



# eFinPlan

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# Client

- Matthew Garrett
- Moneytree (owned by Accutech)
- Patrick Spencer



# Mentor Feedback

- Enjoyed the user flow of making available times and then letting Investors schedule appointments during those times
- Found issues with dates displaying incorrectly
- Likes the UI
  - Did suggest that we change some button sizes and fix an issue with a shadow
- Requested that we test the data modifier classes in eFinPlan.Core
- Helped us stop commits from going to the master branch directly
- We fixed the styling issues, tested the Core project, and restricted the master branch

# Client Feedback

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- Started by using the software
  - Said it was exactly what they were looking for
- Requested that we make pop-up modals for displaying Appointment information and fix certain button placements
  - These are the only changes they suggested that we implemented
- Had some requests for next iteration
  - Make the site only show a week in advance, not 30 days
  - Have Advisors set the meeting link and description
- Overall, they gave really high praise and mostly had things to change for next iteration, not this one

# Iteration 3

## Features

# Add, Remove and Edit an Advisor's Available Times

Feb, 7, Tuesday

1:00 PM - 3:00 PM

Edit

Delete

4:00 PM - 6:00 PM

Edit

Delete

Add

Are you sure?

Yes

No

Tuesday, 7

Start:

--:-- --



End:

--:-- --



Save

Cancel

# Approve Reject and View Pending Appointments

## Pending appointments

2/10/2023 1:26 AM 32 Minutes

2/7/2023 8:59 PM 30 Minutes

2/7/2023 11:59 PM 60 Minutes

# View Appointment Details





# Request Appointment During an Available Time

Feb, 7, Tuesday

3:03 AM - 4:04 AM [Request Appointment](#)

5:05 AM - 6:06 AM [Request Appointment](#)

3:03 AM - 4:04 AM [Request Appointment](#)

5:05 AM - 6:06 AM [Request Appointment](#)

Please Fill Out The Information Below To Finish Your Request:

Appointment Start Time:  

Duration of Appointment (In Minutes):

Description:

Meeting Link:

File:

[Submit Request](#)

[Cancel](#)

# View Next 30 Days of Available Appointment Times

<div>Feb, 7, Tuesday</div> <div>3:03 AM - 4:04 AM <a href="#">Request Appointment</a></div> <div>5:05 AM - 6:06 AM <a href="#">Request Appointment</a></div> <div>3:03 AM - 4:04 AM <a href="#">Request Appointment</a></div> <div>5:05 AM - 6:06 AM <a href="#">Request Appointment</a></div>	<div>Feb, 8, Wednesday</div> <div>4:04 AM - 8:08 AM <a href="#">Request Appointment</a></div>	<div>Feb, 9, Thursday</div> <div>8:08 AM - 10:10 AM <a href="#">Request Appointment</a></div>
<div>Feb, 10, Friday</div> <div>4:16 PM - 9:21 PM <a href="#">Request Appointment</a></div>	<div>Feb, 11, Saturday</div> <div>11:11 AM - 12:12 PM <a href="#">Request Appointment</a></div>	<div>Feb, 12, Sunday</div> <div>4:00 AM - 6:45 AM <a href="#">Request Appointment</a></div>
Feb, 13, Monday	Feb, 14, Tuesday	Feb, 15, Wednesday
Feb, 16, Thursday	Feb, 17, Friday	Feb, 18, Saturday
Feb, 19, Sunday	Feb, 20, Monday	Feb, 21, Tuesday
Feb, 22, Wednesday	Feb, 23, Thursday	Feb, 24, Friday
Feb, 25, Saturday	Feb, 26, Sunday	Feb, 27, Monday
Feb, 28, Tuesday	Mar, 1, Wednesday	Mar, 2, Thursday
Mar, 3, Friday	Mar, 4, Saturday	Mar, 5, Sunday
Mar, 6, Monday	Mar, 7, Tuesday	Mar, 8, Wednesday

# Cancel Appointments

## Approved Appointments

2/6/2023 4:04 AM 30 Minutes

Cancel

# Benefit to Client

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- We are making an entirely new system for them
- None of their other products have the ability to make appointments between Advisors and Investors
  - Would rely on Advisors and Investors to talk through phone to interact
- They now have a stylish system for Investors to view content, see their financial plans using the calculator, and contact Advisors for appointments
- This complements the other MoneyTree software that offers financial advice and planning
- Releasing right now would be completely functional and useful for the client and their users

# Plans for Iteration 4

The screenshot shows the 'eFinPlan' web application. At the top, there is a dark green header with the 'eFinPlan' logo on the left and navigation links 'Content', 'Appointments', and 'Planning' on the right. Below the header is a light gray section titled 'Your plan'. Inside this section is a white box containing several input fields and a paragraph of placeholder text. The input fields are: 'Inflation rate:' with a value of 'ex. 1,000,000', 'Starting age', 'Starting \$', 'Target age', and 'Goal \$'. Each of the last four fields has a green star icon below it. A horizontal line separates the input fields from the placeholder text below. The placeholder text is a standard Lorem Ipsum paragraph.

eFinPlan

Content Appointments Planning

Your plan

Inflation rate:  
ex. 1,000,000

Starting age  
Starting \$

Target age  
Goal \$

★ ★

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum

Financial Plan  
FR 34-36

Edits to Appointments  
FR 23 & 32

**PEYTONBERG**

