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

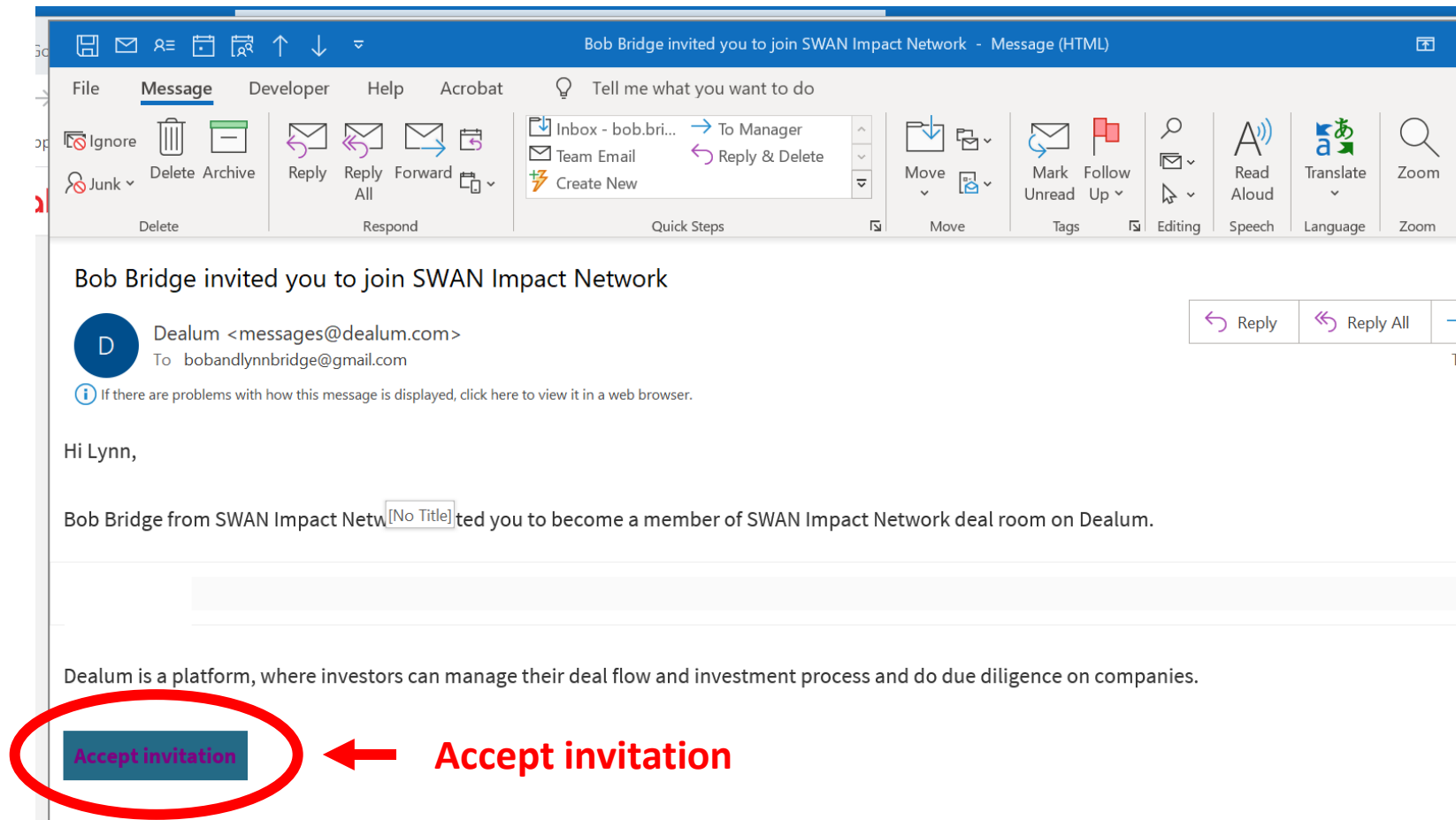In dealum, the term "Deal Room" refers to our SWAN network.

