Equity.MyProBuddy.com Process Flow (Screen By Screen)

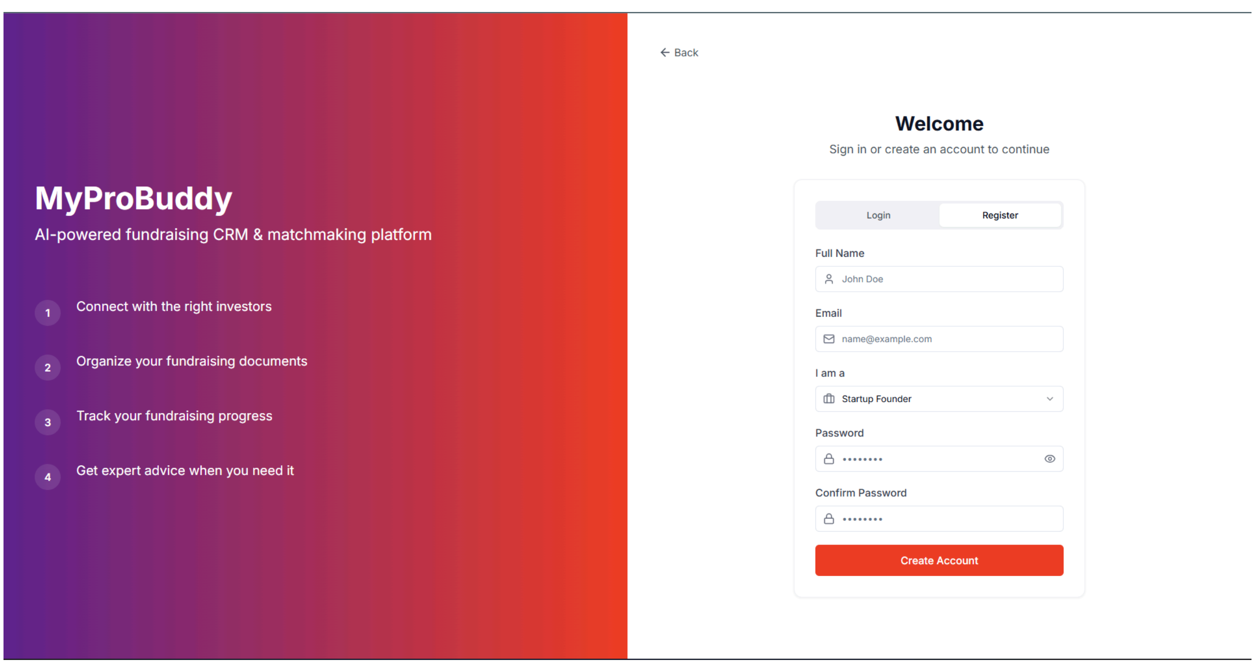
Roles:

- **Startup Founder (from signup to deal closure)**
- **Mentor (from signup to guidance delivery)**
- **Incubation Admin (from signup to portfolio mgmt)**
- **Internal MyProBuddy Team (approvals + oversight)**
- **Investor (after outreach campaign → engagement → deal) (Assumption)**
- **Admin (Access to all the features)**

1. Startup Founder Flow

Signup → Onboarding → VDR → Dashboard → Diligence → Outreach → Deal → Closure

Sign Up Screen

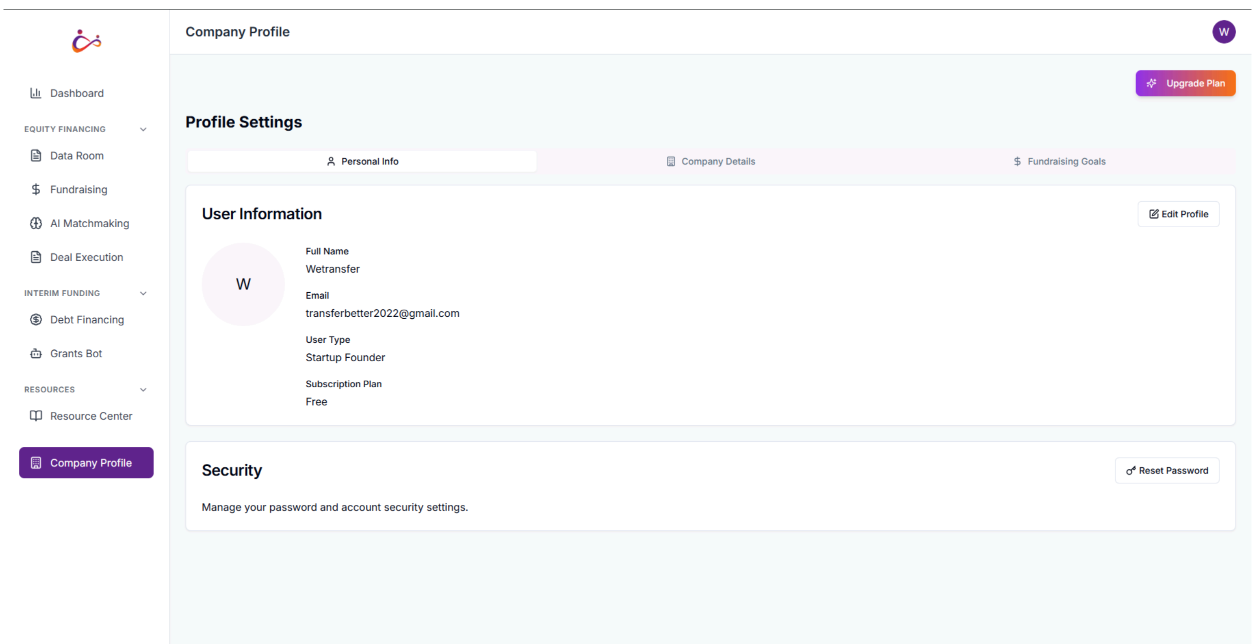


Dropdown Label: `I am`
Options:

- **Startup Founder**
- **Mentor**
- **Incubation Admin**
- **Investor**

After signup, an authentication email is sent to the user. Once confirmed, they should be redirected to the onboarding page. Only the company profile page should be accessible; all other pages are restricted.

Onboarding Screen



Founder & Team Background

- Full Name, Email ID, Phone Number
- LinkedIn Profile
- Prior Experience (brief narrative)
- Size & Composition of the Founding Team
- Are any of the founders full-time? If not, why?
- Are you currently drawing a salary from the business?

About the Company

- Company Name & Website
- Year of Incorporation
- Which problem are you solving? (real-world pain point)
- What is your product/service offering?
- Who are your target customers?
- What is your current Go-To-Market strategy?
- Current monthly revenue
- CAC, LTV (if applicable)
- Do you currently have paying customers or pilots?

Fundraising Intent

- How much are you looking to raise?

- What will the funds primarily be used for?
  (Breakdown: Product, Team, GTM, Debt Closure, etc.)

