



## Phundex Product Release Notes October 2023

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

Heather-Anne Hubbell, CEO of Phundex, explained that "we have continued to enhance functionality and updates to prior releases to meet customer requests and are delighted to be able to meet those requests regularly."

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### Platform Notice

**Xodo Sign acquired Eversign**, and we've updated the information in the platform to reflect that. We've now resolved the Xodo sign issue with returning signed documents to the Phundex Platform and any document sent to Xodo sign will once again be automatically returned to the Pathway it was originally sent from.

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

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

#### Platform Enhancements

**Team Members editing Task** – some clients have asked us why Team Members can't edit Tasks. This is a control mechanism, and we have added a tooltip to let Team Members know that they should contact the Pathway Manager should they need to change the way the Task works.

**Sending Documents for e-signature** – with this release, you can now send 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 have increased this functionality to meet client requests.

**Adding documents or forms from the Data Room to Task Forms** – we have added a notation on the Task Form selection button that allows you to see not only the name, but also the file type to make it easier to select the correct document or form to attach to the Task Form.

**Uploading new document versions and sending for signature** – Team Members assigned a Task to upload or attach a document could not previously amend the Task to be able to upload a new version or send for signature. This reflects the controls we

established where a Team Member can't edit a Task. However, by client request, we have added functionality in the Data Room to enable a Team Member who is assigned a Task to either 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 the Task (or Pathway Managers) can do this, maintaining control for the Manager, but allowing flexibility for the assigned Team Member.

Uploading documents and sending for signature from the Data Room – previously it was possible for any Pathway Team Member to do this. In line with the above change, we have restricted this ability to only the assigned Team Member or Pathway Manager, to maintain appropriate controls.

**New Predefined Form – Company Appointments** - we have added a new Company Appointment predefined form. This will allow users to add details about Company Appointments (typically Directors and Company Secretaries) into a pre-set form, and to easily add additional appointments in the form. The form is free-text, so you can add appointments for a particular Company or you may choose to add all appointments for any company for a particular person. There is no longer a need to create a new Company Appointment Form Task for any Pathway.

**Date Filter** – previously the Dashboard overview and Pathway overview screens allowed you to select from certain prescribed choices, such as Overdue, Due today, Due this Week, Due this Month. We have now added the ability to select from a specified date range for both of these Dashboard views.

**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**

**Data Room File view** – in an earlier release we created the option to view Documents and Task Forms by list view as well as tile view. When you load documents into the Data Room you give them a new name for your Pathway. We discovered that in the List view, the name of the document recorded was actually the name from its original source, and



have fixed that so the File view name reflects the name given to the document when you add it to the Data Room

**Multiple Dropbox Task Forms** – previously when you created a multiple dropdown form, it only closed if you clicked within the box. We have updated that to allow you to click anywhere in the form to see the whole dropdown selection and to close it when required.

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**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.

### Coming Soon

Team Member Users have asked for flexibility in when they receive Task Notifications. Managers have also asked if they can be notified when Tasks are completed or comments are added to Tasks. We are currently working on both of these requests, with email and on-platform notifications for Managers being scoped out. Please let us know if you have any comments about how you would like that functionality to work. We expect to provide this functionality in our final release of 2023.

### Phundex Pathway Enhancements

While we haven't made any Pathway Enhancements for this release, we are currently working on Data Protection Agreements to update a new Pathway, so look for this in our final release for 2023.

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.

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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](mailto: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 Knowledge Hub](#)