



# Iteration 1 - Subscription Manager

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# Team Member Info

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# Client Information

## Company



## People

Nathan Householder (nathan.housholder@trustasc.com)

Patrick Spencer (patrick.spencer@trustasc.com)

Matthew Garret (matthew.garrett@trustasc.com)

## Mentor

Evan Knapke



# Mentor FeedBack

- Mid-teration
  - We need to work on getting the API from the client so that we have time to test our requests.
  - We probably do not need a database for this first iteration.
  - Make sure to prioritize the backend a bit more, to make sure it gets done.
- Before Client Meeting
  - Documentation looks good, but our section on our backend was out of date in development.md.
  - Push off small bugs that do not affect the client, for now.
  - Seems functional!
- Resulting Changes
  - Backend now only involves talking with third parties like Maxio.
  - Pushed back some planned work for the frontend to the next iteration, to focus on the core functionality of Bulk Signup.
  - Redid the backend section of development.md.



# Client Feedback

## Feedback:

- Overall everything was what they expected, if not more.
- Make sure we get the email address copied over as the license key, as this is something Moneytree does when creating a new subscription.
- Suggested to move edit button for the advisors so it wasn't next to the delete button.

## Resulting (Planned) Changes:

- Copy that email address as a license key, and update our backend to include it in the request to Maxio.
- Move the position of the edit button for easier user experience.



# Client Feedback

Results of client using the software:

- Client found the signup easy to use.
- The only issue was when editing the advisor information, the selected product was not populated, so it had to be re-selected.
- Ultimately, the client was able to create a couple of new advisors in Maxio.

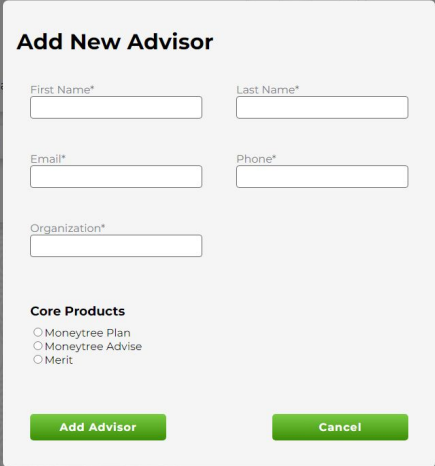


# Iteration One Features

- Add/Edit Advisor Modal
- Advisor Info Dropdown
- Edit and Delete Buttons
- Billing Info Panel
- Front End Validators
- Submission for Maxio Subscription Creation

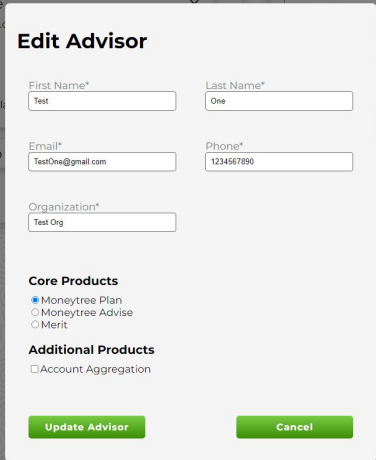
# Add/Edit Advisor Modal

The modal is reused for adding or editing an advisor. It is renamed accordingly, and when editing, the information is repopulated into the modal.



The 'Add New Advisor' modal is displayed over a blurred background of the main application interface. The modal is white with a green border and contains the following fields and controls:

- First Name\***: Text input field.
- Last Name\***: Text input field.
- Email\***: Text input field.
- Phone\***: Text input field.
- Organization\***: Text input field.
- Core Products**: A section with three radio button options:
  - ☐ Moneytree Plan
  - ☐ Moneytree Advise
  - ☐ Merit
- Buttons**: Two green buttons at the bottom, 'Add Advisor' and 'Cancel'.



The 'Edit Advisor' modal is displayed over a blurred background of the main application interface. The modal is white with a green border and contains the following fields and controls:

- First Name\***: Text input field with the value 'Test'.
- Last Name\***: Text input field with the value 'One'.
- Email\***: Text input field with the value 'TestOne@gmail.com'.
- Phone\***: Text input field with the value '1234567890'.
- Organization\***: Text input field with the value 'Test Org'.
- Core Products**: A section with three radio button options:
  - ☒ Moneytree Plan
  - ☐ Moneytree Advise
  - ☐ Merit
- Additional Products**: A section with one checkbox option:
  - ☐ Account Aggregation
- Buttons**: Two green buttons at the bottom, 'Update Advisor' and 'Cancel'.



