



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.

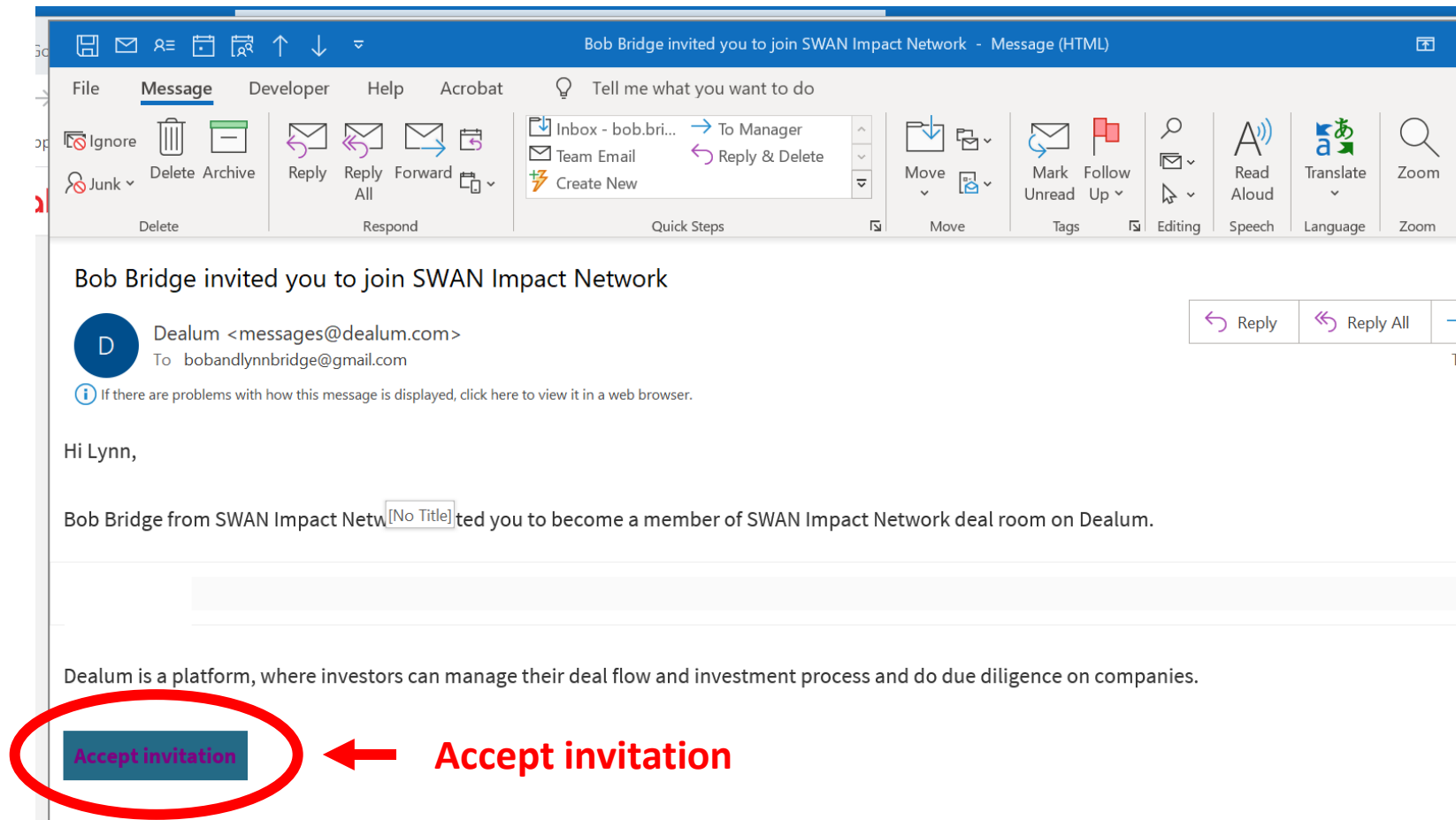
“Deal Room” has nothing to do with a room for a specific deal memo team, deal memos or deal data rooms.

