Accutech Puma

Proposal Generator

CS 495

Hi there!

We are the proposal generator team.
We are working with Accutech Systems Corporation.
Feel free to ask questions at any time.

OUR TEAM MEMBERS…

John Perales

-Grasp IO Mobile VR Training

-Front End and Back-End Experience

Ryland Babusiak

-Data Processing and Manipulation

-Primarily Back-end Experience

Jacob Knoll

-Front End Experience

-Student

Thomas Ferrigan

-Front end experience

-Little outside of the classroom experience

Accutech Systems Corporation

- Trust and Investment Software

- Created by Adam Unger in 1987

- Originally started as a farming accounting service

"See your needs. Create Solutions. Deliver results.

-Accutech Systems

Client Meeting

- Our Liaisons: Michael Garrett & Phillip Wu

- Met at the Accutech HQ in Yorktown

- 2 members would ask questions while the other 2 took notes

- How did it go?

The meeting went great!

- Nearly no off topic discussion

- All points made from both parties were relevant

- Both of our contacts were very helpful and knowledgeable.

Notable meeting moments

- Important: they said that user experience is key

- Unusual: Gave no style sheet or preferred stack requests when asked

- Misc: Mr. Garrett has a financial background, while Mr. Wu has a CS background.

Meeting Insights

- Overall observation: Our clients will provide us with information readily, we have great freedom for the solution

- JP found it easy to talk.

- Future Improvement: Talk in more detail about the business, their customers, etc. (the domain)

- Note for next meeting: Discuss viability of mobile app vs web app

Our Mission

An application that:

Can parse a picture of an investment statement from another brokerage, send the relevant information to Accutrust Cheetah, and display a comparison of the how Accutech can manage your investments better.

Features

Image Parsing

Our application is able to parse images of brokerage statements into usable investment data, accurately and efficiently.

Accutrust Cheetah Integrated

Our application is able to interface with Accutech Cheetah, sending parsed data and receiving processed data.

Visual Comparison Display

Our application is able to display a comparison of the old investment data with the new investment data in an effective way

Web Application

A web application solves most compatibility issues and allows for easy integration into their current technology stack

Our Prospective Stack vs Accutech Stack

Their Backend

-.net framework

-written in C#

Their Frontend

-Javascript (unknown framework)

-CSS

-HTML

Their Hosting

-Amazon Web Services

-Unknown if using EC2 or Lambda server

Our backend

-.net (asp) framework

-written in C#
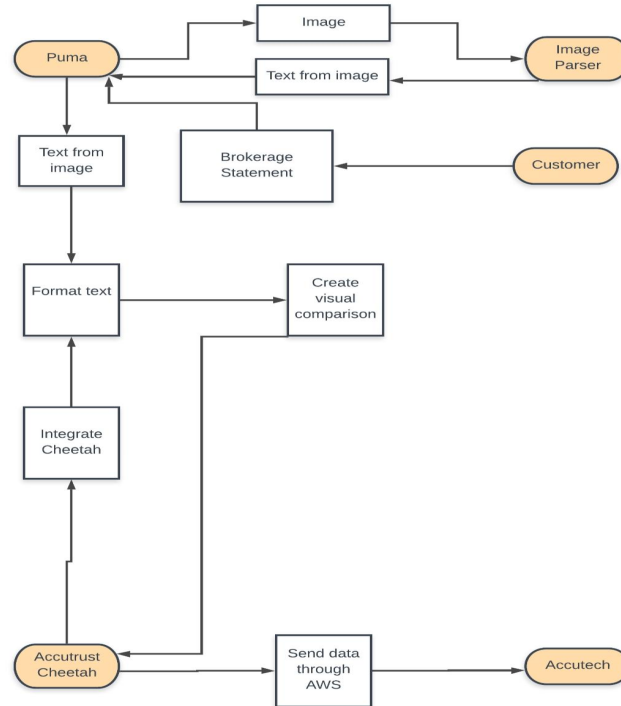
-Uses Tesseract OCR

Our Frontend

-Javascript (React framework)

-JSX

-CSS

-HTML

Our Hosting

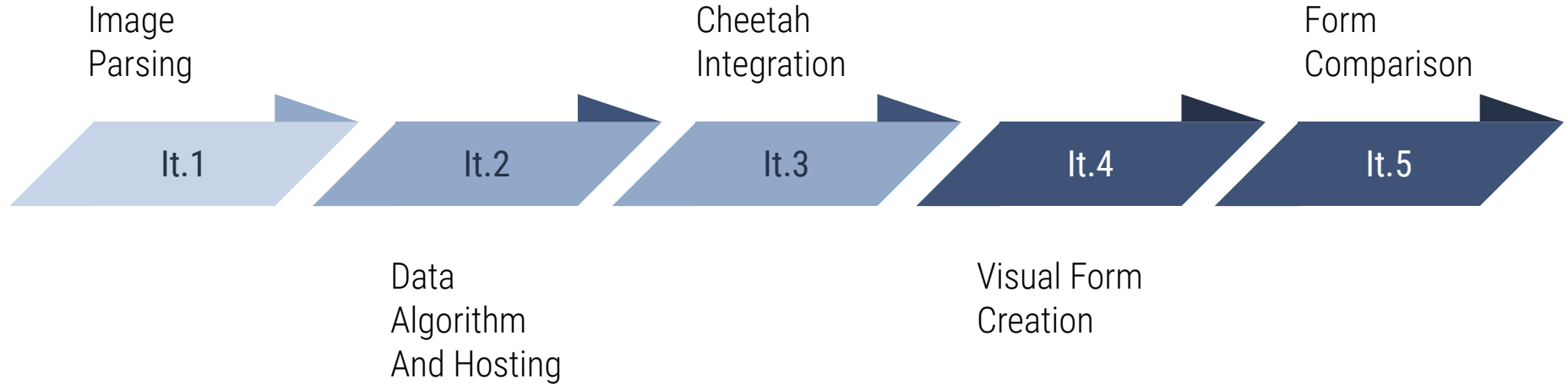-Amazon Web Services

-Preferably Lambda Server

-possibly DynamoDB

Our Iteration Plan

Image
Parsing

Cheetah
Integration

Form
Comparison

It.1

It.2

It.3

It.4

It.5

Data
Algorithm
And Hosting

Visual Form
Creation

Iteration 1

- Tesseract Integration
- Basic backend construction
- Skeletal frontend
- Research into AWS

Any Questions?