Cahier des charges: summary of instructions for Solomartel.com

So first of all,before we start,I need to let you know one very important thing

Home section:

The home page should be as it is currently,there really isn't much to change as in regards to how it looks,we may have to modify the our markets section.

It is the section on which the user lands by default.

Otherwise,at the top of the page,when the user clicks on invest,it brings him to the investment section whereas if he clicks on schedule a call,it should redirect him to the Calendly page of our website.

Behind these 2 buttons,a video is meant be played but maybe we will find an alternative.

The most important feature is the big bar thing below where the video is meant to be which says "Join the club to not miss out on any new opportunity".
Where users enter their email to join the subscription list and receive promotional emails.

Also,on that page we will add a small section with videos of people who share their experience of having invested with us. That will be simply like 2 or 3 videos(3 max) of people sharing their experience.

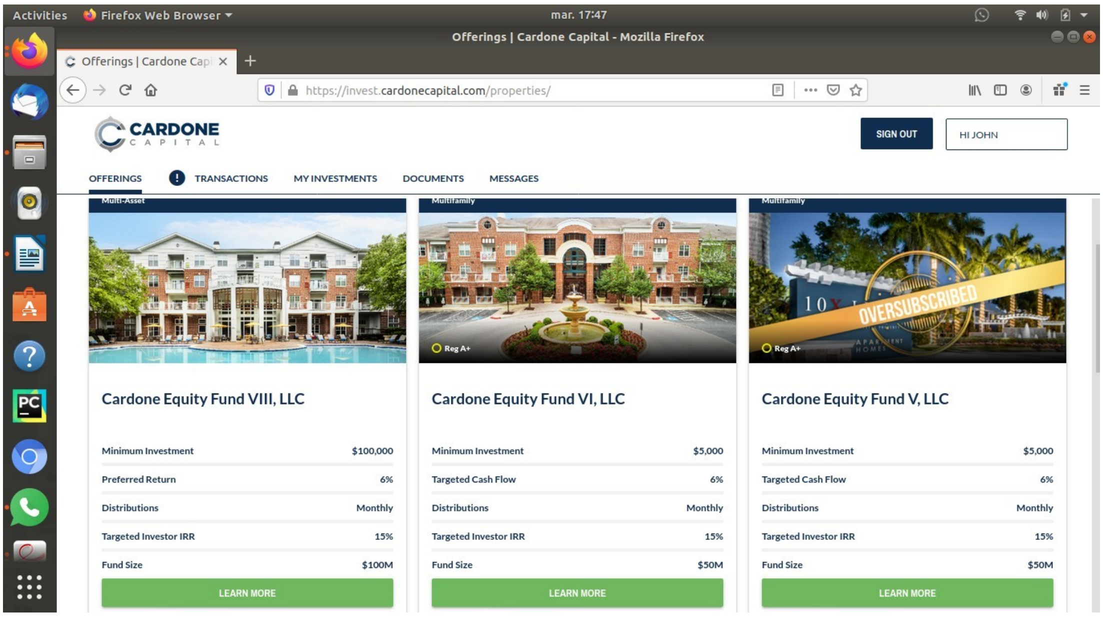
*The font used on our website is Ubuntu Condensed btw.

Investments section:

This section will contain all of our currently available investments,the user can get in that section by either clicking on investments button located on the blue bar or by clicking the invest button on the home page.

This section should contain all of the portfolios of properties/funds that people can invest into at a given moment.

The way our current website looks is not the best,a better model for us to use is Cardone's interface:



However,make sure to still use all of the fields that we used (I'm talking about the details for each property,they should be like they currently are on our website not like on Cardone's website).

This is the only section that we will constantly be modifying because the investments we propose will vary as you may suppose.

The actual template for each property:

When a user clicks on details,he will be transferred to the actual details of the property.

What I think needs to be done here is that we create a template and that template will be customizable for each property.

I think we should do that in the form of a class,each new property will be an instance of that class or smth,but then again these are just my thoughts,not sure to what extent the idea is relevant.

It'd be good to organize the data in a better way than this stupid table.

The features on this page are the images that the user can go through.

The buttons Invest and Schedule a call.

The invest button will start the investment process and the schedule a call button will transfer the user to the Calendly page of our website.

Also,there should a possibility for the user to download the fund/portfolio's promotional pdf located on the right hand side or smth like that.

Also,the question feature where the user can send us a question,it should arrive directly to our mailbox.

Checkout /investment process:

This is basically the process through which the user will go through when he clicks on the aforementioned invest button to invest in an actual fund/investment portfolio.

