



# SWAN Dealum User Guide

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

<https://dealum.com>

# Avoid confusion - understand dealum nomenclature



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

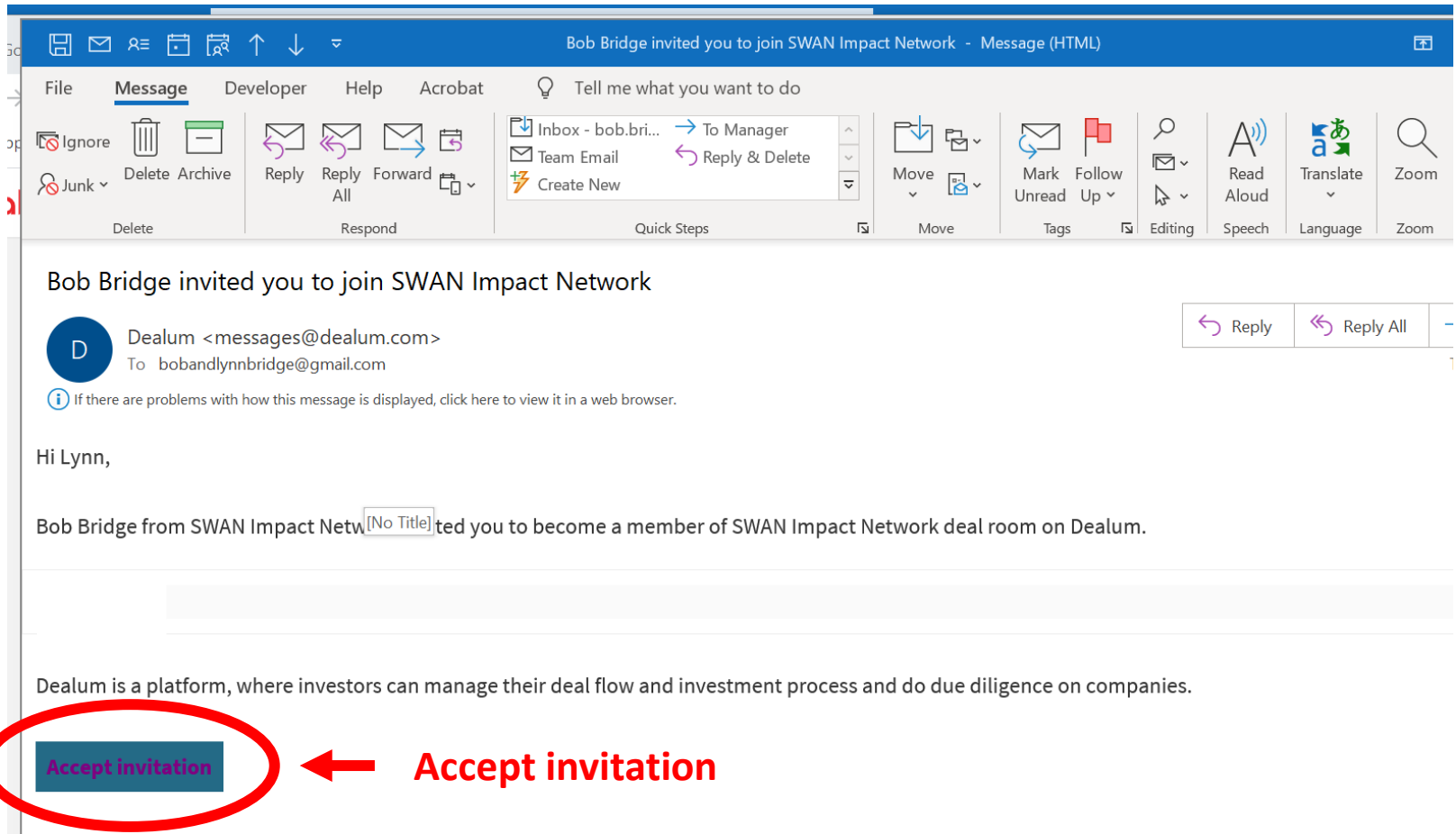
“Deal Room” has nothing to do with a room for a specific deal memo team, deal memos or deal data rooms.

