

By default, the title is contract update... the title should be the title of the document and the date too

DEAL SUMMARY



ASSET className	
Equity	
INVESTMENT DATE	
dd/mm/yyyy □	
CUMULATED	
INVESTMENTS	
-	
CURRENT VALUATION	
-	
TOTAL PROFIT (LOSS)	
-	

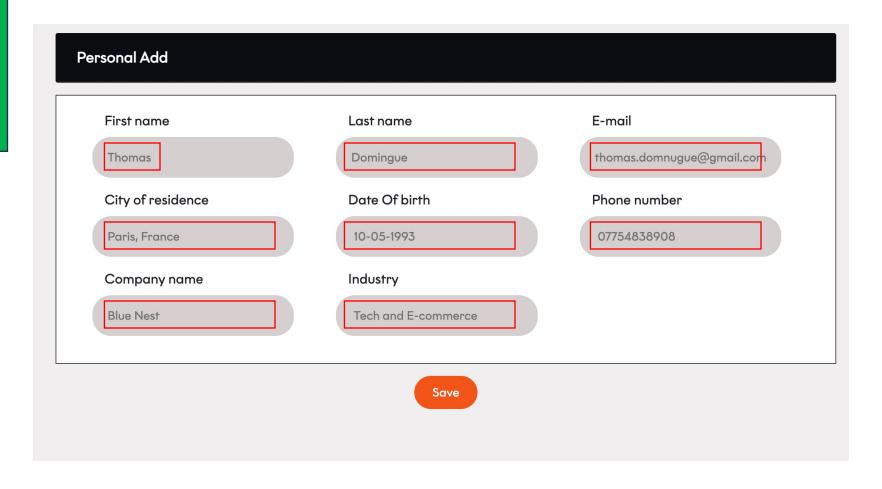
The investment date is the first date of the first deal entered so the admin is not supposed to be able to enter it here

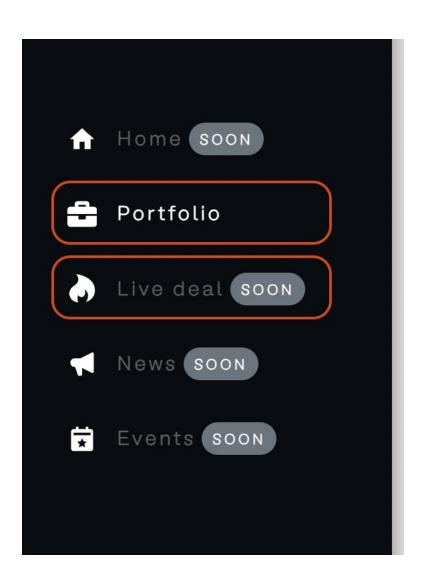
Add the possibility to enter "sector" as shown on the platform

Same for cumulated investments and profits, not supposed to enter it there because it should come from automatic calculation of all the deals and profits calculated.

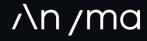
Make sure all calculations are entered correctly on the platform. This is the most urgent one of all.

emove all placeholder text on every empty text field on the platform, including the form





