# LAYOUT OF WEBSITE

## I. Resources

- We want the below points inside the resources tab.
- These can be re-shuffled as per our need

### a. About US

- Refer to content of (https://www.clear.in/s/about-us)
- Trusted By: (Our client's brands to be mentioned here)
- Our Integration and Collaborations with software partners will also be mentioned here.

### b. Careers

- Refer to (https://www.clear.in/s/careers)

### c. Blogs/Financial News

- Put a link to a separate blog page where all our blogs and financial news will be uploaded both in video and text.
- We will provide earning opportunities to the freelancers and Rs.---- per ARTICLE APPROVED by us will be provided to them.

### d. Data Integrity

- Refer to (https://cleartax.in/s/trust)

### e. Tools

- A “TOOLS” tab is to be put on the website which will have various financial calculators, the formula for which will be provided by us.

## II. LOGIN

- Customer Login

## III. BODY of this page

- On this page, we want some catchy taglines related to finance.
- 2-3 lines of content related to our work.

- 3 or 4 boxes in which our main category of services will be linked for eg: STARTUPS, INCOME TAX, PAYROLL, VIRTUAL CFO, ETC. (We will provide details)
- Summary of the above boxes to be shown while hovering over the box.
- On opening every box there should be a CTA button, benefits to clients, features, some numbers or reviews (for this refer to ClearTax.in)
- Further page can be built as per developer.

# LOGIN

- **Point (1 to 8) to be present on the left side of the page**
- **In the middle, the services opted for to be mentioned and below the price after discount of those services and the PAY NOW button**
- **Point (I and II) to be mentioned on top of page**

1. **DASHBOARD**

- It will be a plain page
- In the middle, a link will be mentioned for "ADD YOUR SERVICES(AYS)"
- On clicking AYS - The all services page will open
- Select the services which are required- add to your cart
- On selecting more than one service, an additional discount of (--%) will automatically be applied to the final price on the checkout page
- Calendar Integration- Appointment for contacting professional

2. **YOUR SERVICES**

- On this page, a table has to be created showing the following details (Dynamic Values):-

| **S. No.** | **Services Availed** | **Payment Status** | **Documents Status** | **No. of Days for completion** | **Start Date** | **End Date** | **No of days taken for completion** | **Remarks** | **Invoice Download** | **Documents Download** | **Professional Assigned** | **Contact** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

- The SERVICE AVAILED have to be in descending order (i.e., the latest one on the top)
- The Payment status has to be paid, in case of payment failure a link of payment to be present in payment status
- There should be a link of Document upload on the cloud. Once it is done, the Document upload status has to be shown as UPLOADED, in case any document is missing or incorrect, it has to be re-uploaded on the link present.
- Our company will provide any Remarks for eg. payment failed, documents missing, any details missing, task completed, etc and the notification of that remark will be sent on mobile and email of the client.
- Client can download their invoice from the Invoice Tab.
- In Documents Download there will be a link to their respective cloud folder in which their docs will be uploaded as per the services availed by them
- Name & Email/Customer care no. of the professional doing their work will be mentioned for any query

3. **ALL SERVICES**

- All of our services will be mentioned here for selection. (List of services provided in a separate file)

4. **REPORTS/DOCUMENTS**

- The client will get a dedicated folder on the cloud in which they can upload their documents eg sales or purchase register, bank statements, etc.
- The client will get a dedicated folder on the cloud in which they will get their documents as per their services availed eg P/L, BS, Certificates, etc.
- Client should be able to access only their folder for which the link is shared with them

5. **GROW YOUR MONEY WITH US**

- In this tab Investment opportunities related to the stock market, mutual funds and investment in startups will be mentioned here
- These will be paid services and a separate page to be created for this
- SERVICES AND CONTENT OF THIS PAGE WILL BE PROVIDED LATER

6. **FINANCIAL UPDATES & DUE DATES**

- Here clients will get updates regarding their business and due dates as applicable to their business and also general updates.
- Two filter tabs have to be inserted
    a. Business Category eg, Clothing, FMCG, Real Estate, etc
    b. Entity Category eg. Pvt Ltd, Proprietor, LLP, etc

  Now the financial updates and due date will be filtered to their requirements only

7. **OUR ANGEL NETWORK**

- The services are for startups availing of our crowdfunding services.
- For this, a different website will be created later.
- On clicking on this tab just open a page and write LAUNCHING SOON.

8. **PARTNER PROGRAMME**

- We will be offering (--%) of commission to our client for every referral they made.
- Commission will be provided for lifetime for every transaction made by their referrals.
- Option to add bank account by the partner in which their commission will be credited
- A table to be created as follows:-

| Referral Name | Service Availed | Amount Excl. GST | Comm. Earned | Comm Disbursed after TDS | Disbursement Status |
|---|---|---|---|---|---|
| | | | | | |

I. **"CONTACT US" Tab**

- Customer Care number and email to be provided here

II. **"MY ACCOUNT" Tab**

- Profile details change option
- Password change option
- Email and Mobile no provided by clients needs to be verified by OTP.

➔ **Other Points**

- We want a discount code feature, we want to create client-specific discount codes and give them as per our promotional offer.
- We want to know how we can create those codes manually as per our requirements.

# WEBSITES FOR REFERENCE

1. https://www.finology.in/
2. https://cleartax.in/

3. https://pilot.com/
4. https://www.indinero.com/
5. https://www.profitmatters.co/