

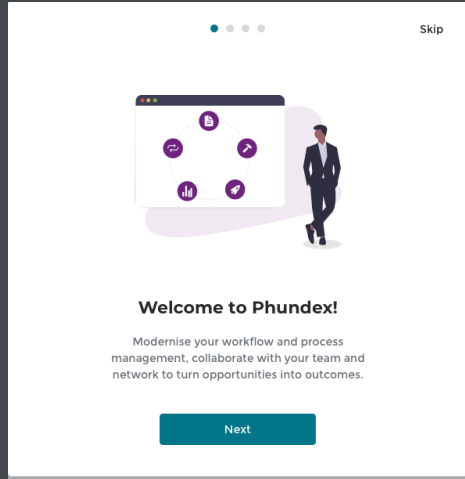


Platform Hints & Tips

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

20 July 2021

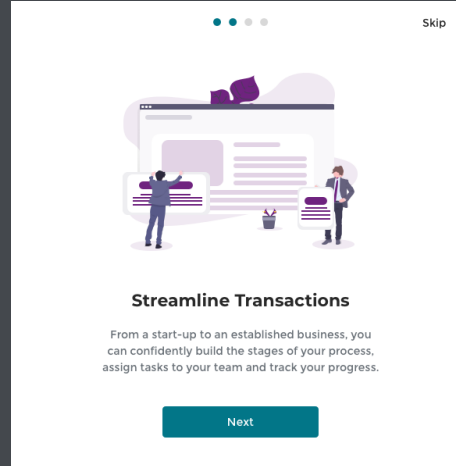
ONLINE USER SUPPORT



Welcome to Phundex!

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

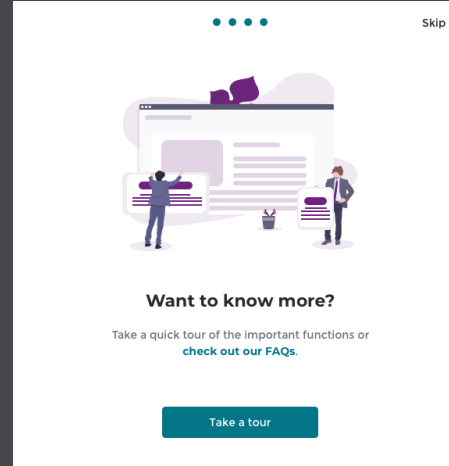
Next



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.

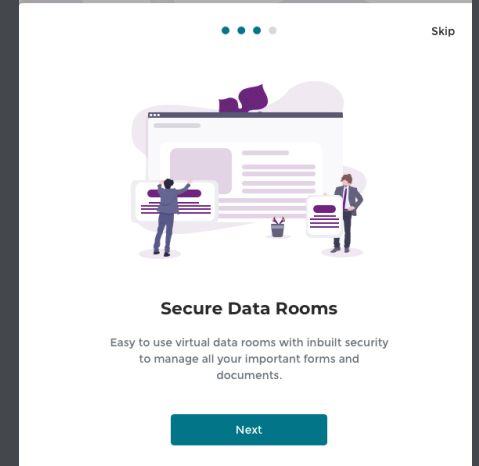
Next



Want to know more?

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

Take a tour

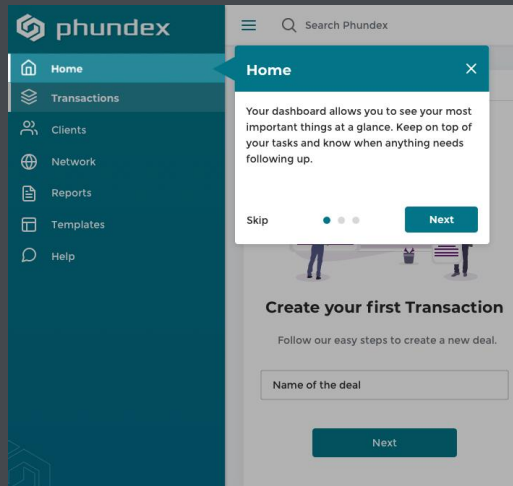


Secure Data Rooms

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



phundex

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.

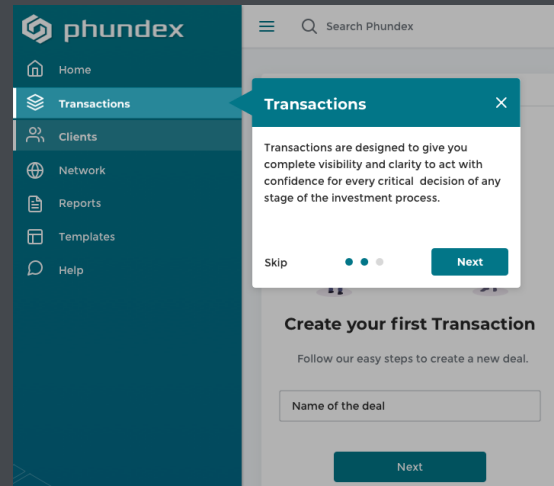
Skip

Next

Create your first Transaction

Name of the deal

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.

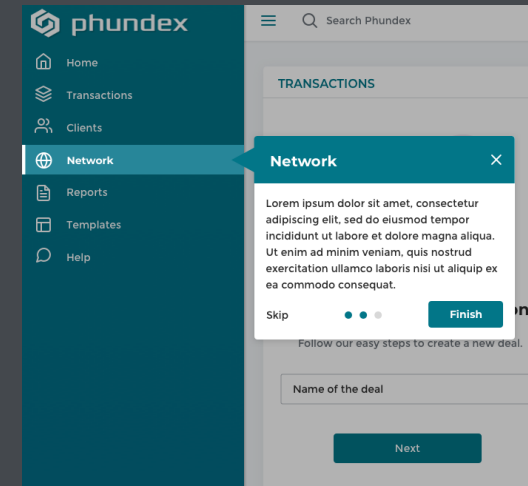
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Next

Create your first Transaction

Name of the deal

Next



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Network

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Skip

Finish

Next

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 has a sub-menu with options like Stages, Business Evaluation, Business Case, Due Diligence, Contracts, Financials, Intellectual Property, 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 a '+2.0% Increase' 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, the 'TRANSACTION DETAILS' section provides information about the client (Sunrise Investments), deal manager (Michael Fitzgerald), and current stage (Business Evaluation).

ONLINE USER SUPPORT

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Create a new transaction

Transaction Name
Luminance Technologies

Client

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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