Once the user clicks on the invest button,he basically begins a transaction.

It will be composed of numerous steps.

Step 1: the user submits the offer by entering the amount he wishes to invest(must me above minimum amount) and then chooses in which way he wants to sign the operations agreement (either he downloads the documents,signs them and uploads them or he downloads them,signs them and reuploads the signed ones on the platform).

Do not worry about the details of this step.

There could've been a better option which was to open all the files online in the browser and the user fills them there but unfortunately docusign is too expensive to implement right away and I haven't found great alternatives compatible with Wordpress hence why we have implemented that part in such a crappy way.

At the end of the day the documents that the user signs at this step are mostly psychological anyway (the actual agreement will be sent once the fund has fully been raised and will start "performing").

So for now,we can leave that step empty where the user doesn't have to upload anything

Step2:
The user must select between whether he wants to send the investment amount via bank transfer or send the money as a credit card payment.

Bank transfer
(that includes all sorts of services: including things such as worldremit,… if they want to be charged lower fees or whatever).Basically in this,we will just show the user the banking coordinates to which they will need to send the money.

Credit card
Here the user will enter their credit card details in a special table and the credit card wil be charged the transaction,again,here we will have to choose wether we use square or the other provider you mentioned.

Step3: Once the user clicks on next,it will just show them a congratulations screen saying that we'll get back to them and confirm their investment once their transaction will be processed and their funds received.

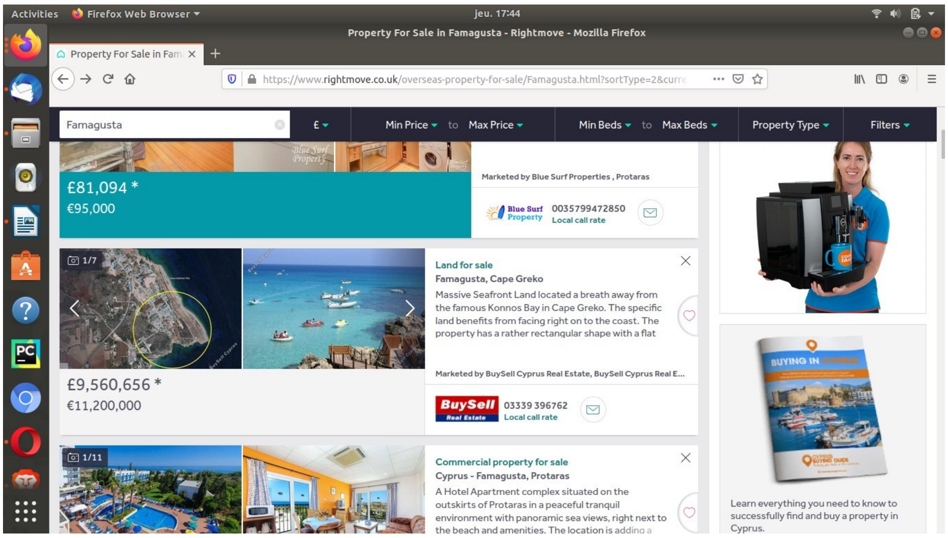
We need to receive a notification email once this process started so we or someone can process it.

Past projects section:

This section will be accessible through the blue bar at the top of the website like it is currently.

This section should be showing the "past projects" that have been done,we need to make sure that there is a way to compare the before and after pictures cuz most people will not look too much in depth in the numbers tbh,at least not at all numbers,they'll look at the pictures mostly.

So we'll need to do smth like it currently is on our website. The model we used is the following:



Idk if you can see it on this screenshot but you can see the 2 pictures and switch them,we could do such a thing with a before and after,at least that was the intial goal.

The FAQ section

This section will be accessible through the blue bar in the middle of the website.

This section will just be beautified text,no real features here,the text will be sent later.

These will just be visuals for the users

Contact section:

This section should be as it is right now,accessible from the blue bar in the middle of the website.

Login/registration feature:

Basically a user must be able to register by creating an account,the user does so by clicking the button on the top right side of the website.

Registration part

When registering on the website,we first need to determine if the user is a legal entity (personne morale) or a person (personne physique) this is for legal purposes.

So an account will be of either one of those types (I guess we can implement this by 2 different python types I.e entity class and investor class.

