



## GP-LP Intelligence Platform Product Document

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# 1. Executive Summary

## Overview

LPxGP is an AI-powered intelligence platform that helps investment fund managers (General Partners, or GPs) find and engage the right institutional investors (Limited Partners, or LPs) for their funds.

**Domain:** lpxgp.com

**Target Users:** Private equity, venture capital, and growth equity fund managers

## Problem Statement

Fund managers face significant challenges in the fundraising process:

- **Information Overload:** Thousands of institutional investors with varying mandates, preferences, and allocation strategies
- **Manual Research:** Hours spent researching LP mandates, recent commitments, and contact information
- **Poor Targeting:** Wasted meetings with misaligned investors who don't invest in the fund's strategy or size
- **Generic Outreach:** One-size-fits-all pitch materials that don't resonate with specific LP priorities

## Solution

LPxGP provides an intelligent matching and outreach platform:

Feature	Benefit
LP Database	5,000+ institutional investors with mandates, AUM, and contacts
AI Matching	Semantic search matches fund thesis to LP mandates
Match Scoring	Ranked list of LPs by fit score with explanation
Pitch Generation	AI-generated personalized outreach for each LP

Outreach Tracking

Pipeline management for fundraising campaigns

**Key Value Proposition:** Reduce time-to-first-close by helping GPs focus on the highest-probability LP targets with personalized, relevant outreach.

## 2. User Personas

### GP Fund Manager (Company Admin)

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**Role:** Managing Partner or Partner at a PE/VC firm

**Goals:**

- Raise capital for new funds efficiently
- Build relationships with institutional investors
- Track fundraising pipeline across the team

**Platform Access:** Full access including fund creation, team management, and all LP features

### GP Associate (Company Member)

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**Role:** Associate or VP supporting fundraising efforts

**Goals:**

- Research and identify potential LP targets
- Prepare meeting materials and pitches
- Support partners with data and analysis

**Platform Access:** LP search, matching, and pitch generation (read-only for fund settings)

### Super Admin (LPxGP Team)

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**Role:** LPxGP platform administrator

**Goals:**

- Onboard new GP firms to the platform
- Maintain and improve LP database quality
- Monitor platform health and usage

**Platform Access:** Full administrative access across all companies

## 3. Screen Mockups

The following pages show all 27 screens in the LPxGP platform, organized by user type.

### Public Screens

4 screens - Authentication and onboarding flows

# Login

User authentication page

The screenshot shows the LPxGP user authentication page. On the left, there is a dark sidebar with the LPxGP logo and a subtext "GP-LP Intelligence Platform". Below this, a large call-to-action button reads "Find the right LPs for your fund." with a subtext "AI-powered matching and outreach tools to help fund managers connect with institutional investors efficiently." At the bottom of the sidebar, a small copyright notice says "© 2024 LPxGP. All rights reserved." The main content area on the right has a "Sign in" heading and a subtext "Enter your credentials to access your account". It features two input fields: "Email address" containing "partner@acmecapital.com" and "Password" containing "\*\*\*\*\*". To the right of the password field is a "Forgot password?" link. A "Sign in" button is at the bottom of the form. Below the form, a link says "Don't have an account? Contact us for access."

## Accept Invitation

New user onboarding flow

The screenshot shows the LPxGP Accept Invitation page. On the left, there's a dark sidebar with the LPxGP logo and a list of steps: "You've been invited to join Acme Capital" and "Complete your account setup below". The main content area on the right shows the invitation details: "You're joining Acme Capital, Private Equity Firm", "Invitation sent to: john.partner@acmecap.com", and fields for "Full Name" (John Partner), "Create Password" (\*\*\*\*\*), and "Confirm Password" (\*\*\*\*\*). There's also a checkbox for agreeing to the Terms of Service and Privacy Policy, which is unchecked. At the bottom are "Accept Invitation" and "Sign in" buttons.

You're joining  
AC **Acme Capital**  
Private Equity Firm

Invitation sent to:  
john.partner@acmecap.com

Full Name  
John Partner

Create Password  
\*\*\*\*\*  
Minimum 8 characters with a number

Confirm Password  
\*\*\*\*\*

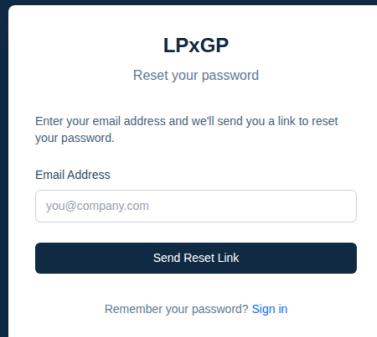
I agree to the [Terms of Service](#) and [Privacy Policy](#)

**Accept Invitation**

Already have an account? [Sign in](#)

## Forgot Password

Password reset request



The image shows a password reset form titled "LPxGP" with the subtitle "Reset your password". It instructs the user to enter their email address to receive a password reset link. A placeholder "you@company.com" is shown in the input field. A "Send Reset Link" button is at the bottom, and a "Sign in" link is at the bottom right.

LPxGP

Reset your password

Enter your email address and we'll send you a link to reset your password.

