ShareSecure Landing Page User Guide

The Page Builder tab in the ShareSecure Landing Page MVP is a powerful tool for administrative users to create and manage personalized landing pages for their investors and users.

This guide outlines the key features and functionalities of the Page Builder tab, offering insights into how users can enhance investor engagement through customized content and design.

Getting Started: Landing Page

Glossary:

- **Workspace:** a secure, customizable environment where users manage and collaborate on documents and communications for specific projects or deals. It helps organize content and permissions, typically for deal rooms or investor updates, ensuring relevant information is accessible to authorized users.
- **Landing Page**: a customizable, branded page that admins create to share specific content, such as documents, videos, and updates, with targeted user groups. It serves as a central hub for relevant information, tailored to the audience's needs.
- **Widget:** a customizable element that can be added to a landing page to display specific types of content, such as documents, videos, text, or links. Widgets allow admins to build dynamic, interactive pages that cater to the needs of their users.

Prerequisites for Building, Previewing, and Sharing a Page

- The landing page feature is enabled in your workspace and you see the "Page Builder" tab in your admin view.
- You have a group of users you can share a landing page with in your Workspace.

Building a Landing Page

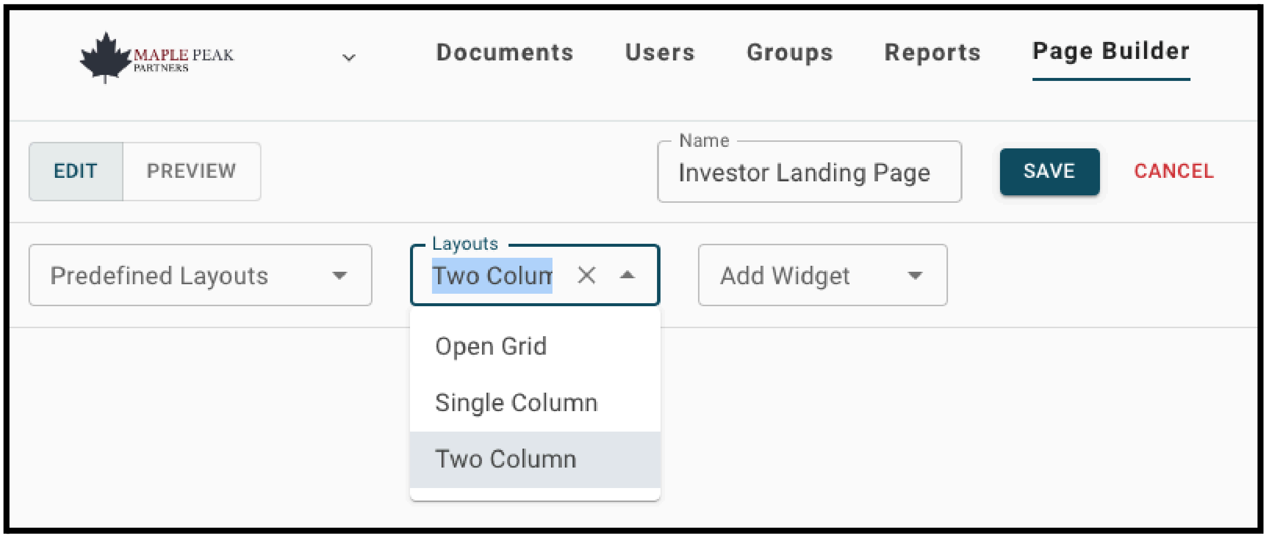
Navigation Bar

- **Accessing the Page Builder**: Use the navigation bar at the top of the interface to access various sections, such as Workspace Selector, Documents, Users, Groups, and Reports. Click on the **"Page Builder"** tab to begin building a Landing Page.

Layout and Widget Selection

- **New Page:** Start by clicking on the button that says "New Page". This will create a new page within your workspace to start building your Landing Page.
- **Edit Mode**: Next, use the edit mode to start customizing the landing page. You can rearrange widgets, update content, and adjust settings to create the desired layout and design.
- **Naming Your Page**: First you'll want to name your landing page in the "Name" field. This will help you and others easily identify the page later.

- **Predefined Layouts**: Lastly before you begin to add widgets, you'll want to select a predefined layout that best suits the content you want to display on your landing page. The available options include:
  - **Open Grid**: Allows for a flexible arrangement of widgets across the page.
  - **Two-Column**: Organizes content into two columns, perfect for side-by-side comparisons or separating different sections.
  - **Single-Column**: Stacks all content in a single column, ideal for a linear flow of information.



Adding Widgets

Click the "Add Widget" dropdown button to select from a variety of widgets to include on your landing page. These widgets can be dragged and dropped into the selected layout to create a custom and engaging experience.

Editing Widgets

- **Title Field**: Each widget includes a title area where you can input a descriptive name for the widget. This helps in organizing and identifying the widget's purpose on the landing page.
- **Drag and Drop Area**: The widget has a drag-and-drop handle on the left side (represented by a set of dots). This allows you to easily move and reposition the widget within your layout, giving you flexibility in arranging your page's content.
- **Remove Option**: On the right side, there's a trash bin icon, which allows you to remove the widget from the page if it's no longer needed. This feature ensures you can easily manage and clean up your landing page content.