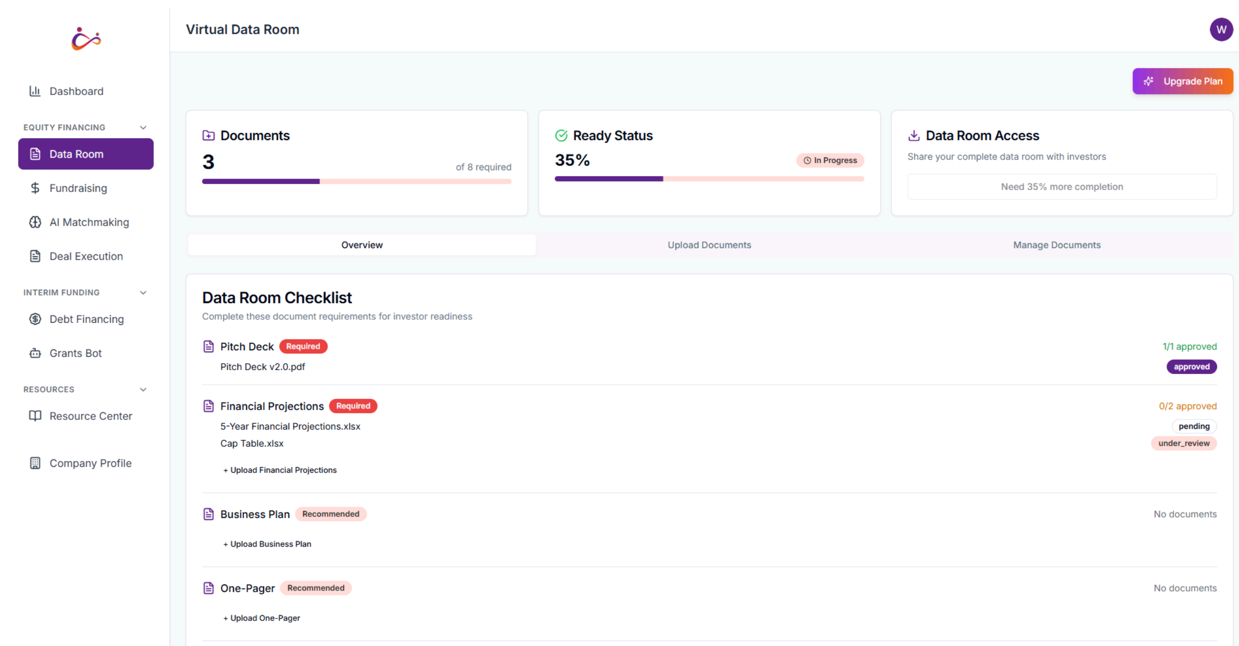
- How open are you to equity dilution? (mention in %)

- Have you raised funds before? (provide details if yes)

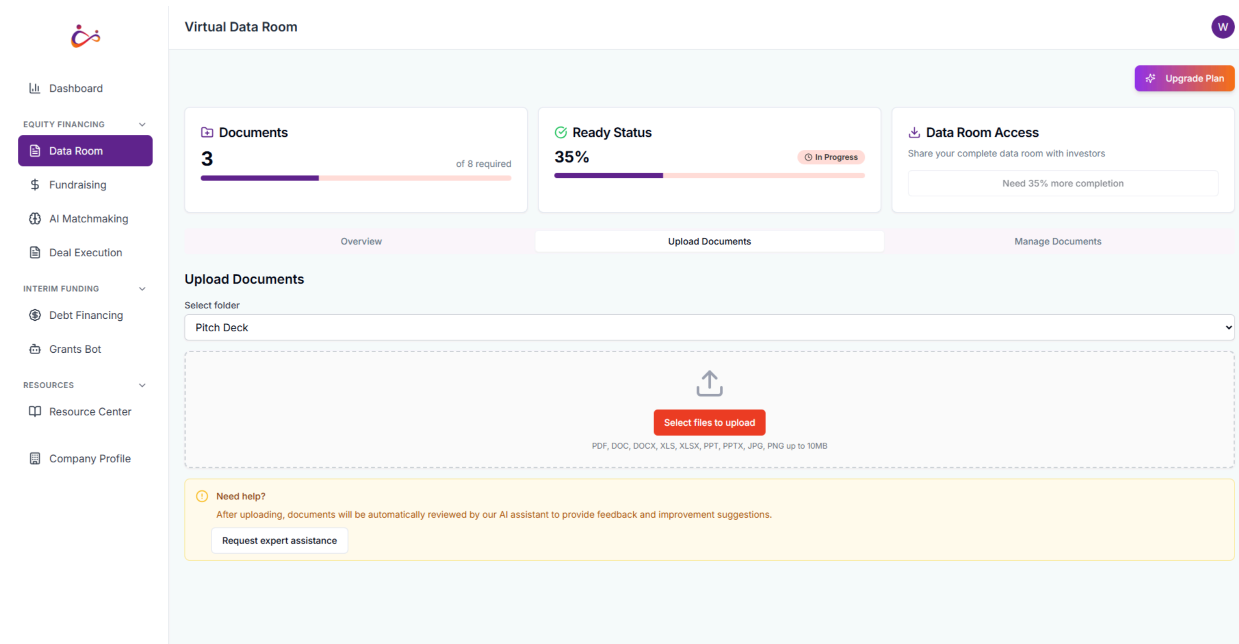
- Are you currently in talks with any investors?

All the details need to be stored in Supabase. After that, the data room should be accessible.

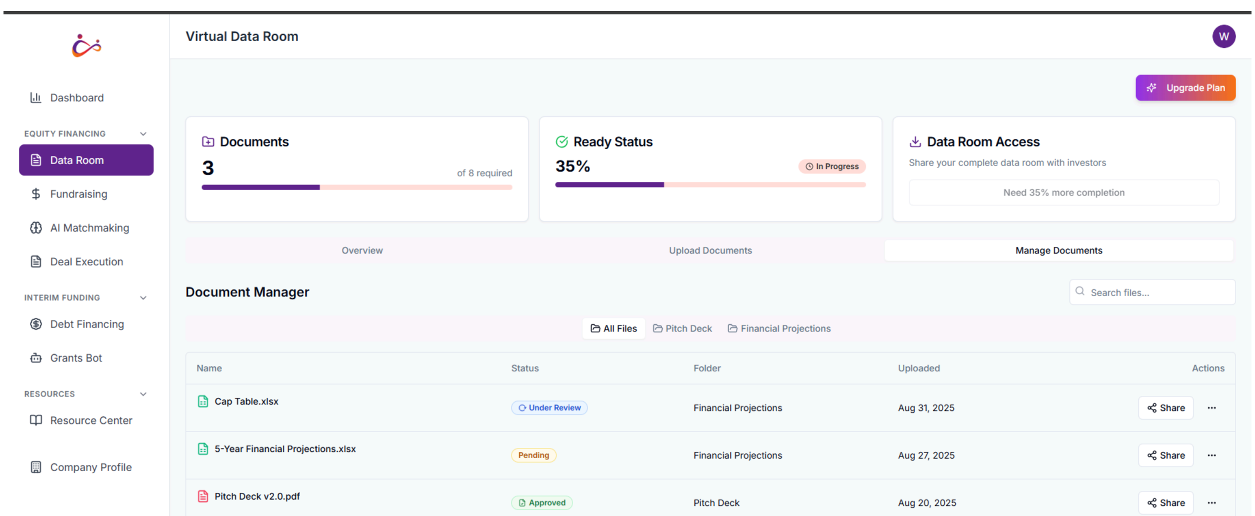
Data Room Screen & Diligence Screen (submit docs + AI review + MBP team notes).



On this page, we have Overview, Upload Documents, and Manage Documents. In the Overview section, all the required and recommended documents will be shown along with their status (Approved, Under Review).



When uploading a document, it should be uploaded to the selected folder, and the system should display AI review and suggestions for the uploaded document.



