



ORION Wireframes

Web Application - Version 3.0

CONTENTS:

ADMIN

- Dashboard
- Ventures
- Investors
- Users

INVESTORS

- Dashboard
- Account

December 2017

app.orionfinancial.com



Email Address

Password

[Forgot your password?](#)

Login



MENU

DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

DASHBOARD

13
VENTURES

\$11.4M
INVESTED

187
INVESTORS

VENTURES *1/1/2018 – 3/31/2018*

Acquired	Status	Venture	Capital Invested	Returned Capital	Pref. Return Paid	Pref. Return %
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.43%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.4%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.43%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%

Viewing 10 clients



MENU

DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

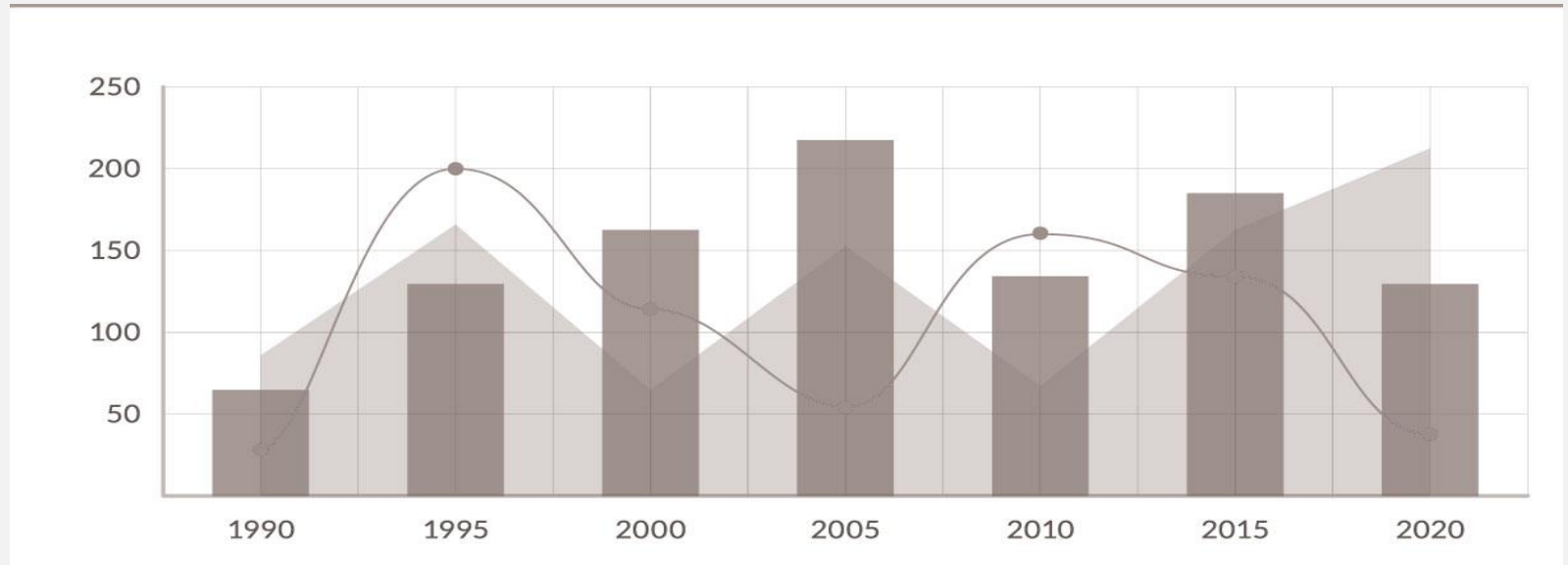
DASHBOARD

13
VENTURES

\$11.4M
INVESTED

187
INVESTORS

INVESTED *1/1/2018 – 3/31/2018*





MENU

DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

DASHBOARD

13
VENTURES

\$11.4M
INVESTED

187
INVESTORS

INVESTORS *1/1/2018 – 3/31/2018*

Client Since	Status	Contact	Email	Phone	Invested	Deals	Actions
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage

Viewing 10 clients



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

VENTURES

Filter Ventures By:

Status



Start Date

End Date

Apply

Viewing: 1/1/2018 – 3/31/2018

Acquired	Status	Venture	Unit Ratio	Capital Invested	Returned Capital	Preferred Return %
1/1/2016	Open	ORION XII	4.26345%	\$200,000	\$0.00	7.24%
2/1/2016	Sold	ORION VII	2.65342%	\$80,000	\$22,000	4.89%
3/1/2016	Pending	ORION XVI	3.65481%	\$1,400,000	\$192,000	6.43%
1/1/2016	Open	ORION XII	4.26345%	\$200,000	\$0.00	7.24%
2/1/2016	Sold	ORION VII	2.65342%	\$80,000	\$22,000	4.89%
3/1/2016	Pending	ORION XVI	3.65481%	\$1,400,000	\$192,000	6.43%
1/1/2016	Open	ORION XII	4.26345%	\$200,000	\$0.00	7.24%
2/1/2016	Sold	ORION VII	2.65342%	\$80,000	\$22,000	4.89%
3/1/2016	Pending	ORION XVI	3.65481%	\$1,400,000	\$192,000	6.43%
1/1/2016	Open	ORION XII	4.26345%	\$200,000	\$0.00	7.24%

Download CSV

DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

CREATE NEW VENTURE

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....