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

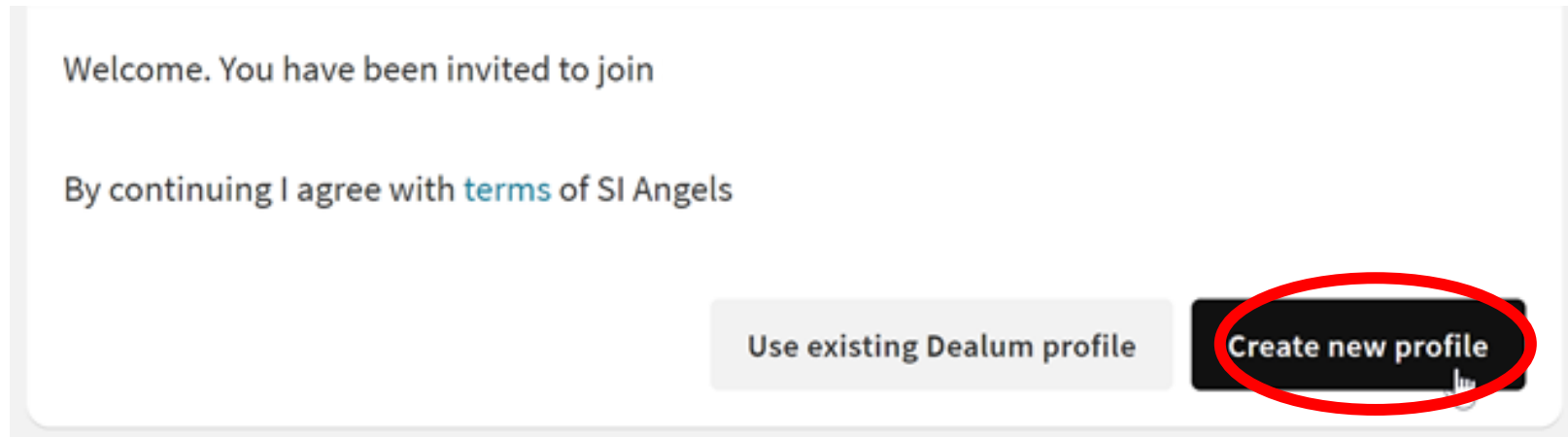
Your initial  
logon to the  
system



# 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

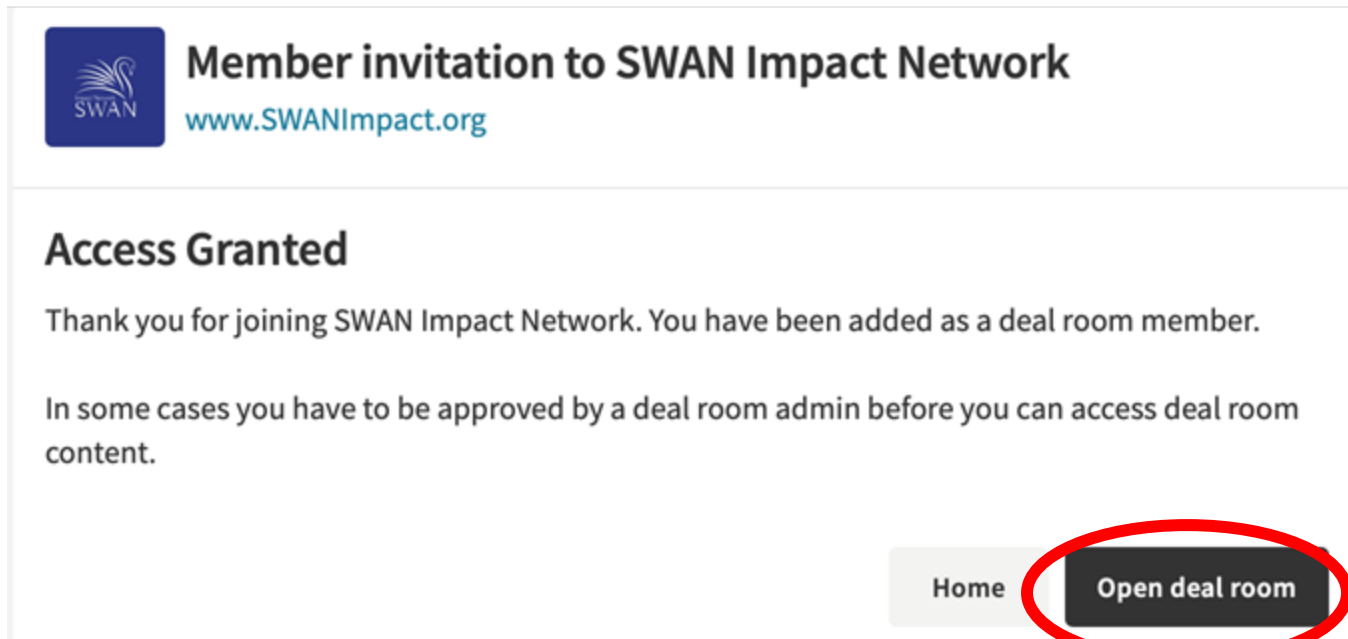
.....

