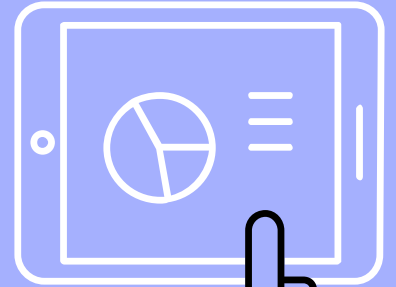
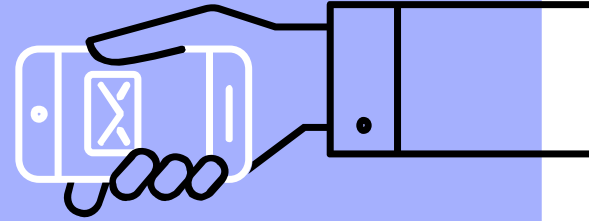
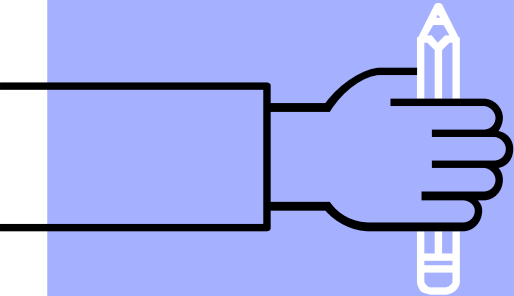
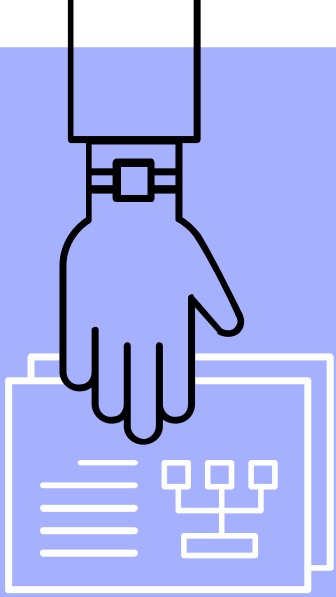
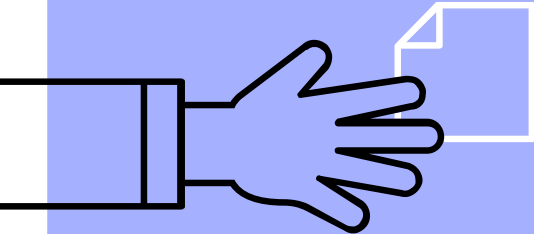
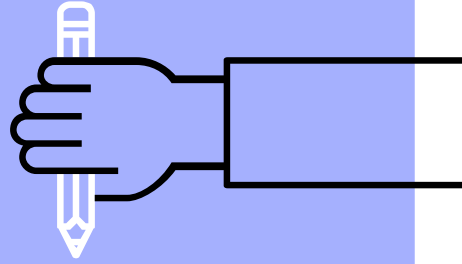


Iteration 1 eFinPlan



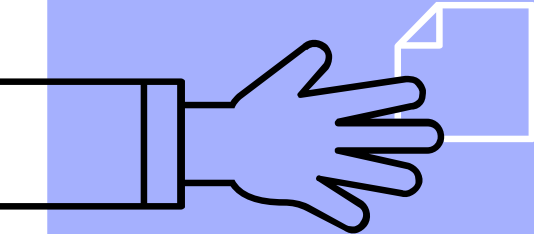
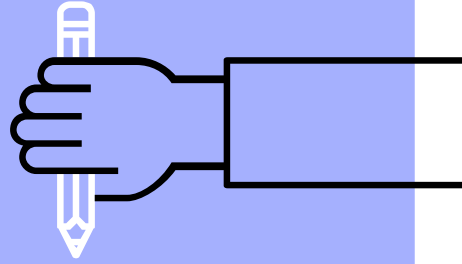
Team members:

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



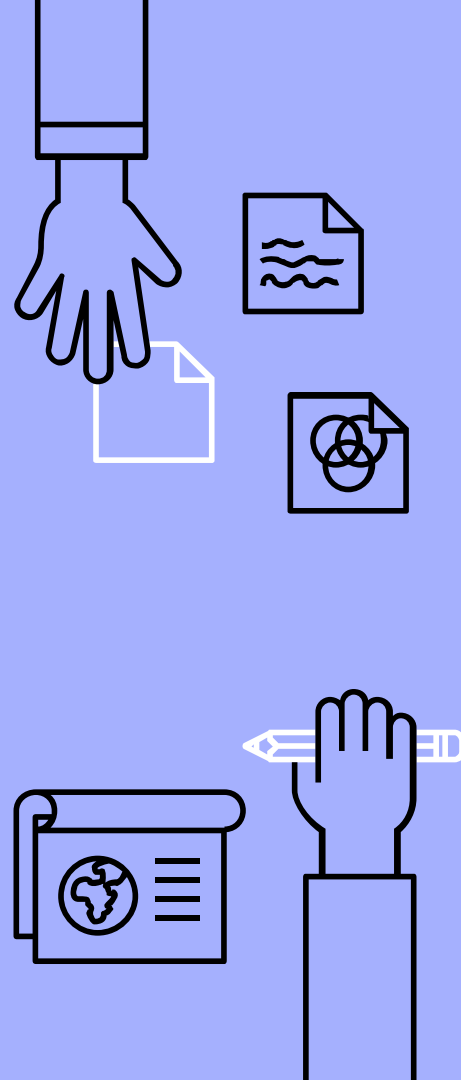
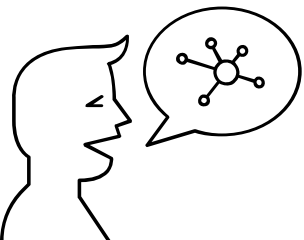
Client:

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



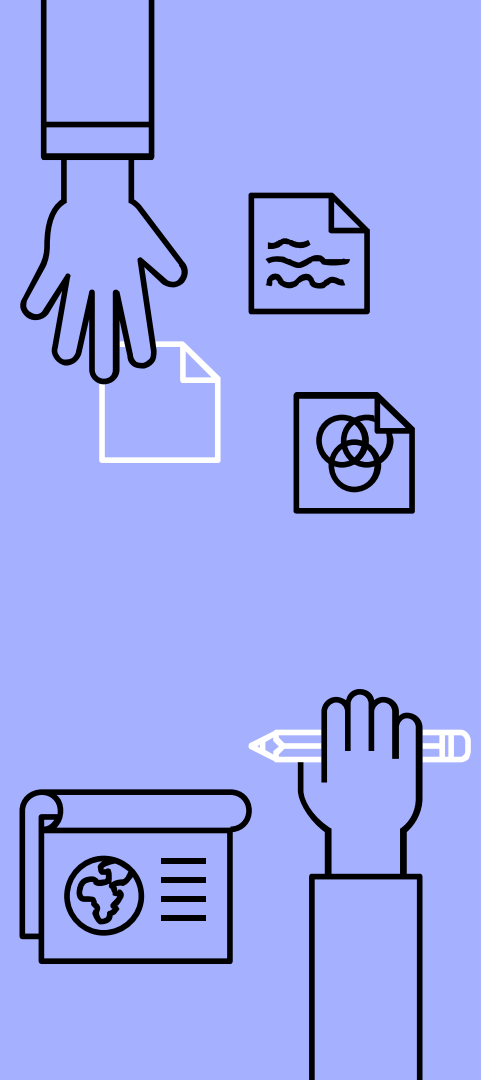
Mentor Feedback

- Suggested we use built-in .NET features, turned out to be a great addition
- Frontend is great
- Styling is coincidentally similar to the guides we will be receiving
- Next iteration needs searching and filtering
- Migrations allow the client to use the frontend even if it's hosted locally
- We need to improve tests

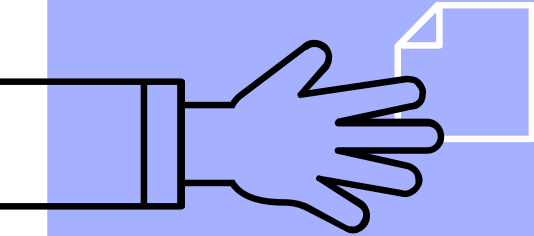
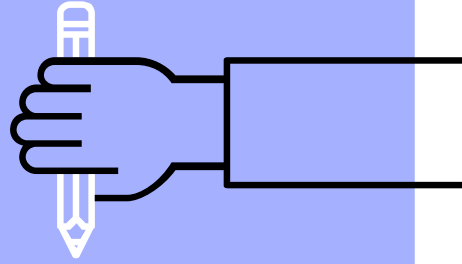


Client Feedback

- Said it is one of the best first iterations they have seen
 - They said they trust us enough to have bi-weekly meetings instead of multiple times in one week
- Everything looks good, styling to fit the marketing department will come later
 - Although they did point out some bugs with the styling that we fixed during the meeting
- Tagging system and calculator frontend should be done next
- They will communicate with FMGSuite, Broadridge, and Vestorly to add in actual content for the database migrations
- Their developers will use the SDK on different projects
- Want us to get certificates so we can deploy on AWS