Status 

Venture Name

Purchase Price

Date Acquired 

Debt Amount

Equity Amount

Preferred Return %

Spilit %

Describe this venture....

[Upload Photo](#)**Create Venture**



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS


- Create Account
- View All

ADMIN USERS


- Create New
- View All


VENTURE ACTIVITY

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....

Choose Venture... 

ORION XVII

Activity Type 

Date Recorded 

Dependent drop-down value (% , \$, etc.)

Activity Details



Update Venture



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

ASSIGN INVESTORS

Select a venture below, and assign or remove investors from the property...

ORION XVII 15 Investors | \$2,500,000 Committed

CURRENT INVESTORS

Assigned	Contact	Email	Phone	Invested	Actions
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove
2/1/2016	Jane Doe	jane@doe.com	(555) 555-5678	\$500,000	Remove
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove
2/1/2016	Jane Doe	jane@doe.com	(555) 555-5678	\$500,000	Remove
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove
2/1/2016	Jane Doe	jane@doe.com	(555) 555-5678	\$500,000	Remove
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove
2/1/2016	Jane Doe	jane@doe.com	(555) 555-5678	\$500,000	Remove
1/1/2016	John Doe	john@doe.com	(800) 555-1234	\$1,400,000	Remove



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

INVESTORS

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....

Client Since	Status	Contact	Email	Phone	Invested	Deals	Actions
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage
1/1/2016	Active	John Doe	john@doe.com	(800) 555-1234	\$1.4M	5	Manage
2/1/2016	Inactive	Jane Doe	jane@doe.com	(555) 555-5678	\$500K	2	Manage

Viewing 10 clients

100





DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

CREATE NEW INVESTOR

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

USERS

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....

Created	Role	Name	Email	Phone	Action
1/1/2018	Super Admin	Chris Sanz	csanz@orionmiami.com	(800) 555-1234	Edit Delete
1/1/2018	Admin	Melissa Gracey	mgracey@orionmiami.com	(800) 555-1234	Edit Delete
1/1/2018	Manager	Joe Manager	manager@oirionmiami.com	(800) 555-1234	Edit Delete
1/1/2018	Service	Jane Service	service@orionmiami.com	(800) 555-1234	Edit Delete



DASHBOARD

- Ventures
- Invested
- Investors

VENTURES

- Create New
- Assign Investors
- Activity
- View All

INVESTORS

- Create Account
- View All

ADMIN USERS

- Create New
- View All

CREATE/UPDATE USER

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....





MENU

DASHBOARD

- Portfolio

ACCOUNT

- Update Profile

- Log Out

DASHBOARD

Filter Report:

Status

Start Date

End Date

Apply

Viewing: Lifetime Investments 1/1/2018 – 12/31/2018

13
VENTURES

\$11.4M
INVESTED

\$1.65M
DISTRIBUTED

Acquired	Status	Venture	Capital Invested	Returned Capital	Pref. Return Paid	Pref. Return %
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.43%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.4%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%
2/1/2016	Funded	ORION VII	\$80,000	\$22,000	\$10,000	4.89%
3/1/2016	Divested	ORION XVI	\$1,400,000	\$192,000	\$10,000	6.43%
1/1/2016	Fundraising	ORION XII	\$200,000	\$0.00	\$10,000	7.24%

Viewing 10 clients

100

View PDF

Download CSV



DASHBOARD
- Portfolio

ACCOUNT
- Update Profile
- Log Out

ORION XII

Purchase Price: \$2.4M | Loan Amount: \$1M | Equity Raise: \$1.4M

INVESTOR's Stake

Invested On:	12/22/2017	Preferred Return:	7.5%
Amount Invested:	\$500,000	Return of Capital:	\$600K
Unit Ratio:	7.24%	Gross Profit:	\$100K
Promote Split:	40%		



Description

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.



ACTIVITY *1/1/2018 – 3/31/2018*

Date	Action	Value	Note
1/1/2016	Fundraising	\$200,000	This is where a short description of the activity goes...
2/1/2016	Funded	\$80,000	This is where a short description of the activity goes...
3/1/2016	Divested	\$1,400,000	This is where a short description of the activity goes...
4/1/2016	Closed	N/A	This is where a short description of the activity goes...



DASHBOARD

- Portfolio

ACCOUNT

- Update Profile

- Log Out

UPDATE INVESTOR PROFILE

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text....

Contact Information

Update Password