Great

Sign up

← Create a password then select "Sign up"

# Then you should see this:



The screenshot shows an email interface. At the top left is the SWAN logo, a blue square with a white swan silhouette and the text 'SWAN'. To its right is the text 'Member invitation to SWAN Impact Network' in bold black font, with the URL 'www.SWANImpact.org' below it. Below this is a section titled 'Access Granted' in bold black font. The text below reads: 'Thank you for joining SWAN Impact Network. You have been added as a deal room member.' followed by 'In some cases you have to be approved by a deal room admin before you can access deal room content.' At the bottom right of the email content area, there are two buttons: 'Home' in a light grey button and 'Open deal room' in a dark grey button. The 'Open deal room' button is circled in red, and a red arrow points from the text below to it.

**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**

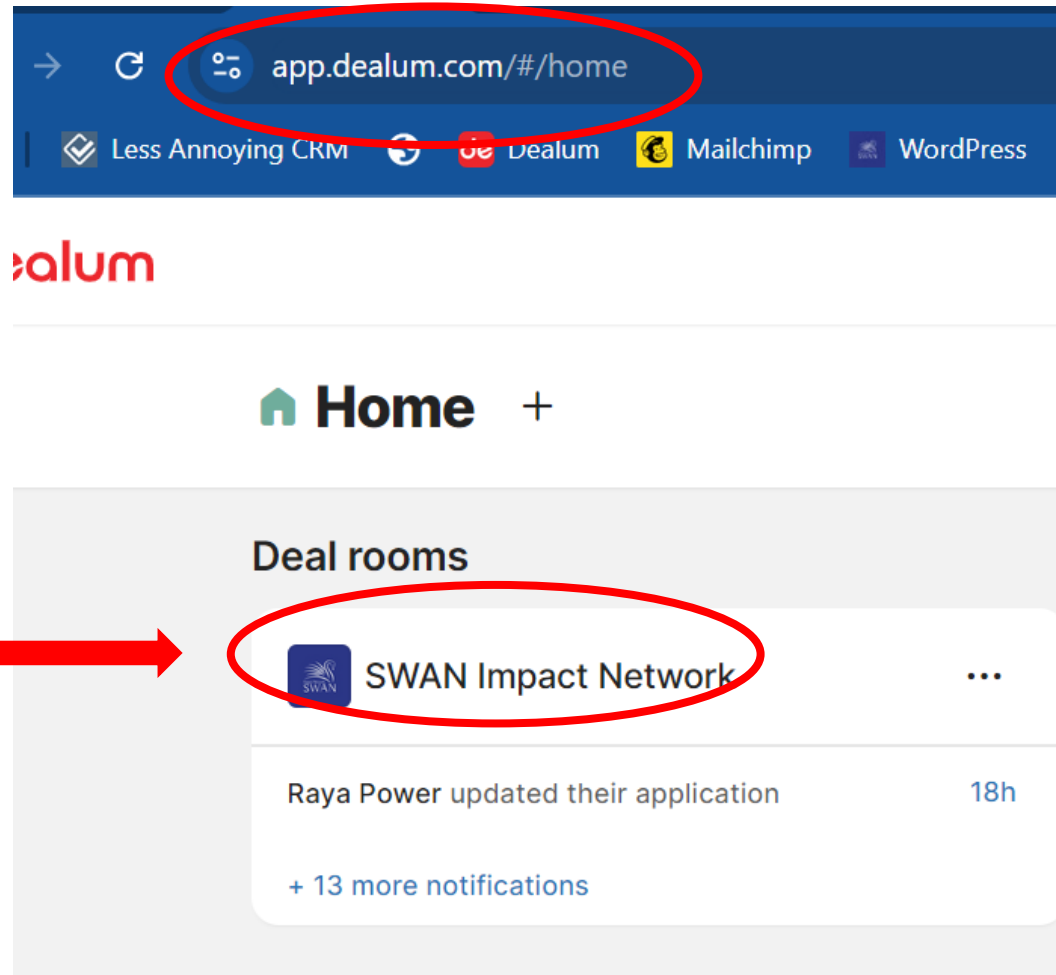
# Now you can help with Down Selection

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





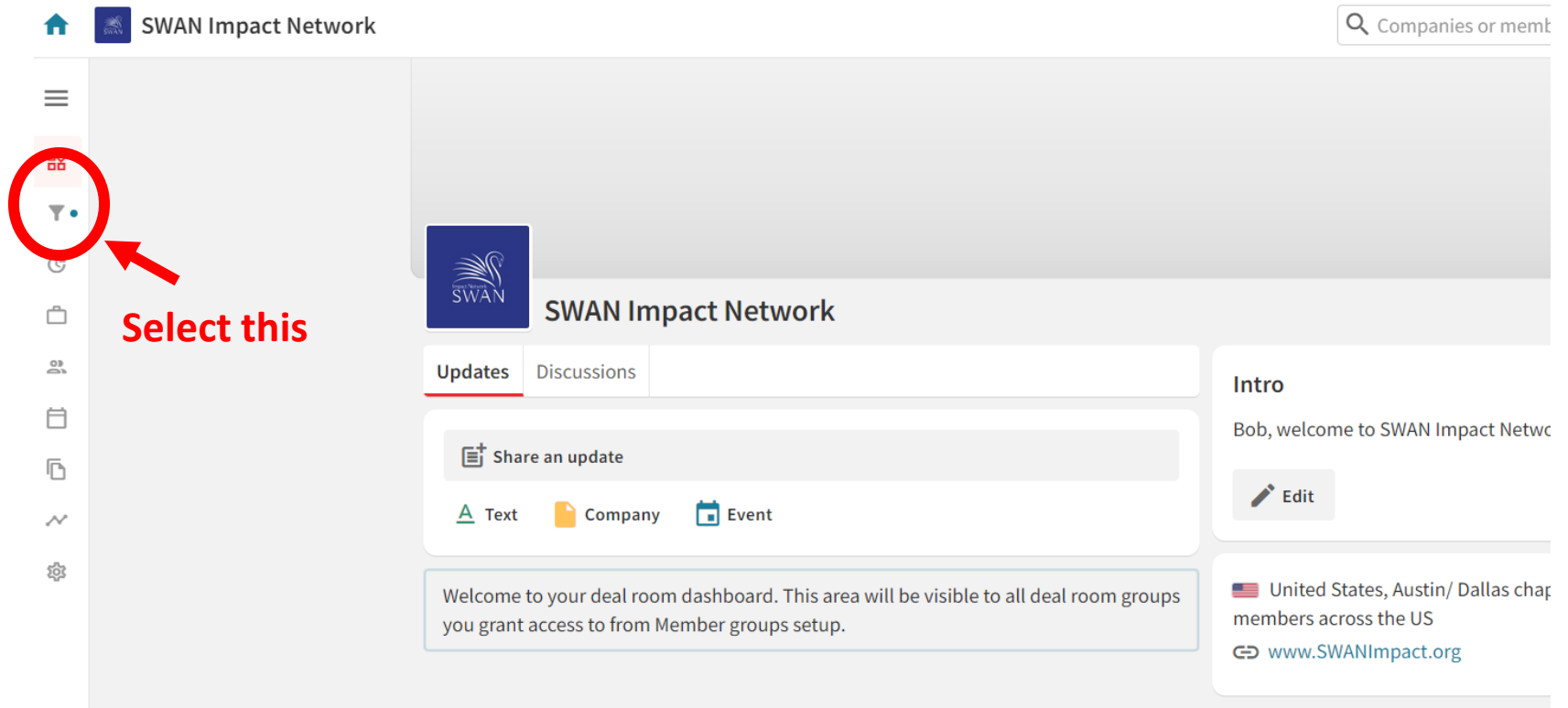
# Navigating the Dealum Home Screen



**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" written 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 is visible: "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" and an "Edit" button. Below that, it lists "United States, Austin/ Dallas chapters members across the US" and the website "www.SWANImpact.org".

# Then: Select the relevant funnel stage.

☑ Funnel ⚙️ View Fields Sort Filter + Add company

Hold for next quarter 1 · 1 new Applied - not paid 4 · 4 new Has been asked to pay 0 Paid - Prescreen candidates 0 No - told nothing 17 No - told "no" but not wh... 2 ...

**We have many funnel stages. To see them all select ...**

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

SWAN Impact Network

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 Pitch Meeting 0 ... + Invite Company Filter

Show unfinished 1

**Then Select this**

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	

# 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 Therape...	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 2S Water Incorp...	Assign to...	Environment	0 \$800,000				2S Water have a sen...	→

Select a company to see more

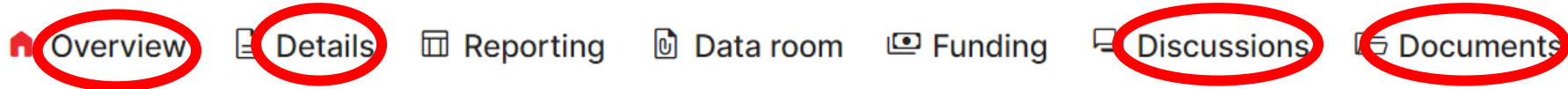
- “Tag” shows their market segment
- If you slide your mouse over the One Liner, the one liner pops out
- You review as few or as many companies as you wish