Not supposed to be able to click on any of the coming soon sections



Customer Dashboard



Thomas Domingue

Edit profile

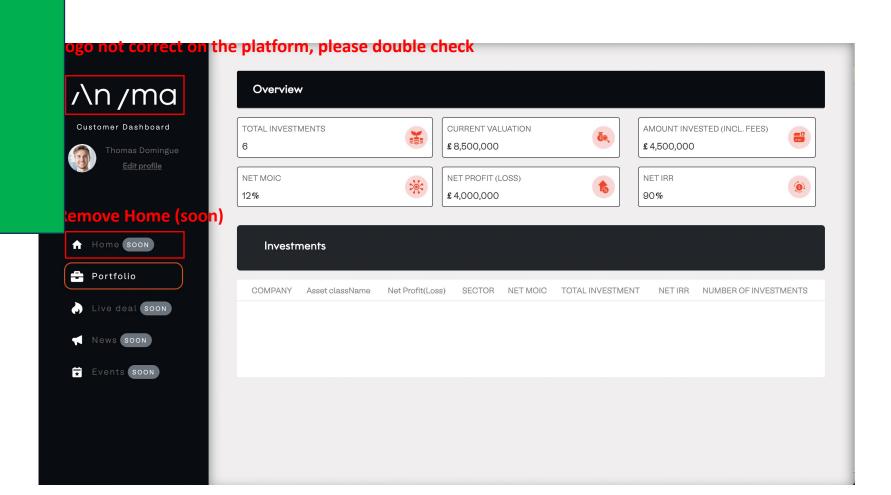




Companies Create a company



Number formatting with comas (,) across the platform.



Log in process

For now deactivate sending an email to member's email when creating a new nember.

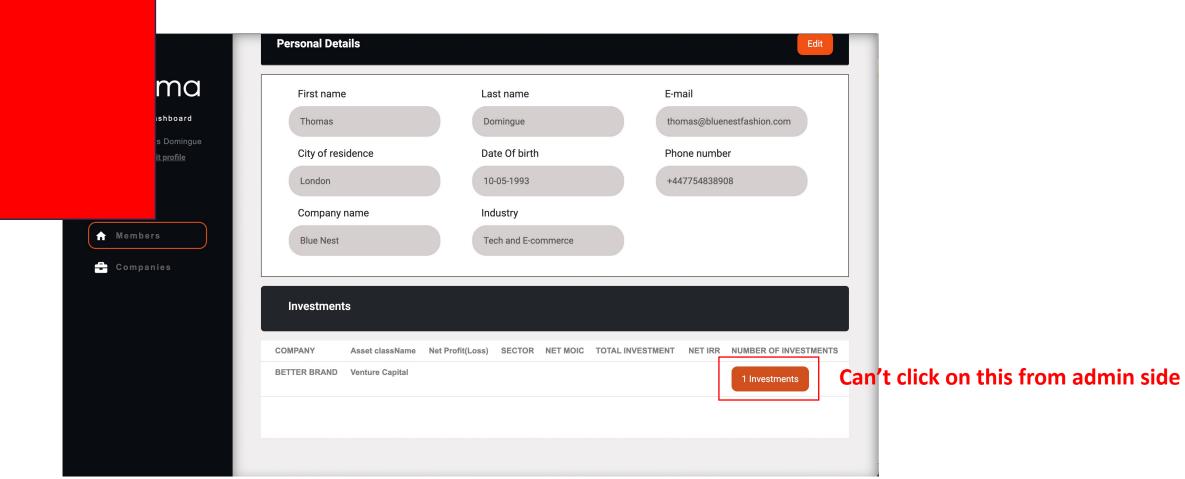
Then, the process myst be as follows:

Admin create a member's account

Admin sends an email with unique link to member to login

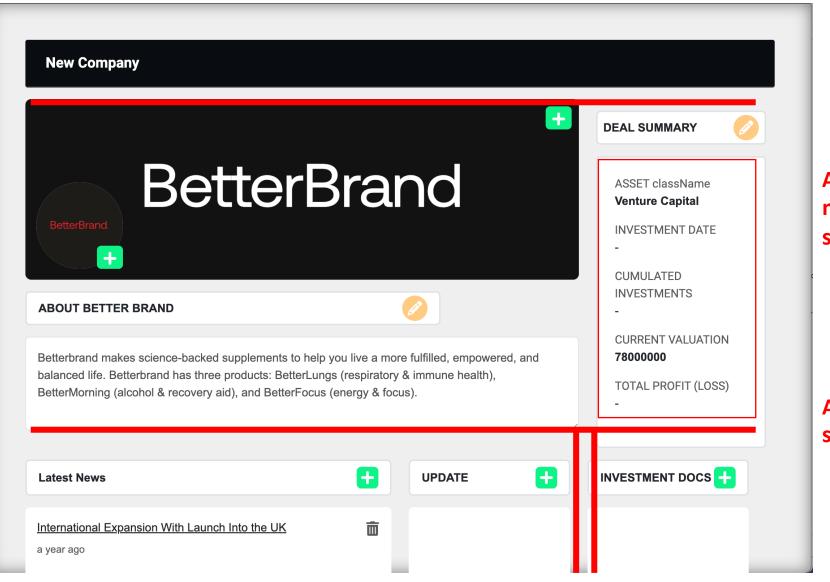
Member fills in the long form (slides 1-13) and create his passwork at the end.