Email Address

you@company.com

Send Reset Link

Remember your password? [Sign in](#)

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## Reset Password

Create new password

The screenshot shows a password reset form titled "LPxGP" with the subtitle "Create new password". A green success message box at the top left contains the text "Email verified. Create your new password below." Below this, there are two input fields: "New Password" and "Confirm New Password", both containing placeholder text "\*\*\*\*\*". Underneath the "New Password" field is a note "Minimum 8 characters with a number". At the bottom of the form is a dark blue "Reset Password" button. At the very bottom of the page, outside the main form area, is a small link "Back to sign in".

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## GP User Screens

13 screens - Core platform functionality for fund managers

# Dashboard

Fund overview and recent activity

The screenshot shows the LPxGP dashboard interface. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search, and Outreach. On the right side of the navigation bar, it says "Acme Capital" and "JP". Below the navigation bar, there is a section titled "Dashboard" with a welcome message "Welcome back, John".

Below this, there are four cards providing summary statistics:

- ACTIVE FUNDS**: 3 (+1 this quarter)
- TOTAL MATCHES**: 127 (across all funds)
- SHORTLISTED**: 34 (LPs for outreach)
- MEETINGS**: 8 (+3 this month)

Under the "Your Funds" heading, there are three cards for different funds:

- Growth Fund III**: Private Equity - Growth (Status: Raising). Details: Target Size \$500M, Matches 45, Shortlisted 12. Action: View Matches →
- Growth Fund II**: Private Equity - Growth (Status: Investing). Details: Fund Size \$350M, Vintage 2021, Deployed 72%. Action: View Details →
- Growth Fund I**: Private Equity - Growth (Status: Harvesting). Details: Fund Size \$200M, Vintage 2017, Net IRR 28.5%. Action: View Details →

At the bottom, there is a section titled "Recent Activity" listing three recent events:

- Generated pitch for CalPERS Growth Fund III (2 hours ago)
- Added Harvard Endowment to shortlist Growth Fund III (Yesterday)
- Match scores updated for 12 LPs Growth Fund III (2 days ago)

# Funds

List of all funds

The screenshot shows the LPxGP platform's 'Funds' section. At the top, there is a navigation bar with links for 'Dashboard', 'Funds' (which is the active tab), 'Search', and 'Outreach'. On the right side of the header, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the header, a section titled 'Your Funds' is displayed, with a sub-instruction 'Manage fund profiles and view LP matches'. A prominent 'New Fund' button is located in the top right corner of this section. The main content area displays three fund profiles in cards:

- Growth Fund III** (Raising)  
Private Equity - Growth  
Target Size: \$500M  
Matches: 45  
Shortlisted: 12  
[View Fund](#)
- Growth Fund II** (Investing)  
Private Equity - Growth  
Fund Size: \$350M  
Vintage: 2021  
Deployed: 72%  
[View Fund](#)
- Growth Fund I** (Harvesting)  
Private Equity - Growth  
Fund Size: \$200M  
Vintage: 2017  
Net IRR: 28.5%  
[View Fund](#)

At the bottom left, there is a dashed box containing a plus sign and the text 'Create New Fund' with the sub-instruction 'Set up a fund profile to find matching LPs'.

## Fund Detail

Fund profile with thesis and track record

The screenshot shows the LPxGP platform's Fund Detail view for 'Growth Fund III'. The top navigation bar includes 'LPxGP', 'Dashboard', 'Funds' (selected), 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. The main content area has a breadcrumb 'Funds / Growth Fund III'. The fund card for 'Growth Fund III' (Raising) includes 'Edit Fund' and 'View Matches' buttons. The 'Fund Overview' section details target size (\$500M), target close (Q2 2025), geography focus (North America), sector focus (Technology, Healthcare), and check size (\$25M - \$75M). The 'Matching Stats' section shows 45 total matches, 12 high score, 8 shortlisted, and 5 contacted, with a 'View All Matches' button. The 'Investment Thesis' section describes the fund's focus on technology-enabled businesses in the upper mid-market segment, targeting companies with proven business models seeking capital for growth, M&A, or expansion. The 'Quick Actions' section provides links to 'Generate LP Pitch', 'Export Fund Summary', and 'Refresh Matches'. The 'Track Record' section displays performance metrics: 2.3x Gross MOIC (Fund II), 28.5% Net IRR (Fund I), 18 Portfolio Companies, and \$550M Capital Deployed.

Fund Overview		Matching Stats	
Target Size \$500M	Target Close Q2 2025	Total Matches <b>45</b>	
Geography Focus North America	Sector Focus Technology, Healthcare	High Score (80+) <b>12</b>	
Check Size \$25M - \$75M	Stage Growth / Expansion	Shortlisted <b>8</b>	
		Contacted <b>5</b>	
		<a href="#">View All Matches</a>	

Investment Thesis				Quick Actions	
<p>Growth Fund III focuses on technology-enabled businesses in the upper mid-market segment (\$50M-\$200M revenue) with strong unit economics and paths to market leadership. We target companies with proven business models seeking capital to accelerate organic growth, pursue strategic M&amp;A, or expand into new markets.</p> <p>Our value-add approach includes operational support through our portfolio services team, board-level governance expertise, and access to our extensive network of industry executives and potential customers.</p>				<a href="#">Generate LP Pitch</a>	
				<a href="#">Export Fund Summary</a>	
				<a href="#">Refresh Matches</a>	

