

The background features a dark blue trapezoidal shape on the left, a light blue trapezoidal shape on the top right, and a white trapezoidal shape on the bottom right. A thick orange horizontal bar is positioned at the bottom, partially overlapping the white shape.

# Accutech **Puma** Proposal Generator CS 495



# WELCOME BACK!

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

# Accutech Systems Corporation

- Originally started as a farming accounting service
- Financial Technology Company
- Trust and Investment Software
- Has recently been experiencing rapid growth

# Refresher

- Proposal Generator
  - ▷ Marketing Tool
  - ▷ Statement Image Parsing
  - ▷ Cheetah API Communication
  - ▷ Data Visualization
    - ▷ Current vs. Accutech

## Refresher Cont.

### Accustrust Cheetah Integration

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

### Image Parsing

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

# Iteration 1

- Goals
  - ▷ Simple Data Entry
    - ▷ Text Field-Based
  - ▷ Web API Communication
    - ▷ RESTful Queries
  - ▷ Response Display
    - ▷ JSON Response

# Iteration 1

- Setbacks
  - ▷ Cheetah Web API
    - ▷ Restricted Authorization
      - ▷ Swagger Documentation
      - ▷ API Simulation
    - ▷ Formatting
      - ▷ Modular Statements
      - ▷ Easily Editable Constructors



Demo Time!





# Systems Stack

## Their Backend

- .net (mostly) core framework
- Written in C#

## Their Frontend

- Javascript
- CSS
- HTML

## Their Hosting

- Amazon Web Services
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## Our Backend

- .net (asp) core framework
- Written in c#

## Our Frontend

- Javascript (React Framework)
- Some Bootstrap
- No Redux (yet)

## Our Hosting

- No hosting yet

# Client Meeting

- Trey Gourley
  - ▷ Lead Architect
- Presentation
  - ▷ Minor hitch with custom API
  - ▷ Client was pleased with demonstrated capability
  - ▷ Data Entry
    - ▷ Most tedious/difficult part of presentation

# Client Meeting

- Our Questions were well-answered
  - ▷ API Clarifications
    - ▷ Developers working on another API-utilizing software
  - ▷ OCR Discussion
    - ▷ Willing to pay for licenses
- API Development Environment
  - ▷ Received Credentials
  - ▷ Will allow more accurate REST requests