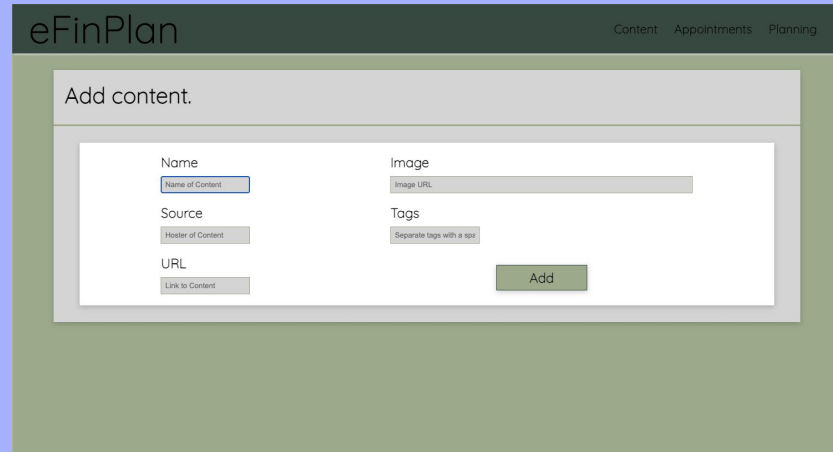


Iteration 1 Features

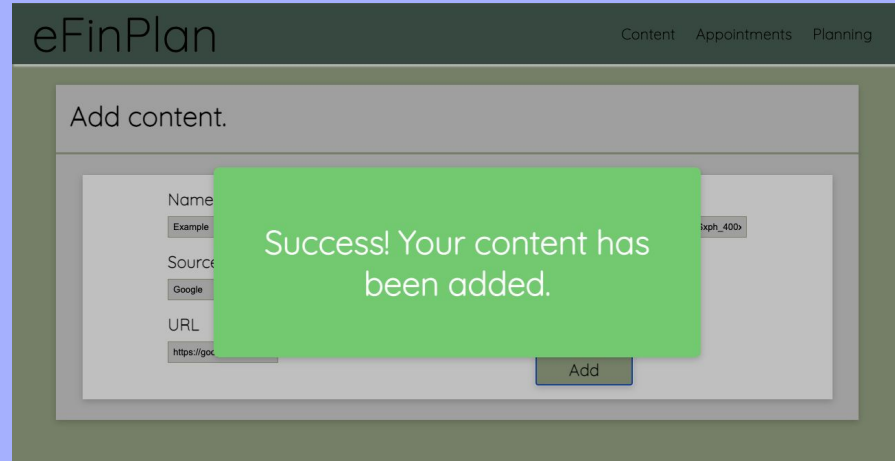


Publishing

FR1: The website shall allow Advisors to publish content.



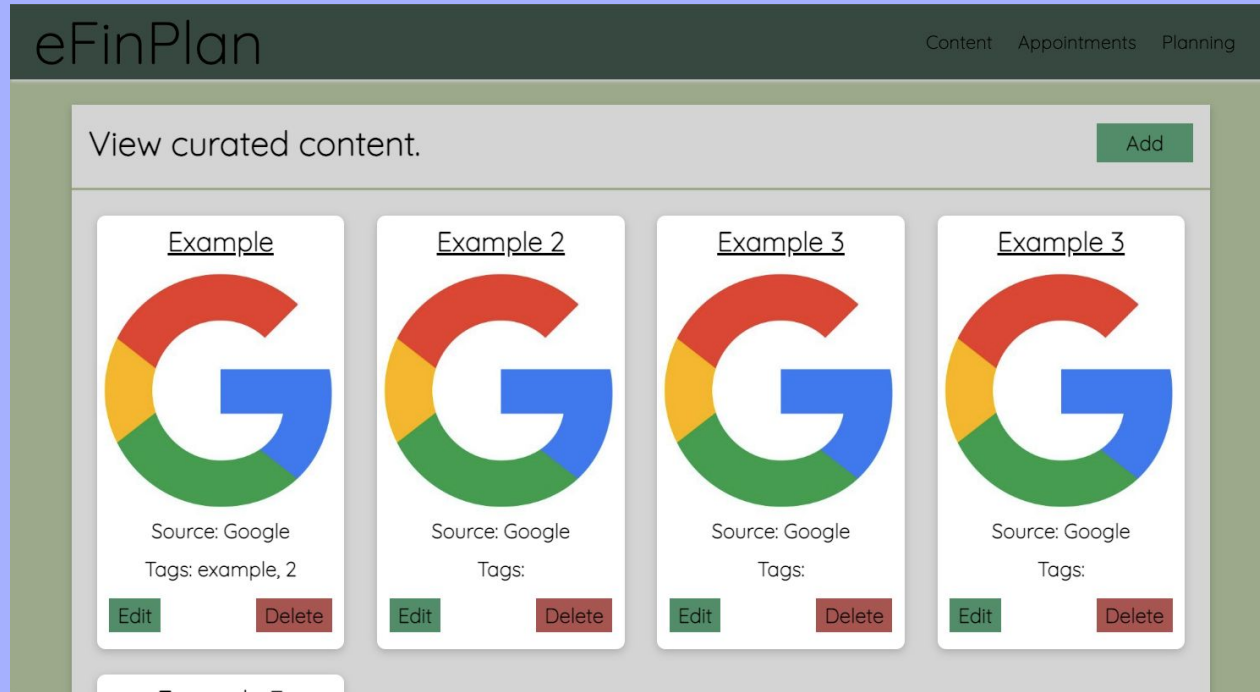
The image shows a web interface for 'eFinPlan' with a dark header bar containing the logo and navigation links: 'Content', 'Appointments', and 'Planning'. Below the header is a light gray box titled 'Add content.'. Inside this box is a white form with two columns of input fields. The left column has 'Name' (with a placeholder 'Name of Content'), 'Source' (with a placeholder 'Hoster of Content'), and 'URL' (with a placeholder 'Link to Content'). The right column has 'Image' (with a placeholder 'Image URL') and 'Tags' (with a placeholder 'Separate tags with a spc'). A green 'Add' button is located at the bottom right of the form.