# Key Information for down selection



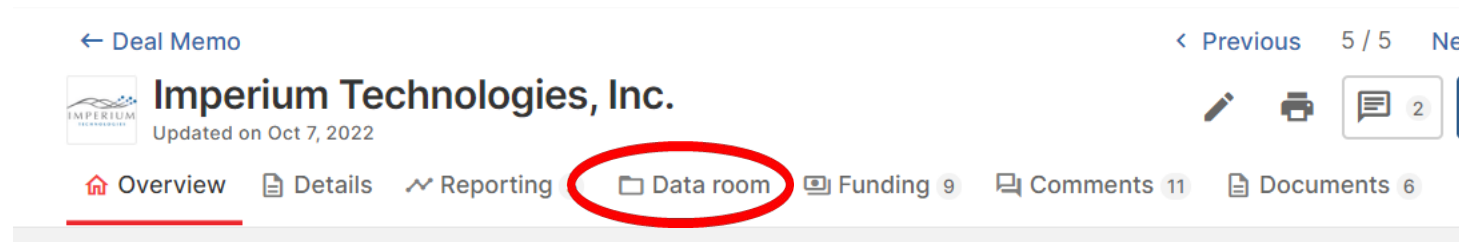
## Fun on the Run Plus One

Updated on Oct 7, 2024



- 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
  - Discussion:
    - You may ask the company questions or add an internal-only comment
  - 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
- 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 is a search bar for 'Companies or members in the deal room' and navigation icons. The main content area displays the profile for 'mHeart', updated on May 31, 2021. The profile includes tabs for Overview, Details, Reporting, Funding, Comments, and Documents. The 'Overview' tab is active, showing a description of the company's mission: 'DRS.LINQ is developing mHeart - a platform designed to create a virtual cardiology office to reduce visits to the ER.' Below this, there are sections for 'Problem' and 'Solution'. The 'Problem' section describes the high cost and burden of ER visits for chest pain. The 'Solution' section describes the mHeart platform as a patient-initiated triage and early detection mobile health solution. On the right side of the profile, there are action buttons: 'Move to Down-selectio...', 'Chat with company' (highlighted with a red circle), and 'All actions'. Below these are details about the company's funding stage, MRR, capital seeking, and funding stage.

- Start a chat using the button
- And you can see everyone's prior Chats by clicking on the "Chat with Company" button..

# Finally, you vote on the companies

**Raya Power**  
Updated yesterday 8:46 PM

Overview Details Reporting Data room Funding Discussions 12 Documents

Raya Power delivers affordable, utility-free solar solutions designed for low- and moderate-income families.

**Problem**  
Low-moderate income (LMI) communities in the US struggling with limited access to clean, affordable, and reliable energy: 30% of Americans skip basic expenses to pay an energy bill, there are 250 hours of grid outages on average per year in Puerto Rico, and households avoid using air conditioners due to the high costs, leading to fatalities.

**Solution**  
A semi-permanent home solar appliance that requires no utility permits or electrical work. Systems are non-roof mounted, easy to set up, accessible to renters, and deliver 60% bill savings. Customers connect a 1.6 to 3.2kW solar plus storage system to run critical appliances (e.g., Air Conditioner, Fridge), providing savings and backup.

**Business model**  
We generate revenue from system

**Market**  
We serve LMI families, including

Contact 3 Request Share Print Edit

0 \$750,000

**Capital seeking (\$)** 750,000 - 1,500,000  
**Pre-money valuation (\$)** 9,000,000

US Dollar

Application link

12 6 0

Code: SKVK-RKJH-4116

**Tags**

-Environment: CleanTech

Voting ^

Select this

**And you are strongly encouraged to add a comment in Discussions.  
SWAN gives feedback to every applicant based upon all the comments.**



Manage your  
dealum profile






# Start by selecting your account

My companies and deal rooms

Notifications

Showing only unread notifications

-  Stephen commented on EVUS Inc. in SWAN Impact Network deal room Jul 16 X
-  Elizabeth and Stephen commented on Lumaegis in SWAN Impact Network deal room Jul 16 X
-  Stephen commented on Socialwyze in SWAN Impact Network deal Jul 16 X

click on your account

# Control dealum emails you receive

The screenshot shows the Dealum user profile settings page. The 'Notifications' tab is selected and circled in red. Below it, the 'Email notifications' section has the 'As few as possible' option selected and circled in red. The 'Notification types' section is also circled in red. Red arrows point from text annotations to these elements.