# Advisor Info Dropdown

A dropdown menu which displays more details for each added advisor.

## Create Subscriptions

Advisor: Test One



Email: TestOne@gmail.com

Phone: 1234567890

Company: Test Org

Products: Moneytree Plan



Advisor: Test Two



Add Advisor

# Edit and Delete Buttons

any: Test Org

cts: Moneytree Plan





# Billing Info Panel

Takes in a single card to be used to pay for all advisor subscriptions.

## Billing

Card Number\*

4111111111111111

Expiration Month\*

Expiration Year\*

CW\*

Address 1

Address 2 (optional)

City\*

State\*

Zip\*

# Front End Validators

Validation for user information and billing information.

Create Subscriptions

Billing

Advisor: Test One  
Email: Test@gmail.com  
Phone: 1234567890  
Company: TestOrg  
Products: Moneytree Plan  
Advisor: Test Two

Add New Advisor

First Name\*  
First name is required

Last Name\*  
Last name is required

Email\*  
Invalid email

Phone\*  
Phone number is required

Organization\*  
Organization is required

Invalid product combination

Core Products

☐ Moneytree Plan  
☐ Moneytree Advise  
☐ Merit

Add Advisor

Cancel

Billing

Card Number\*  
Invalid credit card number

1

Expiration Month\*  
Required

Expiration Year\*  
Required

CVV\*  
Required

Address 1  
Required

Address 2 (optional)

City\*  
Required

State\*  
Required

Zip\*  
Required

# Maxio Subscription Creation

When clicking submit, submitted information is taken and creates a request to Maxio to create a subscription for each advisor added in the form.

### Create Subscriptions

Advisor: Test One

Email: TestOne@gmail.com

Phone: 1234567890

Company: Test Org

Products: Moneytree Plan

Advisor: Test Two

Add Advisor

### Billing

Card Number\*

Expiration Month\*

Expiration Year\*

CVV\*

Address 1

Address 2 (optional)

City\*

State\*

Zip\*

Submit

MAXIO

Search...

Quick Actions

MoneyTree Software...

Subscriptions

Customers

Invoices

Payments

Transactions

Catalog

Insights

Tools

Config

Subscriptions 443 Subscriptions

Import

Export

Create New Subscription

All

Search term

Subscription Status

Filter

	Subscriber	Organization	Status	Total Payments	Open Balance	Signup	Period Start	Period End	
<input type="checkbox"/>	Subscription Manager BULK TEST Subscription Manager	Subscription Manager	Canceled	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager BULK TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager 5 TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager 4 TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager 3 TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager 2 TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...
<input type="checkbox"/>	Subscription Manager TEST Subscription Manager	Subscription Manager	Trialing	\$0.00	\$0.00	11/12/2023	11/12/2023	11/26/2023	...



# Planned Iteration 2 Features

- Add additional product support to Bulk Signup
  - It currently does not support Moneytree's additional products, only the core products.
- Implement communication between Bulk Signup and Hubspot, Moneytree's CRM tool.
- Start the subscription manager. An interface that will allow users to:
  - View information such as subscription details, user details, recent activity, etc.
  - Update details/information, specifically subscription and user details.
- We will also work on some Bulk Signup bugs.



# Retrospection


## Sacrifices:

- We sacrificed the correctness of the software: we left in some minor bugs, or just did quick fixes in order to get the software working.
- We sacrificed reusability: we could have made more reusable components or dictionaries.

## How we plan to approach the next iteration:

- Clean up Bulk Signup, such as bugs or small missing things.
- Focus on architecturally planning out the Subscription Manager Dashboard.
  - We ran into issues this iteration by making assumptions on the front end side, which did not accurately match what the backend wanted.
  - This resulted in changes to the fields on the front end, in order to match our API.

# Interesting Slide



```
$ start NEW_DAY
$ wake_up
$ start GET_OUT_OF_BED
$ start BREAKFAST
$ ERROR: cereals not found
$ ERROR: milk not found
$ skip_breakfast
$ start DRIVE_TO_WORK
$ start DRINK_COFFEE
$ start WORK
$ ALERT: deadline is today
$ start PANIC
$ init_anxiety
$ skip_dinner
$ DELIVERED PROJECT SUCCESSFULLY
```

```
// my life cycle
```

```
while ($me.isAlive())
{
    $me.eat();
    $me.sleep();
    $me.code();
}
```