



Angels@Essex

Registering and creating a deal as an entrepreneur

WE ARE A UNIVERSITY ENTERPRISE ZONE

■ Expertise ■ Business Support ■ Funding



University of Essex

Invitation email



University
of Essex

Come be a part of our Platform

Dear .

You have been invited by Angels at Essex to join their platform.

Please click the button below to create an account and find out more.

[Join the platform](#)

Kind regards,

Angels at Essex


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Create credentials



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Title

First Name

Last Name

Username

Your username must consist of alphanumeric characters, optionally separated by one of the following characters: . @ _ -

Email address


Password

Password strength: Weak password

Confirm Password

Passwords match: Yes

- At least one letter
- At least one number
- At least one symbol
- Both upper and lower case characters
- A minimum of 8 characters
- A maximum of 256 characters

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Basic company details

Introduction

Before we can register you as an entrepreneur seeking investment on the Angels@Essex platform, we need some basic information about you and your business.

Business information required

Please provide the following information about your business seeking investment

Business name *

Company Registration Number *

Date of first registration *

Date you started trading (issued the first invoice) *

Number of employees (Full Time Equivalent) *

Balance Sheet Total *

Current Turnover *

Short description of the business and the reason for seeking investment (~100 words) *

SEIS / EIS / SISR qualifying? *

Yes No

Person(s) with significant control *

Next page



Personal details

Personal information

Please provide the following information about you:

Name *

Contact Address *

Daytime telephone number *

Email address *

Position in the business seeking investment *

I, [REDACTED] agree that I have given the correct details.

I agree *

Next page



Terms of service

- This is the legal agreement between the entrepreneur, the University of Essex and Delio Ltd.
 - The University of Essex is the owner of the platform and
 - Delio Ltd is the operator.
- Read through the document carefully and then when you are satisfied that you understand the contents of this document, check the “I Agree” box to confirm your agreement.
- Then press the “Complete On boarding” button at the bottom of the page to move to the next step, which is to create the deal.



Create the deal – 6 steps



Add New Deal ✕



Adding a Deal

Let us get you started - tell us more about your investment opportunity.

Your deal template

To make things easier for you, we have generated a sample deal template.

[Preview a sample deal template](#)

Step 2	Basic Details	15 minutes
Step 3	More Information	10 minutes
Step 4	Images	2 minutes
Step 5	Attachments	2 minutes

① Once you have completed these steps, you can always add/remove more content later on.

[Start Creating Deal](#)



Step 2 – Basic details

Add New Deal  Save step progress 



Adding a Deal - Basic Details

Please fill in the basic information below that will display on the deal page.

Description

Deal Name *

This is the headline title for the opportunity

Deal Summary *

This is an informative description in no more than 150 characters

Deal Overview *

File - Edit - View - Insert - Format - Table -

Rich text editor toolbar with icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, unlink, image, video, table, and text alignment.

0 WORDS POWERED BY TINYMCE

This is a short introduction to the opportunity that will be displayed on the first page of the deal

Key Contact

Please add the details of a key contact for the deal who can be contacted by internal users only.

Name

The full name of the key contact

Phone Number

The best contact phone number of the key contact

Address

The primary address of the key contact

Email

The email address of the key contact

Location

Location *

Please select a location from the drop down menu

Location Detail (optional)

Use this space to enter any additional information about the deal location. For example, description, building, street, town (only applicable if map enabled in Location Settings).



Step 2 Basic details (cont.)

Key Contact

Please add the details of a key contact for the deal who can be contacted by internal users only.

Name

The full name of the key contact.

Phone Number

The best contact phone number of the key contact.

Address

The primary address of the key contact.

Email

The email address of the key contact.

Location

Location *

Please select a location from the drop down menu.

Location Detail (optional)

Use this space to enter any additional information about the deal location. For example, description, building, street, town (only applicable if map enabled in Location Settings).

Financials

Currency *

Please select the currency for this deal.

Funding Sought *

Please enter the total capital being sought as part of this investment round.

You can also enter the shortcut 'm' for millions or 'k' for thousands, e.g 1m = 1,000,000

Minimum Investment *

Please enter the minimum investment amount per investor.

You can also enter the shortcut 'm' for millions or 'k' for thousands, e.g 1m = 1,000,000

Availability

Date Available From *

Date Available To (if applicable)



Clear Field

Investor Type

Please select which investor classifications you wish to make this deal available to.



Step 3 – Deal specific information

Add New Deal  Save step progress 



Adding a Deal - More Information

Please fill in the fields below - they are specific to your deal type.

Growth Stage *

Growth

Sector *

Manufacturing and Engineering

Expected Tax Relief

Tax relief is not applicable

Has a valuation been set? *

Yes No

Valuation

Undisclosed

Please provide any additional information regarding the valuation (eg. negotiable, undisclosed)

Previous Funding Secured

10000

Please state the total external investment that your company has received to date, you can also enter the shortcut 'm' for millions or 'k' for thousands, e.g 1m = 1,000,000*

[Go Back](#)

[Save & Continue](#)



Step 4 - Adding images



Adding a Deal - Images

Images help make your deal page more appealing to potential investors.

