**Technical specification for tech build of reverse marketplace for comparing financial products and services– V1**

Main comparable websites – [www.carwow.co.uk](http://www.carwow.co.uk) & www.swoopfunding.com

Other comparable websites

1. [www.comparethemarket.com](http://www.comparethemarket.com)
2. [www.moneysupermarket.com](http://www.moneysupermarket.com)
3. [www.fundingxchange.co.uk](http://www.fundingxchange.co.uk)
4. [www.fudingoptions.com](http://www.fudingoptions.com)
5. [www.capitalise.com](http://www.capitalise.com)

**Home page – landing / marketing page**

* Sign in/up options – finance providers and customers. API Backbone?
* Overview of product offerings (as below)
* Current accounts
* Treasury solutions
* Financing solutions
* Advisory solutions

**Customer page (SME companies)**

* Sign in/up (Company name / number, description, sector)
* Account settings / user permissions - Needed for MVP?
* API – Companies house, KYC (Stripe Identify?), Sage / Xero - Needed for MVP?
* Incumbent providers overview & debenture search. Reword for none finance people
* Finance product requests, eg. FX, AF, lending.
* Shortlisting function
* Meeting bookings (phone/video calls)
* Receiving offers
* Accepting / declining offers
* Email notifications of updates/changes

**Finance provider page (advisers / funders etc)**

* Sign in/up
* Account settings / user permissions
* Email notifications of updates / changes
* Meeting bookings (phone/video calls)
* Sending offers (add/changing content)
* Receiving feedback from declined offers
* How finance provider can interact – Link to HoT doc.
* Permissions /approval process

**Admin page**

* CRM
* Account settings / user permissions
* Data analytics (track number of requests / what stage they get to. Product type, company location, where the lead came from.