eFinPlan

Team Members

Jared Brown, Desiree Nelson, Joah De Vries, and Noah Perez

Mentor: Ryland Babusiak

Client Information

Matthew Garrett

- MoneyTree (owned by Accutech)

Design Items

Business Requirements

BR1: We want to help investors learn financial planning for themselves using curated content.

BR2: We want to allow investors to receive financial advice directly from financial advisors.

BR3: We want to assist investors in the creation of attainable financial plans.

BR4: We want MoneyTree to receive money based on financial advisors' involvement in the platform.

Use Cases

UC1: Publish links to financial education content

UC2: View financial education content

UC3: Tag financial education content

UC4: Search financial education content

UC5: Schedule financial advising appointment

UC6: View scheduled financial advising appointments

UC7: Mark scheduled financial advising appointment attendance

UC8: Form financial plan

UC9: View financial plan

UC10: Use MoneyTree calculators

UC11: Subscribe to eFinPlan

UC12: Connect financial information to eFinPlan

UC13: View aggregated financial information

Requirements

FR1: The website shall allow Advisors to publish content.

FR2: The website shall allow the Advisor to publish content only if they tick a checkbox verifying that they have had their broker dealer review it.

FR3: Once an Advisor publishes content successfully, the website shall display a success message for five seconds.

FR4: If an error occurs once an Advisor tries to publish content, the website shall display an error message for five seconds.

FR5: The website shall allow any user to view all available content in a list.

FR6: The website shall allow Advisors to edit content that they have published.

FR7: The website shall allow the Advisor to publish edited content only if they tick a checkbox verifying that they have had their broker dealer review it.

FR8: Once an Advisor publishes edited content, the website shall display a success message for five seconds.

Requirements

FR9: If an error occurs once an Advisor tries to publish edited content, the website shall display an error message for five seconds.

FR10: The website shall allow the Advisor to delete content that they have published.

FR11: Once an Advisor deletes content, the website shall display a success message for five seconds.

FR12: If an error occurs once an Advisor tries to delete content, the website shall display an error message for five seconds.

FR13: The website shall allow the Advisor to add tags to content that they have published.

FR14: If an error occurs once an Advisor tries to add tags, the website shall display an error message for five seconds.

FR15: The website shall allow the Advisor to remove tags to content that they have published.

Requirements

FR16: If an error occurs once an Advisor tries to remove tags, the website shall display an error message for five seconds.

FR17: The website shall allow for Investors to favorite content.

FR18: The website shall allow for Investors to unfavorite content.

FR19: The website shall allow for Investors to view only the content that they have favorited.

FR20: The website shall allow any user to search for content by tag using a search bar.

FR21: If an Advisor clicks on the title of a piece of content, the website shall direct them to the URL of the content in a new tab.

FR22: If an Investor clicks on the title of a piece of content, the website shall direct them to the URL of the content in a new tab.

FR23: The website shall allow an Investor to view all available timeslots for an Advisor appointment.

Requirements

FR24: The website shall allow an Investor to schedule an appointment with an Advisor.

FR25: The website shall only allow an Investor to schedule an appointment if there is already no appointment scheduled at that time.

FR26: If an error occurs once an Investor tries to schedule an Appointment, the website shall display an error message for five seconds.

FR27: The website shall allow any user to click on one of their scheduled appointments and view its information.

FR28: The website shall allow an Investor to view all of their approved appointments on the Appointments page.

FR29: The website shall allow an Investor to cancel a selected approved appointment on the Appointments page.

FR30: The website shall allow an Investor to view all of their pending appointments on the Appointments page.

Requirements

FR31: The website shall allow an Advisor to view all of their scheduled appointments.

FR32: The website shall allow an Advisor to approve a selected appointment.

FR33: The website shall allow an Advisor to deny a selected appointment.

FR34: The website shall allow an Investor to create a financial plan.

FR35: The website shall allow an Investor to view all of their created financial plans.

FR36: The website shall allow an Investor to edit the details of their created financial plans.

FR37: The website shall allow an Investor to use the MoneyTree Plan Education Fund Calculator.

FR38: The website shall allow an Investor to use the MoneyTree Plan Financial Goal Calculator.

FR39: The website shall allow an Investor to use the MoneyTree Plan Retirement Fund Calculator.

Requirements

FR40: The website shall allow an Investor to use the MoneyTree Plan Social Security Calculator.

FR41: The website shall allow an Investor to connect their bank information using MX.

FR42: If an Investor has connected their bank information using MX, the website will display the bank information.

FR43: The website shall allow for Advisors to register only if they have subscribed through AMember.

FR44: If an Advisor attempts to register without subscribing through AMember, then the website shall notify the Advisor that they have not paid.