Track Record			
<b>2.3x</b> Gross MOIC (Fund II)	<b>28.5%</b> Net IRR (Fund I)	<b>18</b> Portfolio Companies	<b>\$550M</b> Capital Deployed

# Create Fund

New fund creation form

The screenshot shows the 'Create Fund Profile' page. At the top, there's a navigation bar with 'LPxGP' and links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a breadcrumb 'Funds / Create Fund'. The main form area has several sections:

- Basic Information**: Fields for 'Fund Name \*' (e.g., Growth Fund III), 'Strategy \*' (Private Equity - Growth), and 'Status \*' (Raising).
- Fund Size & Timeline**: Fields for 'Target Size \*' (\$ 500M) and 'Target Close' (Q2 2025). Below these are 'Min Check Size' (\$ 25M) and 'Max Check Size' (\$ 75M).
- Investment Focus**: Fields for 'Geography \*' (North America) and 'Stage Focus' (Growth / Expansion). A 'Sector Focus' input field contains 'e.g., Technology, Healthcare, Financial Services'.
- Investment Thesis**: A large text area for 'Describe your investment strategy' with placeholder text: 'What types of companies do you invest in? What is your value-add approach? What makes your fund unique?'. A note below says 'This will be used for AI matching with LP mandates'.
- At the bottom right are 'Cancel' and 'Create Fund' buttons.

# LP Search

Search and filter institutional investors

The screenshot shows the LPxGP LP Search interface. At the top, there's a navigation bar with 'LPxGP' and links for 'Dashboard', 'Funds', 'Search' (which is active), and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a search bar containing 'technology growth equity' with a 'Search' button. To the left is a sidebar titled 'Filters' with sections for 'LP Type' (checkboxes for Pension, Endowment, Family Office, Foundation, Sovereign Wealth), 'AUM Range' (input fields '\$1B' to 'Max'), 'Geography' (dropdown 'North America'), and 'Invests In' (checkboxes for Private Equity, Venture Capital, Real Estate). A 'Clear Filters' button is at the bottom of the sidebar. The main area displays a table of 247 LPs found, sorted by AUM (High to Low). The columns are NAME, TYPE, LOCATION, AUM, and ACTIONS (View + Shortlist). The table includes entries like CalPERS, Yale Endowment, Harvard Management, Ford Foundation, and Texas Teachers. At the bottom, it shows 'Showing 1-5 of 247' with a page navigation section.

NAME	TYPE	LOCATION	AUM	ACTIONS
CalPERS California Public Employees' Retirement System	Pension	Sacramento, CA	\$450B	<a href="#">View</a> + Shortlist
Yale Endowment Yale University Investments Office	Endowment	New Haven, CT	\$41B	<a href="#">View</a> + Shortlist
Harvard Management Harvard Management Company	Endowment	Boston, MA	\$53B	<a href="#">View</a> + Shortlist
Ford Foundation Ford Foundation Endowment	Foundation	New York, NY	\$16B	<a href="#">View</a> + Shortlist
Texas Teachers Teacher Retirement System of Texas	Pension	Austin, TX	\$180B	<a href="#">View</a> + Shortlist

## LP Detail

LP profile with mandate and contacts

The screenshot displays the LPxGP Product Document interface, specifically the LP Detail page for CalPERS. The top navigation bar includes links for LPxGP, Dashboard, Funds, Search, Outreach, Acme Capital, and a user icon (JP). The main header shows "Search / CalPERS". The CalPERS profile card features a blue square with "CP", the name "CalPERS", its description "California Public Employees' Retirement System", location "Public Pension Sacramento, CA", and buttons for "+ Add to Shortlist" and "Generate Pitch".

**Overview**

Total AUM <b>\$450B</b>	PE Allocation <b>13%</b>	Est. PE Commitment <b>\$58.5B</b>
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**Investment Mandate**

CalPERS maintains a diversified private equity portfolio with allocations across buyout, growth equity, and venture capital strategies. The system prioritizes partnerships with established managers demonstrating strong track records and operational value creation capabilities.

TARGET RETURN Net IRR 11%+	PREFERRED CHECK \$100M - \$500M
GEOGRAPHY North America, Europe	SECTORS Diversified

**Key Contacts**

MS Michael Smith Managing Investment Director, Private Equity	<a href="#">View Profile →</a>
JC Jennifer Chen Investment Director, Growth Equity	<a href="#">View Profile →</a>

**Match Score**

**92** Excellent Match

Strategy Alignment	Strong
Size Fit	Good
Geography	Match
ESG Focus	Aligned

[Why This Score?](#)

**Actions**

- Generate Email Draft
- Create LP Summary
- Flag Data Issue

**Data Quality** High  
Last updated: 2 weeks ago

# Matches

AI-ranked LP matches for fund

The screenshot shows the LPxGP platform's 'Matches' section. At the top, there is a navigation bar with links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right side of the navigation bar, it says 'Acme Capital' and 'JP'. Below the navigation bar, the path 'Funds / Growth Fund III / Matches' is displayed. In the center, the title 'LP Matches' is shown above a subtitle 'Growth Fund III - 45 matched LPs ranked by fit score'. To the right of the subtitle is a 'Refresh Matches' button. Below this, there are four summary boxes: 'Total Matches 45', 'Avg Score 72', 'Shortlisted 12', and 'Contacted 8'. The main content area displays four match cards for 'CalPERS', 'Yale Endowment', 'Texas Teachers', and 'Ford Foundation'. Each card includes the LP's name, match rating (Excellent, Strong, Good, Moderate), AUM, location, and specific alignment details. There are also 'Why this match?' and '+ Shortlist' buttons for each card. At the bottom of the list is a 'Load More (41 remaining)' button.