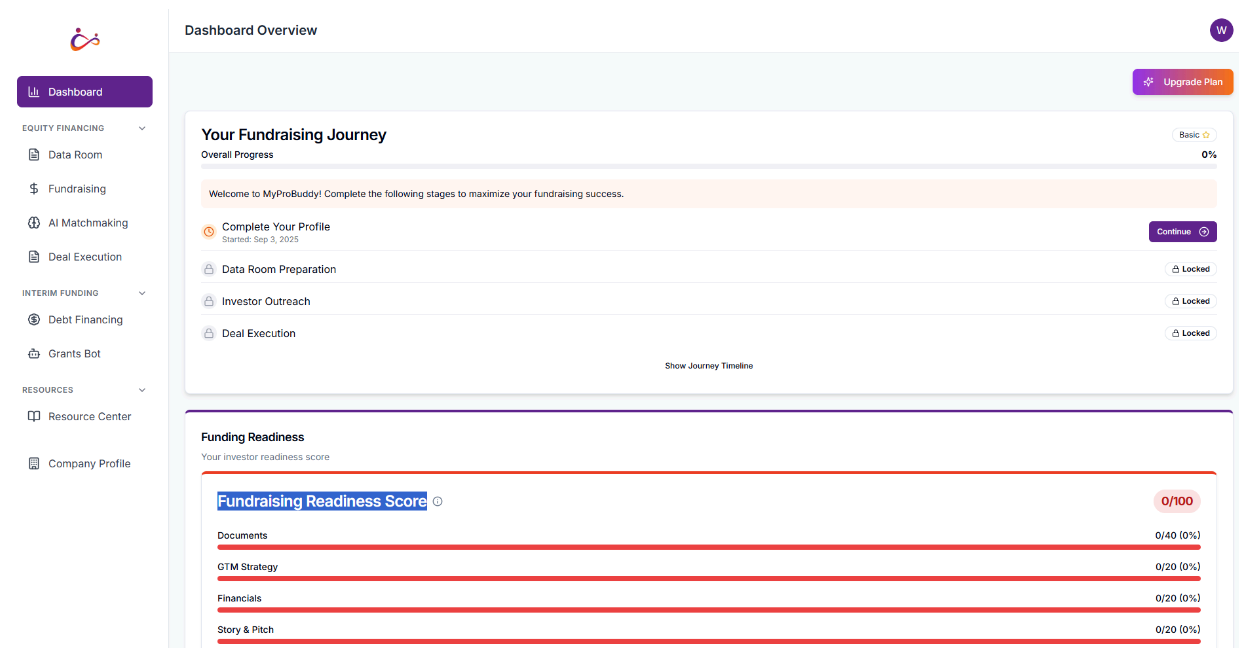
In the Manage Documents section, documents should be displayed based on their folder, with tags such as Approved, Pending, and Under Review. These statuses are managed by the admin, who decides whether to approve them or not.

If any document is rejected with a reason, it needs to be shown to the user so that they understand the issue, resolve it, and upload the correct document.

Once the admin approves all the documents and everything is completed, the Data Room Dashboard page should become accessible. Based on the uploaded documents, the Fundraising Readiness Score (0–100) will be determined by the AI. The following elements should be visible on the dashboard:

- **Visual progress tracker**
- **Fundraising Readiness Score (0–100)**
- **Milestone tracker (gamified UI)**
- **Links to Data Room, Outreach, and Support**

Dashboard Page

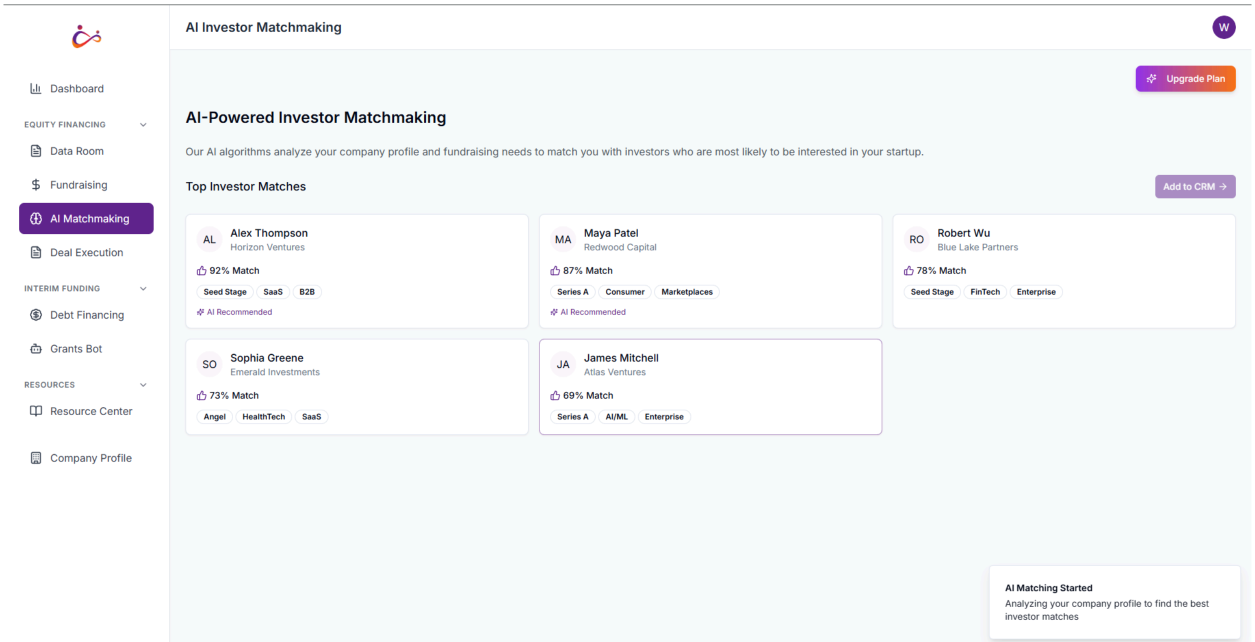


The below things needs to be done to proceed forward:

- Complete documentation
- VA Approval
- Signed Success Fee Agreement (3-5%)

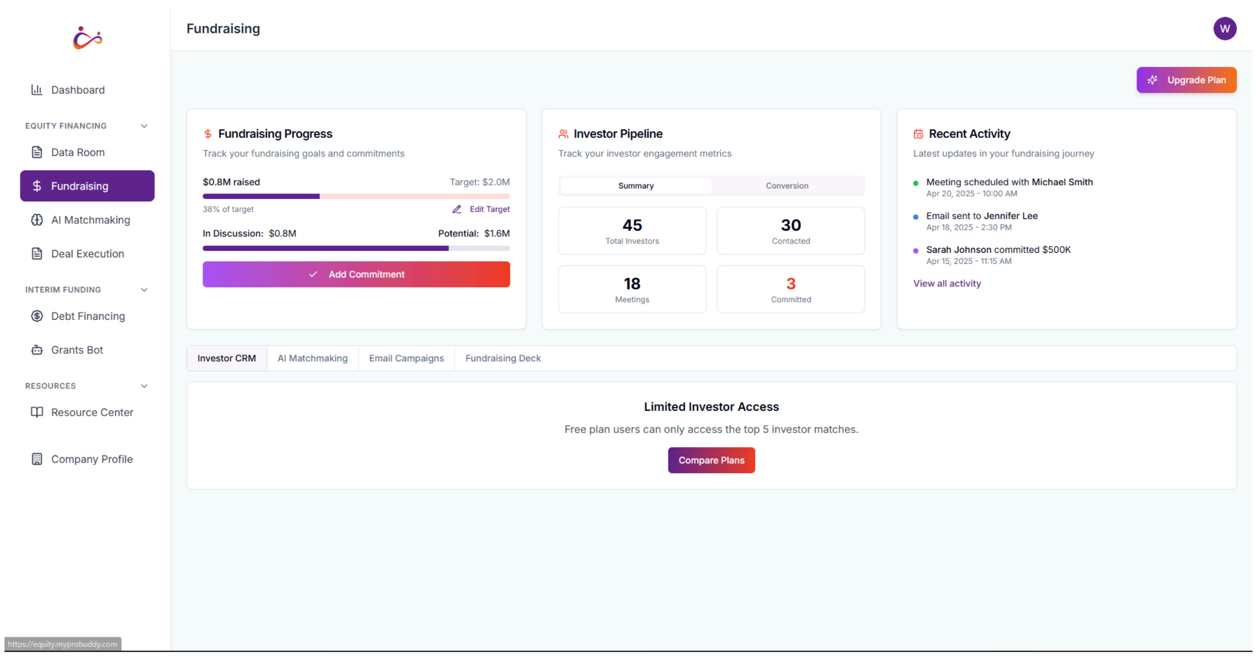
After that all the other pages needs to be accessible there needs to be no restrciction after that the flow is going to the Investor Outreach Screen

Investor Outreach Screen



On this page, after clicking on *Start AI Matching*, the system will use the information provided by the founder and the uploaded documents to match against the investor database. The matched investor details will then be displayed. If an investor is clicked and added to the CRM, it should be shown that they have been successfully added to the CRM

On the Fundraising page, everything needs to be available with tabs for Investor CRM, AI Matching, Email Campaigns, and the Fundraising Deck.



