# Accutech Puma Proposal Generator CS 495



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

# **Accutech Systems Corporation**

- A straight talk, no fluff, no filler financial technology company with the goal of redefining the trust and investment industry through state-of-the-art software solutions
- A company that focuses on the long-term well-being of it's customers
- A company that lives and breathes to have the best trust and investment software solutions



# Refresher

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

### Refresher Cont.

# Accutrust 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 Summary**

- Runnable .exe that created a local server in which one could input personal asset info
- Not yet connected Accutech's official Cheetah API
  - Led to hard-to-follow results

# **Demo Time**

# Demo Time

It is time for the demo

# **Iteration 2 Goals**

- ✓ Connect the system to the Cheetah API
- Refactor User Inputs
  - Require less info
- × Visual Form Display
- × Visual Form Comparison

# **Iteration 2 Complications**

- Issues
  - POST bugs on crucial structures
  - GET Trade permissions
  - Critical step inaccessible
- Solutions
  - Reworked scope of responsibility
  - Discussed issues with client

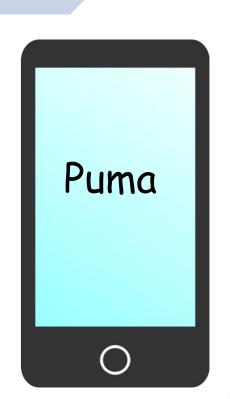
# **Iteration 3 Plan**

#### New Goals:

Get Puma to run on mobile

#### Pushed-Over Goals:

- Visual Form Display
- Visual Form Comparison



# **Systems Stack**

#### **Their Backend**

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

#### **Our Backend**

- net (asp) core framework
- Written in C#
- Flurl

#### **Their Frontend**

- Javascript
- CSS
- HTML

#### **Our Frontend**

- Javascript (React Framework)
- Materialize
- CSS framework

#### **Their Hosting**

- Amazon Web Services
- \_

#### **Our Hosting**

No hosting yet

## **Client Meeting**

- The meeting went well
  - Zoom Virtual Meeting
    - A little less organized
    - Screen-Share Demo
  - Scheduled another meeting for Tuesday
    - Hands-On Demo
    - Further problem-solving
- Client was happy with progress
  - "On track for goals of the project"

# **Client Meeting: Moving Forward**

- Creating Solutions to Setbacks
  - Team Google doc to log issues we encounter
  - Share access with Accutech clients
    - Possibly use their internal bug logging systems
- User Interface Planning
  - Figma Interface Design Tool
    - Share access with client