



Phundex Consolidated Release Notes

Having delivered numerous Platform updates over the past 18 months, we thought it would be helpful to consolidate the various changes into a single document, particularly as some functionality has changed significantly over the releases.

Platform Notice

Xodo Sign acquired Eversign earlier in 2023, and we've updated the information in the Platform to reflect that. Any Document sent to Xodo sign for signature will be automatically uploaded to Phundex once signed to its originating Pathway. We have links to several other e-signature systems, but you must upload the signed Document into Phundex for those systems.

We have recently partnered with AutoNDA and are working with them to establish a way forward technically. If you are now using AutoNDA, please get in touch with us at support@phundex.com so we can help you leverage the additional functionality in line with your requirements.

Platform Enhancements

General Administrative Functions

Team Members – when you add a new Team Member to a Pathway, you can select whether they are a Client Admin, a Pathway Manager or a Team Member. External contacts can only be set up as Team Members and that is the default.

Temporary users- in addition to your usual subscription plan, you can add individual temporary user licenses monthly or annually. You can set up as many temporary usernames in your Network but limit the number of people accessing your Pathways at any time. This allows you to add Team Members for short-term transactions or on a rolling access basis, helping you keep costs down while enjoying the collaboration benefits of the central hub and workflow.

If you are interested in Temporary users, please contact Support@phundex.com, who will be happy to help you set this up.

Changing User access – in addition to adding new Temporary users, you can modify existing users to Temporary users and back again. You can also activate and deactivate any users' access to your Network, giving you complete control over who and how users access your Network and Pathways.

Time zones – Users can add the time zones where they work, enabling log-on and activation refreshes on a rolling end-of-day basis. This ensures that if Temporary Users are timed out rather than logging out, the system will log them out at the end of the day, freeing up that temporary license for another user.



Sending Documents for e-signatures

Sending Documents for e-signature –you can send PDF, Word and PowerPoint Documents directly for signature. Users should note that typically, e-signature systems recommend using PDF Format for signature but often allow other document formats, so we increased this functionality to meet client requests.

Uploading new Document versions and sending for signature – Team Members assigned a Task to upload or attach a Document can't amend the Task to upload a new version or send for signature from the Task itself. However, by client request, we have added functionality in the Data Room to enable a Team Member who is assigned a Task requiring them to upload or attach a Document to upload a new version and to send for signature from the Data Room without having to request changes to the Task from the Pathway Manager. Only Team Members assigned to the Task (or Pathway Managers) can do this, maintaining control for the Pathway Manager but allowing flexibility for the assigned Team Member.

Tasks/Stages

Editing Stages/Tasks – You can change the Stage/Tasks by selecting from your existing Stages/Tasks list via a drop-down menu. This allows you to either manually amend the Stage/Tasks name or clear the typed word and select from your existing lists. The dropdown list includes all Stage and Tasks names used in any Pathway for your organization, helping you standardize names and save time by selecting existing options.

Team Members editing Tasks – some clients have asked us why Team Members can't edit Tasks. Team Members can't edit Tasks to ensure the Pathway Manager has control over what is required and how Team Members complete Tasks. We have added a tooltip to inform Team Members that they should contact the Pathway Manager if they need to change how the Task works.

New Predefined Form – In addition to our original Company Information and Company Marketing information Predefined Forms, a Company Appointments Form is now also available. This allows users to add details about Company Appointments (typically Directors and Company Secretaries) into a pre-set Form and to add additional appointments in the Form quickly. The Form is free text so that you can add appointments for a particular Company, or you may choose to add all appointments for any company for a specific person. You no longer need to create a new Company Appointment Form for any Pathway.

Editing Tasks by changing Documents or Task Forms– Previously, if you edited a Tasks to remove a Tasks Form or Document, the old Tasks 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 Tasks Form or Document is attached to a particular Task, no matter its status.



Tasks Duplication – You can copy Tasks with or without their content. Reuse or amend Task Forms to collect the information you need to manage transactions across all of your transaction and process Pathways.

Copying Tasks with completed Documents and Forms – you can copy Tasks with data and Documents to other Stages and Pathways – and you can decide if you want to copy the original blank Forms and Documents or the completed ones. We have a pop-up to alert you so you don't unintentionally copy completed data that shouldn't be shared.

Copying Tasks – When copying Tasks from one Stage to another or a different Pathway, you can change the attached Document's name to a new one. 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.

Creating Tasks with Multi-select Forms – You can create Forms with multiple selection options in the Data Type field so that Team Members can pick and choose from amongst the choices on a Tasks Form or confirm as they review each item on the list that it is complete.

Dependencies – Dependent Tasks include automation, enabling you to prioritize and assign Tasks and change the prioritization with automated number updating. Team Members only receive email notifications of Task assignments when the prior dependencies are complete. A Team Member can't start a Task until any previous dependent Tasks are complete.

Changing completed Tasks – As a Pathway Manager, if you wish to change a completed Tasks and reassign it to the same Team Member, a pop-up box will allow you to send the email to the original Team Member to let them know of any changes and then allow you to amend the Tasks. If you wish to amend the Task and send it to a different Team Member, you can skip the email step, amend the Task and assign it to the new Team Member. Phundex will automatically send an email to alert the Team Member about their Tasks.