The image shows the same 'eFinPlan' 'Add content.' form, but with a green success message overlay. The message reads: 'Success! Your content has been added.' The form fields are partially obscured by the message. The 'Name' field has a placeholder 'Example', the 'Source' field has a placeholder 'Google', and the 'URL' field has a placeholder 'https://goo...'. The 'Image' field has a placeholder 'xph_400'. The 'Add' button is now blue.

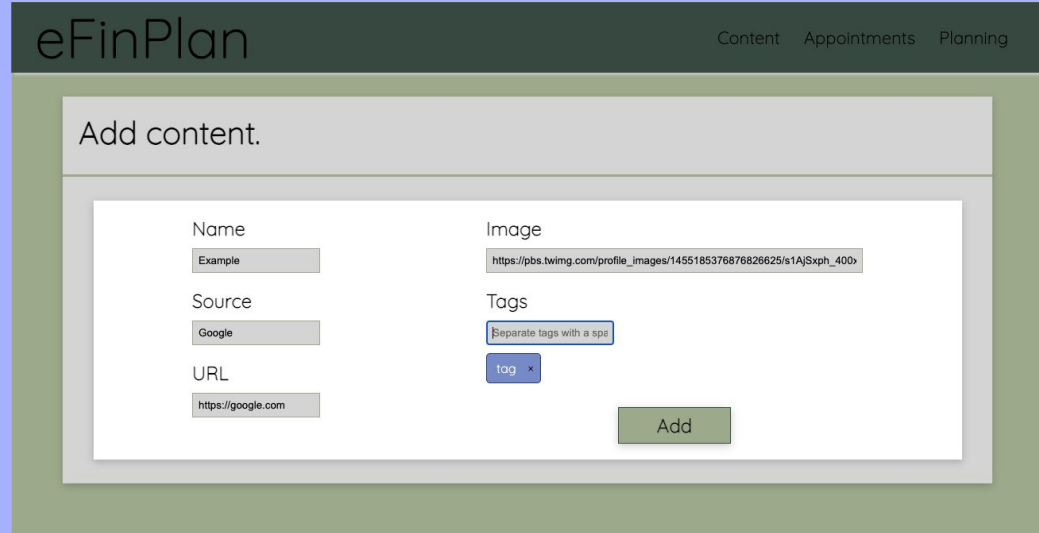
View content

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



Editing

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



The screenshot shows the 'eFinPlan' application interface. At the top, there is a dark header with the logo 'eFinPlan' on the left and navigation links 'Content', 'Appointments', and 'Planning' on the right. Below the header is a light green sidebar. The main content area is white and features a form titled 'Add content.' in a grey box. The form contains several input fields: 'Name' with the value 'Example', 'Image' with a long URL, 'Source' with the value 'Google', and 'URL' with the value 'https://google.com'. There is also a 'Tags' section with a text input containing 'Separate tags with a spa' and a button labeled 'tag x'. An 'Add' button is located at the bottom right of the form.

eFinPlan

Content Appointments Planning

Add content.