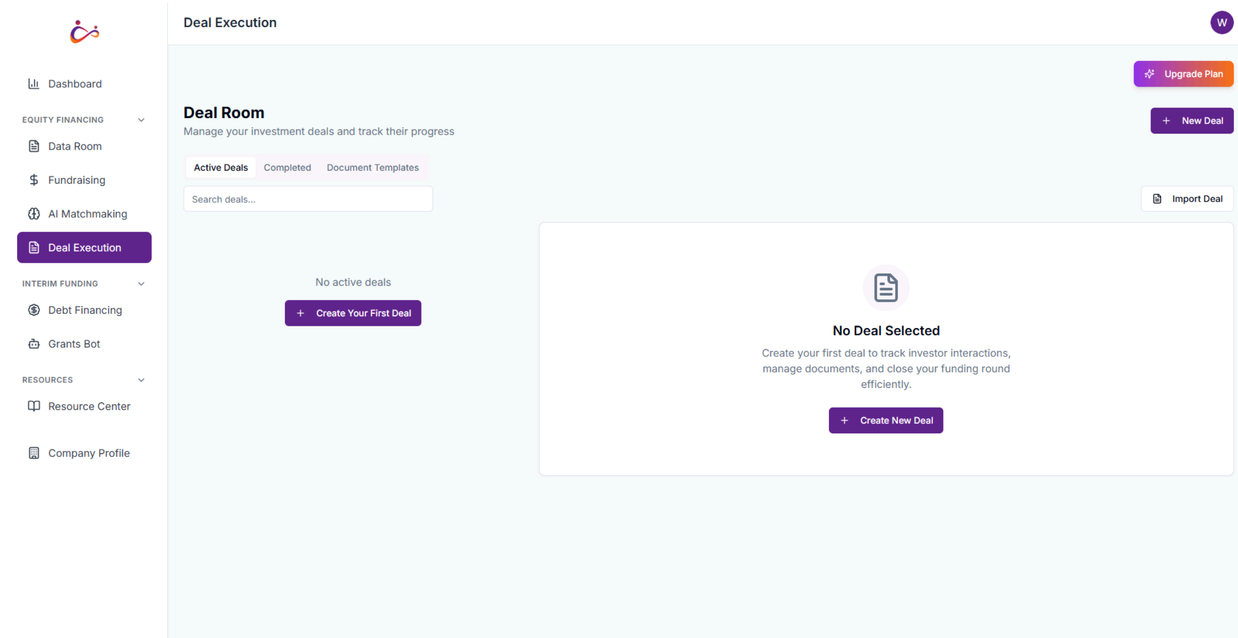
The following features need to be available in all cases:

- **Email Templates**
- **Investor Buckets** (categorized leads)
- **AI-Powered Investor Recommendations**
- **Automated Outreach Campaigns**
- **Campaign Tracker** (Sent / Opened / Replied / Negotiation)
- **AI Agent Integration**: personalizes follow-ups, writes emails, and monitors investor engagement

And then if the investor is interested then proceed with the deal execution

- Mock Pitch Option with Venture Analysts
- Term Sheet Negotiation & Documentation
- Final Status Options:
  - LIVE
  - CLOSED – WON
  - CLOSED – LOST

Deal Flow Screen(Manage investment deals and track their progress)



Deal Execution Page – Structure

Header / Deal Overview

- **If no deals exist → show "Create Your First Deal" (CTA button).**
- **If deals exist → show list of active/past deals with a "Create New Deal" button.**
- **Deal Title (e.g., *"Series A Funding – Startup X & Investor Y"*)**
- **Deal Status (*Negotiation, Drafting, Signed, Closed*)**
- **Progress Tracker (visual timeline: *Term Sheet* → *Due Diligence* → *Final Agreement* → *Closure*)**

Create New Deal / First Deal Form

Basic Info

- **Deal Title**

- **Startup Name (auto-filled from profile)**
- **Investor Name (auto-filled if from CRM or manual entry)**

Key Terms

- **Investment Amount**
- **Equity Offered (%)**
- **Valuation**
- **Funding Stage (Seed, Pre-Series A, Series A, etc.)**

Optional Notes

- **Deal Objective**
- **Special Conditions**

CTA: “Save & Continue” → takes user to full Deal Execution workflow.

Active Deal Workspace

1. Key Deal Terms (Editable / View Mode)

- **Investment Amount**
- **Equity Offered (%)**
- **Valuation Agreed**
- **Payment Schedule**
- **Special Clauses (*Drag-along, Liquidation Preference, etc.*)**

2. Document Exchange Section

- **Upload / View Term Sheet**

- **Upload / View SHA (Shareholders Agreement)**
- **AI Validation (flagging missing clauses, risks, inconsistencies)**
- **Digital Signatures Integration (eSign)**

3. Negotiation Chat / Collaboration Panel

- **Secure chat between Founder ↔ Investor**
- **AI Agent Suggestions (*clarify terms, summarize risks, propose edits*)**
- **Comment tagging on specific clauses**

4. Task & Checklist Tracker

- **Founder Tasks (e.g., provide cap table, compliance docs)**
- **Investor Tasks (e.g., KYC, payment verification)**
- **MBP Team Notes (internal compliance / legal team review)**

5. Finalization Section

- **Approve & Lock Terms**
- **Execute Agreement (digital sign-off)**
- **Generate Deal Summary PDF**
- **Trigger Post-Deal Workflow (*fund transfer, equity issuance, CRM update*)**

Once the deal execution is completed After that closure screen

Closure Screen (Success fee, deal won/lost).

Closure Screen – Structure

1. Header / Deal Summary

- **Deal Title (e.g., *Series A Funding – Startup X & Investor Y*)**
- **Deal Status → Won / Lost (toggle with confirmation modal)**
- **Progress Tracker → highlights Closure Stage**

2. Deal Outcome Section

- **If Deal Won:**
    - **Final Investment Amount Closed**
    - **Equity Diluted (%)**
    - **Valuation at Closure**
    - **Transaction Date**
    - **Success Fee Calculation (auto-calculated % of deal size)**
    - **Payment Status (Pending / Paid / Verified)**
- **If Deal Lost:**
    - **Reason for Loss (dropdown: *Investor backed out, valuation mismatch, due diligence failed, other*)**
    - **Notes/Comments field**

3. Success Fee & Payments (Platform Side)

- **Success Fee % (defined in system/admin settings)**
- **Amount Due (calculated from closed deal size)**
- **Payment Options (Bank Transfer / Online Payment)**
- **Upload Proof of Payment (if offline)**
- **Status Tracker → Pending → Under Review → Confirmed**

