

Trust Admin Mobile App

Iteration 4

Team Member Info

- 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
 - Add/delete relationships
 - Dismiss/resolve tasks
 - Add activities
 - Main assignments page
 - Scheduled transactions
 - New graphics



Software (continued)

- Aesthetics
- Pending Transactions for Accounts
- Resolving and Dismiss Tasks
- Add/Remove Relationships
- Add new activities for individual accounts



Software (continued)

- Modularity (shown in project)



Software (continued)

- Testing
 - Business logic testing
 - UI testing



Software (continued)

Development Environment

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



Software (continued)

Clean code (shown in project)



Documentation

- Changes to user documentation



Feedback

- Mentor feedback
 - Likes the Clean UI
 - Need more visual indicators when the app is working on something
 - Indicate what tab is active for tabbed views
 - Instead of blank pages, indicate there is “no data”



Feedback (continued)

- Client feedback



Report

- Mentor feedback on software use
 - Can the tabs on transactions/assignments be more defined
 - Research infinite scrolling again



Report (continued)

- Client feedback on software use
 - There was a app crash bug during the transactions page demo
 - Christo is looking into that
 - Can the tabs on transactions/assignments be more defined
 - Reroute after successful posts
 - Some are complete (Such as relationships and activities)



Report (continued)

- Client permissions for student symposium
 - Screenshots, but no source code



Future

- Iteration 5 features
 - Push notifications
 - Assignments Page for logged in user (Tasks/Activities)
 - UX updates for tabs
 - Update existing activities



Teamwork

(each member will talk about their role)



?