Page Settings

- **Saving and Canceling**: Use the "Save" button to preserve any changes you've made. If you need to discard changes, click "Cancel" to revert to the last saved version of the page.

Previewing a Landing Page

Switching Mode and Preview Options

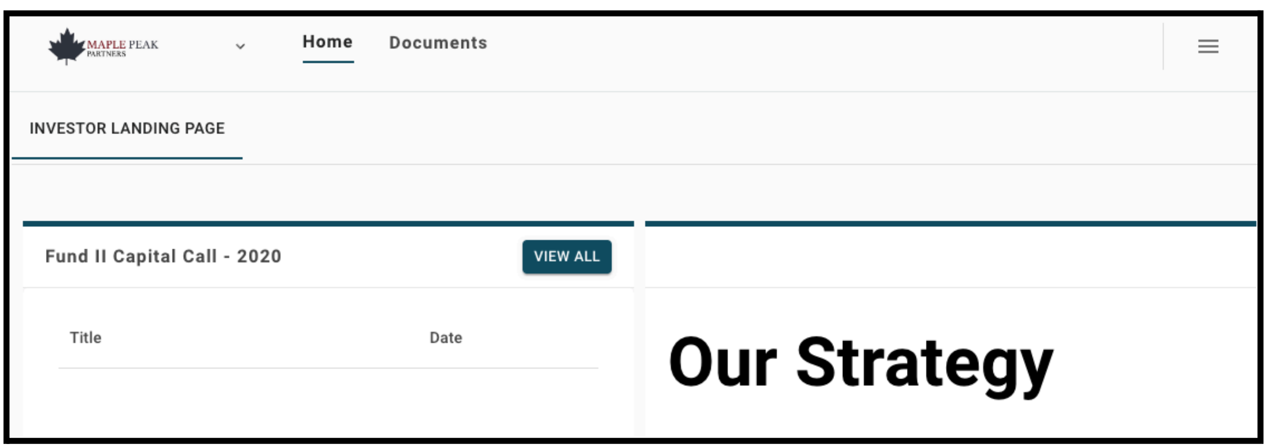
- **Switching Modes**: Use the "Edit" mode to make changes to your landing page's layout and content. Once you're done editing, switch to "Preview" mode to see exactly how the page will appear to users.
- **Preview Mode**: Provides a real-time view of what the final landing page will look like to users. This helps you ensure that the content is displayed correctly and is visually appealing.

Sharing and Setting Permissions

- **Setting as Default**: If you have multiple landing pages, you can set the current page as the default for users by selecting the "Default" option. This means that whenever users access the page, they will be directed to this one by default. Only one page can be set as default at any given time.
- **Sharing the Page**: Use the "Share" button to share the landing page with specific groups of users found within ShareSecure. You can also remove shares if you no longer want certain users to have access to the page. This feature ensures that only the intended audience can view the landing page content.

What will your Investors/LP/End-users see once the landing page is shared?

When a landing page is shared, the "Home" tab will appear next to the Documents tab for your users. When they click on the "Home" tab, they will see all the landing pages you've shared with them, with the default landing page displayed first in the tabbed menu below the main navigation.