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

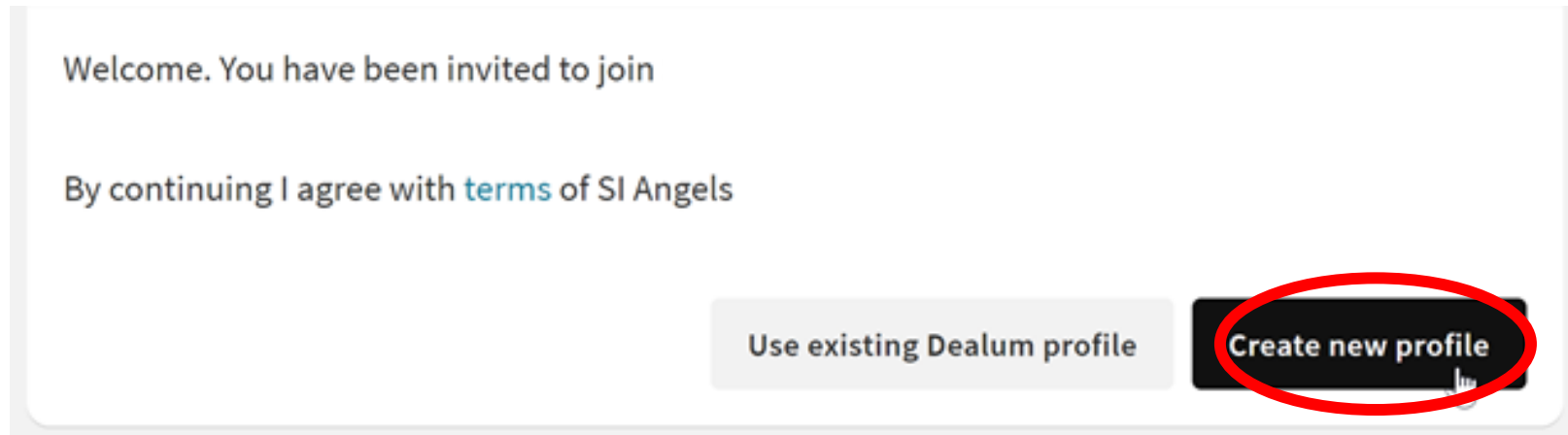
Your initial
logon to the
system



Look for email invitation (including checking your spam folder)



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



Create new profile

Create a password

Sign up


Name


Liina Test


Email

liina@dealum.com


Password

 ← Create a password then select "Sign up"

