Functionality of the Aciety Platform

Contents

Google Material UI/UX

It’s Google’s standard for design, layout as well as UI/UX. It’s one of the leading standards used by many global products (i.e. Google, Lastpass). Responsive mobile friendly design.

Representative Website of the Platform

1. Home page
   a. Suppliers page
   b. Lead Exchange page
   c. About us page
   d. Partners
   e. Career
   f. EU Support
   g. Contact us
   h. Terms of service
   i. Privacy
   j. Blog (outdated and not used)

Login, Registration, Upgrade and Password Recovery Features

User Management

a. Ability to create a register, create user, upgrade its status.
b. User information (profile), including personal info, multiple emails, pre-defined languages, work positions, social profiles and GDPR questions.

Company Management

a. Ability to have many companies (for one user) and to have many users (for one company).
b. Ability to manage company data.
   i. Main information.
   ii. Public/private profile.
   iii. Predefined SKILLS and SERVICES.
   iv. Extensive Pricing profile (hourly rate, employee rates, discounts, payment terms, engagement models).
   v. Ability to add multiple office locations (based on Google Maps).
   vi. Documents management. Ability to add:
      1. Cooperation agreements (automatic company status upgrade),
      2. Presentations,
      3. Price rates,

            4. Portfolios.
      vii. Administrators management. Ability to add other users to manage company profiles.
   c. Lead Exchange company profile
      i. A dashboard revealing your status in the lead exchange programme (with high quality graphics revealing your business potential).
      ii. A lead exchange questionnaire, which if answered calculates your lead exchange benchmark (business potential).
      iii. Ability to request calls to discuss lead exchange opportunities.
   d. Offers received and submitted. Ability to see the requests received from the Aciety platform and your answers (offers to the client).
   e. Company portfolio management. Extensive portfolio functionality.
      i. Main view
         1. Ability to add name, SKILLS (pre-defined), SERVICES (pre-defined), industries (predefined), markets (predefined), size, scale, description, duration, team size, URL's, case studies.
         2. Ability to add screenshots.
         3. Ability to inform that this portfolio item could be sold as a software solution.
      ii. Ability to import case studies (pdf files) as portfolio items.

CRM Module

Can be given to any user, company (client or provider). It work the basis for extensive data collection for lead exchange opportunities

   a. Contacts (ability to manage individual contacts).
   b. Companies (ability to manage company contacts).
   c. Deals (ability to manage deals).
   d. Settings.
      i. Ability to manage tags (for contacts, companies and deals).
      ii. Ability to manage deal stages.

Admin. Platform Management for Managers.

   a. Dashboard.
      i. Extensive summarizing graph showing users, companies, suppliers, leads and portfolio created.
      ii. Tables revealing the latest action / need to do action of uses, companies, leads and portfolios.
   b. Users management (Admin).
      i. Ability to select different views (information columns (18 parameters)).

1. Nr, Email, Upcoming Event, Full name, First name, Middle name, Last name, Enabled, Archived, Roles, Companies, Tags, manager, Invited by, Avatar, Skype, Last Activity, Created at, Updated at.

ii. Ability to search/filter.
    1. Pre-saved filters, email, full name, first name, last name, manager, invited by, companies, tags, roles, last activity, created at, updated at).
    2. Ability to include/ exclude or ignore parameters (5).

iii. Ability to merge users.

iv. Hover view. Ability to see company data when you hover on it in the users view.

v. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.

vi. User management admin features (additional from the ones the user himself has): Enable\disable , manager, tags, roles, comments, archive.

vii. Rows per page: from 5 to 100.

c. Company management (Admin).
   i. Ability to select different views (information columns (38 parameters)).
   ii. Ability to search/filter (49 parameters).
   iii. Ability to include/ exclude or ignore parameters (19).
   iv. Ability to merge companies.
   v. Ability to export company list.
   vi. Ability to add, archive or delete company.
   vii. Hover view. Ability to see company data when you hover on it in the users view.
   viii. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.
   ix. Company management admin features (additional from the ones the user himself has): CRM enable\disable, supplier enable\disable, signed agreement, signed at, offers consent, legal representative, visible in search enable\disable, active or passive supplier, leads benchmark, lead exchange contact, admin manager, tags, company user/admin managers, received surveys, comments.
   x. Rows per page: from 5 to 100.

d. Company (providers) on-boarding management (attracting providers).
   i. On-boarding.
      1. A list with contacts, who could be approached to join the platform (6 view filters).
      2. Ability to send a pre-filled (template based) customizable email to the user.
   ii. Follow-up.
      1. A list with contacts, who were approached and did not reply about joining the platform (6 view filters).
      2. Ability to send a pre-filled (template based) customizable email to the user.
   iii. Signing & LE.

1. A list with contacts, who are platform users, but have not signed the agreement yet. (6 view filters).
2. Ability to send a pre-filled (template based) customizable email to the user.

iv. Lead Exchange.
1. A list with contacts, who are platform users, but are not participating in lead exchange (6 view filters).
2. Ability to send a pre-filled (template based) customizable email to the user.

v. On-boarding settings management.
1. Ability to write templates.
2. Ability to search and sort templates based on different criteria.

e. Lead Exchange admin.

i. Dashboard. The views\tables:
1. Companies calculated leads benchmark but non active
2. Call Requests
3. Lead Exchange Participants; Active, Sent. An attractive graph.
4. Lead Exchange Volume; Estimated, Exchanged, Sub-Contracted. An attractive graph.
5. Companies by leads sent and received (numbers, sizes in Eur).