Name
Example

Image
https://pbs.twimg.com/profile_images/1455185376876826625/s1AJSxph_400x

Source
Google

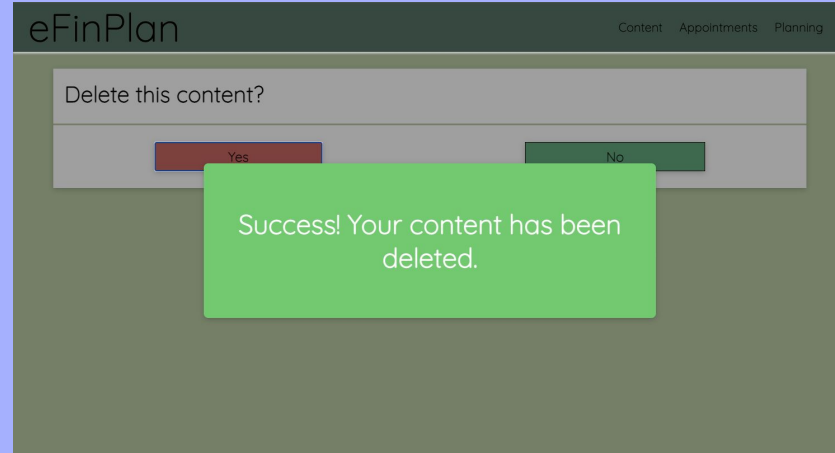
URL
https://google.com

Tags
Separate tags with a spa
tag x

Add

Deletion

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



SDK

Because the SDK is a class library, there isn't much to show visually.

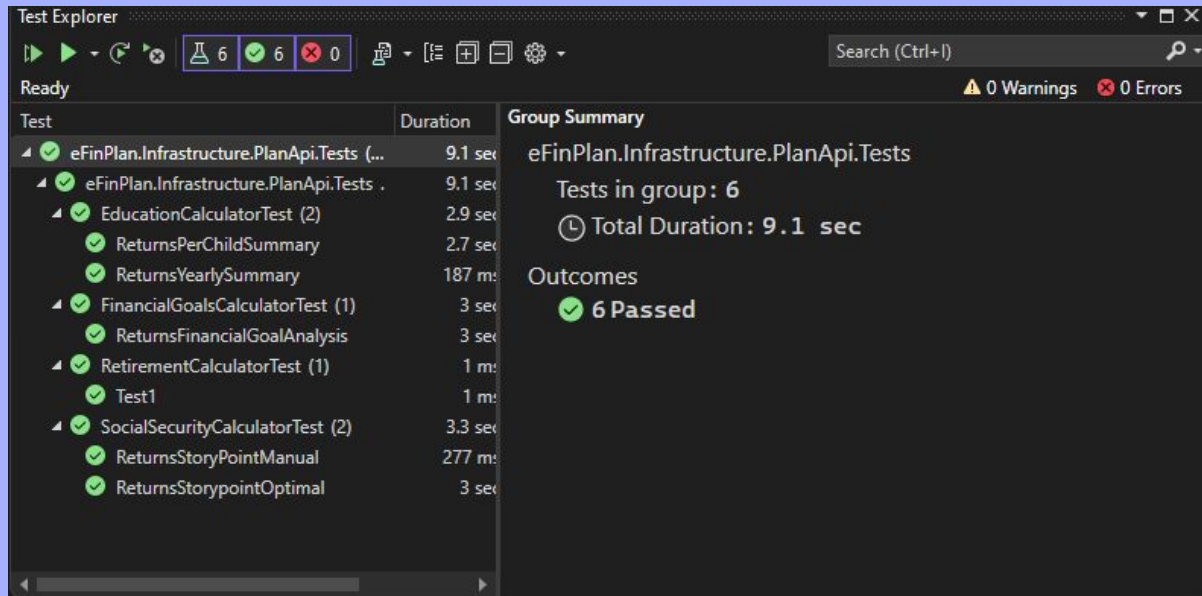
The client intends to use this SDK on various other projects.

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

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

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

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



Plans for iteration 2

- Integrate PlanApi SDK into tools on the financial planning front end. (Finish FR 37-40)
- Extend tagging system to include searching and error handling
 - FR14: If an error occurs once an Advisor tries to add tags, the website shall display an error message for five seconds.
 - FR16: If an error occurs once an Advisor tries to remove tags, the website shall display an error message for five seconds.
 - FR20: The website shall allow any user to search for content by tag using a search bar.
- Add favoriting system
 - FR17: The website shall allow for Investors to favorite content.
 - FR18: The website shall allow for Investors to unfavorite content.



Software demo