Great 

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**

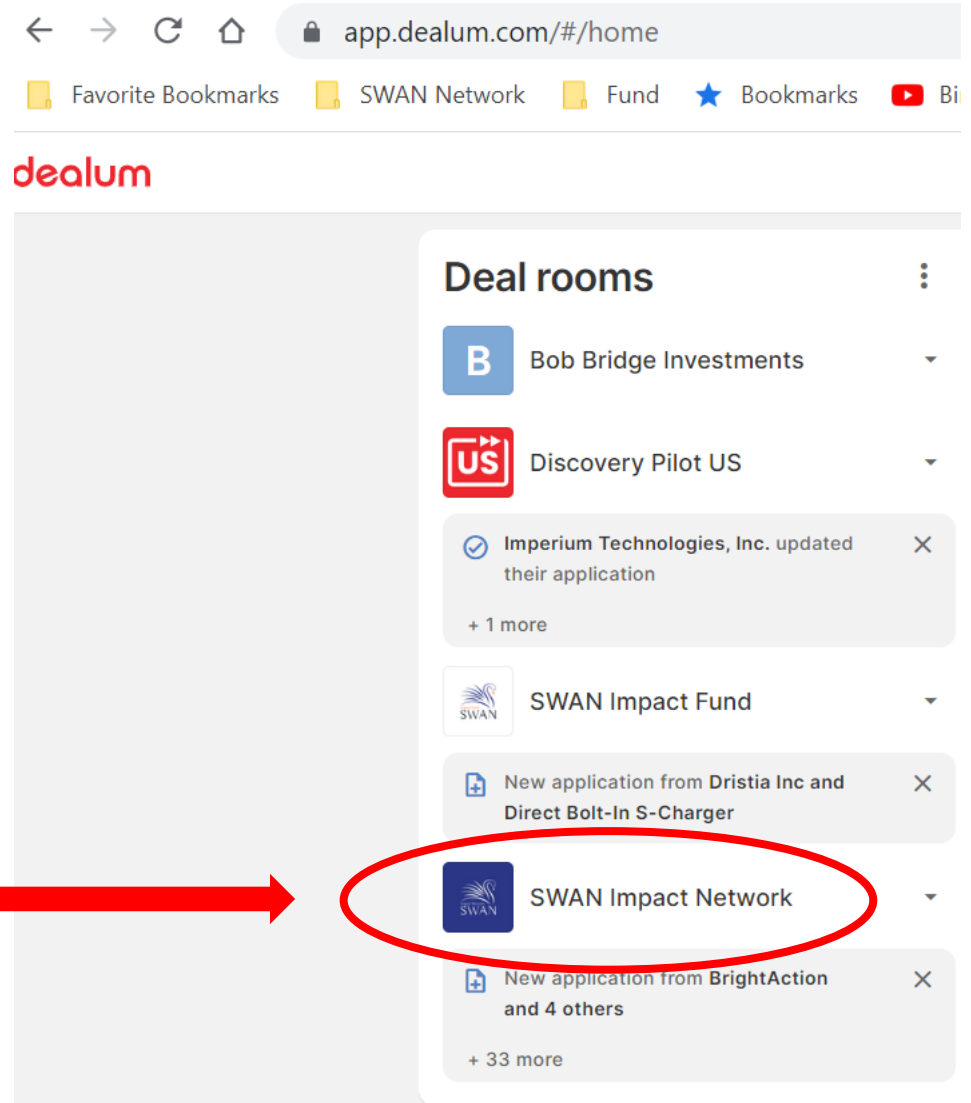
Now you can help with Down Selection

- Read
- Chat with the company
- Read / Add Comments
- Vote

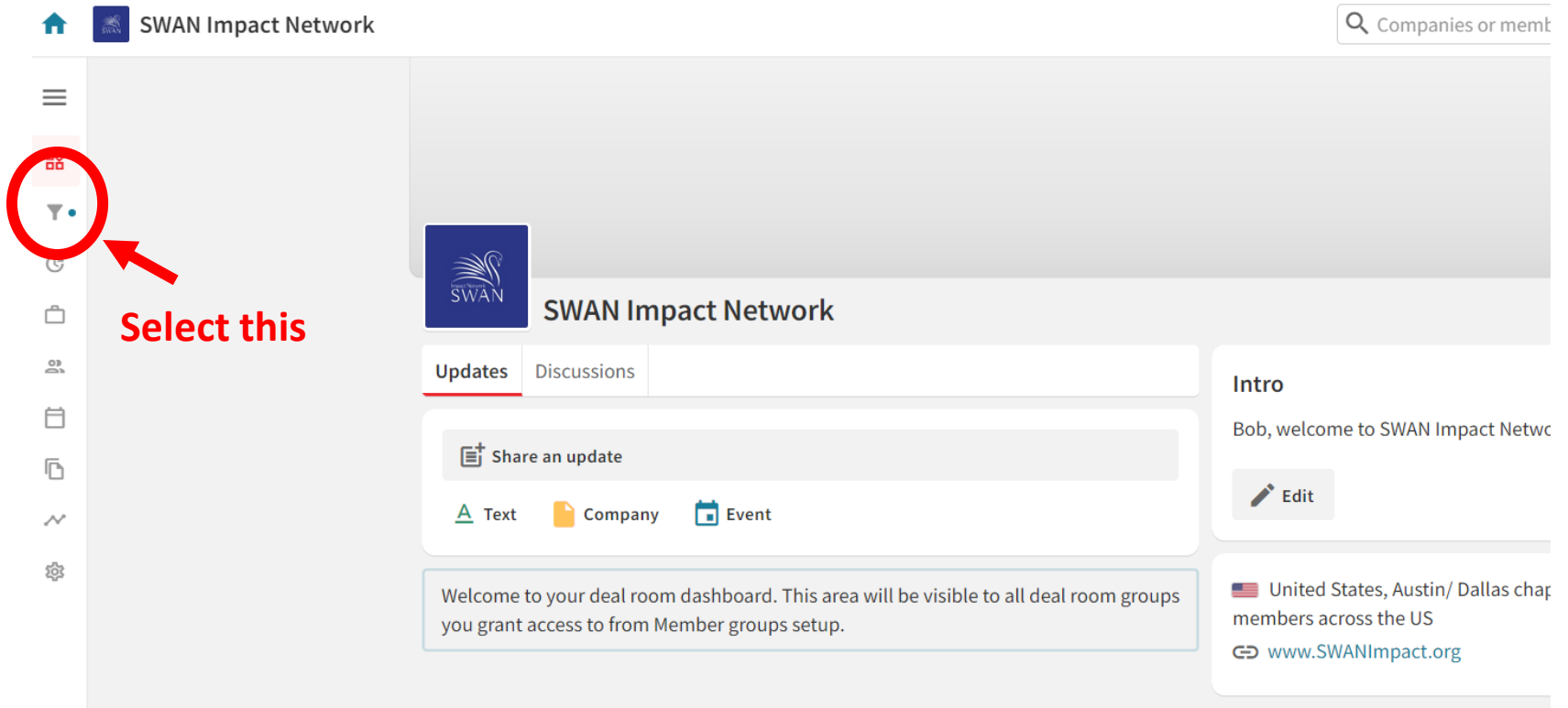


Navigating the Dealum Home Screen

Select This →



Next: navigate to the Funnel Window



The screenshot shows the SWAN Impact Network dashboard. On the left sidebar, a red circle highlights the funnel icon, with a red arrow pointing to it and the text "Select this" in red. The main content area displays the SWAN logo, the text "SWAN Impact Network", and tabs for "Updates" and "Discussions". Below the tabs is a "Share an update" section with options for "Text", "Company", and "Event". A welcome message states: "Welcome to your deal room dashboard. This area will be visible to all deal room groups you grant access to from Member groups setup." On the right, there is an "Intro" section with a welcome message "Bob, welcome to SWAN Impact Network", an "Edit" button, and a link to "www.SWANImpact.org".

SWAN Impact Network

Search Companies or memt

Select this

SWAN

SWAN Impact Network

Updates Discussions

Share an update

Text Company Event

Welcome to your deal room dashboard. This area will be visible to all deal room groups you grant access to from Member groups setup.

Intro

Bob, welcome to SWAN Impact Network

Edit

United States, Austin/ Dallas chap members across the US

www.SWANImpact.org

Then: Select the current funnel stage