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

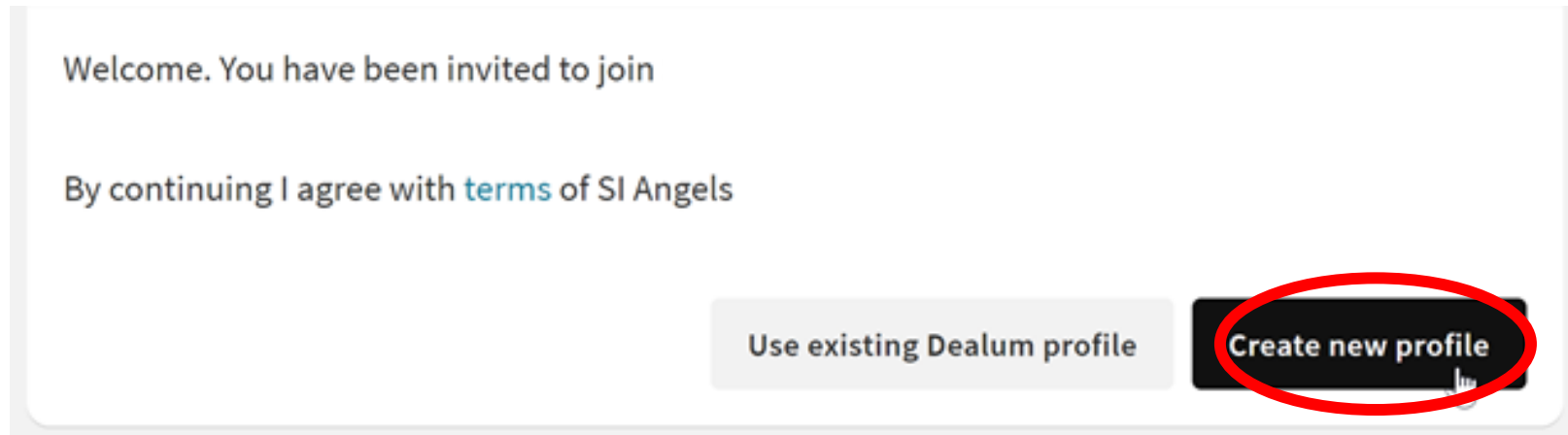Rather, it refers to a meeting place (a virtual room) where angels can consider a large number of deals.

Your initial logon to the system

Look for email invitation
(including checking your spam folder)

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

Welcome. You have been invited to join

By continuing I agree with terms of SI Angels

Use existing Dealum profile   Create new profile

Create new profile

Create a password

Create a password then select "Sign up"

Then you should see this:

Member invitation to SWAN Impact Network
www.SWANImpact.org

Access Granted

Thank you for joining SWAN Impact Network. You have been added as a deal room member.

In some cases you have to be approved by a deal room admin before you can access deal room content.

