



Accutech **Puma** Proposal Generator CS 498

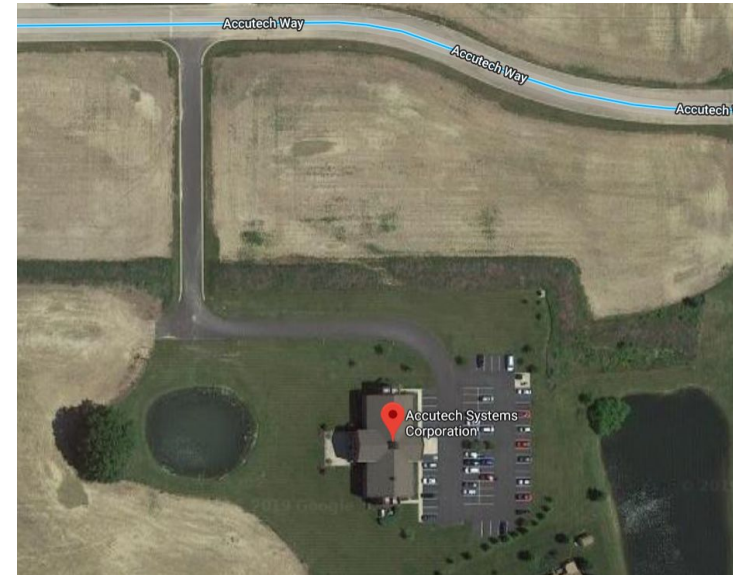


WELCOME BACK!

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

Accutech Systems Corporation

- 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 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

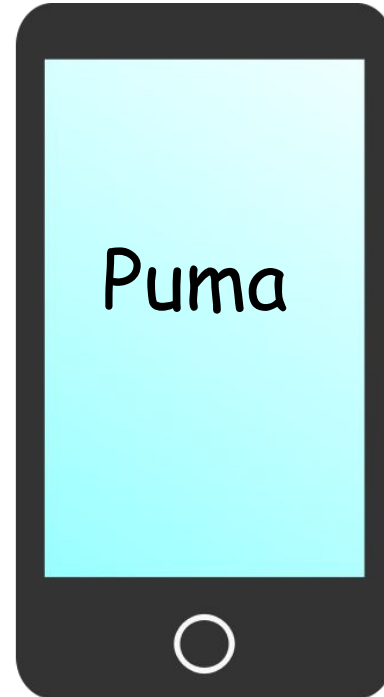
Image Parsing

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

Iteration 3 Initial Plan Review

Goals:

- Get Puma to run on mobile



Refresher

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

Second Iteration 2 Client Meeting

- Quick meeting to let them get a hands on demo of the Iteration 2 .exe as well as get feedback
- Matt gave us a lot of insight as well as ideas to what could make this better for the end user

Systems Stack

Their Backend

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

Their Frontend

- Javascript
- CSS
- HTML

Their Hosting

- Amazon Web Services
-

Our Backend

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

Our Frontend

- Javascript (React Framework)
- **Materialize**
- **CSS framework**

Our Hosting

- No hosting

Demo Time

Demo Time

- It is time for the demo

Iteration 3 Setbacks

- Get fields other than Stocks and Bonds to work as desired
- Saving information in a PDF when finished

Client Meeting

- Thought we were on track with our initial plan
- Content with amount of added features from our meeting last week
- Dwayne joins the battle
- Accutech is working on fixing many of the API problems we have brought to light
- They enjoyed the mobile app

Plans

- Web App is primary focus according to our liaisons, since it is farther along
- If we must choose one, web app comes first
- We still plan on co-developing for both platforms, if it does not compromise the web app's functionality.

Iteration 4 plans

New Goals:

- Better form comparison
- Web App login
- More, smaller steps to make app more user friendly

Pushed-Over Goals:

- Saving Form as PDF
- Making the mobile app prettier (TBD)