Platform Development Requirement Document

Jan 22, 2023

Customer & Platform Name: Invest In

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Invest In Platform

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Overview

We want to create a platform on the web to allow local and regional SMEs to post their projects and brands seeking for investors or franchise opportunities.

The platform should have a custom workflow to ensure that adding a company is managed and monitored by us, posts and deals are also escrowed by us which will make investors more comfortable dealing with unknown companies.

The scope mainly will be a replica of www.investin.am, the only difference is that GCC has no items to export so instead of that we will introduce the feature of Franchise a Cafe, Restaurant…etc

Goals

1. **Connect SMEs and Startups** To get investors in their projects

2. **Connect SME's with** Regional entrepreneurs who want to take their brands as franchise in GCC

3. **Digital Onboarding** of Companies and investors in the platform

Scope

Scope of the requirement is to deliver an end to end web based platform that will help us connect Entrepreneurs, investors and SMEs together for investment and franchise opportunities.

Scope will include

- CMS To manage the content
- Registration & login flow
- Front End (Responsive)
- Workflow
- Payment feature
- Newsletter (automated and manual)

High Level Requirements

CMS

We would like to have a cms to manage

- Content & Text of the front end
- Manage Navigation menu and Sitemap
- Ability to create pages and edit/manage pages
- Manage Banners, Images
- Manage Language Localization
- Forms, Advance Forms
- Manage Investors
- Manage users
- Manage Entrepreneurs
- Manage newsletter
- Manage subscription & payment module
- Workflow management

Registration & Login Flow

Users can register using Email, Facebook, Google, Apple ID

Investors can register but they will go through a screening process after they submit to become an investor which will be done via set of questions asking them about their interests, wealth estimate, estimated investment budget..etc

Entrepreneurs can register with a fee to show their projects (Submit a project), similar to Investin.am we want them to have two options 6 months and 1 year where they can post a single investment project and keep promoting it

Entrepreneurs can also register to add a business which they want to put out for franchise opportunities in different pricing scheme

Becoming a partner, option of a user is yearly payment or 6 months payment to get unlimited posts of Investment and Franchise opportunities.

Front End

Front end should be very intuitive design and modern UX following apple standards and guidelines.

Front end should be responsive in nature to support mobile and desktop/tablet browsers.

SImilar to investin.am website

Workflows

Workflows have to be dynamic and manageable/configurable from CMS to create multiple workflows in someone registers to submit a project for investment it has to go to person X for review and approval.

Admin should be able to create multiple work flows connecting forms to specific work flows

Payment Feature

Since we have payment and subscription we should integrate with a local payment gateway (tap.company) which provides payment facilities in GCC and can be utilized with SDK integration. Below is the URL explaining the integration

https://www.tap.company/kw/en/developers

Furthermore from CMS we should be able to monitor the payments, alter prices, and manage subscription modules to be shown to customers and users.

Newsletter

We should have the ability to create multiple newsletters and send them to registered users, investors and subscribers, some of them can be automated digests and some other can be triggered manually.