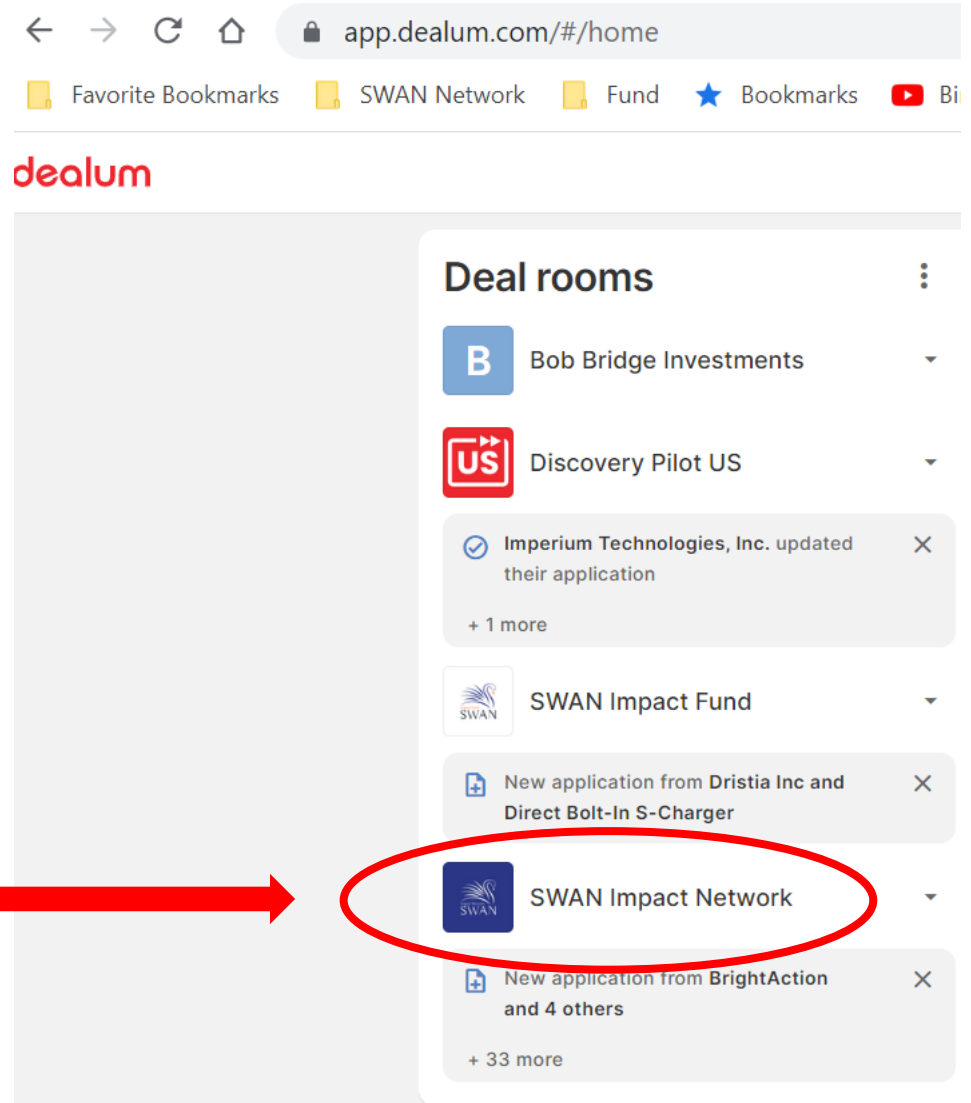Home   Open deal room

**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
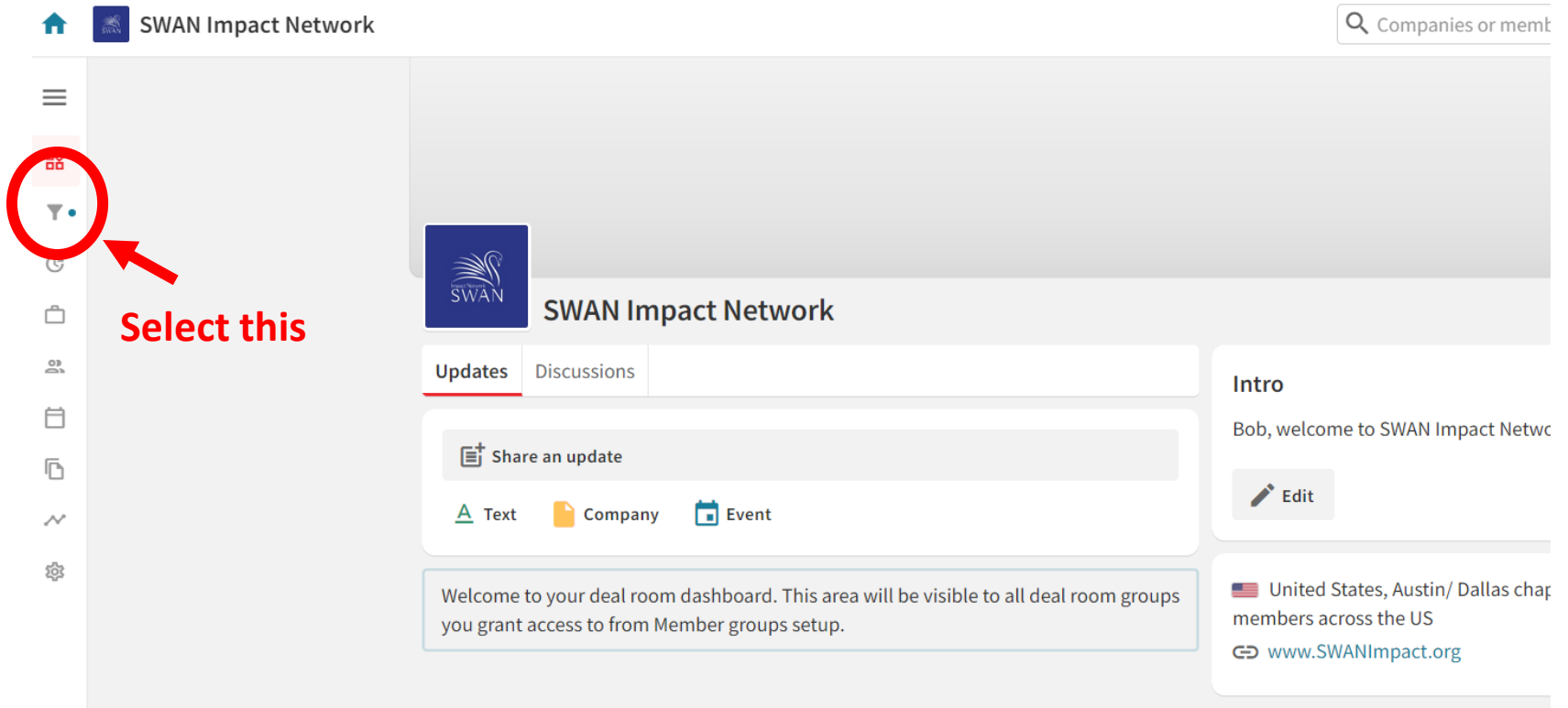
Navigating the Dealum Home Screen

Next: navigate to the Funnel Window

Then: Select the current funnel stage

Then Select this

- The funnel steps are shown across the top.
- "Applied" means that the company has completed an application in Dealum.
- In the example above, 20 application 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

Companies for Your Review


Select a company to see more

- 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

