Final changes to Alberon

General:

Please give consistent and meaningful class names. For each page please add page name to class list for the content div.

Layout to be consistent with mobile changing media rules so it displays as one column as would be on mobile.
Convention: "Submit" and "Go back" buttons to go on the left hand side (see pics below)

Add a js from Cap-It. Link to js: https://www.capit.co.uk/uploads/js/main.js
the pages. Link to stylesheet: https://www.capit.co.uk/uploads/css/main.css

The pictures show the new version how we want the page to look vs the current version. The color is Cap-It color and it is applied with a stylesheet from Cap-It. The html files for the pages are provided via link see section heading for link, instructions per page is given below. These pages are visual only, note that icons are missing, we are not actually changing them.

New vs Current
Login / Join

Login form

Move forgot password link to the right of password label use justify-content-between
Change password label width to fit content
Change label text from "Remember me" to "Keep me logged in"
Make Login button width 100%
Add <hr> tag
Add line "New to Cap-It? Join" Link join to the sign-up page
Change "E-Mail" to "Email"

Join form

Update links-

Replace:	With:
`<div class="col-md-6 offset-md-4 mb-3">` By creating an account you agree to the website `<a href="https://www.capit.co.uk/wp-content/uploads/2019/06/20190619.1-Deed-Poll-Schedule-1-Terms-and-Conditions.pdf">terms and conditions</a>` , our `<a href="https://www.capit.co.uk/wp-content/uploads/2019/06/20190628-Cap-It-Privacy-Policy.pdf">privacy policy</a>` , and our `<a href="https://www.capit.co.uk/wp-content/uploads/2019/06/20190620.3-Risk-Statement.pdf">risk statement</a>`. `</div>`	`<div class="col-md-6 offset-md-4 mb-3" style="padding-left: 0px;">` By creating an account you agree to the website `<a href="https://www.capit.co.uk/uploads/documents/investor-agreements/terms-and-condions.pdf" target="_blank">terms and conditions</a>` , our `<a href="https://www.capit.co.uk/uploads/documents/notices/privacy-policy.pdf" target="_blank">privacy policy</a>` , and our `<a href="https://www.capit.co.uk/uploads/documents/notices/risk-statement.pdf" target="_blank">risk statement</a>`. `</div>`

Make login button width 100%
Add `<hr>` tag
`<div><p>Already have an account? <a href="https://members.capit.co.uk/login">Login</a></p></div>`

Verify email

Verify Your Email Address

Before proceeding, please check your email for a verification link. If you did not receive the email, click here to request another.

Verify Your Email Address

Before proceeding, please check your email for a verification link. If you did not receive the email, click here to request another.

Verify success

Welcome to Cap-It
Get started

Welcome to Cap-It
Please add your details and choose your eligibility type.
Get started

Remove text "Please add your details and choose your eligibility type."

Dashboard evolution

Remove your details card and your certificates card.
Move company above partnership in the dropdown list for adding an entity
Change card heading from "Your entities" to "Entities" and "Your subscriptions" to "Subscriptions"
Remove text "Cap-It Certificates may only be purchased by the categories of investor listed below. Please choose the category that applies to you and confirm your eligibility by submitting the appropriate statement." from above "Add company/partnership" button
Remove Your account heading

Dashboard#01 - No details yet

Remove the heading "Next Step", update blue message, remove the "Your details" card (the user's details can be viewed/edited by clicking the individual entity).

Details form

Update labels from "Your Full Name" to "Full Name"
Remove blue info alert
Move your details to card header to be consistent with the rest

Dashboard#02 - Details added, Eligibility Test next

(As specified above, the "Your details" card is no longer to be displayed. The contents of that card will reside under the individual entity. The user may view/edit their details by clicking on their individual entity.)

Eligibility Test Pages

EligibilityTest#0 - First view of test

Update text (blue message) as above. Hide the FAQs button in the blue message/ Change title to Eligibility Test. Change all occurrences of Appropriateness Test to "Eligibility Test", including messages for failing and passing the test.

