

## Summary of what we have left to do(unless more bugs are created along the way in which case we will have to fix the newly created bugs also):

- Complete each section in the details of each investment that was done in the my investment section. (implemented in the accounts/templates/accounts/acc\_invest\_details section)
- The add investment functionality does not work,I added a new investment,it does not show up,also it is not possible to add pictures or anything for each investment,moreover we should be have to create a new client for a new investment that is a problem,both should be totally independent.
- The screens from the checkout process do not stick to the screen,at least not on my firefox browser,it needs to work on every browser that people will use,if it only works for some but not for others then it isn't practical as it won't work for some users.(Make sure that all screens of every page stick on all browsers).
- in the registration form,there are some fields at the very bottom that are misaligned(I think it's the Swift code and financial institution/bank.
- We need to make sure that it is not possible to go throught the forgot password method before an account has been created and every error returns correct message also grammatically.
- When adding new investment,we need to be able to configure the pictures and choose which one is the thumbnail for when it shows on the investments section screen
- The front end for the my investments section and transaction section,the transactions "rectangles" need to look more like the way it looks on Cardone Capital.
- There needs to be a mechanism that allows us to change the current state thing in the details for a given made investment,similarly there must be a a mechanism to add/remove documents to the document section also.Also when a certain investment has been closed and has started operating.
- Details for the each invesment of the my investment section also need front end perfecting and the schedule a call must not be there,also no home thing,idk why it's there.
- The user must have the ability to delete the offer they made(rubish bin icon) make sure to have a "are you sure you want to delete this offer screen pop-up so they don't delete by detail" and this option must be doable until they have paid,after that they won't be able to remove their offers anymore.
- When registering,if the user types his email address manually everything works but if the users chooses the email address that appears in the autofill data suggested then it says address does not exist.
- There needs to be a mechanism counting the amount that is currently raised (i.e the total amount from every transaction that has been approved at any given moment,we should be able to check it)
- On the finish screen,my investments section (when empty),transactions section (when empty) and investments section (when empty) the messages shown must be properly put into the middle of the screen and be grammatically correct,also beneath each of these messages,there is a phrase written in gray,that must have an imbedded link to the page it is refering to.
- When entering the credit card details in the fields for the stripe,it shows the characters in red,no need for that,it may freak out some users.

-when clicking on the invest button on a given transaction,there needs to be a solomartel logo in the animation and there should be no phone number field on the page where the user needs to submit the offer.

-The front end for the transactions section,currently it is ok but it can be improved to look credible.

-The toggle menu needs to look more like the one on facebook,integrating the name of the user next to the head will also be good,maybe finding a btter looking head will make sense also.

-When receiving the email that requests the approval of a certain transaction, it needs to also say the amount of the transaction,the fund the user has invested in,the amount,as well as the time when the payment was "made".That way we will be able to better check which transaction has arrived and which one has not or else having a thousand people investing,it will be difficult to manage everything especially since we have about a few hundreds potential investors right now.

Also when this amount has been reached and we decide to transfer all the transactions to the my investments section,the transactions\_objects will be all deleted and the my\_investments will be created. It is also important that we be able to check

-There are 2 ways of going through the checkout process,either the user needs to go through the checkout process by going through it via first attempt,meaning they enter the amount, then click then select the payment method or the second way meaning they leave along the way and then come back through the transaction section well if they go they come back then it will work but if they try going through the process right away then the credit card option will produce an error and the same happens if someone chose the credit card option,but then go back to the previous page and decide to choose credit card again,it won't work.

-The "promo-code" entering feature: Basically idk if I have told you but one of the ways we will be getting a considerable amount of clients is by way of influencers, you probably know a lot of online gurus teaching how to invest their money and all that stuff;they have a large follower base that follows their advice when it comes to investing their money...well we have contacted and have some such influencers in our connexions and will strike up a deal where ma,y of them will recommend our platform for people to invest in real estate. Of course in order to recognize the users that came from a specific influencer we will introduce a certain "promo code" feature for each influencer that needs to be creatable for a given influencer by someone who is an administrator of the website. In order for a uer to redeem this code,we will need that on the page that appears after the user has clicked on the invest button (the same page where the user needs to enter the amount they want to invest.It should say smth like enter your special Solomartel invitation or member code here if y