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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

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There is an access-controlled Dataroom for the most-sensitive company information
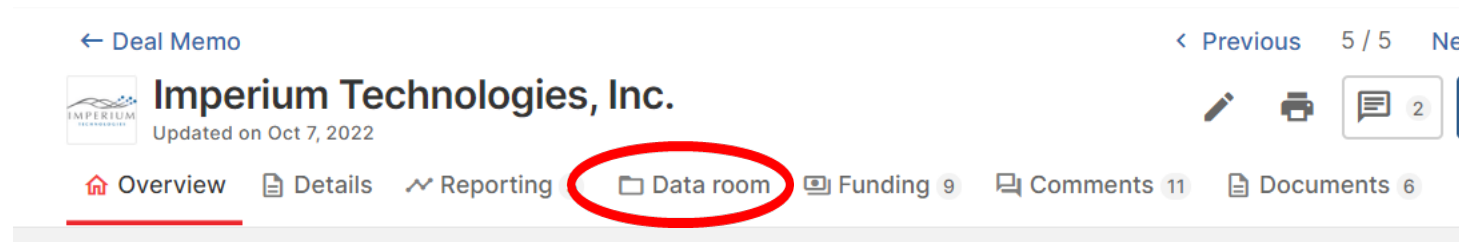
- Company applicants expect that access to the most highly sensitive information be initially limited to only SWAN members working on the deal memo and later to only those who have actually invested

- Starting in 4Q2022 dealum introduced Datarooms that allow data access to be tightly controlled

- SWAN's dealum administrators enter a list of who can access each dataroom's content.