**first: select "Notifications"**

**Second: Select "as few as possible"**

**Third: scroll down to notification types**

Profile **Notifications** Security Other

### Settings

Browser notifications

Show browser notifications while Dealum is open

Email notifications

All messages

As few as possible

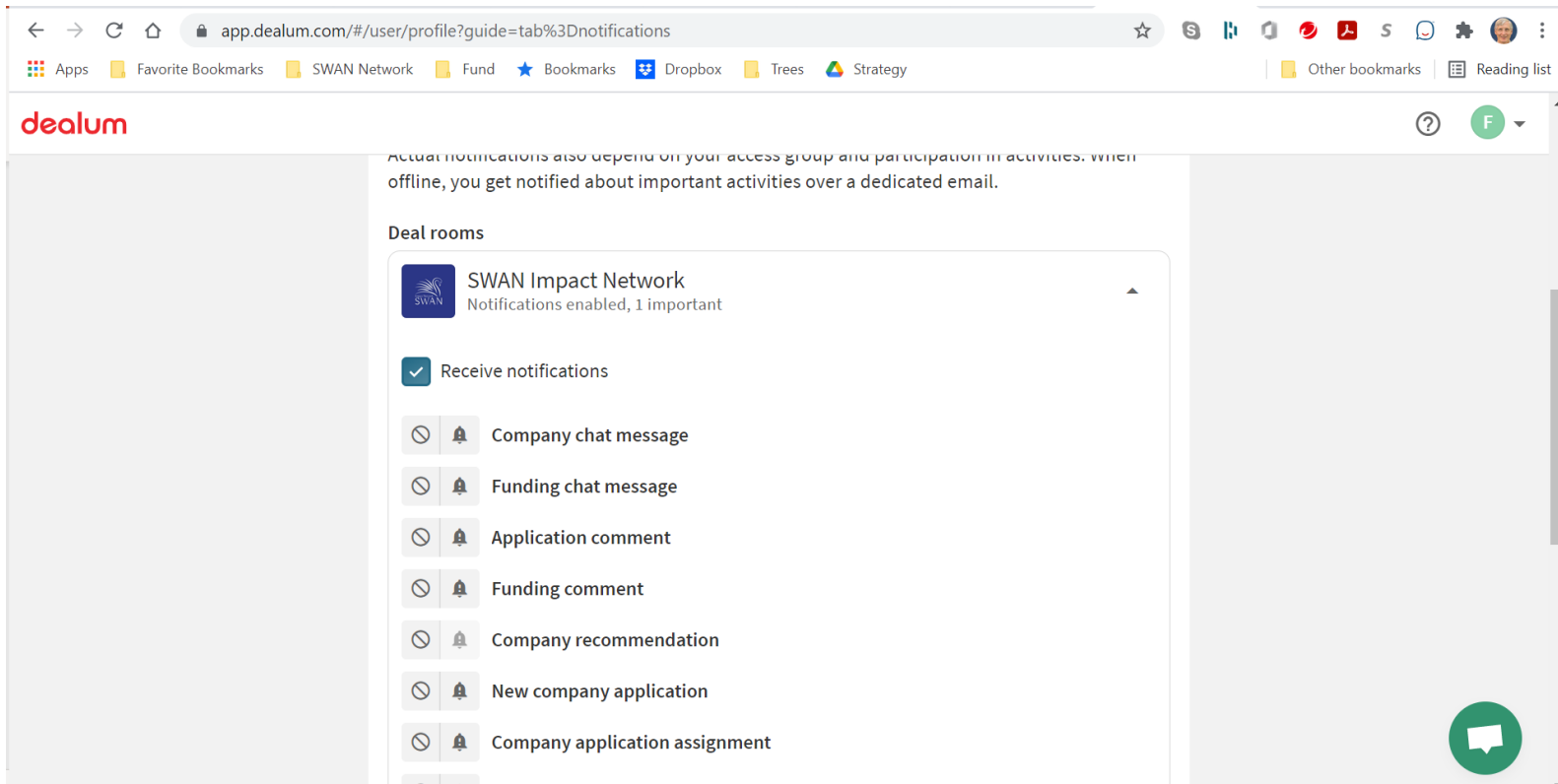
**Notification types**

Actual notifications also depend on your access group and participation in activities. When offline, you get notified about important activities over a dedicated email.

Deal rooms

**B** Bob Bridge Investments  
Notifications enabled

# 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 bookmark bar are visible. The dealum logo is in the top left corner. The user profile navigation tabs are Profile, Notifications, Security (highlighted with a red circle), and Other. The Security section contains a 'Change password' form with fields for 'Current password' and 'New password \*', and a 'Password strength' indicator. Below this is a 'Sessions' section with a 'Log out from all devices' button. A green chat bubble icon is in the bottom right corner.



# 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 [Associate@swanimpact.org](mailto:Associate@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](mailto:bob.bridge@swanimpact.org)