# PioBay Major Updates 2020

Company and Application Form Overhaul, NewCurator Functionality and New Data Handling with Unique identifiers.

The purpose is to make the application process more straightforward for the average user and adapting it to the new way data is handled on PioBay. The project solves the following issues:

- Making the Company & Application Forms more User-Friendly.
- Adding better Data Handling by implementing categories for data points.
- Splitting the questions into 2 types: Qualitative and Quantitative.
  More Details at this link → Google Sheet with new Data Points.
- Adding the 'Curator' tab to the open call.
- Using a Unique Identifier to automatically update startup information.
- General Information → Information from all applications of a startup.
- Activity Tracking → Tracking changes in open calls (Startups & Users).
- New status bar → Users Online
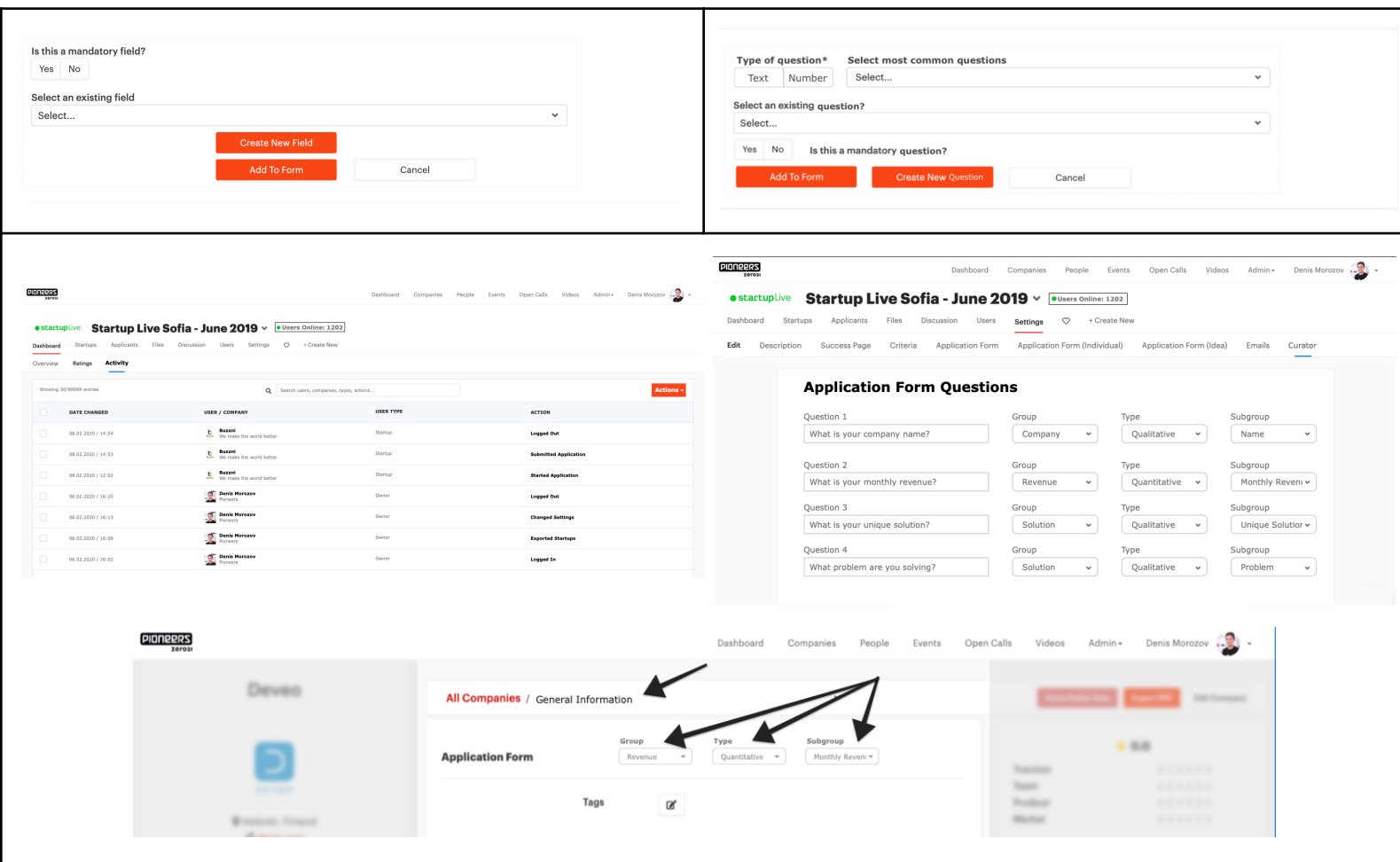
Company Form Overhaul

The current form has several issues, the biggest ones being 3 pages long, while only 1 is needed and mixing required questions with non-mandatory questions. According to Google Analytics, the largest percentage of users bounce on the first page of the company form.