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

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Voting Options

Manage your dealum profile

Start by selecting your account

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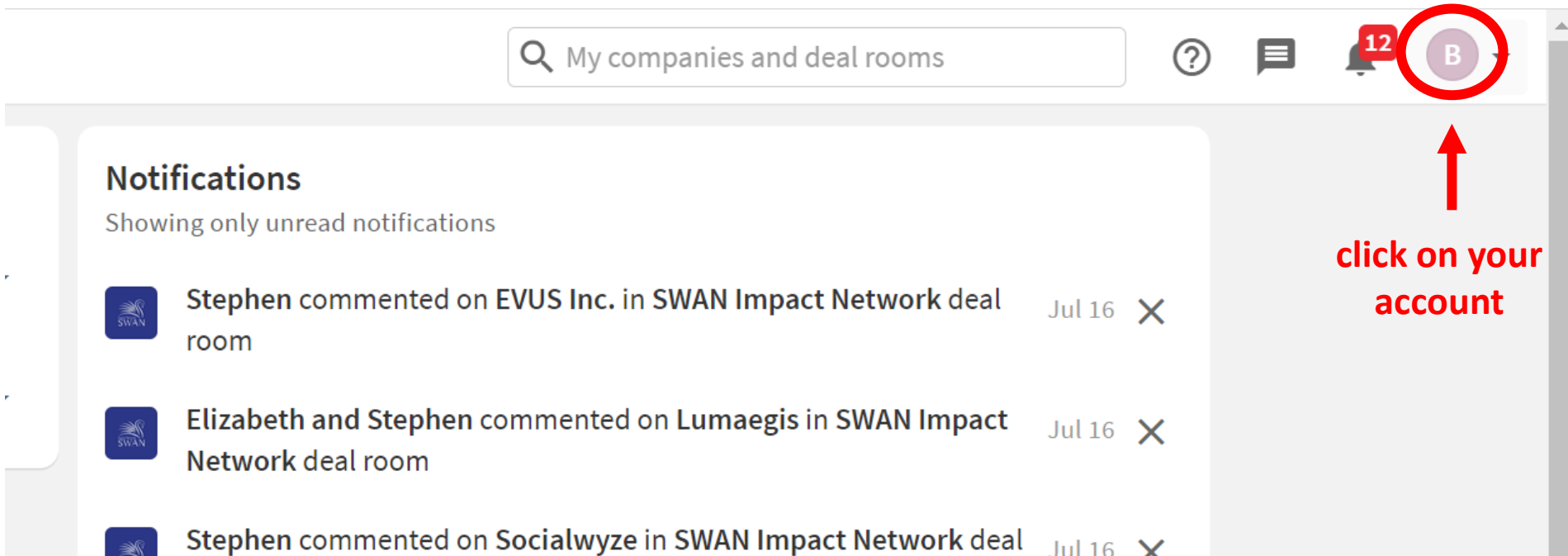
Control dealum emails you receive

first: select "Notifications"

