER SUPPORT



Welcome to Phundex!

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

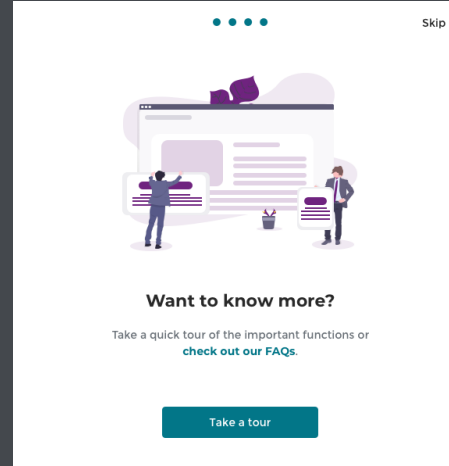
Next



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.

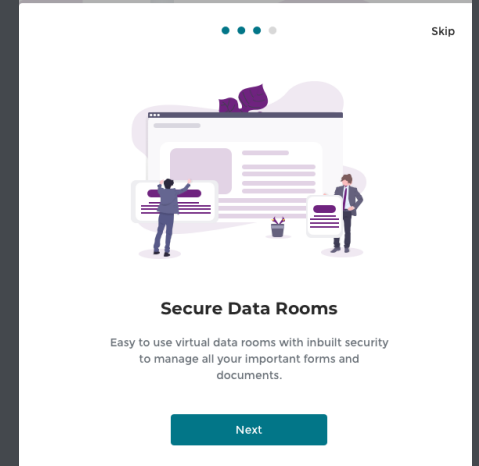
Next



Want to know more?

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

Take a tour

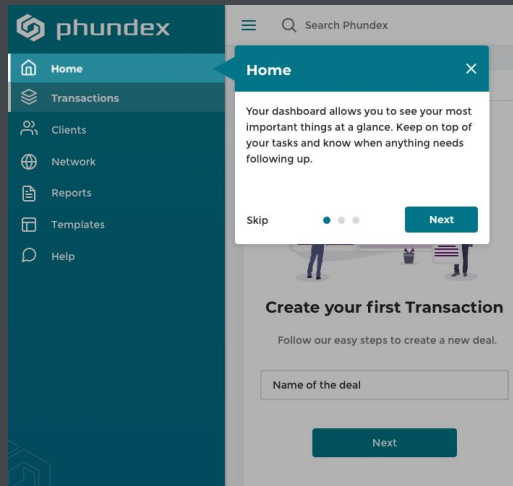


Secure Data Rooms

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

Next

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



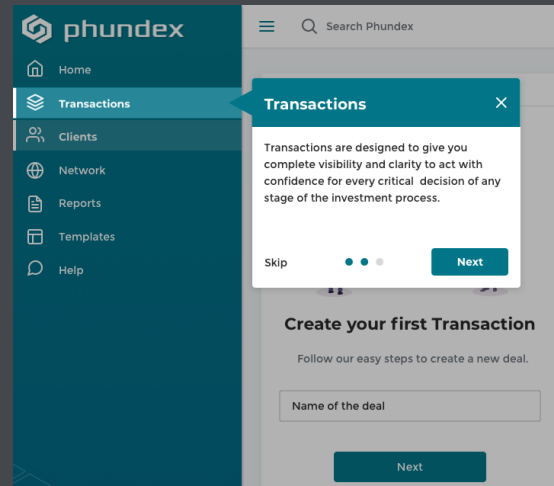
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Home

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.

Skip

Next



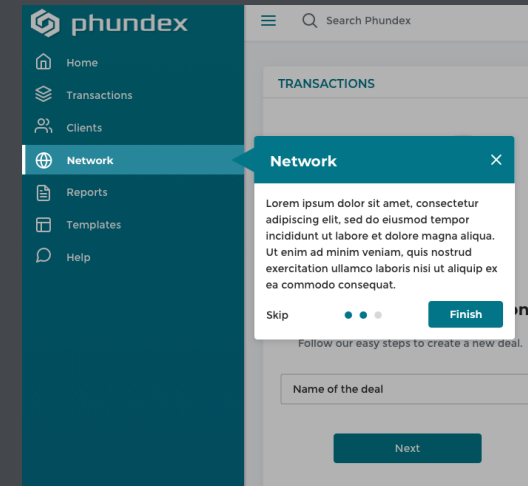
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Transactions

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.

Skip

Next



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Network

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Skip

Finish

ONLINE USER SUPPORT

Dashboards help give you an overview of status and alerts

Help is available at every step – just click on the <help> icon on the menu bar- that will bring you straight to the Resources section of our website for more information

The screenshot shows the Phundex dashboard home page. At the top left is the Phundex logo. Below it is a navigation menu with icons for Home, Transactions, Clients, Network, Reports, Templates, and Help. The main content area features three summary cards: '1 Tasks overdue', '45 New tasks this month', and '12 Tasks completed this month'. Below these is a 'MY TASKS' section with a table of tasks, including 'Business Evaluation: Upload NDA' for Luminance Technologies due on 30 Mar 2021. To the right is a 'RECENT TRANSACTIONS' section showing progress for 'Luminance Technologies' (5/38 tasks, 13% complete), 'Curious Minds - App' (28/50 tasks, 56% complete), and 'MiGoals Start Up' (38/38 tasks, 100% complete).

The screenshot shows the Phundex dashboard transaction details page for 'Luminance Technologies'. The left sidebar contains a navigation menu for this transaction, including Stages, Team, Data Room, Reports, Activity History, and Settings. The main content area is divided into 'OVERVIEW' and 'MY TASKS'. The 'OVERVIEW' section shows a progress indicator for '60/100 (60%) tasks complete' and a bar chart showing an 'Increase +2.0%' compared to the previous 6 weeks. The 'MY TASKS' section lists tasks such as 'Business Evaluation: Upload NDA' due on 30 Mar 2021. On the right is a 'TRANSACTION DETAILS' sidebar with information like Name (Luminance Technologies), Jurisdiction (Canada), Current Stage (Business Evaluation), Description (Start up looking for investors), Client (Sunrise Investments), and Deal Manager (Michael Fitzgerald).

ONLINE USER SUPPORT

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Create a new transaction

Transaction Name
Luminance Technologies

Client
[Empty field]

Jurisdiction: Select | Transaction Type: Select

Industry: Select an Industry | Transaction Manager: Billie Smith

Effective Start Date: Select

Cancel | Next

Create a new transaction

Select the tasks to customise the template.

Capital Raise Template


- Business Evaluation 7 Tasks
- Business Case 10 Tasks
- Due Diligence 3 Tasks
- Contracts 4 Tasks
- Financials 8 Tasks
- Intellectual Property 2 Tasks
- Legal 3 Tasks
- Transactional 7 Tasks

Add to My Templates


Back | Create

Business Evaluation 7 Tasks

- Primary contact
- Secondary contact
- Basic company info
- Company location and currency
- More company info
- Company stage
- Business summary



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