The screenshot shows the Dealum application interface for the SWAN Impact Network. The top navigation bar includes a search bar and a user profile. The main content area displays a funnel of stages: Applied (2 · 2 new), Hold for Next Qtr (16 · 16 new), Needs Pre-screen (0), Down-selection 1 (0), Down-selection 2 (7 · 7 new), and Pitch Meeting (0). The 'Down-selection 1' stage is circled in red. Below the funnel, a table lists companies. The 'Tags' column header in the table is highlighted with a red arrow, and the text 'Then Select this' is written in red below the arrow.

Name	Assigned	Tags	Funding	Location	One-liner	Source	Actions
Ecosystem In...	new Assign to...		0 \$400,000	Canada, M...	ESI offers a unique air ...	Discover	

- 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

app.dealum.com/#/dealroom/6379?guide=tab%3Dfunnel

SWAN Impact Network

Companies or members in the deal room

Applied 21 · 19 new | Hold for Next Qtr 0 | Needs Pre-screen 5 | **Down-selection 1 4** | Down-selection 2 0 | Pitch Meeting 0

+ Add Company | Filter

Start voting 4

Name	Assigned	Tags	Funding	Your vote	Progress	Result	One-liner	Actions
BRIDGE Bridge Therapie...	Assign to...	Healthcare	0 \$2,000,000				Bridge separates th...	→
New Dominion ...	Assign to...	Environment	0 \$500,000				We are commerciali...	→
mHeart	Assign to...	Healthcare	0 \$1,000,000				DRS.LINQ is develo...	→
2S Water Incorp...	Assign to...	Environment	0 \$800,000				2S Water have a sen...	→

Select a company to see more

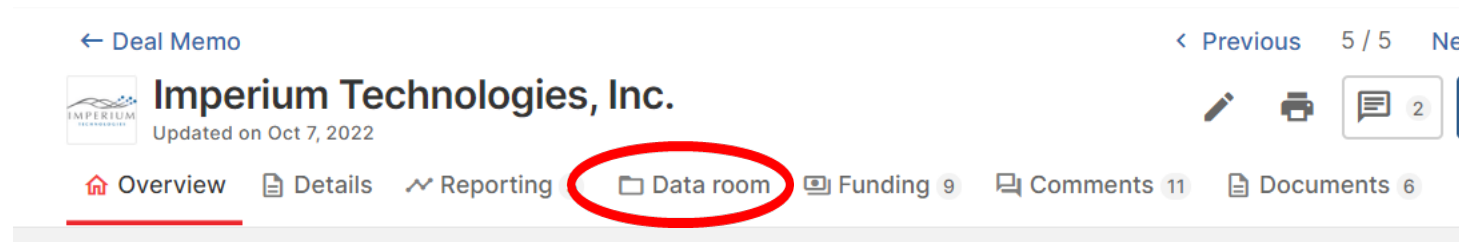
- This is an early and incomplete list of companies
- I have “tagged” the companies to show their market segment
- If you slide your mouse over the One Liner, the one liner pops out
- You review as few or as many companies as you wish