EligibilityTest#1 - First fail

EligibilityTest#2 - Second fail

Please relocate the "Submit" and "Go back" buttons as shown

EligibilityTest#3 - Third fail

Top message "Thank you for taking the Eligibility Test. You answered.. (etc.)" is missing on third fail -bug fix-

EligibilityTest#4 - 4th attempt

Hide blue message box

Dashboard#03 - Eligibility Test passed - Eligibility Type next

Congratulations, you have passed the Eligibility Test.

Your account

Your eligibility will be confirmed when you have chosen your Eligibility Type

Choose Eligibility Type

Entities

David McInnes — Get price

Add a company/LLP or partnership ▾

Subscriptions

Your subscriptions will appear here.

You have passed the Appropriateness test

Congratulations you are now eligible to purchase cap protection. Please add eligibility to your entity below, or create a new entity.

Your account

Next Step

Please confirm your eligibility to purchase Cap-It Certificates

Take the next step

Your entities

David McInnes — Get price

Cap-It Certificates may only be purchased by the categories of investor listed below. Please choose the category that applies to you and confirm your eligibility by submitting the appropriate statement.

Add a company/LLP or partnership ▾

Your subscriptions

Your subscriptions will appear here.

Your certificates

Your certificates will appear here when they are issued.

Your details

Email	david.mcinnes+102@capit.co.uk
Password	******** Change password
Name	David McInnes
Date of birth	10 November 1995

Update text as shown

Eligibility Type selection form

Please choose one of the eligibility options below

Elective Professional Client

You elect to be treated by Cap-It as a "professional client" in respect of purchasing Cap-It Certificates. This means you will lose certain protections that are afforded to retail clients, as set out in the Statement For Elective Professional Client.

High Net Worth Individual

Your annual income is at least £100k or you have net assets valued at £250k or more, as specified in the Statement For Certified High Net Worth Individual.

Self-Certified Sophisticated Investor

You have previous experience of similar investments or other alternative investments, as specified in the statement for Statement For Self-Certified Sophisticated Investor.

Go back

You can choose one of the following eligibility options:

Elective Professional Client

You elect to be treated by Cap-It as a "professional client" (only for the purpose of buying Cap-It Certificates). This means you will lose certain protections that are afforded to retail clients, as set out in the Statement for Elective Professional Client.

Choose

High Net Worth

Your annual income is at least £100K or you have assets valued at £250K or more, as set out in the Statement for Certified High Net Worth Individual.

Choose

Self-Certified Sophisticated Investor

You have previous experience of similar investments or other alternative investments, as detailed in the Statement for Self-Certified Sophisticated Investor.

Choose

Later

(NJS: We may soon wish to add a 4th Eligibility Type - "Advised Client")

ELIG#01 - Elective Professional Client

Html docs provided in last spec (emailed on Tuesday 19 April).

ELIG#02 - High Net Worth Statement

ELIG#03 - Self-certified sophisticated statement

Dashboard#4 - eligibility confirmed

Update green message to

Congratulations, you are now eligible to invest in Cap-It Certificates for yourself and for any company or partnership you represent. Please click the Get price button to specify your desired cap protection and find out its likely cost.

Cap-It Calculator

Update layout to price guide. Add title: "Cap-It Calculator"
Make radio buttons match that of the duration buttons
Change button text:
"Get price" instead of "Calculate" please give this button an id
"Subscribe" rather than "Buy now" please give this button an id

Need to price guide rules table 1 new rule:
1) Indices as a comma separated field or otherwise a simple way for us to decide which indices to offer and which order they go in. For example "soni,libo" would display Sonia and Libor as the two radio buttons

Capit calculator - after cal

Summary page:
Change card-header to Subscription summary
Add line "Please confirm the details of your subscription"
Change card-header from "Summary" to "Subscription summary"
Change "Guide Price" to "Subscription Price"
Remove row "Created at"
For supplemental subscription add another row for "Funds received" - missing from previous spec?

Make hidden the text block explaining how to increase subscription price and the subscription price increase row field.

Normal Subscription

Supplemental

Important details-formerly bank info

Change layout and wording

Supplemental subscription will skip this page entirely, since we already collected this information in the subscription process.

