



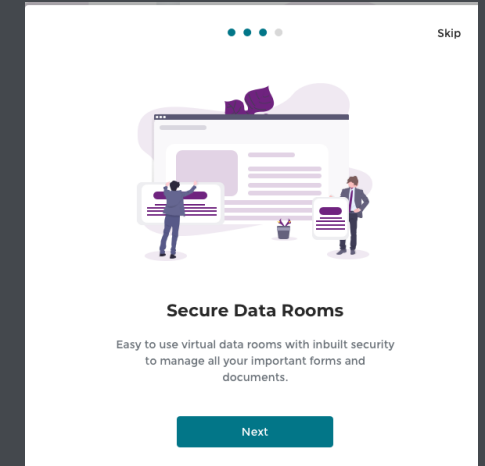
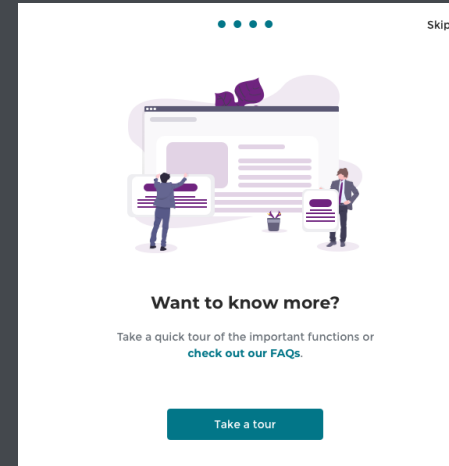
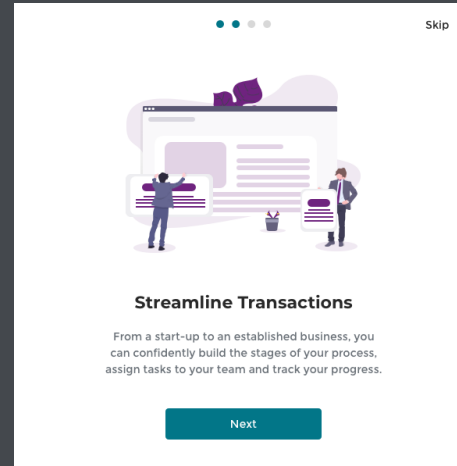
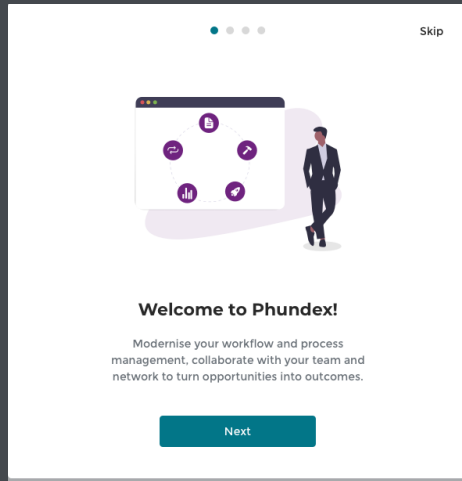
# Platform Hints & Tips

To make it easier, we've added tips and suggestions along the way on the platform and well as providing a Help Desk and Resources on our website

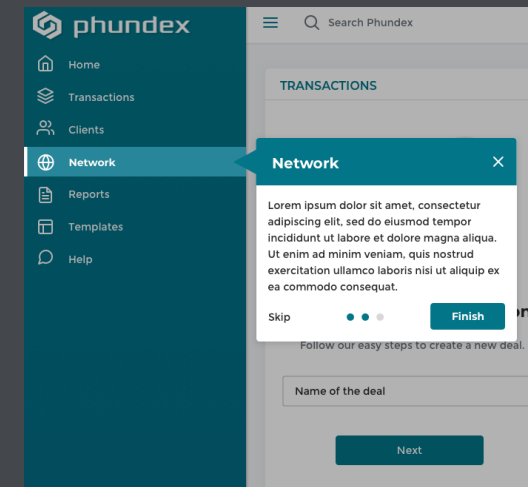
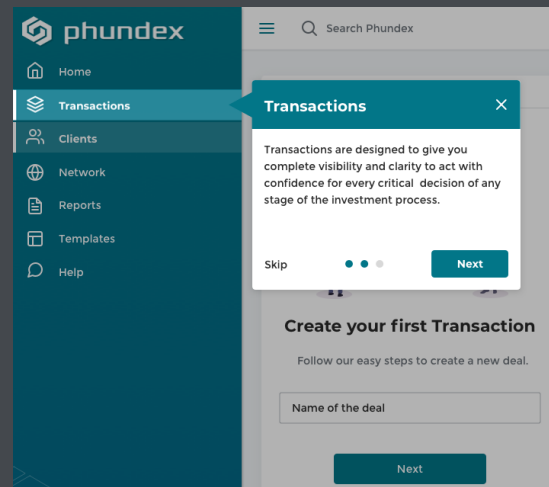
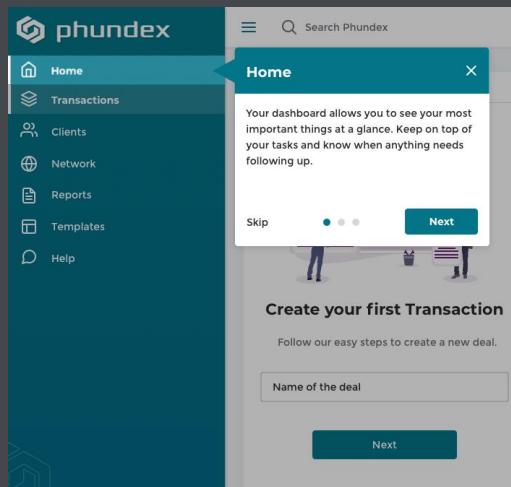
November 2021