This is solved by only having 2 pages for the company information:

- **Page 1: Mandatory Questions**
  1. Company Name
  2. City of Operations
  3. Website
  4. Product Tweet
  5. Product Description
  6. Industry
  7. Customer Focus
  8. Product Focus
  9. Current Stage
  10. Number of Employees
  11. Pitch Deck

- **Page 2: Extra Questions**
  Investors:
  1. Market Focus
  2. Types of Investors
  3. Total Funding Received
  4. Types of Funding
  5. Traction Now
  6. 2020 Revenue --- (always current year)
  7. Exit Strategy
  Corporates:
  8. Business Model
  9. Key Technology
  10. Competition
  11. What is your problem
  12. What is your solution
  13. Why is your solution different
  General:
  14. Logo
  15. Founding Date
  16. Country of Incorporation
  17. LinkedIn
  18. Add Members

Note: The user is incentivized to fill out the extra information with a description on the top of the page that more information increases the chances of being selected for the project.

Application Form Updates

The updates solve 2 problems: simplifying the creation of applications for average users and adapting the form to fit into the new data handling framework.

- ❏ The word 'Field' is substituted by 'Question':
  1. Add Field => Add Question
  2. Is this a mandatory field => Is this a mandatory question
  3. Select an existing field => Select an existing question

- ❏ The divider is added at the top and bottom of every question to create better visibility between different questions:

Parameters of divider: opacity 40%, HEX #E0E0E0 & width 1

- ❏ The 'Add Field' function (=> 'Add Question') was reworked

1. 2 new fields are added: Type of Question & Select the most common questions:
   - **Type of Question** can either be Qualitative (Text) or Quantitative (Number). It is a mandatory field, and depending on the choice, relevant questions of the selected type will be available for selection from the dropdown menus. If no option is selected, the dropdown is unavailable.
   - **Select the most common question** is a predefined list of questions that are most commonly used by the owners of open calls. When the type of question is selected, it either displays the most common qualitative or quantitative questions.
2. 'Is this a mandatory question' was moved to the bottom.

3. Buttons are rearranged.

❏ The 'Create New Field' function (=> 'Create New Question') was reworked

The 'Type' field in 'Create New Field' has too many options, that are all written as one word and unusable by the new users. The solution is to delete and update the types.

Delete and fix the following:

1. MoneyField - to delete
2. SearchAddMultiField - to delete
3. MultiCheckboxField & CheckboxField are redundant & the difference is unclear
4. DomainsField & URLField are redundant
5. SearchOneField is repeated twice & the function is unclear
6. SearchMultiField & SearchAddMultiField are redundant & should both be deleted
7. SelectOneField & SearchOneField are redundant
8. All words should be separated with spaces
9. Rename 'Label' into 'Question Name'
10. Rename 'Create Field' to 'Create Question'

The new users of PioBay are not going to know what kind of data points there are (Ecosystems, Industries, etc.), therefore the creation of the question should be more dependent upon simple user queries (text & numbers) and less on them choosing the existing types, used by us. The most useful types are *text*, *large text*, *number*, *yes or no* & *picture or doc upload*.

In order to make this data useful, the '**Curator**' page was created.

