

# Steps to a successful Fundwave implementation

This guide describes the required tasks and their owners for a successful deployment of Fundwave.

Questions? Reach us:

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## Deployment Tasks

This document presents a quick overview of deployment tasks and their owners for a private implementation and FundCloud, our SaaS offering.

### 1. Pre Requisites

**Fundwave Contract.** The terms of our contract with you, including a non-disclosure clause to safeguard Fundwave's software solution.

### 2. Servers & Network

ID	Task	Owner		Dependency
		<i>Private Implementation</i>	<i>FundCloud</i>	
1	Hardware / Virtual Machine Setup	Internal Service Delivery	FundWave	-
2	Internal DNS / Public Domain Name	Internal Service Delivery	FundWave	1
3	Procure SSL Certificate	Internal Service Delivery	FundWave	2
4	Issue VPN Credentials to FundWave Support	Internal Service Delivery	Internal Service Delivery (for any integration)	3
5	Issue private keys / OAuth2 Endpoints for any integration projects	Internal Service Delivery	Internal Service Delivery	-
6	Environment Setup – App Server	FundWave	FundWave	3
7	Environment Setup – Database	FundWave	FundWave	3
8	Email Server Configuration	Internal Service Delivery	FundWave	6, 7
9	Database Metadata / Sample Fund	Fundwave	Fundwave	7

<b>10</b>	Application Installation	FundWave	FundWave	8, 9
<b>11</b>	Single Sign On – Access	Internal Service Delivery	Internal Service Delivery	-
<b>12</b>	Single Sign On – Configuration	Fundwave	Fundwave	10, 11
<b>11</b>	Ongoing Maintenance – Hardware & Environment	Internal Service Delivery	FundWave	12

### 3. Application

<b>ID</b>	<b>Task</b>	<b>Owner</b>		<b>Dependency</b>
		<i>Private Implementation</i>	<i>FundCloud</i>	
<b>12</b>	System Module Testing (Staging Server)	Fundwave	Fundwave	10
<b>13</b>	User Testing	PE Business Team	PE Business Team	15

### 4. Training

<b>ID</b>	<b>Task</b>	<b>Owner</b>		<b>Dependency</b>
		<i>Private Implementation</i>	<i>FundCloud</i>	
<b>14</b>	IT Training - Environment	Fundwave	N/A	-
<b>15</b>	Initial User Training	FundWave	FundWave	12
<b>16</b>	Ongoing User Training	PE Business Team	PE Business Team	15

### FundCloud +

Should you choose FundCloud +, our virtual private cloud service, an additional step for configuring your data center gateway to allow VPN access from FundCloud + is required.

### Data Migration

For existing funds, a one-time data migration follows the steps mentioned above. We provide spreadsheets based data migration templates so that it easy to transfer data from your existing spreadsheets to Fundwave.

### Integration

Integration projects with your Investor CRM or your Accounting system are excluded from the scope of this document. It is recommended that these projects are implemented in a phased manner following this implementation.

## Using Fundwave as Your Contact Manager

Are you currently not using an Investor CRM? Consider using Fundwave as your dedicated contact manager. Please get in touch for more details regarding our contact manager module.