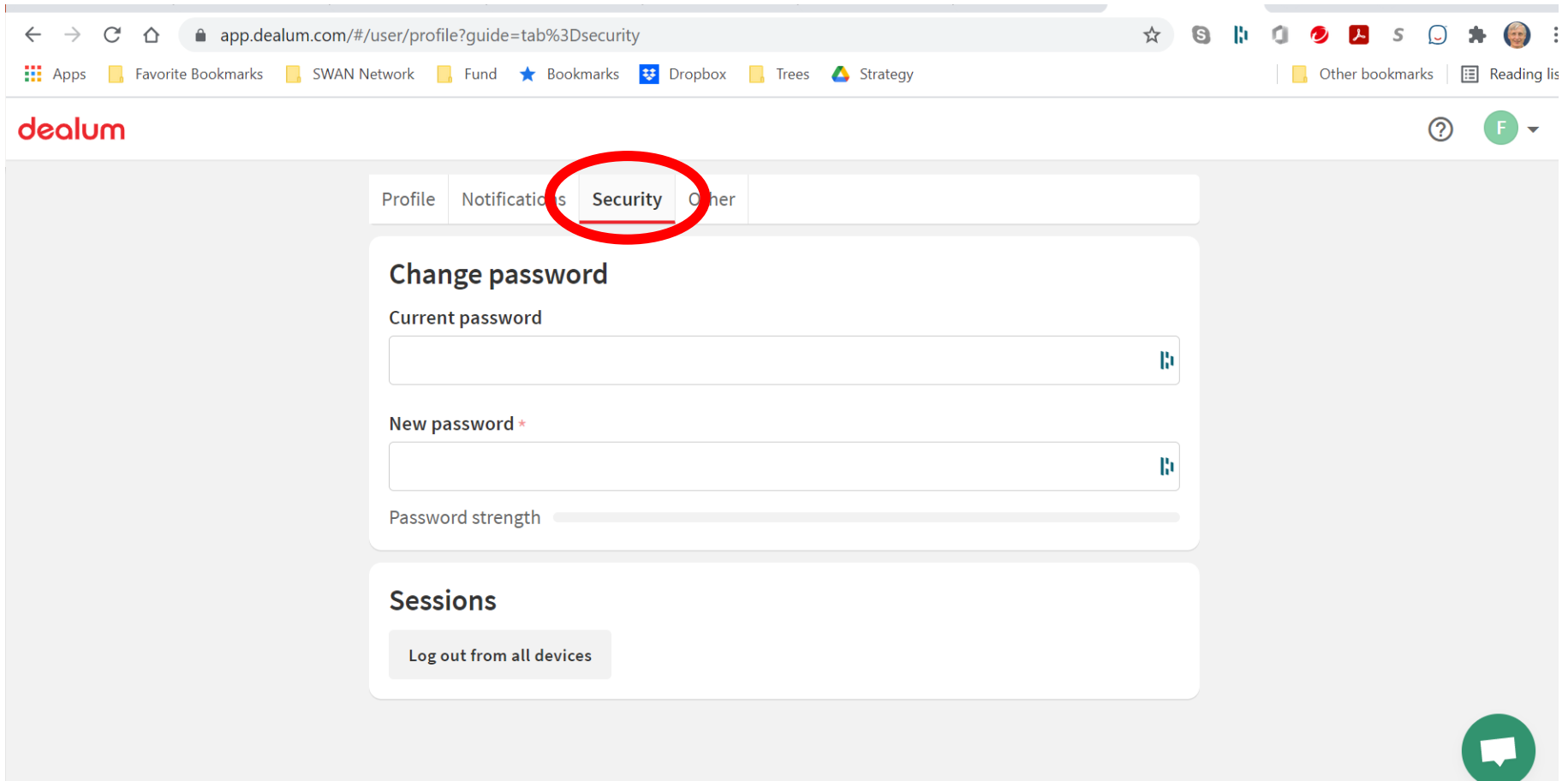Second: Select "as few as possible"

Third: scroll down to notification types"

