Phundex Product Release Notes August 2023

Phundex is pleased to announce its third release for 2023, delivering functionality requested by clients earlier this year.

Heather-Anne Hubbell, CEO of Phundex, explained that "some of our changes relate to functionality from earlier releases, where customers have asked for additional information or changes to make it easier to use. Others are because we've found more ways to streamline and improve the way you do business using Phundex."

Platform Notice

Xodo Sign recently acquired Eversign, and we've updated the information in the platform to reflect that. There is currently a problem with the Xodo Sign to Phundex document return, and signed documents aren't being returned to the Phundex Platform as expected. We've raised this with the Xodo Sign technical Team and are working with them to solve this issue.

DropBox recently acquired HelloSign, and we've changed the access link to reflect that. You can send documents for e-signature from the Phundex Platform by preparing and sending for signature in Phundex. You can select Xodo Sign, DropBox Sign, DocuSign and Adobe Sign, and our internal link will take you directly to your account sign-on page, giving you full access to your account and your usual signing process. Don't forget to save the signed documents back into Phundex, as they don't automatically get repopulated yet.

Just a reminder – to send documents out for signature from Phundex, the document must be part of a Task assigned to you and it must be in pdf format. We are extending functionality in our next release to permit Word and PowerPoint documents to be sent for signature as well, although for now those format documents need to be amended off the platform and uploaded for review and signature.

Here's the additional functionality newly released on the Phundex Platform.

Platform Enhancements

Document renaming and status – In our original design, documents were attached to specific Tasks, and you needed to edit the Task to edit the document's status. We made some data architecture changes, and Managers and Client Administrators can now rename and change the status of documents directly in the Data Room without having to edit the Task itself. This also allows you to change the names of documents in the Data Room of any Pathway for which you are a Manager or Client Admin, enabling you to update document names and making it easier to identify the specific documents you are looking for in your Data Rooms. We've also made it possible for you to name a document with the same name as a previously archived document, even in the same Pathway.

Minor functionality enhancements

Editing Stages/Tasks – Previously, you had to type in the new Stage or Task name but didn't have the option to change the Stage/Task by selecting from existing Stages/Tasks**.** We've now added a drop-down menu to allow you to either manually amend the Stage/Task name or clear the typed word and select from your existing lists. These include all Stage and Task names used in any Pathway for your organization, helping you standardize names and save time by selecting existing options.

Editing Tasks – Previously, if you edited a Task to remove a Task Form or document, the old Task Form or document "lost" its name. You could still see what the document or Form was by opening it in the Data Room, but we thought that was clunky, so now the name remains whether the Task Form or document is attached to a particular Task and no matter its status.

Copying Tasks – Copying Tasks from one Stage to another Stage or a different Pathway has been improved to allow you to change the attached document's name to a new name if so choose. The default is to leave the same name when you copy, but in addition to selecting a different Stage and/or Pathway to copy to, you can also change the document name.

Filtering Tasks on Pathway Dashboards – We discovered that the filtering process for showing outstanding Tasks didn't filter out completed Tasks. We've now corrected that, so you only see the outstanding Tasks.

Document List View – In our last release, we added the option to view documents and Task Forms by List View and Tile View. We've reduced the information in the List view by reducing the number of columns, making it easier to read the document names. We also changed the default filtering so that you only see current documents and need to select the Archive Document button to see Archived Documents. We are already planning further enhancements in the List View for our next release.

Team Members – when you add a new Team Member to a Pathway, you can select whether they are a Client Admin, a Manager or a Team Member. External contacts can only be set up as Team Members, and we've made that the default, so you don't have to manually select the option when you add them to the Team.

Temporary Users – We've also cleaned up a minor bug for Temporary Users, and you can now reset your password, whether you want to change it or locked out your access by mistake.

Task Numbers – we've fixed a minor bug for the number of Tasks in the Task List. On your Home Dashboard and each Pathway Dashboard, you now see the total number of "My Tasks" and, if you are a Manager or Client Admin, the total number of "All Tasks", when you look at your Dashboards.

Phundex Pathway Enhancements

We have added new Pathways you can leverage for business operations and transactions. For each new Pathway, we have created an FAQ article explaining how or when to use the Pathway, screenshots of what the various Stages and Tasks look like, a document showing all of the Stages and Task content, and, in some cases, short videos to explain the functionality. We've also added links in the Pathway Document List to take you directly to the relevant Pathway articles so you can easily find the relevant information about each Pathway. This information is also available for all existing Pathways. You can download the articles and documents from our HelpDesk for future reference.

The new and updated Pathways include:

- Jersey Private Fund Set-Up
- Updated oneNDA Pathway providing several templates to choose from together with additional information to make it easier to use.
- Client Onboarding Process

Pathways we are currently working on include:
- Commercial Real Estate Acquisition
- Due Diligence
- OneDPA – a data processing agreement created by the team behind oneNDA which will include detailed instructions on how to complete the documents.

HelpDesk and FAQ's Enhancements

The **Phundex** Platform includes an online HelpDesk with handy tips, videos, FAQ's and details about each of our Pathways. The HelpDesk also has all resource material from our website and a chat feature to request more bespoke information or ask about additional features. We've added information about each of the enhancements above and some general suggestions on how to organize the way you work using our Pathways.

Our HelpDesk includes general articles about helpful topics, how to use Phundex for certain types of processes and transactions, and our e-books. We've recently updated our HelpDesk material, tagging our articles and e-books by industry so you can type in your industry type, and we'll give you a list of Pathways, articles and e-books you might find particularly relevant.

Our Help Desk is standing by if you have additional questions, want to ask how to do something, or have suggestions on additional support information you'd like to see.

Based on customer requests, we've already started prioritizing additional enhancements for the rest of this year. Want some functionality you don't see here? Contact us and let us know what you'd like to see.

Request a demo or trial today at support@phundex.com, or use the link on our website to book directly. You can find additional resources on LinkedIn Phundex | LinkedIn or at our website Phundex Resources