

# Onboarding

## Page 1

1. Name of business.  
**Currently** : Parent ID is generated. This account is saved in < survey > collection. Also, this user is saved in < user > with email ID and password.
2. Aspect list  
**Currently** : Not saved explicitly anywhere. Only saved as options in survey['structure']['fields']['field\_options']  
**To be done** : Save in < client\_aspects > along with the parent ID thats generated.

## Page 2

1. Name of units  
**Currently** : Unit IDs are generated. This account is saved in < survey > collection.  
**To be done** : Save in < relation >
3. Email ID of the designated unit owners  
**Currently** : Accounts are saved in < user > with email ID and password.

## Page 3

1. Configure Facebook  
**Currently** : Links are saved in < survey >, as survey['metadata']['social']  
**To be done** : A 'login with Facebook' button to be added, which appends the provider "Facebook" as a StringField in < client\_providers > along with the parent ID. Also, save the access token and page URL in < aspect\_q > with the unit ID.
4. Configure Twitter  
**Currently** : Links are saved in < survey >, as survey['metadata']['social']  
**To be done** : A 'login with Twitter' button to be added, which appends the provider "Twitter" as a StringField in < client\_providers > along with the parent ID. Also, save the access token and page URL in < aspect\_q > with the unit ID.
5. Configure review websites  
**Currently** : By default he can give links for only trip advisor and zomato. Links are saved in < survey >, as survey['metadata']['services'].  
**To be done** : Save the choice of providers as a list in < client\_providers >. Also save the URL in < aspect\_q > with the unit ID.

## Page 4

1. Edit survey  
**Currently** : It goes to "/survey/s:survey\_id/edit" to view the survey builder.
6. Go to Dashboard  
**Currently** : It goes to "/survey/s:survey\_id/analysis?parent=true" to view the dashboard. No server side transactions are done.  
**To be done** : Finalise the < aspect\_q > objects, for each child ID, for each provider. Make sure it has the 'base\_URL', 'survey\_id', 'parent\_id', 'aspect\_notation'. And a 'access\_token' if the provider is Facebook or Twitter, not otherwise.