Information on a Company

The screenshot shows a web browser window with the URL `app.dealum.com/#/dealroom/6379?application=65828&guide=tab_application%3Doverview`. The browser's address bar and tabs are visible. The page header includes the SWAN Impact Network logo and a search bar. The main content area displays the profile for 'Insight Optics', updated on Jul 15, 2021. A navigation bar below the company name contains tabs: 'Overview', 'Details', 'Funding', 'Comments' (with a count of 5), and 'Documents'. The 'Overview' and 'Documents' tabs are circled in red. The 'Overview' tab is active, showing a description of the company's platform, a 'Problem' section, and a 'Solution' section. On the right side, there are buttons for 'Chat with company' and 'All actions', and a sidebar with company details including the website `www.io.care`, funding stage 'MVP/Seed Stage', MRR, capital seeking, and funding stage 'Seed Round'.

- 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

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

The screenshot shows the SWAN Impact Network interface. At the top, there's a search bar for 'Companies or members in the deal room'. Below the header, the breadcrumb trail is 'SWAN Impact Network / Down-selection 1'. The main content area displays the profile for 'mHeart', updated on May 31, 2021. The profile has tabs for Overview, Details, Reporting, Funding, Comments, and Documents. The 'Overview' tab is active, showing a description of DRS.LINQ's mHeart platform. To the right of the description, there's a sidebar with a 'Move to Down-selectio...' button, a 'Chat with company' button (highlighted with a red circle), and an 'All actions' dropdown. Below these, there's a section for company details including a website link, MVP/Seed Stage, MRR (\$): 0, Capital seeking (\$): 1,000,000 - 2,000,000, Funding stage: Seed Round, Pre-money valuation (\$): 6,000,000, and a 'Show voting' button. A green chat icon is visible in the bottom right corner.

- 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

The screenshot displays the SWAN Impact Network interface. At the top, there's a navigation bar with a home icon, the network name, a search bar, and user avatars. The main content area shows the profile for 'mHeart', updated on May 31, 2021. A red circle highlights the 'Comments' tab in the navigation menu. Below the tabs, a text box describes the company's mission: 'DRS.LINQ is developing mHeart - a platform designed to create a virtual cardiology office to reduce visits to the ER.' To the right, there are buttons for 'Move to Down-selection...', 'Chat with company', and 'All actions'. A sidebar on the right lists key metrics: 'MVP/Seed Stage', 'MRR (\$): 0', 'Capital seeking (\$): 1,000,000 - 2,000,000', 'Funding stage: Seed Round', and 'Pre-money valuation (\$):'. A green chat bubble icon is visible in the bottom right corner.

- 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

The screenshot shows the SWAN Impact Network dealroom interface. The top navigation bar includes a search bar and a sidebar with various icons. The main content area displays a funnel of deal stages: Applied (19 new), Held for Next Qtr (0), Needs Pre-screen (5), Down-selection 1 (4), Down-selection 2 (0), and Pitch Meeting (0). A red circle highlights the 'Start voting 4' button under the 'Down-selection 1' stage. Below this, a table lists four companies: Bridge Therapeutics, New Dominion, mHeart, and 2S Water. A red arrow points to the 'Bridge Therapeutics' row with the text 'Select this'.

Name	Assigned	Tags	Funding	Your vote	Progress	Result	One-liner	Actions
Bridge Therapeutics	Assign to...	Healthcare	0 \$2,000,000				Bridge separates th...	→
New Dominion	Assign to...	Environment	0 \$500,000				We are commercial...	→
mHeart	Assign to...	Healthcare	0 \$1,000,000				DRS.LINQ is develo...	→
2S Water	Assign to...	Environment	0 \$800,000				2S Water have a sen...	→

Voting Options

app.dealum.com/#/dealroom/6379?setup=runner

AppsFavorite BookmarksSWAN NetworkFundBookmarksDropboxTreesStrategyOther bookmarksReading

SWAN Impact Network

SWAN Impact Network

QuestionsAdd question

One-liner

Please use a descriptive sentence and not a marketing one. If you do not already have one, feel free to use this formula: "(Company name) is developing (a defined offering) to help (a defined audience) (solve a problem) with (secret sauce)".