Total Matches	Avg Score	Shortlisted	Contacted
45	72	12	8

**CalPERS** Excellent Match  
Public Pension | \$450B AUM | Sacramento, CA  
✓ Strategy aligned ✓ ESG aligned ✓ Size fit

**Yale Endowment** Strong Match  
Endowment | \$41B AUM | New Haven, CT  
✓ Strong PE allocation ✓ Thesis aligned

**Texas Teachers** Good Match  
Public Pension | \$180B AUM | Austin, TX  
✓ Strategy aligned △ Usually requires Fund III+

**Ford Foundation** Moderate Match  
Foundation | \$16B AUM | New York, NY  
✓ ESG aligned △ Lower PE allocation

# Match Analysis

AI insights and talking points

The screenshot displays the LPxGP Match Analysis interface. At the top, there's a navigation bar with 'LPxGP' and links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the navigation is a breadcrumb trail: 'Funds / Growth Fund III / Matches / CalPERS Analysis'. The main content area features a summary card for 'CalPERS x Growth Fund III' with a score of 92, labeled 'Match Analysis & AI Insights'. It includes a 'Generate Pitch' button and an 'Add to Shortlist' button. Below this is a 'Score Breakdown' section with four categories: 'Strategy Fit' (95), 'Size Match' (90), 'Geography' (92), and 'Thesis Alignment' (88). A detailed 'AI Match Analysis' section follows, which includes a heading 'Why This Is a Strong Match' and a list of four green checkmark items: 'Strategy alignment', 'Fund size fit', 'Track record', and 'ESG commitment'. Below this is a 'Points to Consider' section with three yellow warning triangle items: 'Competition', 'Due diligence timeline', and 'Co-investment'. The final section is 'Suggested Talking Points' with three items: 'Track Record Highlight' (highlighting a 28.5% net IRR), 'Value Creation Story' (mentioning growth through operational support and M&A), and 'ESG Commitment' (mentioning integration across the investment process). Each talking point has a 'Copy' button.

# Pitch Generator

AI-powered outreach content

The screenshot shows the LPxGP platform's Outreach section, specifically the 'Generate Pitch' feature. On the left, the 'Pitch Settings' sidebar includes fields for 'Target LP' (CalPERS, Score: 92), 'Fund' (Growth Fund III), 'Content Type' (Outreach Email selected), 'Tone' (Professional & Formal), and 'Key Points to Emphasize' (Track record, Team experience checked). A large blue button at the bottom says 'Generate Pitch'. On the right, the generated outreach email is displayed. It has a green checkmark icon and the text 'Generated Outreach Email'. Below it are 'Regenerate' and 'Copy to Clipboard' buttons. A yellow warning box states: 'Human review required: AI-generated content should be reviewed and personalized before sending.' The email itself is addressed to Michael Smith, Managing Investment Director at Acme Capital Growth Fund III - Investment Opportunity. The body of the email discusses the fund's performance, strategic interest in growth equity managers, and a request for a meeting. At the bottom, it shows the message was generated by Claude via OpenRouter based on CalPERS mandate analysis.

**Pitch Settings**

Target LP  
CalPERS Score: 92

Fund  
Growth Fund III

Content Type  
 Outreach Email  
 Executive Summary  
 Meeting Brief

Tone  
Professional & Formal

Key Points to Emphasize  
 Track record  
 Team experience  
 ESG commitment  
 Co-investment capacity

Generate Pitch

**Generated Outreach Email**

Regenerate Copy to Clipboard

**Human review required:** AI-generated content should be reviewed and personalized before sending.

To: Michael Smith, Managing Investment Director  
Subject: Acme Capital Growth Fund III - Investment Opportunity

Dear Mr. Smith,  
I hope this message finds you well. I am reaching out regarding Acme Capital's Growth Fund III, a \$500 million growth equity vehicle focused on technology-enabled businesses in North America.  
Given CalPERS' strategic interest in growth equity managers with demonstrated operational value creation capabilities, I believe there may be strong alignment with our investment approach.

**Key highlights:**

**Track Record:** Fund I has achieved a 28.5% net IRR, ranking in the top quartile among growth equity peers

**Team:** Our partners average 20+ years of PE experience across technology, healthcare, and financial services

**Strategy:** We target \$50-200M revenue companies with proven unit economics, focusing on organic growth acceleration and strategic M&A. We are currently meeting with prospective limited partners for Fund III and would welcome the opportunity to discuss how our strategy may complement CalPERS' private equity portfolio.

