



Trust Admin Mobile App

Iteration 3



Team Member Information

- Clayton Mercer
- Michael Keen
- Jakob Lamb
- Christo Staszewski

Client Information

Accutech Systems

- Trust and wealth management firm
- Utilizes Cheetah API for conducting business
- Administrators use Cheetah to look up information about their clients and tasks

Software

Functionality

- Single Account Relationships
- Single Account Tasks & Activities
- Single Account Transactions
- File Attachments
- Phone number quick dial in relationships

Software (continued)

Aesthetics (shown in project)

Software (continued)

Modularity (shown in project)

Software (continued)

Testing

Software (continued)

Development Environment

- Microsoft Visual Studio
- C# and .NET framework
- Xamarin mobile platform

Software (continued)

Clean code (shown in project)

Documentation

User Documentation

Feedback

Mentor feedback

- Ryland said to remove the Relationship ids from the single relationship page

Feedback (continued)

Client feedback

- Use the details document that Iris made for us to figure out what needs to be displayed for any given page
- Make sure to have the iOS UI be consistent
- Tasks and Activities: Tasks should be able to be added and resolved. Additionally, Relationships should be able to be added
- They need to decide if the API key will be provided by the user, or if it will be setup on compiling of the application.
- At some point, the transactions should be able to be created and made on a scheduled basis
- Scheduled Transactions could be an upcoming transaction | Transaction history should show previous few days. Split into 2 tabs at the top of the Transactions Page.

Future

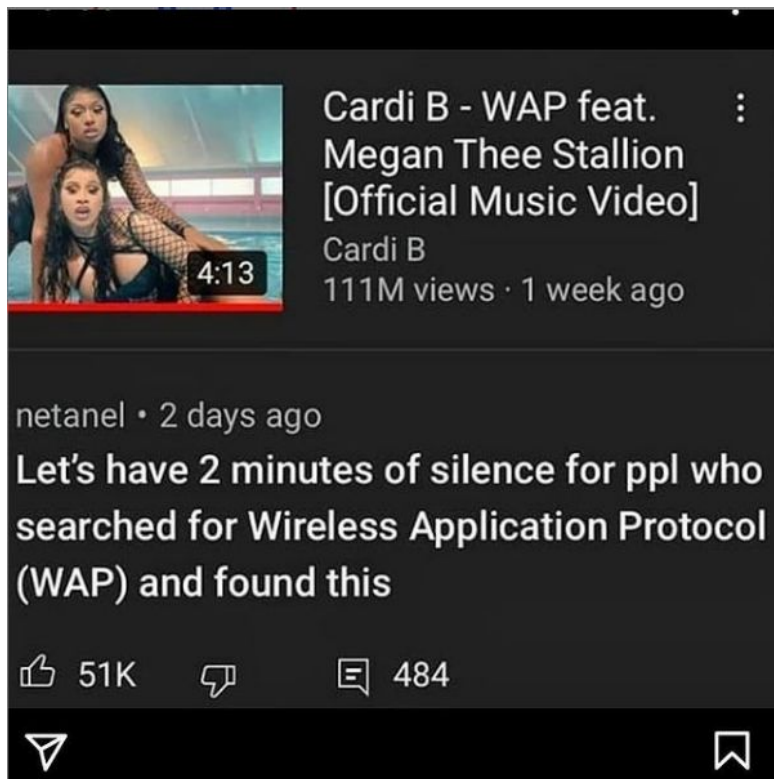
Fourth iteration features

- Update Tasks
- Create new Relationships
- Assignments page
- Reviews page
- Deployment Options
- Transactions should be Scheduled Transactions

Teamwork

- Clayton
 - Single account relationships
- Michael
 - Single account tasks & activities
- Christo
 - Single account transactions
- Jakob
 - File attachments

?



The image shows a YouTube video player interface. At the top left is a video thumbnail featuring Cardi B and Megan Thee Stallion, with a '4:13' duration label. To the right of the thumbnail, the video title 'Cardi B - WAP feat. Megan Thee Stallion [Official Music Video]' is displayed, followed by the channel name 'Cardi B' and view information '111M views · 1 week ago'. Below this, the uploader 'netanel' is noted as '2 days ago'. The main text of the video is a message about a 2-minute silence for people who searched for WAP. At the bottom, engagement metrics show 51K likes, a dislike icon, and 484 comments. The bottom navigation bar contains a share icon and a bookmark icon.

Cardi B - WAP feat. Megan Thee Stallion
[Official Music Video]
Cardi B
111M views · 1 week ago

netanel · 2 days ago

Let's have 2 minutes of silence for ppl who searched for Wireless Application Protocol (WAP) and found this

51K 484