



Iteration 3 - Subscription Manager

Connor, Drew, Davis, Eyvn, Conner



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
 - He clarified and explained how to deal with multiple promises. He showed how to make a list of promises and wait until they are resolved.
 - He thought our idea for multi-dashboards was a cool solution
 - We are making good progress
- Before Client Meeting
 - He said we are doing a great job and that invoices looks good
 - He said that he thinks that our mutli dashboard setup looks nice, and agrees that it will be super nice when editing dashboards in the future, since you can just drop components ittle into each dashboard
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- Resulting Changes
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Client Feedback

Feedback:

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Resulting (Planned) Changes:

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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 Three Features

- View Invoices
- Ability to pay invoices
- Show customer billing information/editing
- Multiple product dashboards (One for each core product)
- Shared component library, stores, and api services.











View Invoices

John Doe

Dashboard

Billing

Invoices

INVOICES						
	ID	Date	Product	Status	Amount	Amount Due
	INV-21061		Total Online (Plan)	Pending	\$2690.00	\$2690.00
	INV-21054	2023-12-15	Total Online (Plan)	Canceled	\$1800.63	\$1800.63
	INV-20999	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20997	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20995	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20993	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20991	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20989	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20987	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
	INV-20985	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00

Prev12Next

Ability to Pay Invoices

John Doe

Dashboard

Billing

Invoices

INVOICES

ID	Date	Product	Status	Amount	Amount Due
INV-21061		Total Online (Plan)	Pending	\$2690.00	\$2690.00
INV-2105				800.63	\$1800.63
INV-2099				.00	\$0.00
INV-2099				.00	\$0.00
INV-2099				.00	\$0.00
INV-2099				.00	\$0.00
INV-2099				.00	\$0.00
INV-2099				.00	\$0.00
INV-2098				.00	\$0.00
INV-20987	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00
INV-20985	2023-12-03	Total Online (Plan)	Paid	\$0.00	\$0.00

Prev12Next

INV-21061

Public Invoice URL:

https://www.chargifypay.com/invoice/inv_bb29n9tz49hy4?token=nngpxk4i7298dn6cngyw95my

Invoice Segments

ID	Date	Product	Amount	Amount Due
INV-21063		Total Online (Plan)	\$1345.00	\$1345.00
INV-21062		Total Online (Plan)	\$1345.00	\$1345.00

Close

Multiple Product Dashboards

John Doe

Dashboard

Billing

Invoices

Advise Dashboard

Total Payment Due	Next Payment Date	Last Payment Date
\$1345.00	12/16/2024	12/16/2023

Total Online (Plan)

\$1345

*Core ProductNext Payment: 12/16/2024

John Doe

Dashboard

Billing

Invoices

Merit Dashboard

Total Payment Due	Next Payment Date	Last Payment Date
\$45.00	2/16/2024	1/16/2024

Merit TEST

\$45

*Core ProductNext Payment: 2/16/2024

John Doe

Dashboard

Billing

Invoices

Plan Dashboard

Total Payment Due	Next Payment Date	Last Payment Date
\$1345.00	12/16/2024	12/16/2023

Total Online (Plan)

\$1345

*Core Product
Account Aggregation ONNext Payment: 12/16/2024



Planned Iteration 4 Features

- Customer Information Editing
 - Create a section in the dashboard to populate customer information, so that the customer can view it and update it if needed
- Spinners on API calls
- Onboarding Project
 - This is a new project separate from both Bulk Signup and the Subscription Manager Dashboard.
 - This iteration will focus on getting it started up, and include 1 or 2 pages of information gathering such as customer signup information, and broker or company information
- Dashboard redesign
 - Alter the layout of the Subscription Manager Dashboard to be more user friendly, less redundant, and more aesthetic



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();
}
```