

AEREDIUM

Funnel

User Manual for Contributors

Version 1.2

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Issued by AEREDIUM for the people who bring prospects to it: the sales team, partners and community leaders.

1. What Funnel is

Funnel is AEREDIUM's register of prospects. Every organisation that AEREDIUM hopes will become a client, and every conversation with the people inside it, is recorded there. You are reading this because you are one of the people who bring prospects to AEREDIUM, and Funnel is where you record them.

You need very little to use it: Google Chrome, your fingerprint or face (or the unlock code of your device), and a few minutes after each conversation with a prospect. There is no password to remember and nothing to install.

Two things are worth knowing from the start. First, everything you enter is confidential to AEREDIUM. Second, Funnel shows you nothing but your own entry form and a confirmation: you will not see the register, other people's prospects, or whether a prospect is already known. That is deliberate, and it is the same for everyone.

2. Your reference

When you were onboarded you were given a reference: two letters and four digits, for example FN 0042. It is your name inside Funnel. It is stamped on everything you record, it appears at the top of every page once you are signed in, and it is how AEREDIUM credits your introductions. You never type it; the system knows it from your passkey. Keep it in mind for any conversation with AEREDIUM about your entries.

3. Signing in

If you have not yet onboarded, open the link in the email AEREDIUM sent you, in Google Chrome, on the device whose fingerprint, face or unlock code you will use. The link is valid for seven days and works once; it asks you to accept the terms and to create your passkey, and nothing else, because AEREDIUM has already recorded your details. Then press Continue and you are on the entry page. If the seven days have passed, ask AEREDIUM for a fresh link.

Funnel uses a passkey instead of a password. Your passkey was created during onboarding and is kept in Google Password Manager, so it follows you to any Chrome browser or Android device signed in to your Google account. To sign in:

1. Open Google Chrome and go to the Funnel address AEREDIUM gave you.
2. Press the button "Sign in with your passkey".
3. Chrome offers your passkey and asks for your fingerprint, your face or your unlock code. Present it.
4. You arrive on the entry page. The top of the page reads "Signed in as" followed by your reference and channel.

Nothing is typed. If Chrome does not offer a passkey, you are probably on a device or browser where your Google account is not signed in; sign in to Chrome with the Google account you used at onboarding, or use the device you onboarded on.

Your session lasts twelve hours without activity, so you will not be signed out while filling in a form. To sign out, use the Sign out link at the foot of the page.

4. Entering a new prospect

The entry page has three tabs. The first, “New prospect”, is for an organisation or a person you have not recorded before. Begin by saying what the prospect is: a corporation, which includes government bodies and every other kind of organisation, or an individual acting for themselves.

Only a few facts are compulsory, and the page marks them with an asterisk. For a corporation they are the organisation name, and the contact’s given name, family name and email address. For an individual they are the given name, family name and email address alone; there is no organisation to name. Without any one of these the prospect is not recorded, and the page tells you which is missing. Everything else may be left empty and filled in later, from the third tab.

Fact	Compulsory?	What to enter
This prospect is	Yes	A corporation, including government bodies, or an individual.
Organisation name	Corporation only	The name the organisation uses for itself in this place, for example the name of the bank’s Swiss business rather than the group’s global name if that is who you are speaking with.
Category	No	What kind of organisation it is, from the list in section 6. For a bank, a government body or an insurance company you may also choose the department; if the department you are speaking with is not on the list, choose “Other department” and type its name in the line that appears.
Country, and city or region	No	Where this organisation is. The same institution in two countries is two prospects, so give the place of the people you are speaking with.
Given name and family name	Yes	The person inside the organisation you are speaking with, or the individual themselves. Add their role if you know it.
Email address	Yes, in all cases	The contact’s email address. Funnel checks that the address’s domain receives mail. It is also how a prospect is found again for a follow-up or to complete their details.
Phone number with country code	No	For example +41 44 000 00 00. If you give a number, Funnel needs the country code to read it.
LinkedIn address	No	The full address of the person’s profile, or the part after linkedin.com/in/.
Telegram	No	The person’s Telegram username, with or without the @.

Beneath the facts you will find the newsletter tick, explained in section 7, and two optional lines: the AEREDIUM product line that seems relevant, and a line or two on how you found the prospect. The note is read by AEREDIUM's administrators and helps the next conversation; write it as you would tell a colleague.

Press "Record". If everything is in order the page answers "Recorded. Thank you." and clears itself for the next entry. That single sentence is all you will see, whatever happened behind it: if the organisation was already in the register, your introduction is credited to you alongside the person who first entered it, and if it was new, it has been added under your reference.

4a. Coming back to complete a prospect's details

You do not have to know everything at the first conversation. When you learn more, open the third tab, "Complete a prospect's details", give the contact's email address, and fill in whatever you now know: the organisation name, category and department, country and city, the contact's role, phone, LinkedIn and Telegram, and the relevant product line.

What you add fills in only what is still empty on the prospect. Nothing already recorded is changed, so you cannot overwrite another person's entry by mistake, and you are not shown whether the prospect exists or what is already known about it. Press "Record" and the page answers "Recorded. Thank you." as before.

5. Recording a follow-up

The second tab, "Follow-up with a prospect", is for a conversation with someone already recorded, by you or by anyone else. Because the page shows you nothing of the register, you identify the prospect by giving the organisation name and the contact's email address; Funnel attaches your follow-up to the matching prospect.

Then say what took place: the kind of contact (call, meeting, email, message, event or note), when it happened, what was discussed and agreed, and the next step with its date if there is one. Press "Record" and the page answers "Recorded. Thank you." If the organisation and address match nothing in the register, your follow-up is still kept and an administrator places it; you are not told which happened, and you need do nothing more.