4. Post-Deal Workflow

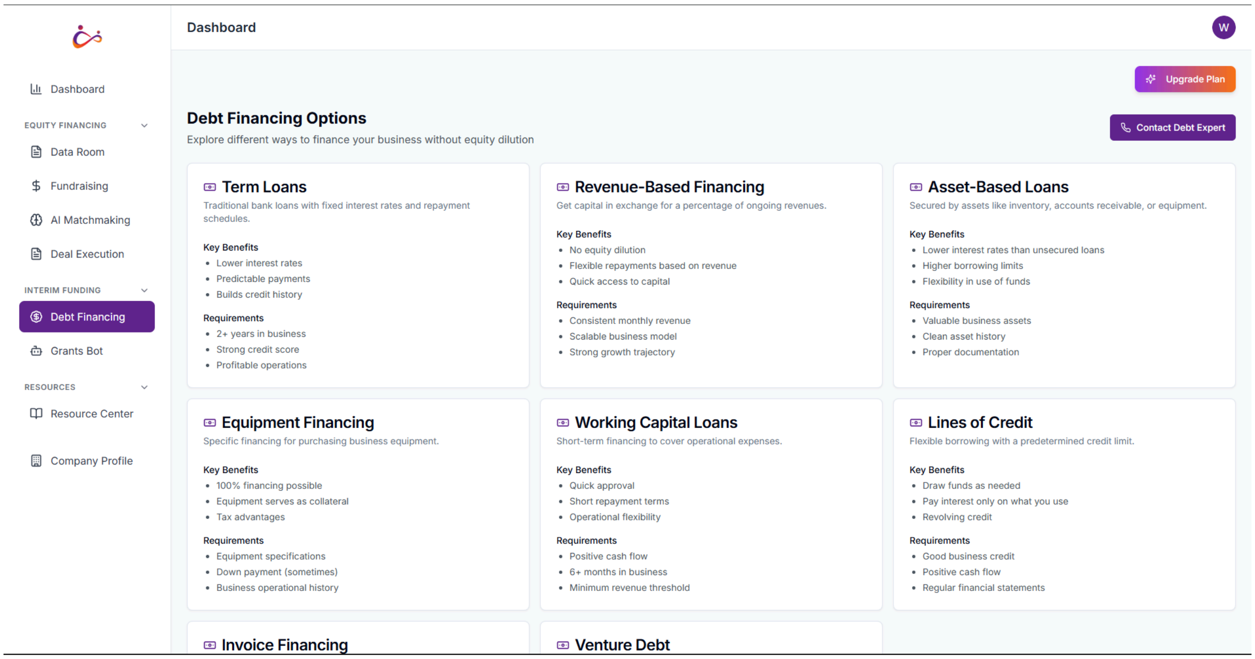
- **Generate Deal Closure Report PDF (auto-generated summary)**
- **Update Founder Dashboard (closed deal history + metrics)**
- **Update Investor Dashboard (portfolio entry created)**
- **Update Admin Dashboard (success fee compliance)**

5. Notifications & Alerts

- **Founder gets confirmation email + receipt (if Won).**
- **Investor gets confirmation email + portfolio update.**
- **Internal MBP team gets notification for compliance/review.**

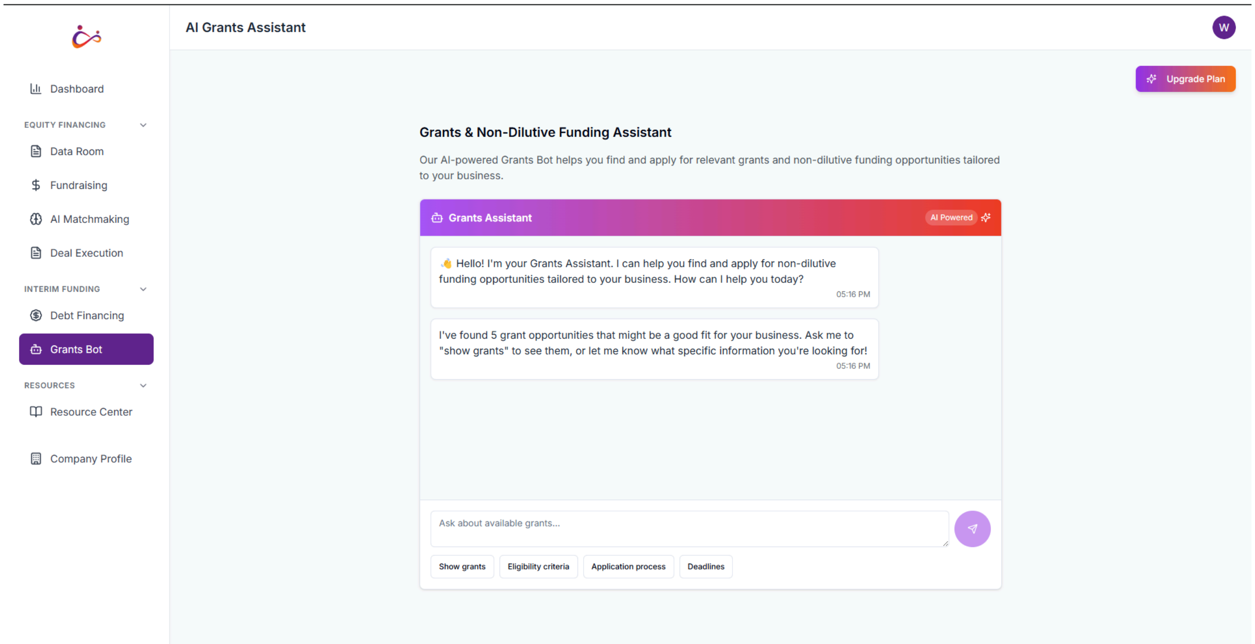
Then we have an option for Interim Funding, which includes both Debt Financing and Grants.

Debt Financing Screen



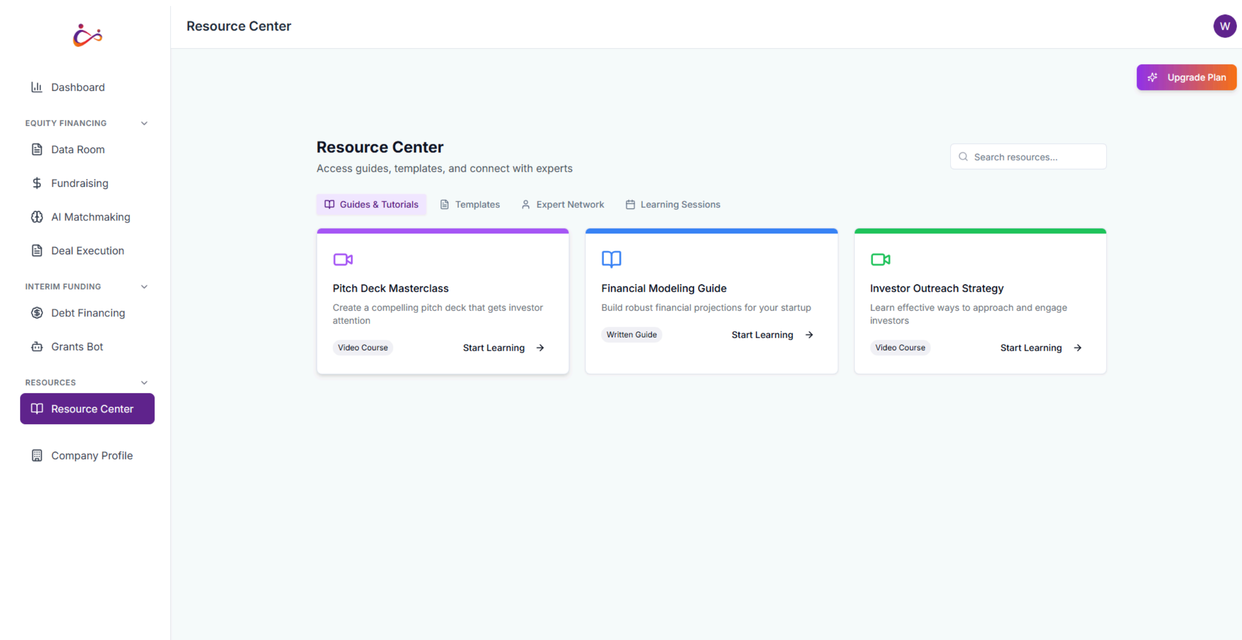
In this section, Debt Financing is explained, and there will be a button labeled *Contact Debt Expert*. When a founder clicks this button, a notification should be sent to the admin console to alert the admin.

Grants Bot Screen



In this section, the Grants Bot uses the OpenAI key to answer the founder's questions about grants. It should pull information from the grants database to provide relevant grant options, and if the question is about a specific grant, it should also return detailed information about that grant.