Both types will have certain things in common,for example: both types have a
-Username,
-an email,
-a password,
-a legal name
-an address
-a region/state/province (optional)
-a zip/postal/location code
-a country
-city
-an account number(entered in freeformat)
-a financial institution/bank name,
-a swift code (also know as BIC/CHIPS/NCC depending on the country)
-A phone number

-And also if the investor or person has his bank account located in the USA,he will have to indicate his routing/ABA number.

Now here are the fields that will separate investors from Entities:

Entities:

Has an entity type,one of the following which Investors do not have as they're just private people:
-Company
-Trust
-Institutional account
-Other entity(so we let anyone invest)

Plz remove the IRA field,it shouldn' t be there

<u>Private investors:</u>

-For private investors,we make the distinction between if they enter a checking/savings account
-A private investor will be able to open a retirement account with us if they so wish and although that feature is not available for now as our company does not have a banking/custodian license yet,I'm saying this already so you can add such an "attribute" for later even though it won't be used for now,that way it'll be easier and we won't have to change everything afterwards.

-If a private investor selects USA for country,he will have to enter his social security number (SSN) also known as tax ID as we need that for legal purposes,I don't want to get in trouble with the IRS but make sure that this feature only shows up if the user is a private investor and has selected USA as his country.

For this section,the form was already done well so if you copy it,everything should be good.

Also make sure to take into consideration the limitations on certain fields,i.e the SSN is 9 characters long,all numbers and same is for routing/ABA number,… everything is already indicated on the webpage.

Once the user has created the account,he will be signed in.

If the user already has an account,he must be able to login

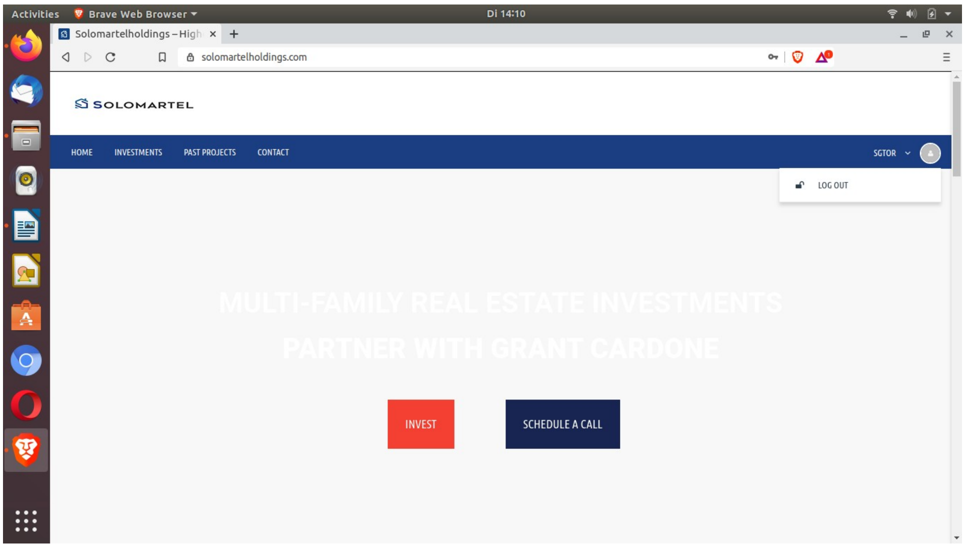
If the user forgot his password,he must be able to reset it

all these are obvious but it's good to indicated

Now for the user sections:

User sections are sections that are only accessible for users that have registered when they are logged into their accounts.

*T*hese sections should appear in the “scrollbar or whatever it’s called”,as you can see on the screenshot below,where the sign out button is located.



The sections should be located above the sign out button.

Regarding these sections,I have already written a pdf so I will resend it to you,it contains all the details,the notes I add here are additional things I thought of that afterwards that will help or could cause problems with the tasks

Transactions user section:
This section will contain all the ongoing transactions that the user has not finished
Basically when a user closes the window during the checkout/investment process and leaves without having finished all the steps,he’ll be able to finish from here.

Also until the fund has started to perform(all money has been raised),it will remain in this section but we still need to get back to the user saying that their transaction has been approved or not (I.e the money has been received or not),for that I propose that we keep the windows in this section orange (until it has been approved) and then turn it into green once it has been approved.

Profile section
To change one's profile details,the details will of course depend on the type of account he has created,if the user is an entity or a private investor.

*Also,in the pdf,I did not mention that the email address should also be changeable,we need to decide regarding that.

My investments section

This section will contain a user's already functioning investments,i.e the transactions that he completed and that were approved and that started performing once the given fund has been closed.

The transferal from transactions to my investments will be done once the fund has been closed if the transaction has been approved.