We would need a counter to be able to know,how much has been invested and how many people have invested with the help of that referral as well as keep track of who this people are,they make get certain advantages from that (though it will not affect us and is not smth we'll have to develop) as well as stop the count on a certain promor code TThen we'll need to based on that reward the

-You will need to beautify the FAQ section,it currently looks pretty bad the way I implemented it,instead it should look like on Cardone's website: <https://cardonecapital.com/faq.html>

No need for all the fancy stuff but having a rollout thing would be good,if you can't figure it out then you can always perfect what we have so far in a different way just make sure that it looks more professional than it does right now.

At the bottom of the website,there are icons for social media,we should implement those and remove the ones we don't need

-the message via messenger feature in the contact section is useless I think,we should remove it.

-past projects section in the investments section, I found a way to make the job easier, instead of making a past projects section and implement everything the way I described it in the pdf, I'd recommend that instead there be no such section at all and instead among the investments of the investments section there will be some investments that will be past projects so on the thumbnail of the past projects funds it will be written fund closed: discover our past project and then upon clicking on it the user will be able to go to the page and see a normal page like for any investment except that one won't have any schedule a call or invest or question field.

Those investments will be named Closed fund: <insert fund name from pdfs>. Likewise we must be able to create such past projects in the investments section and it would be good that once a fund has been closed, the fund can be transformed into a closed fund/past transaction type so just the unnecessary details such as invest, schedule call, ... gets removed.

-The home page needs to be a bit smoother, we need to copy as much as possible the solomartelholdings.com website, also the invest and schedule a call buttons need to be placed at the first screen at the top like on solomartelholdings and there should be a link to our trustpilot page saying 5\* review on trustpilot, try finding a special logo for that so it looks legit, I know there are some for that and we'll place an imbedded link to the trustpilot page, we also need to make sure to leave comments on there, a few people with a VPN for many IPs so it doesn't block or anything.

-On the registration/login form the solomartel image should have an imbedded link leading to the home page otherwise there is no way to go back or maybe have a home button next to the login/register ones or smth cuz otherwise it looks confusing.

-In the registration form, for the phone number box should not have any arrows and there should be no limitations on the phone numbers entered, also if it is possible to use a special phone number field (with the countries flags and stuff, that would look more credible) that would be great and give our website another level of credibility.

-Upon opening the profile section the account info option should already be in green not just after being clicked upon so the user knows which section he is in.

-The add to emailing list functionality on the home page should actually add the users to a emailing list and it will also add the emails of all created accounts on the platform.

-We need to know how to upload the pdfs for each new investment as well as how to add and remove pictures from it.

-On each investment there must be like a zoom feature like on Cardone though not necessary, it'd be good to have

-There should be no other measures applied to bank accounts and swift codes, only on SSN numbers there will be limitations and similarly the phone number needs no arrows on the sides and needs a special field but I think I already wrote it here.

-When there are no funds, the investments section should say "No offerings are available at the current moment."

-The email that is sent to the user when he receives the demand to change the password should be named Solomartel: forgotten password not the current one.

-The emails the platform will send will be once a user has made an offer,when the user has made a payment saying we will get back to him and approve the offer once payment has been received(this email will be sent once the user reaches the last screen) and once a payment has been approved (once we click on approve transaction),they should also receive an email. The other automatic email that needs to be sent will be once the fund has started working,i.e all transactions have been moved to the my\_investments section as specified above. There also must be a custom email to be sent to people if they have used a promo code but by default that option will be deactivated and that email will not be sent. You will have to show me how to edit the content of each aforementioned email so that I can modify/correct it,for now just make dummy ones,I will actually write them but you need to show me where to edit them.

-The font we initially planned to use was ubuntu font but idk if it's still worth changing cuz it's good as it is.

-create the mechanism that creates the details page of the my investments section for each investment.

-Also,the website should have a slogan kind of thing at the top like on solomartelholdings.com when a user puts his mouse on the tab,it needs to show our slogan so to speak

A few adjustments may be needed to the description section in the details for the my investments.

And that is everything that is left to do at this point,maybe a few other adjustments here and there and as I'm saying I want to work long term so yeah