Follow-ups are never edited. If you made a mistake, record another follow-up saying so; the history stays honest and readable in order.

6. Categories and departments

The category says what kind of organisation the prospect is, and it is the same list for everyone so that reports mean the same thing to all of us.

Category	Use it for
Bank	A licensed deposit-taking bank. Choose the department as well.

Category	Use it for
Custodian	An institution whose business is holding assets for others, including digital-asset custodians.
Exchange	A venue on which assets are traded: securities, derivatives or digital assets.
Financial institution other than a bank	A payments company, broker, lender, trust company or other regulated financial business that is not a bank.
Insurance company	An insurer or reinsurer. Choose the department as well.
Fund	A pooled investment vehicle or its manager, other than a hedge fund or a venture capital firm.
Hedge fund	An actively traded private investment fund or its manager.
Venture capital firm	A firm that invests in early-stage companies.
Investor	A family office, a high-net-worth individual acting for themselves, or an investor that fits no fund category.
Stablecoin issuer	An issuer of a fiat-referenced or asset-referenced token.
Real-world asset issuer	An issuer of tokens representing bonds, funds, property, commodities or other off-chain assets.
Government	A public body at any level and the bodies it owns. Choose the department as well.
Other	Anything that fits none of the above. You will be asked to say in one line what it is.

For a bank, the departments are treasury; custody and securities services; digital assets; payments and transaction banking; trade finance; private banking and wealth; asset management; markets and trading; compliance and risk; technology and innovation; executive office; or other department. For a government body: ministry of finance or treasury; central bank; financial regulator; securities regulator; sovereign wealth fund; digital government and technology; trade and investment promotion; central securities depository or public registry; executive office; or other department. For an insurance company: life; general; reinsurance; investments and treasury; claims and operations; compliance and risk; technology and innovation; executive office; or other department.

Two departments of the same bank in the same city are two prospects, each with its own contacts, so record the department you are actually speaking with. If that department is not on the list, choose “Other department” and a line appears asking “Which department?”; type its name there and it is recorded as you wrote it. If you are speaking with the organisation as a whole, leave the list on “Choose a department”.

7. The newsletter tick

AEREDIUM writes to the people in the register from time to time with news and information. Every contact you enter is subscribed from the moment you record them; the box “This contact receives AEREDIUM’s newsletter and information” is shown already ticked. Leave it ticked unless the person has already told you they do not wish to hear from AEREDIUM; in that case untick it, and their wish is recorded as their own request.

Beneath the tick, say why AEREDIUM may write to them: either you introduced the prospect on your own initiative, or the prospect told you they would like to hear from AEREDIUM. Every newsletter carries a one-press unsubscribe link and honours a reply saying “unsubscribe”, and a person who has unsubscribed can only subscribe again themselves, never through you or through AEREDIUM. So if a contact later asks you to stop the newsletter, tell AEREDIUM and it will be recorded; if they ask to receive it again, point them to the subscribe page at the foot of any issue.

8. What the page will tell you

Funnel says plainly what happened. These are the sentences you may meet and what to do.

Sentence	Meaning and what to do
Recorded. Thank you.	Your entry is recorded. Nothing else is needed.
Not recorded. The following is missing: … The prospect has not been added.	One of the compulsory facts is missing: the organisation name for a corporation, the given name, the family name or the email address. Add what is named and press Record again.
Not recorded. The address … is at a domain that does not receive mail.	The email domain has no mail server. Check the spelling of the address with the contact.
Not recorded. The LinkedIn address could not be read. Give the full address or the part after linkedin.com/in/.	The LinkedIn address you gave does not look like a profile address. Paste the full address from the browser, or leave the line empty.
Not recorded. The following is missing: … The details have not been recorded.	On the third tab the contact’s email address is required. Add it and press Record again.
Not recorded. The phone number could not be read as an international number.	Add the country code, for example +61 for Australia, +41 for Switzerland.
Not recorded. You have reached the number of entries allowed in one hour.	The page accepts a limited number of entries per hour. Wait until the time shown and continue.
Sign-in refused: the passkey presented is not registered with Funnel.	Chrome offered a passkey that Funnel does not know, usually one for another site or an old one. Choose the Funnel passkey, or use the recovery link if you have a new device.
Sign-in refused: your passkey was released without a fingerprint, face or unlock code.	Funnel requires the verification. Try again and complete it when Chrome asks.

Sentence	Meaning and what to do
This browser did not offer a passkey.	Use Google Chrome signed in to the Google account you onboarded with.
Your access to Funnel has been disabled by an administrator.	Your access has been ended. Contact AEREDIUM.
Funnel is misconfigured … This is an operator matter, not a fault in your entry.	Something on AEREDIUM's side needs attention; nothing you did was wrong. Tell AEREDIUM and try later.

9. If you cannot present your passkey

If you have lost the device that holds your passkey, or Chrome no longer offers it, press "I cannot present my passkey" on the sign-in page and give your email address. AEREDIUM will send you a recovery link to that address. Opening it in Chrome lets you create a new passkey in the same way as at onboarding; your earlier passkeys stay until an administrator reviews them. If you did not ask for a recovery link and receive one, tell AEREDIUM at once.

10. Confidentiality

What you enter in Funnel is AEREDIUM's confidential commercial information, and so is the fact that a given organisation is a prospect. Do not share the Funnel address, your passkey or your entries outside AEREDIUM. Funnel records who entered what and when, under each person's reference, and an administrator can read that record. If you leave the organisation or the partnership, your access is ended and your past entries remain, attributed to you.

11. Help

This manual is available from the Help link at the foot of the entry page. For anything it does not answer, contact AEREDIUM and give your reference.