eFinPlan

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

Client

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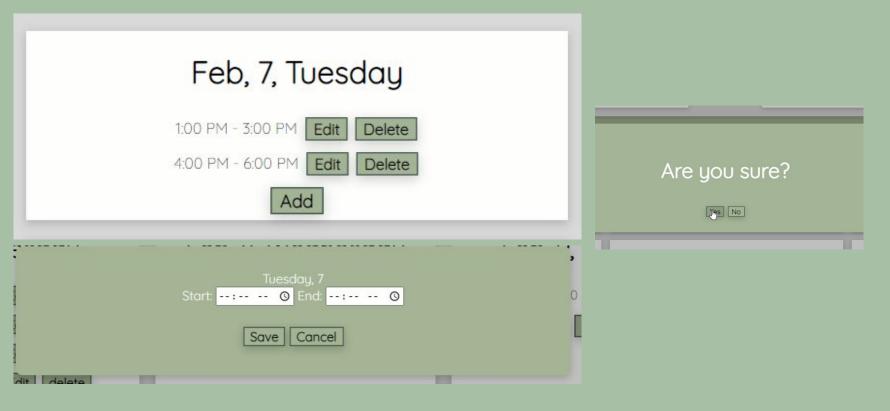-Patrick Spencer

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
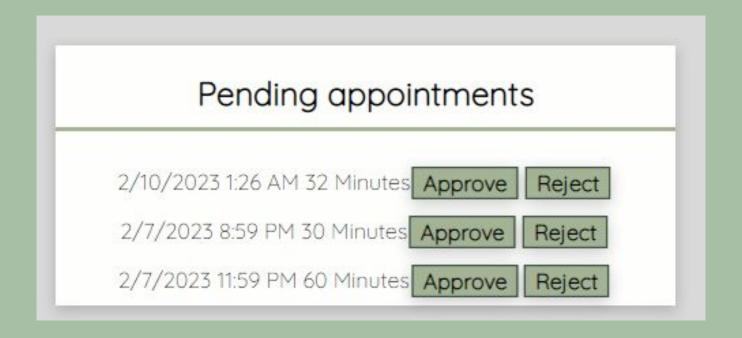
Client Feedback

- 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

dit delete

Approve Reject and View Pending Appointments

View Appointment Details
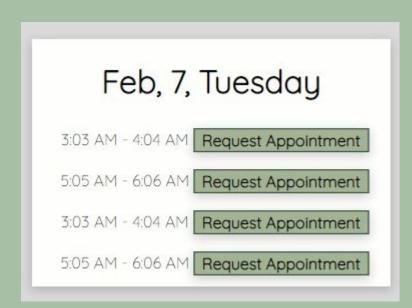
Appointment Details

1/1/1 12:00 AM

test

https://michaelnthiessen.com/force-re-render/

https://michaelnthiessen.com/force-re-render/

Exit Details Page

Request Appointment During an Available Time

View Next 30 Days of Available Appointment Times

Feb, 7, Tuesday	Feb, 8, Wednesday	Feb, 9, Thursday
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	4:04 AM - 8:08 AM Request Appointment	8:08 AM - 10:10 AM Request Appointment

Feb, 10, Friday	Feb, 11, Saturday	Feb, 12, Sunday
4:16 PM - 9:21 PM Request Appointment	11:11 AM - 12:12 PM Request Appointment	4:00 AM - 6:45 AM Request Appointment

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

Benefit to Client

- 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

Financial Plan

FR 34-36

Edits to Appointments

FR 23 & 32

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