Open Call Curator

The purpose of the curator is to assign the questions that are created by users in the application form to a specific group, type & subgroup. It also gives an overview of all the questions used in the Application Form. This page is only available to Admins.
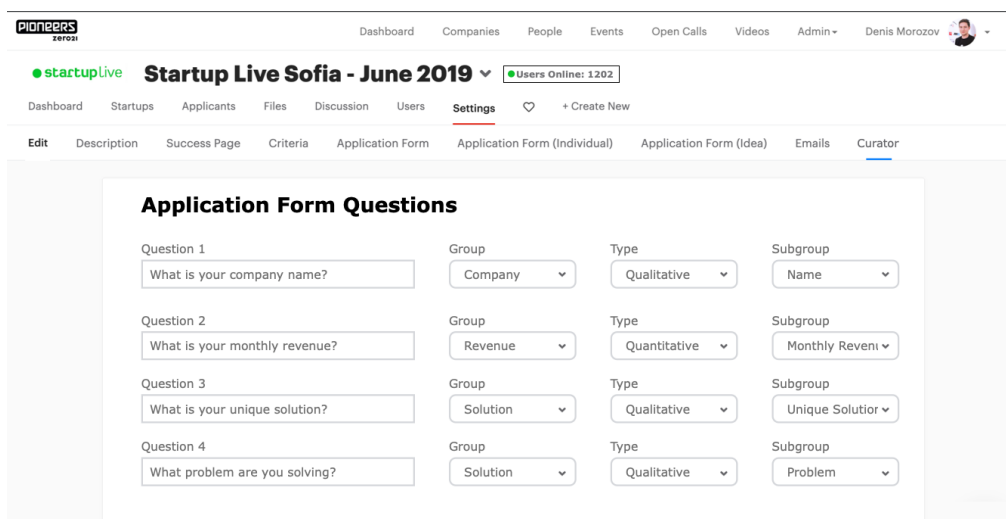
The Curator page consists of:

- Questions from the Application form
- Group - refer to this link
- Type - qualitative or quantitative
- Subgroup - unavailable until the group and type are selected

If the question was already created,

then this page makes a call to the SQL database and looks for a **unique identifier**, consisting of *group_type_subgroup*. When the identifier is located, it automatically inputs the information into Group, Type, and Subgroup.

All old questions are already assigned to subgroups, so the last step is to create the new column in SQL called Unique Identifier and add the UIDs.

If the question is new,

then the curator of the open call needs to assign the question by hand to the Group, Type, and Subgroup (that are all predefined) and click 'Save'. When it is saved, the new unique identifier is created (*group_type_subgroup*) and it is assigned to the question.

Unique Identifier to Automatically Update Startup Information.

After all previous steps are implemented, now every question on the platform has a unique identifier. This is done with the purpose to keep the Company Information of startups as relevant as possible, without any redundant input from their side.

When a startup fills out the new application, the company information makes a call to the application form and uses a unique identifier to see if there is any new data that can be retrieved and inserted into the company profile. Every company has a specific set of questions (of different subgroups), so each time the new application is submitted, it checks if any unique identifiers in the application form match the unique identifier in the company profile and if yes it updates the data with the information from the application form.

This is the process in action steps for Startup that just registered on the platform:

1. Startup fills out the Company Information (the form is updated <u>with new questions</u>)
2. Startup fills out the Application Form
3. When startup clicks submit, the call from Company Information happens to Application Forms.
4. Company Information looks for specific Unique Identifiers if it finds them, it inserts or updates the information of the question with the same Unique Identifier.
5. For future applications, the same procedure is repeated, if this is the last submitted application.

Important Note: if we want to better utilize Google Analytics and this function, then the 'Submit Application' button at the end of the application needs to have a static final link so that it can be inserted into the GA funnel as a Goal destination.

Company Page - General Information

On the company page, a new tab 'General Information' is created, where all the data from all applications with Unique Identifier is stored.
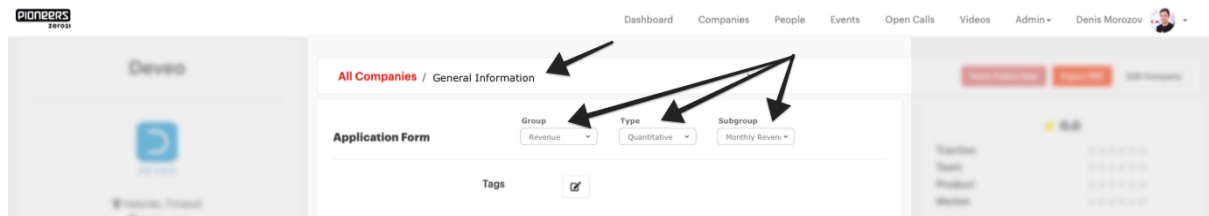
The data is filtered by using unique identifiers: Group, Type and Subgroup (each has 'None' as an option). When 'None' is selected in every cell, all data is displayed in the order ('*Group 1, Type 1, All Subgroups*'; '*Group 1, Type 2, All Subgroups*'; etc. with all remaining groups)

Filter conditions

1. If the subgroup is missing → the subgroup is removed from the dropdown menu.
2. If all subgroups in the group are missing, the group is removed from the dropdown menu.