Would you be available for a brief introductory call in the coming weeks?  
Best regards,  
John Partner  
Managing Partner, Acme Capital  
john@acmecapital.com

Generated by Claude via OpenRouter • Based on CalPERS mandate analysis

# Shortlist

LPs ready for outreach

The screenshot shows the LPxGP platform's "Shortlist" feature. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search, and Outreach. On the far right, it shows "Acme Capital" and a user icon labeled "JP". Below the navigation is a breadcrumb trail: Funds / Growth Fund III / Shortlist. To the right of the trail are two buttons: "Export List" and "Batch Generate Pitches".

Below the toolbar, there is a filter bar with four categories: All (12), To Contact (7), Contacted (3), and Meeting Set (2). The "All (12)" button is highlighted.

The main content area displays a table of LPs. The columns are: checkbox, LP name, Type, Score, Status, Notes, and Actions. The table contains the following data:

	LP	Type	Score	Status	Notes	Actions
<input type="checkbox"/>	CalPERS \$450B AUM	Pension	92	Contacted	Sent intro email 2 days ago	<a href="#">View →</a>
<input type="checkbox"/>	Yale Endowment \$41B AUM	Endowment	88	Meeting Set	Call scheduled Jan 15	<a href="#">View →</a>
<input type="checkbox"/>	Harvard Management \$53B AUM	Endowment	85	To Contact	—	<a href="#">View →</a>
<input type="checkbox"/>	Ontario Teachers \$250B AUM	Pension	79	Contacted	Follow-up needed	<a href="#">View →</a>
<input type="checkbox"/>	Texas Teachers \$180B AUM	Pension	76	To Contact	—	<a href="#">View →</a>

At the bottom left, it says "Showing 1-5 of 12". At the bottom right, there are navigation buttons for "Previous", "1", "2", "3", and "Next".

# Outreach Hub

## Activity tracking and pipeline

The screenshot displays the LPxGP Outreach Hub interface. At the top, there is a navigation bar with tabs: LPxGP, Dashboard, Funds, Search, and Outreach (which is currently selected). To the right of the navigation bar are user details: Acme Capital and a profile icon labeled JP.

**Outreach Hub**

Manage LP communications across all funds

**Recent Activity**

	Action	Date
	Meeting scheduled with Yale Endowment January 15, 2025 at 2:00 PM EST Growth Fund III	2 hours ago
	Email sent to CalPERS (Michael Smith) Growth Fund III	Yesterday
	Pitch generated for Ontario Teachers Growth Fund III	2 days ago
	Added 3 LPs to shortlist Growth Fund III	3 days ago

[View All Activity →](#)

**Quick Actions**

- Generate Batch Pitches
- Export Shortlist to CSV
- [View All Meetings](#)

**Upcoming Meetings**

Yale Endowment Jan 15, 2:00 PM
Stanford Endowment Jan 18, 10:00 AM

**Needs Follow-up**

Ontario Teachers	5 days
CalPERS	3 days
CPPIB	7 days

## Settings - Profile

### User profile settings

The screenshot shows the LPxGP Settings - Profile page. At the top, there is a navigation bar with links for Dashboard, Funds, Search, Outreach, and a user icon for Acme Capital (JP). On the left, a sidebar titled "Settings" has a "Profile" tab selected, along with options for Team, Company, Notifications, and Security.

The main content area is titled "Profile Settings". It includes a circular profile picture placeholder with "JP" and a "Change Photo" button. Below the photo are fields for First Name ("John") and Last Name ("Partner"). There is also an Email field containing "john@acmecapital.com" with a note below it: "Contact support to change your email address". The Title field contains "Managing Partner". The Phone field contains "+1 (555) 123-4567". The Bio field contains "20+ years of private equity experience focused on growth investments in technology and healthcare sectors." Below the bio is a "Brief description for your profile" input field, which is currently empty.

At the bottom of the profile settings section are "Cancel" and "Save Changes" buttons. Below this is a "Danger Zone" section with a "Delete Account" link and a note: "Permanently remove your account and all data".

## Settings - Team

Team member management

The screenshot shows the LPxGP Settings - Team interface. At the top, there's a navigation bar with 'LPxGP' and links to 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon 'JP'. The main area has a sidebar titled 'Settings' with 'Profile', 'Team', 'Company', 'Notifications', and 'Security' options.

**Team Members**

Manage who has access to Acme Capital

	Name	Role	Action
JP	John Partner john@acmecapital.com	Admin You	Edit
SJ	Sarah Johnson sarah@acmecapital.com	Member	Edit
MC	Mike Chen mike@acmecapital.com	Member	Edit

**Pending Invitations**

✉️	emily@acmecapital.com Invited 2 days ago	Pending	Resend	Cancel
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**Role Permissions**

<b>Admin</b>	<ul style="list-style-type: none"> <li>Manage team members</li> <li>Create and edit funds</li> <li>Access all features</li> <li>View billing</li> </ul>	<b>Member</b>	<ul style="list-style-type: none"> <li>View funds</li> <li>Search LPs</li> <li>Generate pitches</li> <li>Manage shortlists</li> </ul>
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## Super Admin Screens

10 screens - Platform administration and data management

# Admin Dashboard

Platform overview and health

The dashboard features a top navigation bar with tabs: LPxGP (selected), ADMIN, Dashboard, Companies, Users, People, LPs, and Data Quality. A user icon indicates 'Super Admin' status.