Resource Center Screen



In the Resource Center, we need to have the following tabs:

- **Guides & Tutorials: Videos and learning resources**
- **Templates: Predefined document templates**
- **Expert Network: Access to assigned mentors**
- **Learning Sessions: Session links posted by the incubation admin**
- **Venture Partners: List of assigned analysts**
- **Support Access: Ticketing system and options for scheduling calls with the team**

Mentor Access Screen

Header: “Your Assigned Mentor(s)”

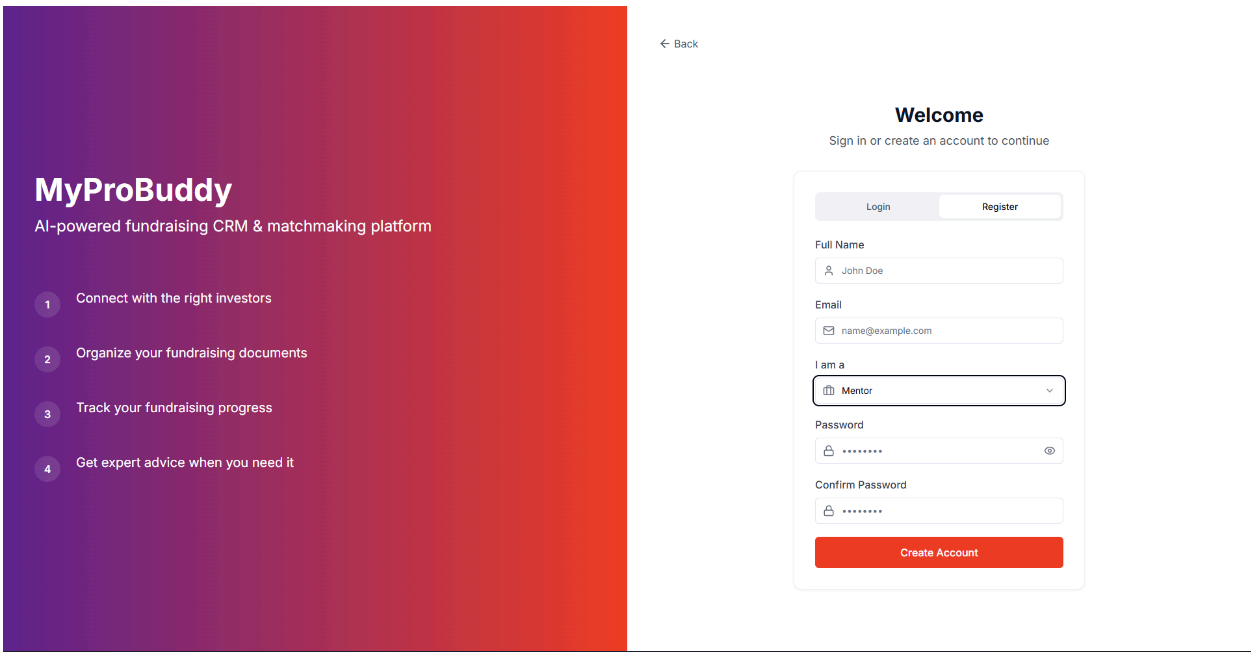
Sections:

- **Mentor Card View (name, expertise, domain, availability, profile link)**
- **Current Assignments: Shows active mentors assigned by incubation admin**
- **Workspaces:**
  - **Guidance Workspace (Deck Review, GTM, Compliance → with inline mentor notes + AI suggestions)**
  - **Collaboration Hub (Chat, Doc Review, Scheduling, Video Calls)**
- **Session Tracker: Upcoming + past sessions with feedback notes**
- **CTA: “Request Session” / “Upload for Review”**

2. Mentor Flow

Signup → Profile → Access Founders → Guidance → Collaboration → Close Engagement

Signup Screen (mentor onboarding).



Signup Screen (Mentor Onboarding)

- **Header: "Mentor Registration"**
- **Fields:**
  - **Full Name**
  - **Email ID**
  - **Phone Number**
  - **LinkedIn Profile**
  - **Domain of Expertise (dropdown: Tech, Marketing, Finance, Legal, etc.)**
  - **Years of Experience**

- **Authentication: Email verification flow (same as founders)**
- **CTA: “Complete Signup” → redirects to Profile Setup**

After signup it needs to redirect to Profile Setup

2. Profile Setup Screen

- **Header: “Set Up Your Mentor Profile”**
- **Sections:**
  - **Expertise (select multiple areas: GTM, Fundraising, Legal, Product, etc.)**
  - **Domain (Industry focus: SaaS, FinTech, HealthTech, etc.)**
  - **Availability (weekly slots/calendar sync option)**
- **Optional Info:**
  - **Bio / Short Introduction**
  - **Past Startups Advised**
- **CTA: “Save & Continue”**

3. Founder Assignment Screen

- **Header: “Assigned Startups”**
- **View Options:**
  - **List of startups assigned (name, logo, industry, stage)**
  - **Search & filter startups**
- **Startup Card Details:**

- **Founder Name**
- **Company Overview (short)**
- **Current Needs (e.g., GTM advice, fundraising prep)**
- **Last Interaction Date**

- **CTA: “Open Workspace” → goes to Guidance Screen**

4. Guidance Screen

- **Header: “Mentor Guidance Workspace”**
- **Tabs:**
  - **Deck Review → Upload/view pitch decks, add inline comments**
  - **GTM Strategy → Templates + mentor inputs**
  - **Compliance Suggestions → Checklist view with mentor notes**
- **AI Assistant: Recommends missing slides, compliance gaps, GTM benchmarks**
- **CTA: “Submit Notes to Founder”**

5. Collaboration Screen

- **Header: “Collaborate with Startup”**
- **Features:**
  - **Chat (secure, threaded discussions)**
  - **Doc Review (upload/review, version history)**
  - **Scheduling (integrated calendar for 1:1 calls/workshops)**

- **Integration: Video conferencing link generation (Zoom/Meet)**
- **CTA: “Schedule Session” / “Share Reviewed Document”**

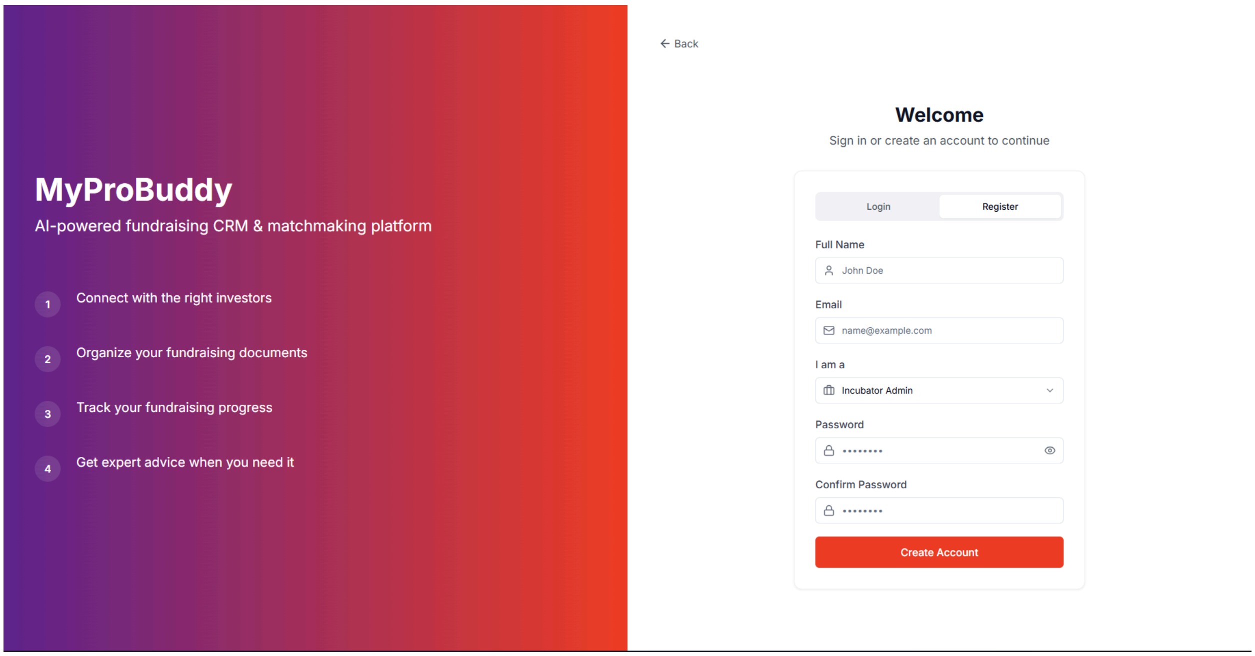
6. Engagement End Screen

- **Header: “Engagement Wrap-Up”**
- **Sections:**
  - **Handover Notes: Final recommendations and status**
  - **Final Review: Checklist of tasks completed**
  - **Next Steps: Suggested follow-up (if any)**
- **CTA: “Submit & Close Engagement”**
- **Post-Action: Startup + admin notified of closure; mentor dashboard updated**

