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MANAGE.VC

FEATURE+FUNCTIONALITY LIST

FEATURES/PAGES

LOGIN/SIGNUP

- Login flow linked to Google account, with the following steps:

1) Sign up with Google
2) Create a password
3) Create an organization (mandatory)
4) Once you created an organization, invite other people to it via email (Text: “XXXX has added you to XXX Firm.
Can you confirm you’re a member?”) (optional)
5) Finally, the system will instruct you to submit a lead to an organization via email [organization]@manage.vc with a lead. Once the email is received and data is parsed into the user’s Organization, he will be allowed to access the dashboard.

* item 5 to be done by Manage.vc developer.

ACCOUNT/SETTINGS

- Personal information (Name, Phone, Mobile, Street, City, State, ZIP Code, Country, Website, Social Network links)
- Email addresses (ability to store all personal email addresses so we can map to this person. Person can set their primary)
- Change password
- Enable/Disable 2-Factor authentication (client requests this to be done through Google Authenticator).
- Enable/Disable “Remember me for 30 days” (this implies that a user will maintain his session open for that period of time. When it expires, we will enforce 2-factor authentication - if enabled)
- Add/Edit Profile photo. Use Gravatar to get default user photo if possible.

ORGANIZATIONS/SUB-ORGANIZATIONS

- Add/edit Organizations (you are automatically part of an Organization you add)
- Roles: Owner/Admin/Member
- Organization information (Name, Logo, Phone, FAX, Email(s), Street, City, State, ZIP Code, Country, Website, Employees)
- Organization-related URLs. (Crunchbase, LinkedIn, Website, Facebook, Twitter, etc)
- Add/suspend/remove a person from an Organization
- See whether a person has confirmed and activated their account (simple “not activated” label next to their name)
- Link to Crunchbase API to match the firm to grab their logo and other data, and pre-populate
- Enable/Disable email updates per organization
- Organizations can have multiple sub-organizations (not mandatory). They behave the same way an Organization does, and can have companies, leads, users, etc associated to them.

DEALFLOW TRACKER (LEADS)

- Add/edit/delete Leads
- Lead information (Lead Owner, Name, Logo, Phone, FAX, Email(s), Street, City, State, ZIP Code, Country, Website, Employees, Annual Revenue, Amount of Capital they are Raising, Valuation, Equity, Notes, Description, Documents/Decks in PDF format, Status)
- Lead-related URLs. (Crunchbase, LinkedIn, Website, Facebook, Twitter, etc)
- When viewing a lead, include a preview of the document(s) the lead has on file for quick access.
- When viewing a lead, provide an environment for users to discuss, leave notes and comments, and also to record all the activity this lead gets (such as status changes, change of ownership, etc).
- Call to action buttons: “not interested” and “funded” (the first one will change the status of the lead to CLOSED. The second one will change the status of the lead to “FUNDED”).
- The lead can only be closed by its owner. Once it’s closed, it can be re-opened by any user within the Organization, who then becomes the new lead owner.
- Transfer leads: The Lead owner can transfer the lead to another user in the same Organization. Provide a dropdown with a list of users and a button to transfer.
- Ability to submit a lead to an individual or an organization via email [firmname]@manage.vc with a certain format. (client to define format/parsing instructions)

COMPANIES

- Tabs (see below for content): General Info. News. Investment Details. Discussion/Logs.
- General Info (Name, Logo, Phone, FAX, Email(s), Street, City, State, ZIP Code, Country, Website, Employees, Annual Revenue, Valuation, Equity Funding Rounds, Notes, Description, Status)
- Company-related URLs. (Crunchbase, LinkedIn, Website, Facebook, Twitter, etc) Use Crunchbase API to match the company to grab their logo and other data, and pre-populate
- News/Updates (tweets, networks, have another system subscribe to Google alerts, and parse results from that as it relates to the company)
- Investment Details: Should display the investment information.

SEE COMPANY CREATION FLOW BELOW for content:

SCREEN ONE
* Company Name (Acme co) - input box
* Company URL (acme.co) - input box
[NEXT]

SCREEN TWO
* Primary contact (founder@company.com) - input box
* Partner (self is default) - selection
* Primary Location (San Francisco) - input box
[NEXT]

SCREEN THREE
* Round (Seed, Series A, Series B, other) - selection drop down with ability to input box if "other" is selected
* Type (Equity, Convertible Note, SAFE) - selection drop down
* Investment Amount ($50,000) - input box

if SAFE / Convertible Note ask:
* Discount (20%) - input box
* Conversion Cap ($5,000,000) - input box

if Equity ask:
* Price per Share ($1.00) -input box
* Number of shares purchased (50,000) - input box
[DONE]

DASHBOARD

- User should be able to switch Organizations from the top header bar (this affects all the info displayed)
- If the user only belongs to one Organization, automatically display data for it
- Display all the companies this Organization has invested in
- Graphics/Metrics (valuation per company, portfolio value, composition %)

PORTFOLIO

- Display all the companies the selected Organization has invested in
- Sort by value, age, equity
- Should display the following for each Company: Company name, name of round, how much invested, current value of that investment, IRR.

NEWS/ALERTS

- Display aggregate newsfeed for all the companies under the active Organization
- Users that invested in one company or more, receive an email digest about their portfolio news weekly.

DEVELOPMENT NOTES

ENTITIES:
- Users: Investors
- Organizations: Firms, VCs, etc (grouping one or more users)
- Companies: Startups or other type of company where an Organization already invested
- Leads: Companies looking for funding
- Portfolio: Groups companies one or more of a user's Organizations have invested in. (Users can't have personal investments, they must create an Organization, even if it's just for them)

THANK **YOU**