**Platform Dashboard**  
Overview of LPxGP platform activity

COMPANIES	25	+3 this month

TOTAL USERS	156	+12 this month

LP DATABASE	5,247	+50 this week

MATCHES GENERATED	12,450	+12 all time

**Pending Actions**

- 3 companies awaiting activation  
Admin invitations pending acceptance [View →](#)
- 12 LPs flagged for review  
Data corrections submitted by users [Review →](#)
- Import job in progress  
500 LPs processing - 78% complete [Monitor →](#)

**System Health**

Database	<span style="color: green;">● Healthy</span>
Supabase Auth	<span style="color: green;">● Healthy</span>
OpenRouter API	<span style="color: green;">● Healthy</span>
Voyage AI	<span style="color: green;">● Healthy</span>

Last checked: 30 seconds ago

**Recent Platform Activity**

2 hours ago	New company Beta Ventures created
5 hours ago	User jane@acme.com joined Acme Capital
Yesterday	LP import completed: 500 records added
2 days ago	Company Gamma Partners deactivated

[View All](#)

# Companies

Manage GP firms on platform

**Companies**

Manage GP firms on the platform

+ Add Company

COMPANY	ADMIN	USERS	FUNDS	STATUS	CREATED	ACTIONS
AC Acme Capital Private Equity	john@acmecapital.com	4	3	Active	Dec 1, 2024	<a href="#">View →</a>
BV Beta Ventures Venture Capital	—	0	0	Pending	Dec 18, 2024	<a href="#">View →</a>
GP Gamma Partners Growth Equity	alex@gammapartners.com	2	1	Inactive	Oct 15, 2024	<a href="#">View →</a>
DC Delta Capital Private Equity	sarah@deltacap.com	6	4	Active	Sep 20, 2024	<a href="#">View →</a>

Showing 1-4 of 25

Previous 1 2 3 Next

# Company Detail

## Company users and funds

The screenshot shows the LPxGP product interface for managing company details. At the top, there's a navigation bar with links for LPxGP (ADMIN), Dashboard, Companies (which is the active tab), Users, People, LPs, and Data Quality. On the far right, it shows 'Super Admin' and a 'SA' badge.

The main content area is titled 'Companies / Acme Capital'. It features a header card for 'Acme Capital' (Active) located in 'Private Equity | San Francisco, CA'. There are three summary boxes: 'Users 4', 'Funds 3', and 'Matches 127'. Below these are two sections: 'Users' and 'Funds'.

**Users:** Shows three users: John Partner (Admin, Active), Sarah Johnson (Member, Active), and Mike Chen (Member, Active). There's a '+ Invite User' button.

**Funds:** Shows three funds: Growth Fund III (\$500M target • Raising), Growth Fund II (\$350M • Investing), and Growth Fund I (\$200M • Harvesting). Each fund has a 'matches' count: 45, 52, and 30 respectively.

**Company Details:** Includes information like 'Created December 1, 2024', 'Strategy Private Equity - Growth', 'Location San Francisco, CA', and 'Website acmecapital.com'.

**Activity:** Shows recent activity: Last login 2 hours ago, Searches (30d) 127, and Pitches (30d) 23.

**Admin Actions:** Includes links for Impersonate User, View Audit Log, and Reset Company Data.

# Users

All platform users

**Users**

All platform users across companies

USER	COMPANY	ROLE	STATUS	LAST ACTIVE	ACTIONS
JP John Partner john@acmecapital.com	Acme Capital	Admin	● Active	2 hours ago	Impersonate <a href="#">Edit</a>
SJ Sarah Johnson sarah@acmecapital.com	Acme Capital	Member	● Active	Yesterday	Impersonate <a href="#">Edit</a>
SD Sarah Davis sarah@deltacap.com	Delta Capital	Admin	● Active	3 days ago	Impersonate <a href="#">Edit</a>
✉️ emily@acmecapital.com Invitation pending	Acme Capital	Member	● Pending	—	Resend <a href="#">Cancel</a>

Showing 1-4 of 156 users

Previous 1 2 3 Next

# People

LP contacts database

The screenshot shows the LPxGP People page. At the top, there is a navigation bar with links for LPxGP, ADMIN, Dashboard, Companies, Users, People (which is the active tab), LPs, and Data Quality. To the right of the navigation is a Super Admin SA button. Below the navigation is a search bar with placeholder text "Search by name, title, or organization...", a dropdown menu set to "All Organizations", and a "Filter" button. A large table below the search bar displays four contact entries. Each entry includes a small circular profile icon with initials (MS, JC, DS, RW), the contact's name, their title, their organization, their email address, their data quality status (High, High, Medium, High), and an "Edit" button. At the bottom left of the table, it says "Showing 1-4 of 8,234 people". At the bottom right, there are navigation buttons for "Previous", "1" (which is highlighted in dark blue), "2", "3", and "Next".