3. Incubation Admin Flow (Screen by Screen)

Journey:
Signup → Program Setup → Founder Management → Portfolio Dashboard → Mentor Allocation → Reporting → Closure

Signup Screen Incubation Admin



1. Signup Screen (Organization-Level Admin)

Header: "Incubator / Accelerator Registration"

Fields:

- **Organization Name**
- **Admin Full Name**
- **Email ID (primary contact)**
- **Phone Number**
- **Designation / Role**
- **LinkedIn (optional)**

- **Authentication: Email verification → redirect to Program Setup**

CTA: “Complete Signup”

2. Incubation Program Setup Screen

Header: “Set Up Your Incubation Program”

Sections:

- **Program Details: Program Name, Description, Duration, Sector Focus**
- **Cohort Creation: Add Cohort Name, Start & End Date, Sector/Stage Focus**
- **Access Tier Selection: Partner / Enterprise (Enterprise = API access)**
- **Branding Options: Upload logo, white-label theme colors**

CTA: “Save & Continue”

3. Founder Management Screen

Header: “Founder & Startup Onboarding”

Features:

- **Invite Founders: Send invite links via email (auto-join with cohort tagging)**
- **Track Onboarding Progress: List of invited founders with status (Pending / Completed)**
- **Search + Filters: By stage, sector, cohort**
- **Startup Card View:**
    - **Company Name, Founder Name**
    - **Onboarding Status**

- **Fundraising Intent (amount, stage)**
- **Readiness Score (once available)**

CTA: “View Portfolio Dashboard”

4. Portfolio Dashboard Screen

Header: “Startup Portfolio Overview”

Sections:

- **Cohort Analytics (Gamified): Cohort readiness score averages, fundraising progress, active deals**
- **Startup Table View:**
    - **Name, Logo, Sector, Stage**
    - **Fundraising Status (Not Started / In Outreach / In Deal / Closed)**
    - **Readiness Score (0–100, with AI highlights)**
    - **Progress Tracker (Docs → Outreach → Deals → Closure)**
- **Export Option: Generate white-labeled PDF/Excel progress reports for stakeholders**

CTA: “Go to Mentor Allocation”

5. Mentor Allocation Screen

Header: “Manage Mentors & Assignments”

Sections:

- **Mentor Pool: List of onboarded mentors with expertise & availability**
- **Startup-Mentor Assignment: Drag-and-drop interface (assign mentors to founders)**

- **Tracking Panel:**
    - **Startup Name → Assigned Mentor(s)**
    - **Last Interaction Date**
    - **Next Scheduled Session**
- **Monitoring: View mentor notes, AI summaries, engagement logs**

CTA: “Confirm Assignments”

6. Reporting Screen

Header: “Cohort & Program Reports”

Features:

- **Cohort Performance Reports: Fundraising progress, mentor hours delivered, readiness scores**
- **Individual Startup Reports: Milestones achieved, pending actions, investor interest**
- **Board/Government Export: Auto-generate white-labeled reports (PDF, Excel)**
- **Analytics: Compare cohorts across sectors, stages, and readiness**

CTA: “Export Report”

7. Closure Screen (End of Cohort)

Header: “Cohort Closure Summary”

Sections:

- **Final Progress Snapshot: # startups, total funds raised, avg. readiness score**
- **Mentor Contributions: Hours delivered, satisfaction scores**

- **Investor Engagement: Total outreaches, deals won/lost**
- **Next Steps: Option to archive cohort or extend duration**

CTA: “Close Program & Archive Data”

4. Internal MyProBuddy Team Flow (Screen by Screen)

Journey:
Signup → Approvals → Oversight → Deal Support → Reporting → Closure

1. Internal Login Screen (Staff Access)

Header: “MyProBuddy Staff Login”

Fields:

- **Email ID**
- **Password**
- **Role Selection (Onboarding / Campaign / Deal / Super Admin)**
- **2FA Authentication**

CTA: “Login to Console”

Post-login → redirect to Admin Review Console.

2. Founder Profile Review Screen

Header: “Founder Submissions – Review Queue”

Sections:

- **Pending Profiles: List of new founder signups with status (Pending / Under Review / Approved / Rejected)**

- **Profile Card View:**
    - **Founder Name, Company Name, Sector, Stage**
    - **Fundraising Intent (amount + purpose)**
    - **Onboarding Completeness %**
- **Actions: Approve / Reject / Request More Info**
- **Fit Check Metrics:**
    - **Market Size**
    - **Founder Background**
    - **Traction / Revenue**
    - **Team Composition**

CTA: “Approve for Next Stage”

3. Document Validation Screen

Header: “Virtual Data Room – Validation”

Features:

- **Document Categories: Legal, Compliance, Financial, Product, Traction**
- **AI + Human Review Panel:**
    - **AI Feedback (missing docs, risks)**
    - **Reviewer Notes (manual inputs)**
- **Status Tags: Approved / Under Review / Rejected (with reason)**
- **Bulk Approval Option**

CTA: “Confirm Documents & Approve VDR”

4. AI + Human Validation Screen

Header: “Investor Outreach Readiness Check”

Sections:

- **Checklist:**
  - **Docs Complete ✅**
  - **Fit Check Passed ✅**
  - **Success Fee Agreement Signed ✅**
- **AI Validation Feedback: (auto-score, risk summary)**
- **MBP Team Notes: manual greenlight/hold comments**
- **Decision Panel: Approve for Outreach / Send Back for Fixes**

CTA: “Approve & Launch Outreach Access”

5. Deal Oversight Screen

Header: “Active Deal Monitoring”

Sections:

- **Deal List: Startup ↔ Investor pairs in progress**
- **Progress Tracker: Term Sheet → SHA → Final Agreement → Closure**
- **Deal Health Indicators: On Track / At Risk / Delayed**
- **Negotiation Watch: Flag risky clauses, unresolved items**
- **Collaboration: Add internal notes visible only to MBP team**

CTA: “Update Deal Status”

6. Reporting & Compliance Screen

Header: "Analytics & Compliance Dashboard"

Features:

- **Startup Outcomes Report: Deals Won / Lost / In Progress**
- **Investor Engagement Logs: Emails Sent, Opened, Replied, Negotiation Status**
- **Cohort Analytics (if linked to incubators): Compare across startups**
- **Compliance Reports: Success fee invoicing, legal documentation**
- **Export Options: PDF, Excel, White-labeled reports**

CTA: "Export Report"

7. Closure Screen

Header: "Engagement Closure & Fee Collection"

Sections:

- **Deal Status: Won / Lost / Deferred**
- **Success Fee Module: Auto-calculation (3–5% of raised funds)**
- **Final Documentation: Signed SHA, compliance docs, deal summary**
- **Post-Deal Workflow: Trigger CRM update, fund transfer, cap table update**
- **Notifications: Founder + Investor + Incubator notified of closure**

CTA: "Mark Engagement Complete"

Access Roles & Permissions (Quick Map)

Module	Onboarding Role	Campaign Role	Deal Role	Super Admin
Profile Review	✅ Full	❌ None	❌ None	✅ Full
Document Validation	✅ Full	❌ None	❌ None	✅ Full
Investor Outreach	❌ None	✅ Full	❌ None	✅ Full
Deal Oversight	❌ None	❌ None	✅ Full	✅ Full
Reporting & Compliance	View Only	View Only	✅ Full	✅ Full
Mentor Network Audit	❌ None	❌ None	❌ None	✅ Full