1 Header Image

Please add an image that will run horizontally across the top of your deal page.

We'll scale your image for you. We recommend a 1020 pixels wide and 700 pixels tall image.



2 Deal Provider Logo

Please add a logo for the organisation that is providing the deal. Please ensure the image has a minimum width of 140px.

The logo will be displayed in a circle. You can zoom in and out, position the image and set a background colour once the image is uploaded.



3 Images Tab

Please add any images you wish to be displayed in the "Images" tab.

When you have selected all the images you want to include, click the "Upload" button below.



Existing Images

Any previously uploaded images will be displayed here.

Upload

Go Back

Save & Continue

2 Deal Provider Logo

Please add a logo for the organisation that is providing the deal. Please ensure the image has a minimum width of 140px.

The logo will be displayed in a circle. You can zoom in and out, position the image and set a background colour once the image is uploaded.



Step 5 – Adding documents

Start Basic Details More information Images Attachments 5 End 6

Adding a Deal - Attachments

Please upload any relevant documentation for your deal.

Q Search... 0 selected Add Folder Upload Document

Home /

File name	Size	Date
Deal information ⓘ	-	-
Transaction Management - NDA ⓘ	-	-
Transaction Management - Confidential ⓘ	-	-
Transaction Management - Completion ⓘ	-	-

Go Back Save & Continue

Documents go into different folders , released at different stages in the entrepreneur engagement

Request signature on NDA:

Q Search... 0 selected Upload Document

Home / Transaction Management - NDA

File name	Size	Date
Dummy NDA.docx	11,628 KB	New

- Analytics
- Duplicate
- Move to folder
- Copy to folder
- Request wet ink signature
- Request electronic signature
- Rename
- Download
- Delete

Step 6 - Review






Thank you for adding your deal




Please confirm the deal information below. You can go back to edit, or you can save and continue.


[Preview your deal](#)

Steps that are missing information:

	 Attachments	 Action this content
---	---	---

Your deal currently includes:

	 Basic Details	 Edit this content
	 More Information	 Edit this content
	 Images	 Edit this content

 Once you have completed these steps you can always add/remove more content later on.

Deal currently in progress

This deal is currently in progress and is not visible within the platform to other investors.

Once you are happy that all the relevant information has been entered, click 'Save & Continue to Dashboard'.

Once you have reached the dashboard, you will be able to continue to manage your deal and get it published on the platform.

[Go Back](#)

[Save & Continue to Dashboard](#)



Review – preview the deal

Virtual Reality Design for Manufacture **New**

Using virtual reality to include ergonomic design in the manufacturing process



Minimum Investment | GBP 15,000

Funding Sought | GBP 150,000

Summary Documentation Images

Currently many machines that require human operation are designed with little or no attention to the comfort of the operator. This proposal seeks investment to take an existing prototype virtual reality design package to market. The package allows potential operators to use virtual reality in the evaluation of designs as part of the design package. The market place for this is any design studio within a large enterprise which manufactures equipment which people are needed to operate or any stand alone design studio doing similar work. The package makes it easy for designers to ensure that the solutions they generate truly incorporate the operator into the design during the design process and not as an afterthought.

Growth Stage

Growth

Sector

Manufacturing and Engineering

Expected Tax Relief

Tax relief is not applicable

Previous Funding Secured

GBP 10,000

Valuation

Undisclosed

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The dashboard

The screenshot shows a web dashboard for managing a deal. At the top, there is a navigation bar with the University of Essex logo and several utility icons (notifications, star, refresh, mail, user, help). Below this is a header for the deal: "Manage Deal: Virtual Reality Design for Manufacture". A secondary navigation bar contains tabs for "Deal Overview" (selected), "Deal Display", "Document Management", "Investor Interaction", "Deal Actions", and "Deal Notepad". On the right of this bar are "Preview" and "Learn" buttons.

The main content area is divided into several sections:

- Overview:** Contains a notification box stating "Approving below will automatically complete the workflow" with a "Push For Approval" button. It also lists deal details: "Created by: William Miller on the Angels@Essex platform", "Engagement type: Enquiries only - Transaction Management Deactivated", "Investor engagement management: Angels@Essex", and "Classification: High Net Worth, Sophisticated Investor, Investment Professional".
- Recent Notes:** A section with an "Add note" button and a message: "There are currently no notes on this opportunity."
- Key Contact Details:** A table listing contact information for William Miller: Name, Phone (01212 112233), Address (A Location A TOWN), and Email (a.b@c.com).
- Transaction Management:** Features an "Add Investor" button and an "Investment Breakdown" donut chart. The chart title is "Investment Breakdown (Funding Sought: GBP 150,000)". The legend shows: Committed - GBP 0.00, Signed - GBP 0.00, Funded - GBP 0.00, Remaining - GBP 150000.00, and Other Investments - GBP 0.00.
- Latest Enquiries:** A section with a heading and explanatory text about tracking deal enquiries and responses, and how to use the "Launch Transaction Process" button.

Push for approval – sends deal to Angels at Essex team for review and feedback prior to publication.

When published – the deal is visible to the investors