Website

Are you registered or incorporated?

Company legal name

Company's legal entity type

E.g., LLC, C-Corp

Down-selection 1 voting

Question *

Should this company be invited to zoom down selection?

Options *

Text	Value	Actions
Yes - is promising	2	
Maybe - not sure	1	
No - not investable	0	

+ Add option

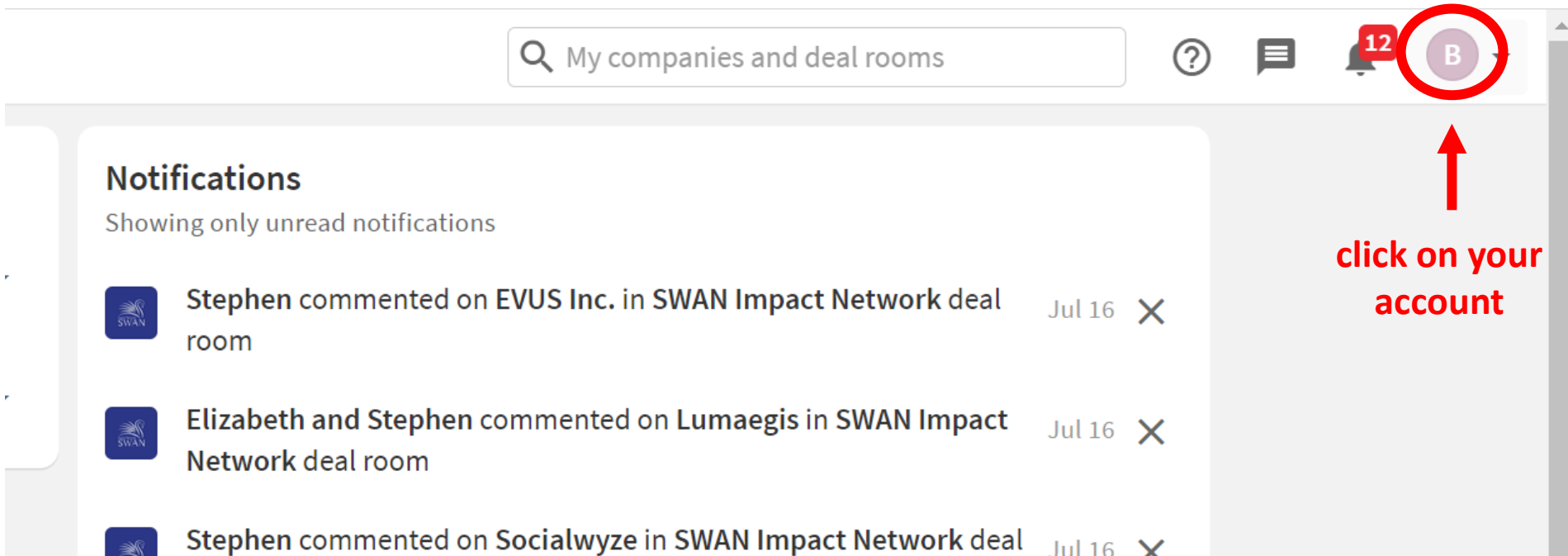
Results type *

Average

Manage your
dealum profile



Start by selecting your account



Control dealum emails you receive

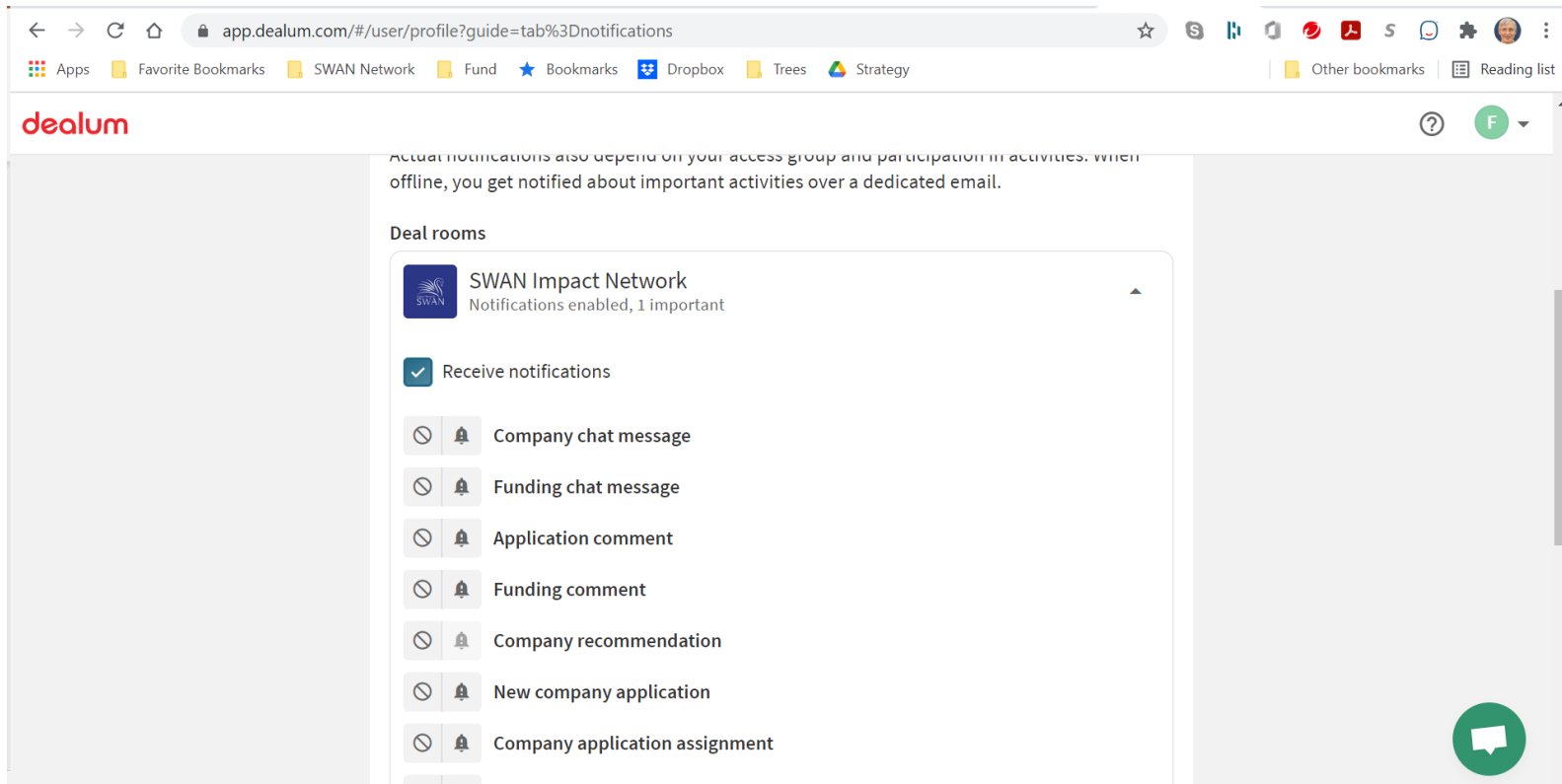
The screenshot shows the Dealum user profile settings page. The browser address bar displays `app.dealum.com/#/user/profile?guide=tab%3Dnotifications`. The page has a header with the Dealum logo and navigation icons. The main content area has tabs for Profile, Notifications, Security, and Other. The Notifications tab is selected and circled in red. Below the tabs, the 'Settings' section is visible, with 'Browser notifications' checked. Under 'Email notifications', the 'As few as possible' option is selected and circled in red. Below this, the 'Notification types' section is circled in red. Red arrows point from text annotations to these elements: 'first: select "Notifications"' points to the Notifications tab; 'Second: Select "as few as possible"' points to the selected email notification option; 'Third: scroll down to notification types' points to the Notification types section. The bottom of the page shows a 'Deal rooms' section with a dropdown menu.

first: select "Notifications"

Second: Select "as few as possible"