Submit subscription agreement

Subscription Page

Users land on the Subscription Page automatically when they click "Submit" on a new Subscription Agreement. They may also access the Subscription Page by clicking on the relevant subscription in their Subscriptions Card.

Please see below the specification for a Subscription Page (to be shown when a user clicks on a particular subscription in their Subscription Card).

The Subscription Page has up to five elements (element#4 - the Bank Transfer Instruction - is only displayed when we are awaiting funds, as specified below)

1) Entity name;
2) Subscription #[subscriptionId];
3) The Subscription Tracker, already expanded and without the "Track progress" button;
4) The Bank Transfer Instruction (Read bank details from table in Nova) (only when relevant, i.e. displays only when the Subscription Tracker Message says "Please send [£Subscription Price]" or "We are awaiting receipt of [£Subscription Price - Subscription Funds]
5) The Subscription Information section has a toggle view to show/hide

When user click on the button the text below is shown

Subscription information

The Cap-It Certificate you subscribed for

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly

Notices regarding this Cap-It Certificate will be sent to the following contact

Contact name	David McInnes
Contact Email	david.mcinnes@capit.co.uk

Payments under your Cap-It Certificate will be made to the following account

Account name	BUBBLES & PIPS LTD
Sort code	04-00-04
Account number	12345678

Download pdf copy below

Subscription Agreement #10053	Download

When a user signs a supplemental subscription agreement they would be taken to this page not a separate page. And under download pdf will have a new row with the document name and download button as shown above.

The examples below show how this page should look according to the rules specified above. They do not cover all possibilities

Stage 1A - New Subscription Agreement.

BUBBLES & PIPS LTD

Subscription #10053

- ☐ Subscription Agreement signed on 18 April 2022
- ☐ We are awaiting receipt of the £3,800 Subscription Price
- ☐ Your certificate has been issued

Bank transfer instructions

Please send the funds immediately to maximise your chance of a successful subscription

Account Name
Cap-It Issuer Limited

Sort Code
23-05-80

Account Number
27667473

Amount
£3,800

Reference
APP10053

I've made my bank transfer

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Stage 2A - Sufficient funds received (not expired)

BUBBLES & PIPS LTD

Subscription #10053

- ☐ Subscription Agreement signed on 18 April 2022
- ☐ We have received £3,800
- ☐ We are sourcing the underlying cap protection
- ☐ Your certificate has been issued

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Stage 2B - Funds received (but not in full)

BUBBLES & PIPS LTD

Subscription #10053

- ☑ Subscription Agreement signed on 18 April 2022
- ☑ We have received £3,000
- ☐ We are awaiting receipt of the remaining £800
- ☐ We are sourcing the underlying cap protection
- ☐ Your certificate has been issued

Bank transfer instructions

The issue price of the Cap-It Certificate is subject to market conditions. We therefore ask that you send the funds to us immediately in order to maximise the chance of a successful subscription.

Account Name
Cap-It Issuer Limited

Sort Code
23-05-80

Account Number
27667473

Amount
£800

Reference
APP10053

[I've made my bank transfer]

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Stage 5A - Expiry (some funds received - but insufficient)

BUBBLES & PIPS LTD

Subscription #10053

- ☐ Subscription Agreement signed on 18 April 2022
- ☑ We have received £3,000
- ☐ It has not been possible to issue your certificate
- ☐ Your subscription expired on 23 April 2022

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Stage 5A - Duplicate? - Expiry (Sufficient funds received)

BUBBLES & PIPS LTD

Subscription #10053

- ☐ Subscription Agreement signed on 18 April 2022
- ☑ We have received £3,000
- ☐ It has not been possible to issue your certificate
- ☐ Your subscription expired on 23 April 2022

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Stage 5B - Subscription expiry (with no money received)

BUBBLES & PIPS LTD

Subscription #10053

☐ Subscription Agreement signed on 18 April 2022
☐ We have not received your Subscription Funds
☐ Your subscription expired on 23 April 2022

Subscription information   Show

Thank you for agreeing to purchase a Cap-It Certificate.