5.Investor Flow – Screens (End-to-End)

1. Signup Screen (Investor Onboarding)

Header: ***"Investor Registration"***

Fields (Mandatory):

- **Full Name**
- **Email ID**
- **Phone Number (with OTP verification)**
- **Organization / Fund Name (if applicable)**
- **Designation / Role**
- **Investor Type (Angel, VC, Family Office, Corporate VC, Fund Manager)**
- **Accreditation Check (checkbox + upload KYC/ID proof)**
- **Ticket Size Preference (range: $10k–$50k, $50k–$250k, etc.)**
- **Preferred Sectors (multi-select dropdown: SaaS, FinTech, HealthTech, etc.)**
- **Preferred Geography (India, SE Asia, Global, etc.)**
- **Investment Stage (Pre-seed, Seed, Series A, Growth, Late stage)**
- **LinkedIn Profile (optional)**
- **Password + Confirm Password**

CTAs:

- **"Complete Signup" → redirects to Investor Dashboard (Home).**

2. Investor Dashboard (Home)

- **Central hub for all campaigns & portfolio.**
- **Elements:**
    - **Notifications (new campaigns, updates on engaged startups).**

- **Saved startups (watchlist).**
- **Recommended startups (AI-matched based on thesis).**
- **Quick actions: Review Campaigns, View Portfolio, Settings.**

3. Campaign Landing Screen

- **Triggered when investor clicks on outreach email.**
- **Elements:**
  - **Personalized campaign message.**
  - **Startup summary (name, sector, traction highlights).**
  - **CTA → View Full Profile (secure access).**

4. Founder Profile Screen (VDR Access)

- **Secure access to the founder's Virtual Data Room.**
- **Elements:**
  - **Founder bio & team structure.**
  - **Pitch deck viewer (inline PDF).**
  - **Key metrics dashboard (ARR, CAC, runway, growth).**
  - **Dataroom files: financials, traction, legal docs.**
  - **Buttons: Engage, Save for Later, Request Clarifications.**

5. Engagement Screen

- **Direct interaction with founders.**
- **Elements:**
  - **AI-powered Q&A (instant responses from startup data).**
  - **Secure chat with founder.**
  - **Call/meeting scheduling (integrated calendar).**
  - **Notes panel (private to investor).**

6. Deal Screen

- **Negotiation & deal structuring.**
- **Elements:**
  - **Term sheet exchange.**
  - **Negotiation tracker (status workflow).**
  - **Legal document uploads.**
  - **E-signature integration.**
  - **Notifications for founder & MyProBuddy team oversight.**

7. Closing Screen

- **Decision checkpoint.**
- **Elements:**
  - **Investment confirmation (amount, valuation).**
  - **Decline → automated polite closure message to founder.**

    - **Payment confirmation (if integrated).**
    - **Compliance & audit logging.**

8. Exit & Portfolio Dashboard

- **Post-investment management.**
- **Elements:**
    - **Portfolio overview (all invested startups).**
    - **Performance tracking (ROI, growth %, valuation updates).**
    - **Exit management (secondary sales, M&A, IPO).**
    - **Exportable reports for LPs / internal fund use.**

6.Admin Flow Screens (End-to-End)

Signup/Login → User Management → Approvals → Campaign Oversight → Data Room Review → Fundraising Tracker → Task Mgmt → Analytics → Investor Category Mgmt → Unified Admin Console → Closure

1. Admin Login Screen

Header: "Admin Console Login"
Sections:

- **Email ID**
- **Password**
- **Two-Factor Authentication (OTP / Authenticator App)**
  CTA:
- **"Login to Console"**

- **“Forgot Password?”**

2. User Management Dashboard

Header: “User Management”
Sections:

- **User List (table with Name, Role, Tier, Status, Signup Date)**
- **Filters: Role (Founder, Mentor, Incubator, Investor), Tier (Basic, Approved, Fundraising), Cohort, Signup Date**
- **Actions per user: View, Edit, Delete, Impersonate**
- **Role Assignment Dropdown (assign/change role)**
- **Tier Management (Basic → Approved → Fundraising)**
  CTA:
- **“Edit User”**
- **“Assign Role”**
- **“Change Tier”**
- **“Impersonate User”**

3. Approval Queue Screen

Header: “Approval Queue”
Sections:

- **Pending Founder Onboarding (list of new signups)**
- **Success Fee Agreement Tracker (status: Pending / Signed)**

- **KYC Verification Queue (for investors)**
- **Review Notes Section (admin comments)**
  CTA:
- **“Approve”**
- **“Reject”**
- **“Request More Info”**

4. Campaign Monitor Screen

Header: “Outreach Campaign Monitor”
Sections:

- **Active Campaigns (list with founder name, investor group, stage)**
- **Campaign Metrics: Emails Sent / Opened / Replied / Negotiation in progress**
- **Campaign Health (AI RAG status: Red, Amber, Green)**
- **Filters: By Founder, Investor, Stage**
  CTA:
- **“Pause Campaign”**
- **“View Campaign Details”**
- **“Export Report”**

5. Data Room Review Queue Screen

Header: “Data Room Review”
Sections:

- **Pending Document Reviews (list view)**

- **AI Validation Score (auto-suggested score)**
- **Document Status: Approved / Under Review / Rejected**
- **Reason for Rejection (mandatory notes)**
  CTA:
- **"Approve Document"**
- **"Reject with Reason"**
- **"Request Revision"**

6. Fundraising Tracker Screen

Header: "Fundraising Pipeline Tracker"
Sections:

- **Visual Pipeline (Discovery → Outreach → Term Sheet → Closure)**
- **Milestone Alerts (highlight delays, missing steps)**
- **Progress Charts: % completion, readiness score**
- **Deal Status: Live / Won / Lost**
  CTA:
- **"View Deal Details"**
- **"Send Reminder"**
- **"Update Status"**

7. Task Management Screen

Header: "Admin Task Board"
Sections:

- **Kanban Columns: Backlog → In Progress → Review → Done**
- **Task Cards (assign user, due date, priority tags)**
- **Filter by Assignee / Deadline**
  CTA:
- **“Add New Task”**
- **“Assign Task”**
- **“Mark Complete”**

8. Analytics Hub Screen

Header: “Analytics & Reports”
Sections:

- **ROI Tracking: Funds Raised vs. Campaigns Run**
- **Cohort Benchmarks: Avg. fundraising readiness, closure rate**
- **Graphs: Daily signups, Outreach performance, Deal pipeline health**
- **Export Options: CSV / Sheets / PDF**
  CTA:
- **“Export Report”**
- **“View Cohort Analytics”**
- **“Download Dashboard”**

9. Investor Category Manager Screen

Header: “Investor Category Manager”
Sections:

- **Investor Buckets: Angel, Seed, Series A, Debt, Grants**
- **Manage Categories: Add / Edit / Delete**
- **Map Startups to Investor Buckets (drag-drop)**
- **Filters: Geography, Sector, Ticket Size**
  CTA:
- **"Add Category"**
- **"Edit Bucket"**
- **"Delete Bucket"**
- **"Assign Startup to Bucket"**

10. Unified Admin Console Screen

Header: "Unified Admin Console"
Sections:

- **User Impersonation (view platform as another user)**
- **Override Permissions (enable/disable features manually)**
- **Assign Founders to Analysts or Mentors**
- **Billing & Subscription Management**
- **Audit Logs (view all admin actions, timestamps)**
  CTA:
- **"Impersonate User"**
- **"Override Access"**
- **"Assign to Analyst"**
- **"Download Logs"**

11. Closure Screen (System Oversight)

Header: “Program & Cohort Closure”
Sections:

- **Mark Cohorts/Programs Completed**
- **Archive Old Startups/Investors**
- **Generate Final Compliance Report**
- **Export Summary (funds raised, deals closed, success fees)**
  CTA:
- **“Close Program”**
- **“Archive Records”**
- **“Export Final Report”**