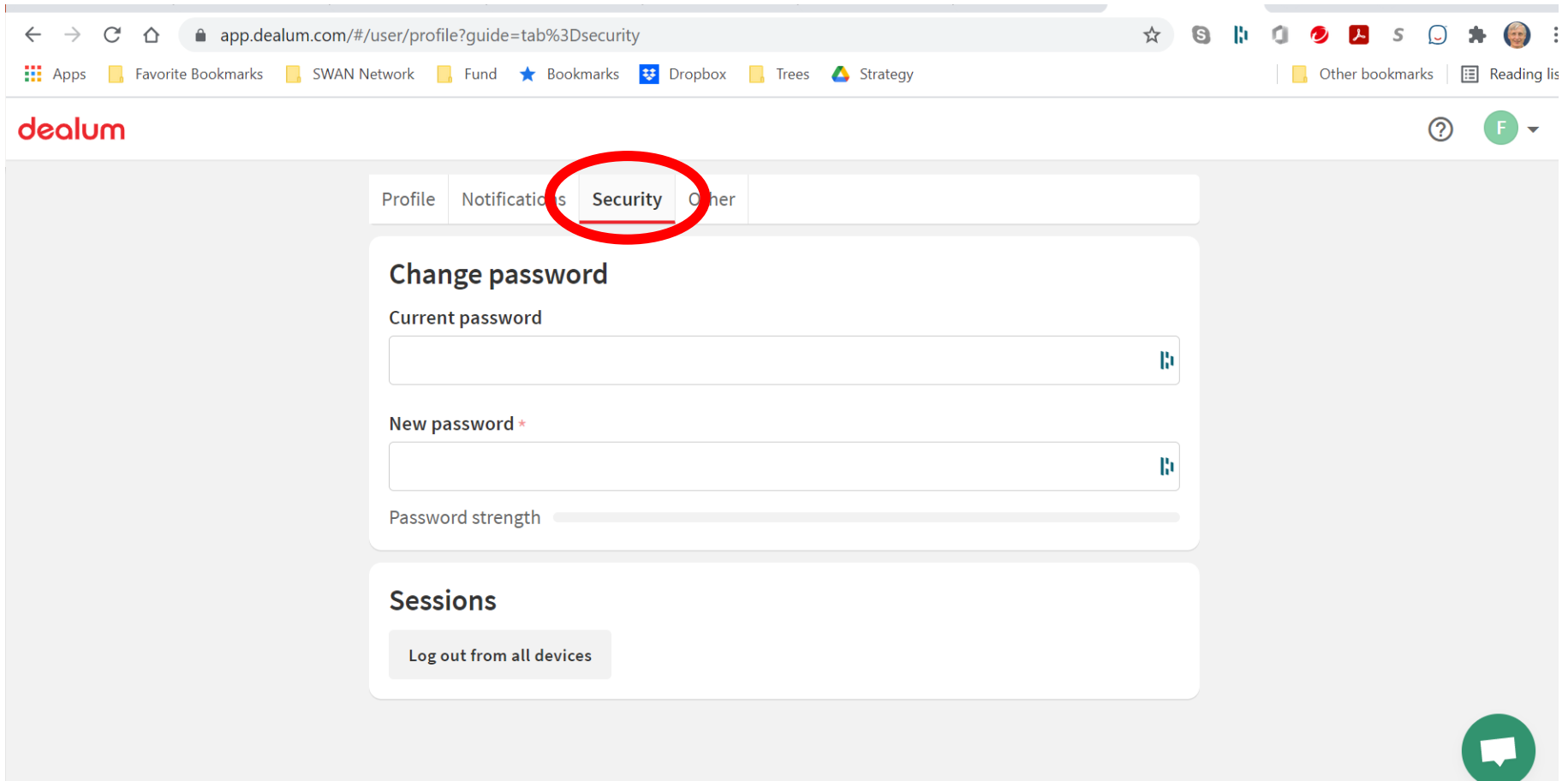
Third: scroll down to notification types

Notification types



Select what notifications you want to receive

You can also change your password



The screenshot shows a web browser window with the URL `app.dealum.com/#/user/profile?guide=tab%3Dsecurity`. The browser's address bar and bookmarks are visible at the top. The dealum logo is in the top left corner of the page. A navigation bar contains four tabs: 'Profile', 'Notifications', 'Security', and 'Other'. The 'Security' tab is selected and highlighted with a red circle. Below the tabs, the 'Change password' section contains two input fields: 'Current password' and 'New password *'. A 'Password strength' indicator is shown below the 'New password' field. The 'Sessions' section below contains a 'Log out from all devices' button. A green circular chat icon is in the bottom right corner.

dealum

Profile Notifications **Security** Other

Change password

Current password

New password *

Password strength

Sessions

Log out from all devices



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 Administrator@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

bob.bridge@swanimpact.org