A confirmation email has been sent to david.mcinnes@capit.co.uk

Please send £3,800 with the reference 53S0 to:

Bank Name:	Metro Bank
Sort Code:	23-05-80
Account Number:	27667473
Reference:	53S0

We ask that you send the above funds to us immediately.

The issue price of the Cap-It Certificate is subject to financial market conditions and therefore may change in the future. Please send the required subscription amount as soon as possible to maximise the chance of a successful subscription at or below your subscription price.

Amount Protected	£200,000
Cap Rate	2.50%
Start Date	19 April 2022
End Date	19 April 2024
Benchmark Rate	Base
Payment Frequency	Quarterly
Subscription Price	£3,800
Created at	18 April 2022 13:32
PDF Copy	Download

Add an entity

Dimensions: iPhone XR ▼   414   ×   896   96% ▼   No throttling ▼   ⊘

Registered address

Beneficial owners

Please provide the names of all the partners/individuals who own over 25% of the partnership or voting shares in the partnership; and any **OTHER** individual(s) who exercise control over the management of the partnership. (If applicable, include your own name)

Add name

[   ] Add

[   ]

Go back   Submit

Make the beneficial owners' names field responsive. Current version does not fit on a page for a narrow screen.

Add an entity

Type of entity

Partnership

Partnership name

Postcode

Registered address

Beneficial owners

Please provide the names of all the partners/individuals who own over 25% of the partnership or voting shares in the partnership; and any **OTHER** individual(s) who exercise control over the management of the partnership. (If applicable, include your own name)

Add name

Add

Submit   Go back

Add an entity

Type of entity

Partnership

Partnership name

Postcode

Registered address

Beneficial owners

Please provide the names of all the partners/individuals who own over 25% of the partnership or voting shares in the partnership; and any **OTHER** individual(s) who exercise control over the management of the partnership. (If applicable, include your own name)

Add name

Add

Go back   Submit

Add entity

Type of entity

Company/LLP

Company number

Clear

☐ Add business address if different from registered address

Submit   Go back

Add an entity

Type of entity

Company/LLP

Company number

Clear

☐ Add business address if different from registered address

Go back   Submit

Edit entity
For partnership allow user to change address and beneficial owners automatically
For company allow user to change business address automatically
For all entities including partnership and company name changes will require Cap-It's approval.

Individual

To edit your address, please enter your new postcode and select the address from the dropdown
To request any other changes, see our FAQ

Update details

Full Name

Date of birth

DD/MM/YYYY

Postcode

Residential address

Submit   Go back

You are submitting a request to Cap-It to update your details. Any changes to your residential address will be updated automatically.

Your details

Your Full Name

David McInnes

Date of birth

10 November 1995

Postcode

w37pe

Residential address

3 Taylors Green
London

Go back   Request update

Deactivate profile

Move your details to div class="card-header" To be consistent with all forms
Change "Your Full Name" to "Full Name"
Remove div for "card-footer" containing "Deactivate profile" button

[Company](#)

You are able update your business address

Change message class to "info" instead of "warning"
Change message to:
Please use the form to add or edit your company's business address (if different from its registered address)

If you wish to make other changes to your company's details, please do so at Companies House

Similar to adding a company entity the fields for company name, company registered address should be filled in and be read only. **We get this through company house API Please display the details from company house and not from database (This has already been built for adding a company entity). When they submit everything will be updated: info from company house and their business address there is no need for Cap-It's approval**
Remove "Clear" button

Remove bank details from the business address section. Changing bank details is manual and per subscription/certificate

Partnership

Entity pages

Applies to all **entity pages**:
Put the entity name as card header **not** inside <h2> or card-title class to be consistent with other cards - remove "-Entity Information"
Remove the row that repeats the "Entity name" in the card-body
Change the order of the buttons but keep the layout: 1.Edit, 2.Go back, 3.Delete
Remove Subscription section
If exists remove certificate section also

A user may not deactivate account if they have an entity with a subscription.
A user may not delete an entity if the entity has a subscription

The button should be inactive and if clicked on should send them to the webpage
"https://www.capit.co.uk/glossary/why-cant-i-delete-an-entity-or-deactivate-my-account/"