Widget Breakdown and Other Features

Widget Breakdown

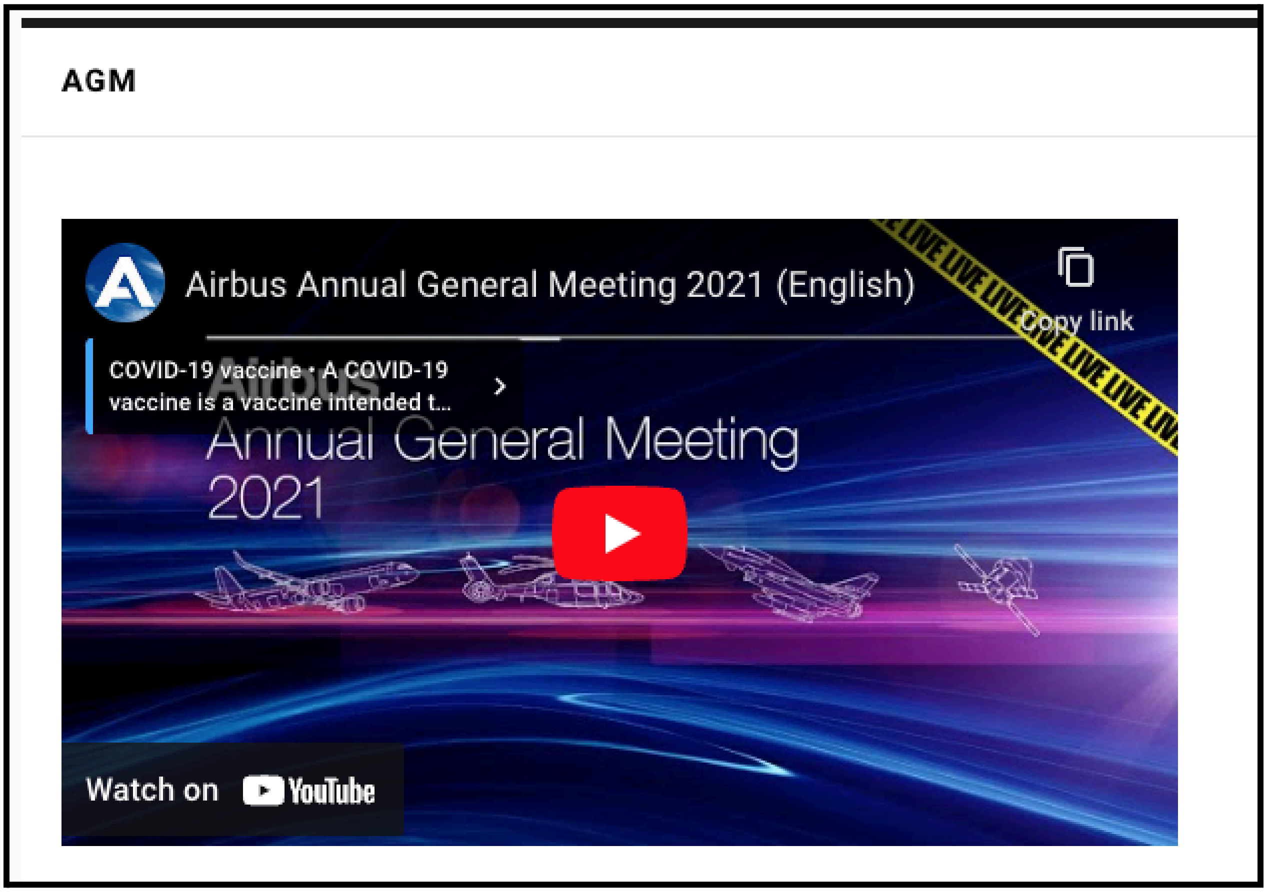
Files & Media Widget

- **Purpose**: This widget is designed to embed existing videos and files from your workspace directly onto the landing page. It is ideal for presenting key documents such as fund prospectuses, quarterly updates, introductory videos, investment spotlights, or any other multimedia content that enhances the investor's experience.
- **Supported Formats**: The widget supports a wide range of file formats, including PDFs, DOCX, XLSX, MP4, and AVI. This versatility ensures you can display various types of content.
- **Customization**: Users can easily customize the placement and size of the embedded documents and videos, ensuring they fit seamlessly within the overall layout of the landing page.

Rich Text Widget

- **Purpose**: The Rich Text Widget provides maximum flexibility for incorporating various content forms, such as text, images, links, and embedded multimedia. It’s particularly useful for adding essential information like contact details, company strategies, or links to important documents and forms that may live outside of the landing page.

- **Embedded Content**: This widget supports embedding YouTube videos and Twitter links, allowing you to enrich your landing page with dynamic, interactive content.



Featured Document List Widget

- **Purpose**: This widget displays a curated list of documents based on specific categories or filters created by admins. It ensures that users only see the documents most relevant to their needs.
- **Filter Creation**: Admins can create filters with associated categories or attributes on the document index page, save them, and then select these filters within the widget to tailor the document list shown to users. This functionality helps in organizing content effectively for different user groups.
  - Step 1: Create Filter On Document Index Page
  - Step 2: Edit the widget to

Fund II Capital Call - 2020

VIEW ALL

Title	Date
Fund III Cap Call_PharmaCo Employees Pension.pc	Dec 18, 2020
Fund III Cap Call_Seattle Equity Partners.pdf	Dec 18, 2020
Fund III Cap Call_Augue Eu Tellus Consulting, LLC.|	Dec 18, 2020
Fund III Cap Call_Teachers Pension Fund.pdf	Dec 18, 2020
Fund III Cap Call_Buchanan Advisors.pdf	Dec 18, 2020
Fund III Cap Call_Colorado Pension.pdf	Dec 18, 2020
Fund III Cap Call_Stone, Jones & Zaitz, LLP.pdf	Dec 18, 2020
Fund III Cap Call_Tribute Group, Inc..pdf	Dec 18, 2020
Fund III Cap Call_Maple Partners (Us).pdf	Dec 18, 2020

Total Rows: 25

Theming Widgets with Brand Colors

- **Purpose**: To maintain a consistent and professional look across all landing pages, users can theme widgets with the firm's brand colors. This feature ensures that all pages reflect the company's visual identity.
- **Color Picker**: The color customization setting is available in the General Organization Settings, where a color picker tool can be used to select the exact brand colors for theming the widgets.

Additional Features

Activities and Tracking

- **Purpose**: The Page Builder tab includes built-in tracking capabilities to monitor activities related to landing pages. This feature helps admins keep track of who is engaging with the pages and when significant changes are made.
- **Tracked Activities**:
  - **Creating a Page**: Tracks the creation of new landing pages, helping admins manage and organize multiple pages efficiently.
  - **Sharing a Page with a Group**: Records when a landing page is shared with a specific group of users, ensuring visibility into who has access to the content.
  - **Updating a Page**: Logs any updates made to a landing page, providing a clear history of changes.