NAME	TITLE	ORGANIZATION	EMAIL	DATA QUALITY	ACTIONS
MS Michael Smith	Managing Investment Director, PE	CalPERS	m.smith@calpers.ca.gov	High	Edit →
JC Jennifer Chen	Investment Director, Growth Equity	CalPERS	j.chen@calpers.ca.gov	High	Edit →
DS David Swensen	Chief Investment Officer	Yale Endowment	<i>Not available</i>	Medium	Edit →
RW Robert Wilson	Sr. Portfolio Manager	Harvard Management	rwilson@hmc.harvard.edu	High	Edit →

# LPs

Institutional investor database

The screenshot shows the LPxGP LP Database interface. At the top, there is a navigation bar with links for LPxGP (ADMIN), Dashboard, Companies, Users, People, LPs (selected), and Data Quality. On the far right, it shows "Super Admin" and a "SA" icon. Below the navigation bar, a section titled "LP Database" displays "5,247 institutional investors". It includes five summary boxes: Total LPs (5,247), Pensions (1,245), Endowments (892), Family Offices (2,156), and Other (954). There are also buttons for "Import LPs" and "+ Add LP". Below these are search and filter options: "Search LPs...", dropdowns for "All Types", "All Regions", and "Data Quality", and a "Filter" button. The main content area is a table listing four LP entries:

LP NAME	TYPE	LOCATION	AUM	CONTACTS	QUALITY	ACTIONS
CalPERS California Public Employees' Retirement	Pension	Sacramento, CA	\$450B	12	High	Edit →
Yale Endowment Yale University Investments Office	Endowment	New Haven, CT	\$41B	5	High	Edit →
Smith Family Office Multi-family office	Family Office	New York, NY	\$2B	2	Medium	Edit →
Unknown Pension Fund State pension	Pension	—	Unknown	0	Low	Edit →

At the bottom left, it says "Showing 1-4 of 5,247 LPs". At the bottom right, there are buttons for "Previous", page numbers (1, 2, 3), and "Next".

# Edit LP

LP data management form

The screenshot shows the LPxGP interface for editing a Limited Partnership (LP). The top navigation bar includes links for LPxGP, ADMIN, Dashboard, Companies, Users, People, LPs (which is the active tab), and Data Quality. A user account for 'Super Admin SA' is visible on the right.

The main content area is titled 'Edit LP: CalPERS' and indicates it was last updated '2 weeks ago'. A green 'High Quality' badge is present. The form is divided into several sections:

- Basic Information:** Includes fields for 'LP Name \*' (CalPERS) and 'Full Name' (California Public Employees' Retirement System).
- Financial Information:** Shows 'Total AUM' (\$ 450B) and 'PE Allocation %' (13%).
- Investment Mandate:** Contains sections for 'Strategy Focus' (Buyout, Growth Equity, Venture Capital, Real Estate, Infrastructure - with Buyout and Growth Equity checked), 'Geographic Focus' (North America, Europe), and a note about CalPERS' diversified portfolio across these areas.
- Data Quality:** Shows a 'Quality Score' of 'High' and a 'Source' of 'Public filings, website'.

At the bottom, there are buttons for 'Delete LP' (in red), 'Cancel', and a prominent 'Save Changes' button.

# Data Quality

Quality monitoring and issues

The screenshot shows the LPxGP Data Quality dashboard. At the top, there's a navigation bar with links for LPxGP, ADMIN, Dashboard, Companies, Users, People, LPs, and Data Quality. On the far right, it shows "Super Admin" and "SA".

**Data Quality**  
Monitor and improve LP database quality

**OVERALL SCORE** **78%** (Green circle with checkmark)

**HIGH QUALITY** **3,124** 60% of LPs

**MEDIUM QUALITY** **1,523** 29% of LPs

**LOW QUALITY** **600** 11% of LPs

**Data Issues to Review** 12 pending

- Duplicate LP detected**: "CalPERS" and "California PERS" may be the same entity. Flagged by system • 2 hours ago. Actions: Ignore, Merge.
- Missing AUM data**: 15 LPs have no AUM information. Detected during import • Yesterday. Action: Review.
- User-submitted correction**: Yale Endowment AUM outdated - should be \$42B not \$41B. Submitted by john@acmecapital.com • 3 days ago. Actions: Reject, Accept.

[View All Issues →](#)

**Quality by Field**

Field	Percentage
Name	100%
Type	98%
AUM	72%
Mandate	65%
Contacts	45%

**Actions**

- Run Duplicate Detection
- Export Quality Report
- Bulk Update AUM

# Import Wizard

## CSV import tool

The screenshot shows the 'Map CSV Fields' step of the Import Wizard. At the top, a navigation bar includes 'LPxGP ADMIN', 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (which is the active tab), and 'Data Quality'. On the right, it shows 'Super Admin SA'. Below the navigation is a breadcrumb trail: 'LPs / Import Wizard'. A progress bar indicates the steps: 'Upload' (green checkmark), 'Map Fields' (blue circle, currently selected), 'Preview' (grey circle), and 'Import' (grey circle).

The main area is titled 'Map CSV Fields' and displays the message 'Match your CSV columns to LPxGP fields. 500 rows detected.' It shows a file upload section for 'lp\_database\_export\_2024.csv' (500 rows x 12 columns). Below this is a table mapping CSV columns to LPxGP fields:

CSV Column	LPxGP Field
organization_name	LP Name *
investor_type	Type *
hq_location	Location
aum_usd	Total AUM
pe_allocation_pct	PE Allocation %
internal_notes	— Skip —

A yellow warning box at the bottom left states: '⚠️ 1 column will be skipped' and 'The "internal\_notes" column is not mapped and won't be imported.'