Entity-individual

Remove the "Choose eligibility" button on this page even if the individual is no longer eligible. They will be able to select their eligibility via prompt on the dashboard

Add row for "Date of birth", "Email" and "Password" add a link "Change password"

Add a <br> after entity info card

Add show/hide button for the eligibility cards
Add a eligibility-status for current eligibility with label value "Active" color green

Entity-company

Entity-Partnership

Add row for "Beneficial owners" display as comma separated values

The format of the money is not consistent. The money should be in the format £###,###,### comma separated. Display with decimal only when the amount contains decimal. The examples below show unwanted results. This rule should apply to all instances of money on the website and emails.

Mistake

✅ Subscription Agreement signed on 28 April 2022

☑ We have received £3,690.00 of £3,700.00 subscription price

☑ We are awaiting receipt of the remaining £10.00

☑ Your certificate has been issued

Sufficient fund received trigger not built to spec. Specifically:

MONEY IN	£SF (k=100)				
2A (SA=£)	Cap-It EP (Funds)	TM#2A	EM#2A	Insert Funds, T=Now,	
2AX (SSA=£)	(SF>=(SP-k))	TM#2AX		RemType=SSA	

Expected result.

✅ Subscription Agreement signed on 28 April 2022

✅ We have received £3,690.00

☑ We are sourcing the underlying cap protection

☑ Your certificate has been issued

Please add a rule on nova for this constant tolerance (k) of the subscription funds so we can change it if we need to in the future.

A supplemental subscription comes up as a new row in the subscription card on the dashboard.

When a supplemental subscription agreement is signed there is an addition to the subscription page under the subscription information, pdf downloads a new row is added with the pdf for the supplemental subscription agreement document that was signed. Order by supplement number descending.

When Cap-It sends data through the certificate API
  1) Tracker message for subscription

TM#3 – Certificate issued
Trigger: Cap-It sends Certificate Trade Info to End Point

Your subscriptions

[Subscription ID] – [Entity Name]   **Track progress**

✅ Subscription Agreement signed on [SD]

✅ We have received £[SF]

✅ Your certificate has been issued on [Issue Date]

Modify to

✅ Subscription Agreement signed on 2 May 2022

✅ We have received £3,000.00

✅ We have sourced the underlying cap protection

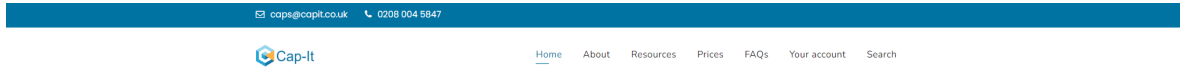☑ You will receive your certificated via email

