SWAN Dealum User Guide

- First-time logon
- Participating in Down Selection
- Managing your profile

https://dealum.com
If you need technical support, call or text Bob at (512) 658-2240
Avoid confusion - understand dealum nomenclature

In dealum, the term “Deal Room” refers to our SWAN network.

“Deal Room” has nothing to do with a room for a specific deal memo team, deal memos or deal data rooms.

Rather, it refers to a meeting place (a virtual room) where angels can consider a large number of deals.
Your initial logon to the system
Look for email invitation
(including checking your spam folder)

Bob Bridge invited you to join SWAN Impact Network

Hi Lynn,

Bob Bridge from SWAN Impact Network invited you to become a member of SWAN Impact Network deal room on Dealum.

Dealum is a platform, where investors can manage their deal flow and investment process and do due diligence on companies.

Accept invitation
You should be taken to a dealum page that looks like this

Create new profile
Create a password

Create a password then select “Sign up”
Then you should see this:

You can now go to the SWAN Deal Room
Now you can help with Down Selection

- Read
- Chat with the company
- Read / Add Comments
- Vote
Select the current funnel stage

- The funnel steps are shown across the top.
- “Applied” means that the company has completed an application in Dealum.
- In the example above, 20 applications are not completed and one, Karlos, is complete.
- Companies stay in Applied until Bob manually moves them to Pre-Screen.
- Bob weeds out Pre-screen misfits and then advances the stronger companies to Down-selection 1.
- The “Down selection 1” companies are the ones you will review.

Version: 7/20/21
Companies for Your Review

- This is an early and incomplete list of companies
- I have “tagged” the companies to show their market segment
- If you slide your mouse over the One Liner, the one liner pops out
- You review as few or as many companies as you wish
Information on a Company

- Select Overview, Details, and Documents to see the information submitted by the company
  - Overview: contains the Pitch Deck
  - Details: contains the answers to our application questions
  - Documents:
    - Contains a financial model for the company
    - May contain a link to the video of the zoom down-selection call

Version: 7/20/21
You can communicate with the company using Chat

- Start a chat using the button
- And you can see everyone’s prior Chats by clicking on the “Chat with Company” button.
See and add comments on a Company

- Comments are not visible to the company.
- See comments: The Comment field shows what other reviewers have said.
- **BEST PRACTICE. Add comments:** Add your own observations on the Strengths and Concerns in a Comment. Your thoughts provide the information we use to give the company detailed and constructive feedback.
Finally, you vote on the companies

- Return to the screen with all of the Down Select 1 companies
Voting Options

Down-selection 1 voting

Question *
Should this company be invited to zoom down selection?

Options *
Text: Yes - is promising, Value: 2, Actions
Text: Maybe - not sure, Value: 1
Text: No - not investable, Value: 0

Results type *
Average
Manage your dealum profile
Start by selecting your account

- Stephen commented on EVUS Inc. in SWAN Impact Network deal room
- Elizabeth and Stephen commented on Lumaegis in SWAN Impact Network deal room
- Stephen commented on Socialwyze in SWAN Impact Network deal room
Control dealum emails you receive

First: select “Notifications”

Second: Select “as few as possible”

Third: scroll down to notification types"
Notification types

Select what notifications you want to receive
You can also change your password

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Immediate Tech Support
Text or call Bob
(512) 658-2240

Suggestions for Additions to this Guide?
What have you learned about navigating around Dealum?
Email
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