Member can log in, enter their profile picture and can manage their profile. Member can also log out.



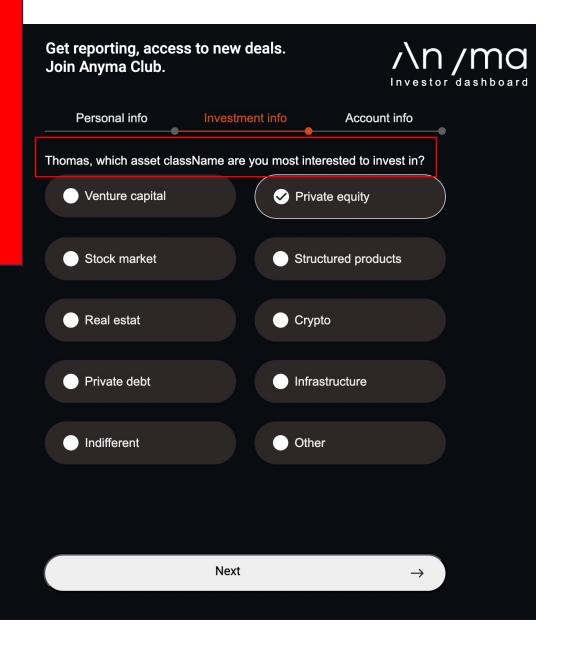
CURRENCY

- we must be able to enter investment (from create a deal pop up) in Euros or US Dollars. Then the amount must always be converted in euros value at the time of deal creation.
- All prices on the platform then show in Euros



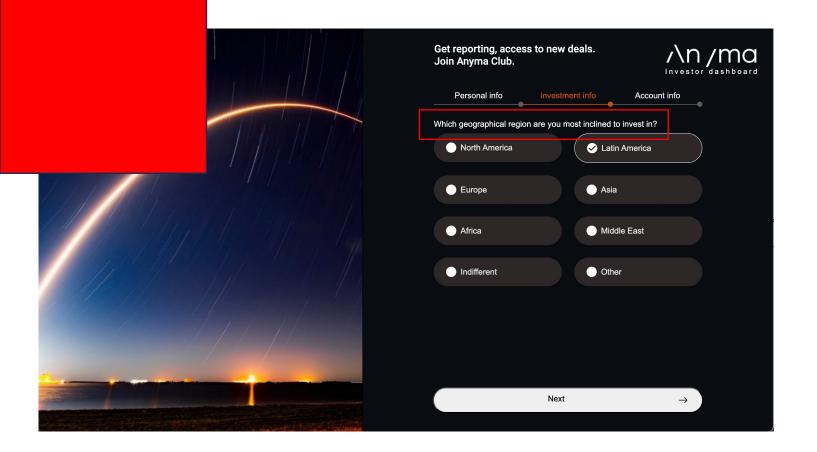
Add "sector" to entermanually and that shows on the platform

Align all sections as shown with the lines



Change to "which asset classe(s) are you most interest to invest in?"

- Make it possible to choose several options



Change it to "Which geographical regions are you most inclined to invest in?"

Make it possible to add several options

Also, use the logos I provided for the regions