  2) **Don't send out email in subscription spec**

EM#3 – Certificate Issuance confirmation

Subject Cap-It - Subscription ID [SID]: Subscription Successful
Dear [**MEMBER NAME**],
Thank you for your subscription to purchase a Cap-It Certificate {+ if not individual entity: on behalf of [**ENTITY NAME**]}.
We are delighted to confirm that your subscription has been successful. Your Cap-It Certificate has been issued at the issue price of £[**IP**]. {+ if SF>IP: Accordingly, the £[**SF-IP**] surplus subscription funds will be returned to your account.}
Please find attached your Confirmed Certificate Terms. You will shortly receive from the Administrator an authenticated copy of the Confirmed Certificate Terms and confirmation that your Cap-It Certificate has been added to the Certificates Register.
You can view your Cap-It Certificates here.
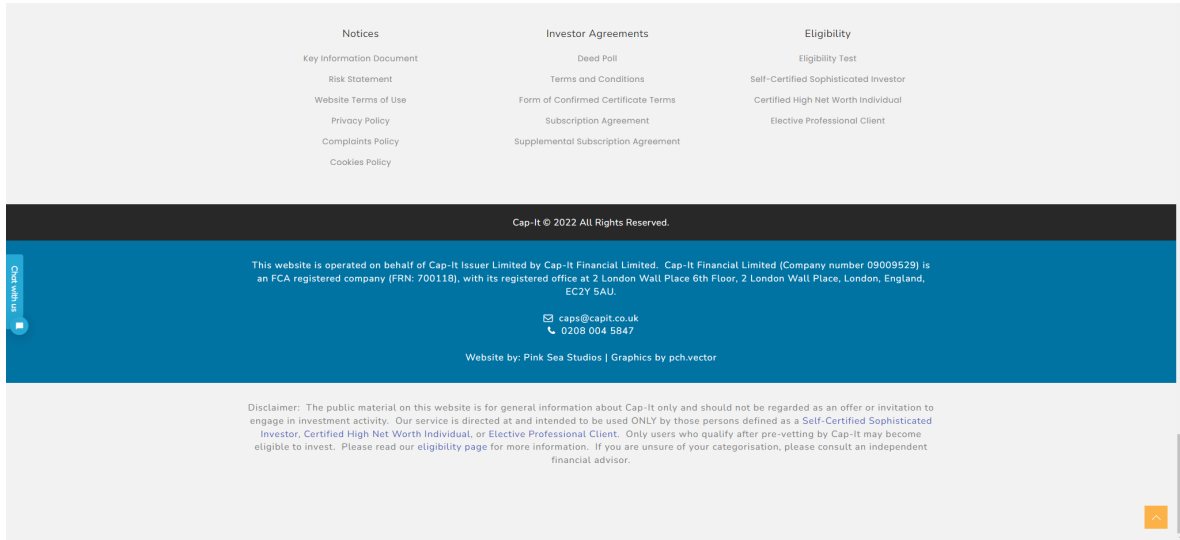Kind regards
Cap-It
Attachments: [CCT]

Header and footer
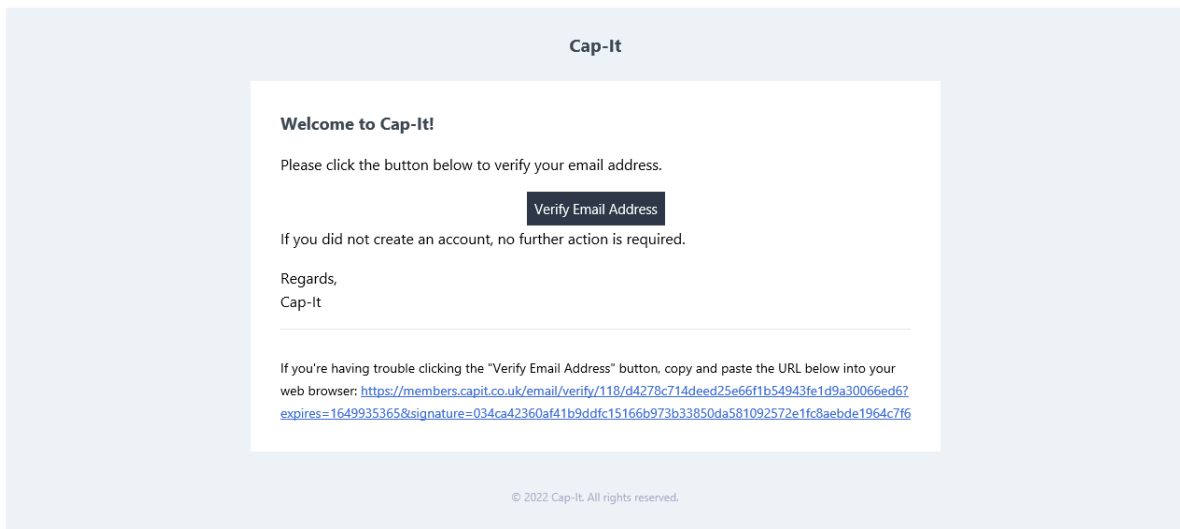
Replace navbar with Cap-It's nav bar

The highlighted tab should be Your account

Add footer from Cap-It's website. If Cap-It make changes to the nav bar or the footer on capit.co.uk, it is desirable that the change is also reflected on members.capit.co.uk

Cap-Its tidio(contact us form) is desirable but not essential.

Emails

Change button colour to match other CTA buttons