Guest Tasks – when you send a Guest a Task and they save it, the Task is marked as complete automatically. This enables Phundex to automatically trigger an email alert for any Tasks dependent on that Task completion to the following Team Member.

Recurring Tasks – you can create Tasks which are recurring. Phundex will automatically email your Team Members to remind them the Task is due on the frequency you choose, whether monthly, quarterly, semi-annually or annually.

Changing completed Tasks – Pathway Managers and Client Admins can move a completed Tasks status back to the "to-do" status, edit and reassign it, as noted above. The Team Member assigned a Task can also change the status back to do in order to do more work on the Task but does not have the option to assign the Task to another Team Member.



Data Room Functionality

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 have made some data architecture changes to address this. Pathway 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 Pathway Manager or Client Administrator, 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.

Adding Documents or Forms from the Data Room to Tasks –When selecting an attachment for a Task, you can now see the name and file type, making it easier to choose the correct Document or Task Form to attach.

Retaining Documents and Task Forms when you change a Task – if you create a Task with a Document or Task Form and later decide to remove the Task Form or Document from that Task, Phundex retains the Document or Task Form in the data room, so it is still available if you later need it.

Individual Documents and Task Form archiving. - Never deleted, with an entire audit history, you can archive individual Documents and Task Forms and replace them with newer versions.

Sharing a Document link – you can share a "Published" Document with any of your contacts. Published Documents in the data room have a "share" option. Simply select Share, enter the name and email address of the person you want to send the Document to and hit the Share button. Our audit trail tracks which Documents have been shared, with whom, and when they've been accessed.

Dashboard View Options

Date Filter – Home Dashboard and Pathway overview screens allow you to select from a predefined list: Overdue, Due Today, Due this Week, Due this Month. You can also select from a specified date range for both Dashboard views.

Document List View – You can view Documents and Tasks Forms by List View and Tile View. The default filtering allows you to see current Documents. You can view Archived Documents by selecting the Archive Document button.

Tasks Numbers –On your Home Dashboard and each Pathway Dashboard, you see the total number of "My Tasks" and, if you are a Pathway Manager or Client



Admin, the total number of "All Tasks" in your Pathways when you look at your Dashboards.

See Tasks for all Team Members – as an Admin or Manager, you can see all Tasks you have assigned to Team Members and all of your Tasks. Your Home Dashboard shows All Tasks for all Pathways you have assigned and your specific Tasks on a separate tab. Each Pathway Dashboard also has ALL Tasks assigned and a tab for your Tasks. You can search by Pathway name, Client Name or Team Member to see the status of Tasks you have assigned to Team Members and if any of your Team Members are overloaded. It will also allow you to easily reassign Tasks if one of your Team members is away for an extended period or leaves the business.

Pathway Filtering – you can sort Pathways by Manager and Client so you can easily see all Pathways related to a particular Manager or Client.

Data room view and filtering – You can view Documents and Task Forms by Tile or by List view. You can also sort Documents and Task Forms by Team Member so you can easily see Documents and Task Forms for your assigned Tasks or those of your Team Members.

Pathway filtering – the default view for your Pathways is active Pathways. You can still filter and search for inactive Pathways, but like Stages and Tasks, you won't see them as a default.

Email address validation of Team Members - When you add a new Team Member to your Network, the Platform will check whether that user is already on the Phundex Platform, automatically validate the email address, and auto-populates the user's first and last name.

User Permissions- User permissions ensure you have the right permissions within your home Network and any other Network you are part of. If, for example, you are a Pathway Manager in your company Network but a Team Member in another Network, the Platform ensures you have the appropriate permissions in each Network, so you have access to the correct information in each Network.

Pathways, Stages and Tasks archiving - Individual Tasks and Stages, and entire Pathways can be archived. Search by Active or Archived Stages and Pathways, and re-activate archived Tasks, Stages and Pathways with a simple toggle.

Amending Data Forms –Phundex Pathway examples and bespoke client-created Task Forms can be amended without creating from scratch, making managing changing requirements more straightforward.



User Experience

Navigating the Menu Bars – users have commented on how "jumpy" the navigation to the left-hand Menu Bar was if you unintentionally slipped your cursor too far. We have made a minor change to reduce that "jumpy" behaviour and will continue to monitor to see if we need to make any further changes.

Pathways

Phundex provides a suite of Pathway Templates for coordinating transaction management and due diligence across all clients and stakeholders. We've leveraged our digital transformation experience to provide best practice Pathways for the most common types of transactions and processes.

We have an evolving suite of 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 Tasks 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.

Pathways we are currently working on include:

- Commercial Real Estate Acquisition, and
- Due Diligence

You can find a list of the currently available Pathways here:

[Phundex Pathway Templates October 2023](#)

To see our new Pathway oneDPA and the functionality on Phundex see our previous article here:

[oneDPA on the Phundex Platform](#)

HelpDesk and FAQ's

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 questions. It includes 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, using Phundex for specific processes and transactions, and our e-books. We've revamped and updated our HelpDesk material, tagging our articles and e-books by industry so you can type in your industry type to find a list of Pathways, articles, and e-books you



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

To book a demo or do a trial, you can either use the link on our website or email support@phundex.com, and they will be happy to set it up for you.
might find particularly relevant.