# ONLINE USER SUPPORT



The platform has built in hints & tips to help new users familiarise themselves with the tool and its functionality



**phundex**

Search Phundex

Home Transactions Clients Network Reports Templates Help

1 Tasks overdue 45 New tasks this month 12 Tasks completed this month

**MY TASKS** Due This Week

Business Evaluation: Upload NDA Luminance Technologies 30 Mar 2021

Business Case: Fill out form Curious Minds - App 01 Apr 2021

Due Diligence: Fill out form Curious Minds - App 02 Apr 2021

Contracts: Get signatures Luminance Technologies 05 Apr 2021

Intellectual Property: Upload NDA Luminance Technologies 06 Apr 2021

Transactional: Create form MiGoals Start Up 06 Apr 2021

Financials: Create form Luminance Technologies 06 Apr 2021

Intellectual Property: Upload NDA MiGoals Start Up 06 Apr 2021

Transactional: Create form Luminance Technologies 06 Apr 2021

Financials: Create form MiGoals Start Up 06 Apr 2021

**RECENT TRANSACTIONS**

Luminance Technologies Current Stage: Business Evaluation

Curious Minds - App Current Stage: Business Evaluation

MiGoals Start Up Current Stage: Business Evaluation

**Luminance Technologies**

Stages Business Evaluation 0/7 Business Case 0/10 Due Diligence 0/3 Contracts 0/4 Financials 0/8 Intellectual Property

**Team** Data Room Reports Activity History Settings

**OVERVIEW**

60/100 (60%) tasks complete Everything is on track! Increase +2.0% Comparable to the previous 5 weeks

**MY TASKS** Due This Week

Business Evaluation: Upload NDA 30 Mar 2021

Business Case: Fill out form 01 Apr 2021

Due Diligence: Fill out form 02 Apr 2021

Contracts: Get signatures 05 Apr 2021

Intellectual Property: Upload NDA 06 Apr 2021

Transactional: Create form 06 Apr 2021

Financials: Create form 06 Apr 2021

Intellectual Property: Upload NDA 06 Apr 2021

Transactional: Create form 06 Apr 2021

**TRANSACTION DETAILS**

Name Luminance Technologies

Jurisdiction Canada

Current Stage Business Evaluation

Description Start up looking for investors

Client Sunrise Investments

Deal Manager Michael Fitzgerald

**PATHWAYS** Create Pathway

Search Pathways Type to search Status Reset Search

NAME	CLIENT	STATUS	CREATED BY	LAST UPDATED
MN Monday's new transaction - equity		On track	Jill North	Today
NI new innovation management process		Overdue	Jill North	7 Aug 2021
HN HA's new Friday transaction		On track	Jill North	7 Aug 2021
SI Start-up initial equity raise		On track	Jill North	7 Aug 2021
SI Syllabiz II	Monceto limited	Completed	Jean Navicloche	6 Aug 2021
MP Matt's Project 13		On track	Jill North	5 Aug 2021
MP Matt's Project 12		On track	Jill North	5 Aug 2021

**PHUNDEX MUTUAL NDA TEMPLATE - AUDIT T**

Upload Files

Team Member Type Data Type

Select Select All Reset Search

Team Member	Date	Type	Description
Jill North	9 Aug 2021 17:19	View	Document is viewed
Jill North	9 Aug 2021 17:19	View	Document is viewed
Jill North	3 Aug 2021 04:22	View	Document is viewed
Jill North	3 Aug 2021 04:09	View	Document is viewed
Jill North	3 Aug 2021 04:05	View	Document is viewed
Jill North	18 Jul 2021 11:31	Edit	Changes made to document

**PHUNDEX MUTUAL NDA TEMPLATE - AUDIT T**

Upload Files

Team Member Type Data Type

Select Select All Reset Search

Phundex mutual NDA template... 100 KB

Review onboarding summary...

start up company stage

Test Mutual NDA 233 KB

this company's informatio...

Validation details

Help

# ONLINE USER SUPPORT

Dashboards give you a real time update every step of the way

# ONLINE USER SUPPORT

The platform has built in hints & tips to help new users familiarise themselves with the tool and its functionality

### 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 Evaluation7 Tasks

Business Case10 Tasks

Due Diligence3 Tasks

Contracts4 Tasks

Financials8 Tasks

Intellectual Property2 Tasks

Legal3 Tasks

Transactional7 Tasks

☒ Add to My Templates

Back

Create

Business Evaluation7 Tasks

Primary contact

Secondary contac


Basic company info

Company location and currency

More company info

Company stage

Business summary



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Lawyer

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Michael Fitzgerald

Fitzgerald's Family Trust  
Deal Manager

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+41 3864 6578 79

# ONLINE USER SUPPORT

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

Our Help Desk on the Platform is available at any time – look at our FAQ's, user guides, Pathway information and so much more

