



## User Guide for Investors of an Enterprise Group Account Tools to Help You Get Started

### How to Access Your Account

Visit <https://seraf-investor.com/> to log in to your account. Enter your Username and Password, as provided in your Account Activation Email.

### How to Use Your Seraf Account

With Seraf, you can access all your group investments online from your own account. You can gain powerful insights into your portfolio to make better investing decisions and stay organized by uploading investment-related documents. Following is a brief overview of what you'll find in each section of your account along with additional links to Seraf's [Help Center](#) to provide further information. Once your investment data is added, you'll see how each page displays your information in an organized framework, making it easy to access, view and analyze your investments. Be sure to look for tabs, links, and hover text that will provide further detail about your investments.

**[Dashboard](#)** - View your account overview and performance highlights at a glance. Gain insights into your current holdings, recent activity, changes in valuation, returns and IRR. See recent portfolio company investor reports and financial statements, if shared by your group leader.

**[Current Investments](#)** - View your active holdings by company, by round, or by fund, using the appropriate tabs. Track each portfolio company's cost basis and current value while viewing the industry and product description. If you've invested in multiple rounds of a company, quickly see the dates and amounts for each individual round. If you invest in a fund, track fund commitments, calls, amount remaining and current value. You can always click on any company, round or fund name to access more details including website, address, and contacts, as well as related KPIs, updates, transactions and documents, depending on what level of detail your group provides.

**[Exits & Returns](#)** - View your exits and returns to celebrate your successes and learn from mistakes. See how much you've invested, how much has been returned, net proceeds, return multiple, realized IRR, and any remaining value along with its unrealized IRR. Entities in green text have current holdings as well as some form of exit, whereas companies in black text are completely exited and have no remaining or future value. View exits by Company, by Round, or by Fund for a deal-by-deal breakdown of your investment returns.

**[Portfolio Analysis](#)** - Gain powerful insights into your portfolio's performance, including diversification, growth, IRR, annual stats and valuation metrics, while viewing relevant and meaningful charts and graphs. View key investment metrics. Analyze, understand and learn from your portfolio so that you can make data-driven investment decisions in the future.

**[Transaction Register](#)** - View a history of your investment transactions in chronological order. Click on the transaction type to access details about each transaction, including stock purchases and sales, note purchases and redemptions, interest paid, and more. As with most



tables, you can export your records as a way to share investment details with family members, tax attorneys, financial planners, and advisors.

**Documents** - Review and upload term sheets, deal documents, financial statements, investor reports, copies of share certificates and other investment records for safe keeping and easy retrieval. Add a new document by [uploading it](#) or [emailing it](#) directly to your account.

**KPIs** - Measure the performance of portfolio companies and the impact of your entire portfolio by viewing company-specific and/or portfolio-wide Key Performance Indicators, if your group records them. View all KPI values, export them to analyze, and review portfolio-wide totals. You can also open a company record to view KPIs graphically to see how they are trending.

**Reports** - Access your [Account Statement](#) for built-in reporting on your portfolio. Generate reports for any time period on demand to view, print or download. View portfolio [company updates](#), if your group provides them.

**Important Dates** - Review and [add important calendar events](#) related to your investments. [Set reminders](#) to appear on your Dashboard, so you don't miss any important future events or deadlines that may impact your portfolio returns. This feature is available upon upgrade (see below).

**Portfolio Management** - View records for companies, rounds, funds, and transactions. This section becomes more useful to group members interested in adding their own personal investments upon upgrade. Full access to add investments, valuations, and contacts as well as the ability to view all associated data is available upon upgrade (see below).

**Account Management** - View and edit your account details such as login information and account settings. Add [Investment Accounts](#) to track investments made through different vehicles, such as a trust or IRA. Set up your own Seraf email address to forward documents to your account. Notify your account manager if you need to change the name of your account, email address, or investment accounts. Upgrade your account to access additional features (see below).

**Add New** - Make context-sensitive entries directly from the side menu bar. Click the "Add New" button to upload a document. Full access to add investments in companies and funds as well as valuations and important dates using this feature is available upon upgrade (see below).



## **How to Add Outside Investments to Your Seraf Account – Account Upgrade**

Interested in tracking *all* your early stage investments on Seraf regardless of whether you made them with a group or not? Want full access to all of Seraf's features? As a benefit of your association with an Enterprise group using Seraf, you're entitled to receive 50% off Seraf's Professional Portal. Upgrading your existing account will allow you to add all your investments made outside your group. You'll be able to view, manage, and analyze all of your investments in Seraf's powerful dashboard. Rest assured, even though you are part of a group, *only you* will be able to view these additional investments. To upgrade, log in to your account, go to [Account Management](#) and select *Upgrade Now*. Next, select *Sign Up* under the Professional plan and follow the prompts. If you'd like a 50% discount (a \$250 savings!), contact your account manager for your group's promo code.

## **Access Articles, Templates & Resources**

Interested in becoming a smarter investor? Learn about early stage investing through hundreds of blog post articles, toolkits, templates, video interviews, courses and free ebooks, covering a wide array of topics from investment to exit, at [The Seraf Compass](#). You can also [order hard copy versions at Amazon.com](#). [Sign up](#) to receive Seraf's award-winning blog post each week. And, stay up to date on early stage investing news and best practices by following us on [LinkedIn](#) and [Twitter](#).

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Seraf's many features are searchable in our [Help Center](#). If you find that you need additional assistance or have questions, please contact your group account manager.