At the bottom are 'Back' and 'Preview Import' buttons.

# System Health

Services and integrations status

The screenshot shows the LPxGP System Health dashboard. At the top, there's a navigation bar with 'LPxGP ADMIN' and links for Dashboard, Companies, Users, People, LPs, Data Quality, System, Super Admin, and SA. A green status indicator 'All systems operational' is shown.

**System Health** section: Monitors platform status and integrations. It includes four cards:

- Supabase PostgreSQL** (Primary database):
 

Response	Connections	Storage
12ms	8/100	2.4GB

 Status: Healthy
- Supabase Auth** (Authentication service):
 

Response	Active Sessions	Logins (24h)
45ms	24	156

 Status: Healthy
- OpenRouter API** (LLM inference (Claude)):
 

Response	Requests (24h)	Cost (24h)
1.2s avg	89	\$2.34

 Status: Healthy
- Voyage AI** (Embedding service):
 

Response	Embeddings (24h)	Vectors
180ms	450	5,247

 Status: Healthy

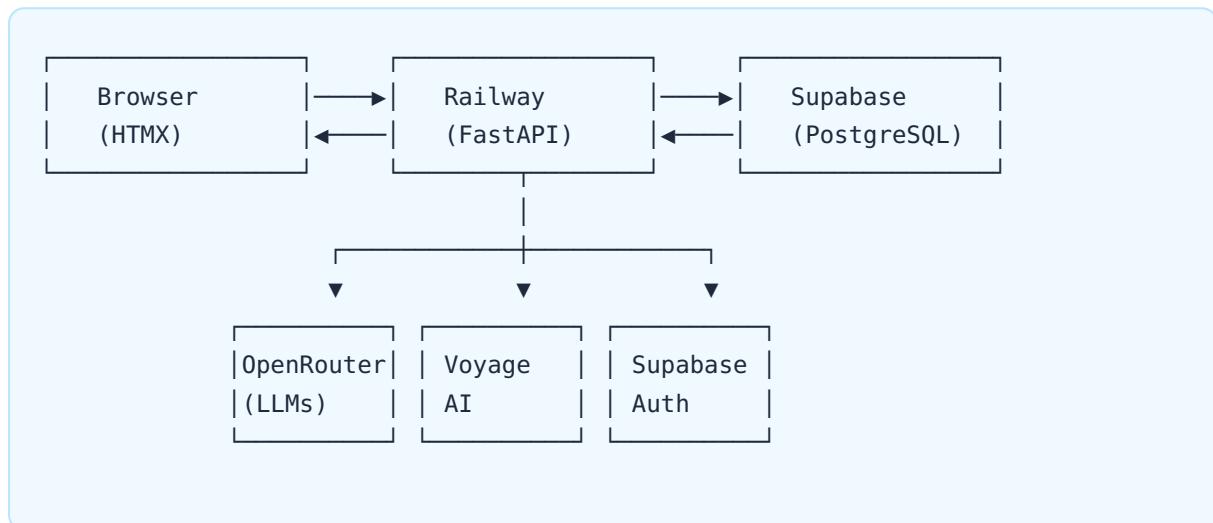
**Recent System Events** section: Shows three recent events with a 'View All' link.

- LP import completed successfully**: 500 records processed, 498 imported, 2 duplicates skipped. (2 hours ago)
- Embedding regeneration completed**: 5,247 LP embeddings updated for semantic search. (Yesterday)
- OpenRouter rate limit approached**: 80% of daily limit reached, consider upgrading. (2 days ago)

# 4. Technical Architecture

## System Overview

LPxGP is built as a modern web application with the following architecture:



## Technology Stack

Layer	Technology	Purpose
Backend	Python + FastAPI	API server and business logic
Frontend	Jinja2 + HTMX + Tailwind	Server-rendered UI with dynamic updates
Database	Supabase (PostgreSQL)	Data storage with pgvector for embeddings
Auth	Supabase Auth	Invite-only authentication with RLS
LLM	OpenRouter (Claude)	Pitch generation and analysis
Embeddings	Voyage AI	Semantic search for LP matching
Hosting	Railway	Auto-deploy from GitHub

## Security Model

- **Invite-Only Access:** Users can only join via company admin invitation

- **Row-Level Security:** Database policies ensure users only see their company's data
- **Role-Based Access:** Company Admins vs Members vs Super Admins
- **Human-in-the-Loop:** All AI-generated content requires review before use

## 5. Milestones

LPxGP is developed in six milestones, each delivering independently demoable functionality:

Milestone	Focus	Key Deliverables
<b>M0</b>	Foundation	Project setup, data model, LP import pipeline
<b>M1</b>	Auth + Search	Supabase Auth, basic LP search, Railway deployment
<b>M2</b>	Semantic Search	Voyage AI embeddings, pgvector similarity search
<b>M3</b>	Matching	Fund profiles, LP matching algorithm, score explanations
<b>M4</b>	Pitch Generation	OpenRouter integration, AI summaries, email drafts
<b>M5</b>	Production	Admin panel, data quality, monitoring, polish

**Current Status:** Ready for Milestone 0 implementation