



## **Phundex User Tips – How to reorganize my Pathways**

We recently worked with a client who wanted to restructure the way they use Phundex. They had created several Pathways using the Phundex Pathway Templates, but in some cases wanted to reorganize the Pathways to better match their processes or to be more streamlined. I suggested they think about how they liked to work and then we could look at their Pathways to see how we could change them to match the way they now want them to look.

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We went through the various Pathways they already had set up, and discussed how we could help them make it more appropriate for the way they work. The first place we looked was NDA's. They had created a series of individual Pathways for with NDAs and contracts for various purposes, but now wanted their NDA's all in one place. No problem we said and helped them restructure those by editing one of the existing NDA Pathways into their standard folder and copying NDA Tasks from the other Pathways into that one. (you can find out more about this by looking at a previous article on Managing your NDA process here : [How Phundex Helps Manage the NDA Process](#))

The contracts they had started to add to the same Pathways were then moved to specific transaction Pathways so that the documentation was all in one place. They could have also created a Contract Pathway and then copied (with content) contracts or legal documents in the transaction specific Pathways later.

We also restructured their transaction Pathways into a more standardized structure and then updated the other transactions with the same Stages and Tasks by adding the new Stages using the dropdown menu of existing Stages in the Pathways, and copying Tasks (with or without content) into the new Pathways where they wanted them located.

If you find you have a Task in the wrong Stage or Pathway, you can easily copy the Task into the correct Stage or Pathway using the copy function. If you don't want the Task in the original Pathway, just mark it as inactive and will won't appear on your list.

One client said they didn't want to end up with a lot of inactive Pathways and wanted to delete them. We don't do that so you never have to worry about accidentally deleting a Task or Document that you might later need. You, however, reactivate an old Pathway and then make any changes you want by editing the Pathway or Stage Names, and by editing Tasks to reflect what you want the new transaction or process you want.

Another client had set up several boardroom meeting Pathways and wanted to automate the Task reminders. We selected one and updated all the Stages and Tasks to create the ideal template for them. That then became a My Template Board Meeting Pathway, and they saved it as a new template,



removing any meeting specific content, but including their standard form Agenda, Executive Summary Format and several other standard reporting documents. As they hold 4 board meetings a year, they set up a series of repeating Tasks for the whole year to ensure Task notifications go out for the various Board meeting papers required throughout the year without any further work. They've decided they will review at the end of the year to assess whether they need to make any changes to the existing Template before they set up the repeating Tasks for a subsequent year.

We also had a client starting a fund who put together some due diligence information on potential investments into a single Pathway. They then decided they wanted a separate Pathway for each prospective investment. We created a mini-due diligence checklist and a new Pathway for each investment, then copied (with content) the existing Tasks into the new Pathways.

We've got lots of articles and videos on the HelpDesk showing you how to do each of these things, and what else you can do as well. If you can't find the information you are looking for, you can contact our support team via the HelpDesk button on our website or the Phundex platform. We will be happy to schedule a call with you to help with how to do any of this restructuring.

You can find more articles on our website, at [Phundex Resources](#), on LinkedIn at [Phundex LinkedIn](#), or for other questions, please email us at: [hello@phundex.com](mailto:hello@phundex.com).

To book a demo or for a trial, you can either use the link on our website or email [support@phundex.com](mailto:support@phundex.com), and they will be happy to set it up for you.