ii. Leads management.
1. Ability to select different views (information columns (27 parameters)).
2. Ability to search/filter (35 parameters).
a. Ability to include/ exclude or ignore parameters (12).
3. Ability to export leads.
4. Ability to add, archive or delete lead.
5. Hover view. Ability to see company data when you hover on it in the users view.
6. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.
7. Ability to send feedback to the lead stakeholders.
   a. The system lets you chose users associated with that lead (clients, providers, partners), select their emails, select CC's and send them separate customizable emails with specific (individual) feedback about their offer or an update about the lead status.
8. Lead management admin features (additional from the ones the user himself has):
   a. Lead subject, type, status, author (user), author (company), client user, client company, manager, supplier, exchanged to, size, attachments, feedback (sent), comments, linked portfolios, description.
9. Rows per page: from 5 to 100.

f. Survey (requests) management.

i. Ability to select different views (information columns (20 parameters)).

ii. Ability to search/filter (24 parameters).
    1. Ability to include/ exclude or ignore parameters (7).
iii. Ability to add, archive or delete surveys.
iv. Hover view. Ability to see company or user data when you hover on it in the users view.
v. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.
vi. Survey builder.
    1. Informational part.
        a. Survey title, internal title, request type (3 types), related lead (association with the lead), offer for client (association with the offer), deadline, published (yes/no), survey manager, lead manager, survey author.
    2. Questionnaire.
        a. The survey has a smart questionnaire builder, which is a tool to form the request questions to which the provider is giving the answers and which serves as the basis for the offer for the client. The questionnaire builder has template based, prefilled questions, different types, help text, offer label, copy, sorting, delete features.
        b. Predefined questions. The questionnaire saves answers of different companies to the same question and later offers them as pre-filled answers.
    3. Receivers. Shows the users who received the survey.
    4. Custom receivers. Shows the customer receivers of the survey (i.e. cluster members).
    5. Offers. Shows the offers, which are received by providers answering the survey.
    6. Comments.
vii. Ability to copy survey.
viii. Ability to send survey to the providers.
    1. Public link.
    2. Platform suppliers.
        a. An internal search engine drops in which you can search for companies. When you do that, the users of that company appear and you can select the users you want to send the survey to. You can cc other users of that company. As many users are selected the number of individual template pre-filled message boxes appear (with deadlines and links), where each and every message can be personalized.
    3. Specific partners (in our case cluster members). The system gives you a checkbox list of contacts to send the survey to. You select and send.
ix. Rows per page: from 5 to 100.

g. Offers management.

i. Ability to select different views (information columns (11 parameters)).
ii. Ability to search/filter (13 parameters).
iii. Ability to include/ exclude or ignore parameters (3).
iv. Ability to add offers.
v. Hover view. Ability to see company or user data when you hover on it in the users view.
vi. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.
vii. Offer view.
    1. Main information: survey, manager, client user, client, company, client name.
    2. Included offers.
    3. Excluded offers.
viii. Ability to edit answers of providers.
ix. OFFER. The offer itself is presented in an attractive format, where all the offers from providers are presented one by one in a styled manner. It pools the information from the system (client name, provider logos, pricing and etc.). The system generates a public link to the offer, which can be send to the client. Example: https://aciety.com/offer/d065046d-de89-4f79-b76d-8e62430d3e91?token=1f0bee7a85037eefea06d3b49ca905c6
    1. The offers let clients to provide with feedback (predefined answers). There is evaluations options settings page.

h. Calendar. A scheduling tool allowing to set appointments and tasks in time. It's interconnected with users, companies, leads and offers.
i. Statistics dashboard. Ability to create attractive charts about the progress of the platform.
    i. Ability to select different chart types.
    ii. Ability to select different data sets (leas overall, leads per day, leads won per day, lead exchange participants, lead exchange volume, nr of developers, suppliers on boarding).
    iii. Different dates, different statuses (won, lost, cancelled).
j. Company \ portfolio search.
    i. Ability to search for companies (providers) in the internal database by keywords.
    ii. Ability to filter companies (providers) database by filters: SKILLS, SERVICES, countries, hourly rate, minimum budget, nr of employees,
    iii. The search engine goes throughout the whole database.
    iv. The search results include portfolio items (matching) and has the portfolio search (view). It can open the most matching portfolio items of specific company.
    v. The search engine UX is based on AirbBnB.
k. CRM. Next to general CRM features it has admin based features: contacts sources, companies sources, deals sources, deals types.

l. Portfolios.
   i. Ability to select different views (information columns (18 parameters)).
   ii. Ability to search/filter (18 parameters).
      1. Ability to include/ exclude or ignore parameters (8).
   iii. Ability to add, archive or delete portfolio.
   iv. Ability to export portfolio.
   v. Hover view. Ability to see company or user data when you hover on it in the users view.
   vi. Links. Ability to enter user profile, company profile, manager profiles when you press on them in the list view.
   vii. Ability to administer all the users provided content of portfolio.
m. Jobs. Ability to add job adds for hiring employees for the platform, which are shown on the platform page.
n. Team members. Ability to add team members, which are shown on the platform page.
o. Partners. Ability to add partners, which are shown on the platform page.
p. Custom partners. Ability to add specific partners and lists which are used on the platform (for examples cluster members).
q. Taxonomies (key data categories) management. Filers, views, ability to add, edit and delete.
   i. Different lists of key taxonomies include: technologies, industries, markets, skills, services, engagement models, promotions, payment terms, payment methods, budgets, advanced rates, languages.
   ii. The platform allows to create and manage your taxonomies (data categories) as well as to create different taxons (data subcategories) within these taxonomies.