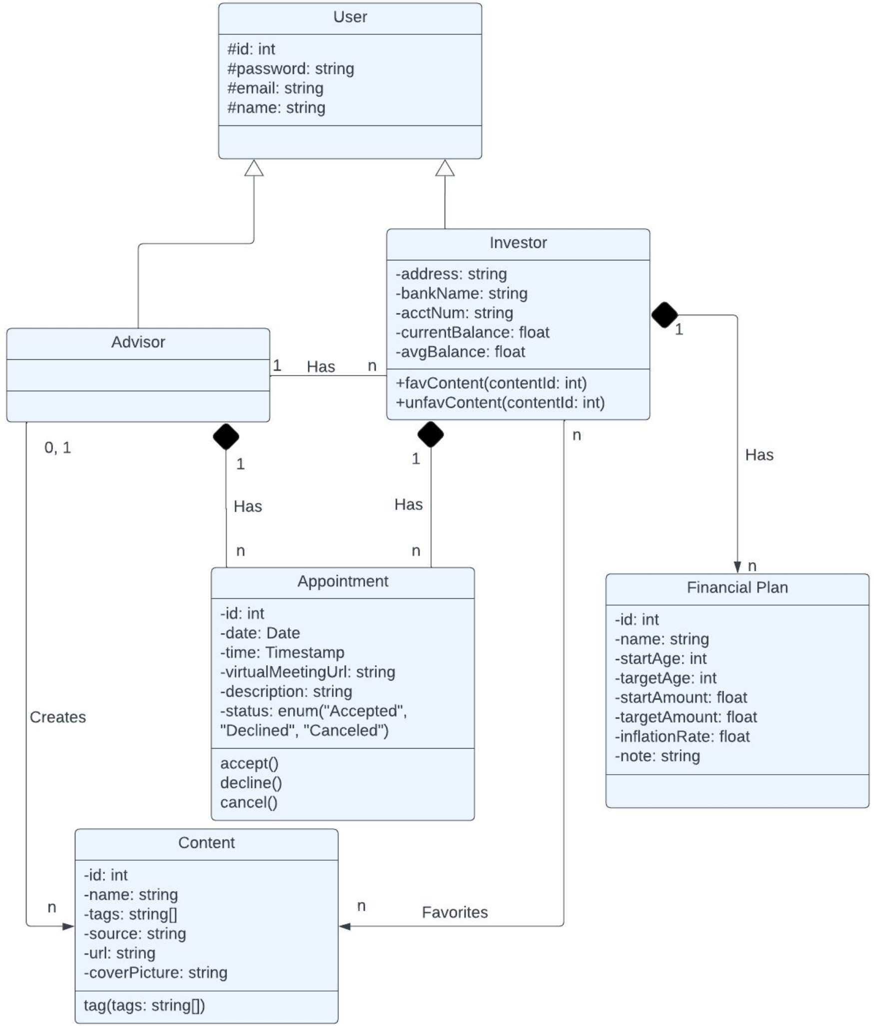
FR45: The website shall allow for Investors to register without subscribing through AMember.

NR1: The website shall be themed around the color scheme of the MoneyTree marketing definition.

NR2: The website shall follow the WCAG 2.1 standards.

NR3: The website shall serve pages to the browser in under one second.

Domain Model


User
#id: int
#password: string
#email: string
#name: string
Investor
-address: string
-bankName: string
-acctNum: string
-currentBalance: float
-avgBalance: float
+favContent(contentId: int)
+unfavContent(contentId: int)
Advisor
1
Has
n
1
Has
n
0, 1
1
Has
n
1
Has
n
n
Appointment
-id: int
-date: Date
-time: Timestamp
-virtualMeetingUrl: string
-description: string
-status: enum("Accepted", "Declined", "Canceled")
accept()
decline()
cancel()
Financial Plan
-id: int
-name: string
-startAge: int
-targetAge: int
-startAmount: float
-targetAmount: float
-inflationRate: float
-note: string
Creates
n
Content
-id: int
-name: string
-tags: string[]
-source: string
-url: string
-coverPicture: string
tag(tags: string[])
n
Favorites
n

Tech stack

IDE
Visual Studio
Visual Studio is the best option for working with .NET and C#, and we are all comfortable with it, so it is the best choice. There is also a plugin for developing Vue web apps.
https://visualstudio.microsoft.com/

Database
PostgreSQL
Client has recommended that we use Postgres, and its similarity to MySQL makes us comfortable using it as a team.
https://www.postgresql.org/

MoneyTree Plan SDK
.NET v6
.NET is required for this project as given by the client
https://dotnet.microsoft.com/en-us/

Backend
.NET v6
.NET is required for this project as given by the client
https://dotnet.microsoft.com/en-us/

Frontend
Vue
Vue is required for this project as given by client
https://vuejs.org/

Prototype


eFinPlan
Add content.
Name
Image
Source
URL
Add

First Iteration Features

FR1: The website shall allow Advisors to publish content.

FR5: The website shall allow any user to view all available content in a list.

FR6: The website shall allow Advisors to edit content that they have published.

FR10: The website shall allow the Advisor to delete content that they have published.

FR37: The website shall allow an Investor to use the MoneyTree Plan Education Fund Calculator.

FR38: The website shall allow an Investor to use the MoneyTree Plan Financial Goal Calculator.

FR39: The website shall allow an Investor to use the MoneyTree Plan Retirement Fund Calculator.

FR40: The website shall allow an Investor to use the MoneyTree Plan Social Security Calculator.

Mentor Feedback

- Our business requirements were initially too specific and ended up acting more like use cases
  - Ryland helped us generalize the business requirements based on the features that the client gave us.
- Our use cases were initially way too specific and ended up acting more like functional requirements.
  - Ryland helped us merge together use cases so that the more specific ones could be turned into functional requirements.
- We initially only had one nonfunctional requirement
  - Ryland helped us find more
  - Although we don't have many, this is because of the website's status as a local site and because any speed faster than an average website was not a requirement

Client Feedback

- Our prototype, while demonstrating the requirements and use cases of the website, will need to be edited to follow MoneyTree marketing and theming guidelines
    - This will be done once we receive the guidelines
- The client helped us figure out the requirements that could be made into features for the first iteration
    - This includes assisting in reprioritizing some similar requirements based on client demands
- The client reaffirmed for us that the nonfunctional requirements we have are sufficient
- The client will send us a template .NET and Vue package so that we can easily start development on the project
    - This will happen early next week

Thanks!