Notification types
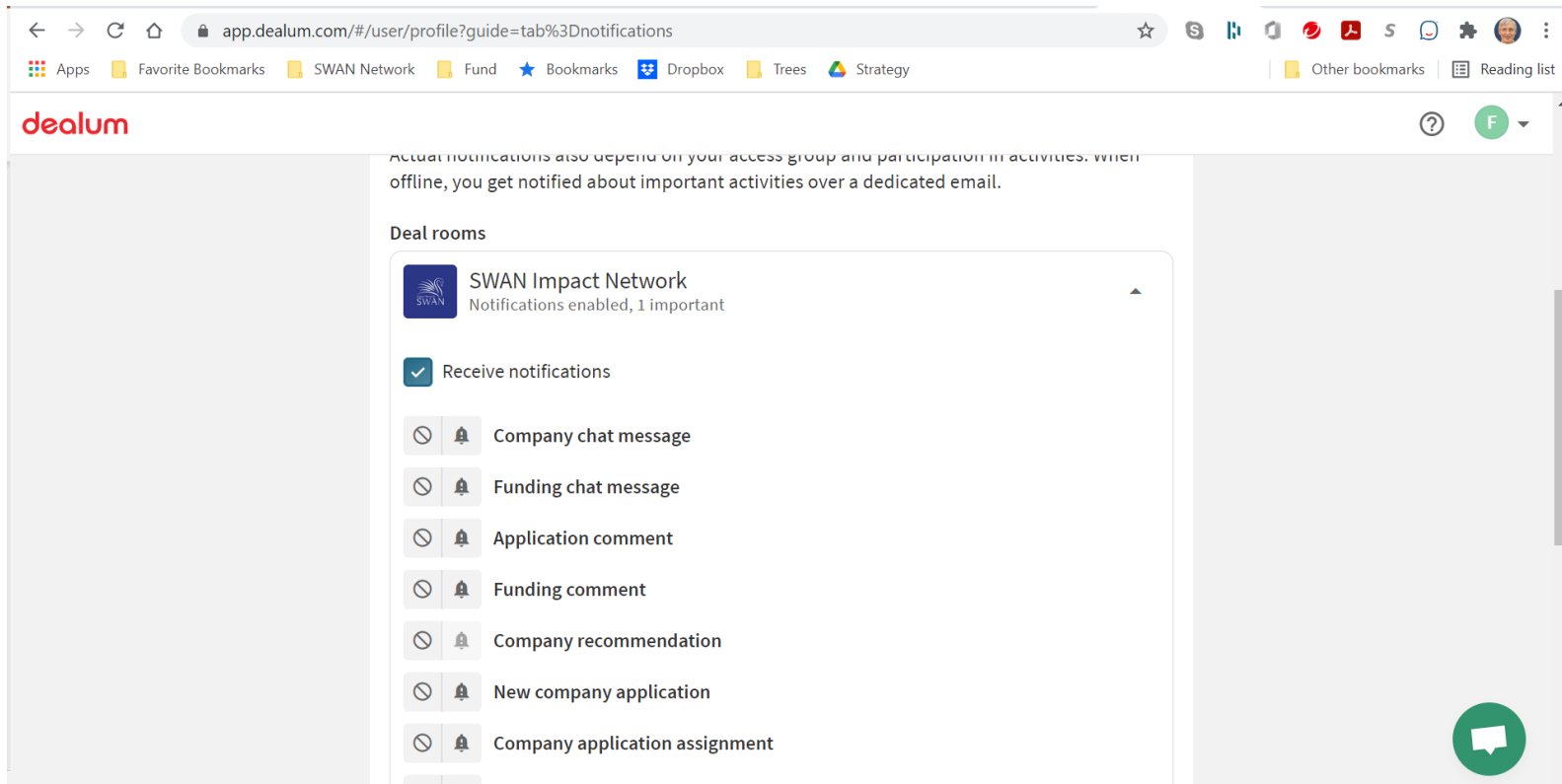
Select what notifications you want to receive

You can also change your password

A final Note

Confidentiality of Dealum Information

The information you see in dealum may not be shared outside of SWAN. If you want to share information on a company with someone outside of SWAN, there are two options:

- The standard approach is to share the URL (web address) for the company

- If you would like to share more than just the URL, please contact Adminstrator@swanimpact.org to discuss your request.

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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