The page collects all the latest unique identifiers and displays all the information on the page.

How Information is added

1. In 'Startup Name' → General Information, all answers from all applications are added.
2. If UID matches the UID assigned to the question, the Question Name and the answer is inserted into the page (if there are multiple Q/As with the same UID, only the latest is inserted).
3. After all UIDs are checked and added, **Filter Conditions** are applied.

Groups, Types & Subgroups

The spreadsheet with all groups and subgroups is available at this link. A small part is copied here as an example. All subgroups are already assigned to all questions.

A typical UID will consist of *group_type_subgroup*
product_qualitative_market_focus

Group	Type	Subgroup 1	Subgroup 2
Product	**Qualitative**	Development Stage	Product Focus
Revenue		Revenue Model	Revenue Description
Market		Market Focus	Customer Focus
Business Model		Business Plan	Network
Solution		What is your solution	Key Innovation
Team		Legal Information	Hiring team
Funding		Types of Funding	Outside Funding
Investors		Raising Capital	Names of investors/funds
Growth		Current Stage	International Market Plans
Interests		Required Support	Collaboration Interest
Other		Application Specific	Other
Industries		Industry	Ecosystem
Company		Company Name	Company Description
Technology		Key Technology	Main Risks
Location		Country of Operations	City of Operations
Revenue	**Quantitative**	Current Revenue	Total Last Year Revenue
Team		Number of Employees	Number of Founders
Funding		Total Funding Received	Funding Target

Activity Tracking + Online Status Bar

Every change in the open call will be recorded in Dashboard → Activity.

- **User Types**
  1. Startup
  2. Rater
  3. Owner

- **Startup Actions**
  1. Started Application
  2. Reopened Application (Instead of Logged In)
  3. Exited Application (Instead of Logged Out)
  4. Submitted Application

- **Rater Actions**
  1. Logged In
  2. Submitted Rating → Condition: Rater closed page with all Criteria filled out
  3. Added Comment
  4. Logged Out

- **Owner Actions**
  1. Logged In
  2. Submitted Rating → Condition: Rater closed page with all Criteria filled out
  3. Logged Out
  4. Changed Settings
  5. Invited New User
  6. Exported Startups

# Technical requirements for Activity Tracking

What needs to be created:
1. Create a new column in PostgreSQL (Users) called last_activity
2. Define timeout (10 minutes)
3. Each time user logs in or accesses any page, last_activity is updated with date & time (19.01.2020 / 12:23)

How does timeout work:
1. User accesses the page and the last_activity is updated with current time
2. If last_activity happened less than 10 minutes ago, the user is considered online. In other cases, user is considered offline
3. Each time a user accesses a new page, the last_activity is updated.

Online Status Bar

Includes both users and startups. The status bar shows all users and startups that are currently online on the platform (not in the selected open call).
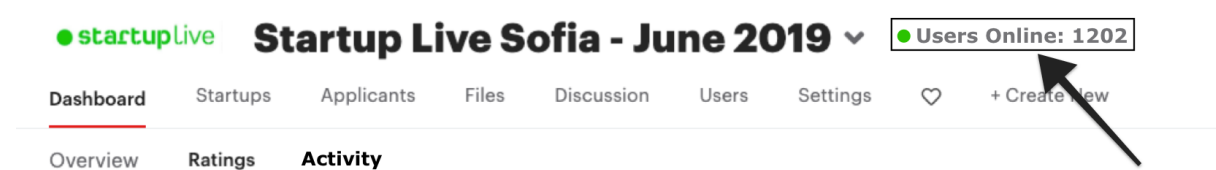
The user is considered to be online if the following conditions are met:
1. User is assigned to at least 1 open call
2. User's *last_activity* was less than 10 minutes ago

The startup is considered to be online if the following conditions are met:
1. Startup started application to at least 1 Open Call
2. Startup's *last_activity* was less than 10 minutes ago