Iteration 4 - Subscription Manager

Connor, Drew, Davis, Eyvn, Conner

Team Member Info

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Client Information

Company

moneytree®

People

Nathan Householder (nathan.housholder@trustasc.com)

Patrick Spencer (patrick.spencer@trustasc.com)

Matthew Garret (matthew.garrett@trustasc.com)
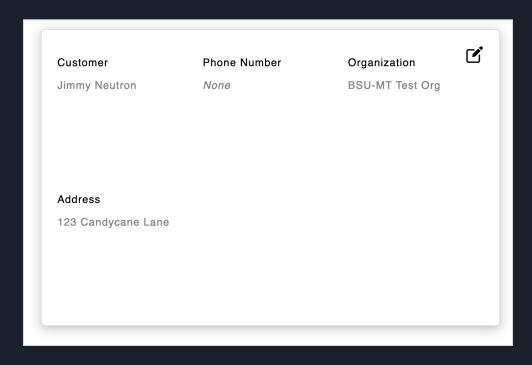
Mentor

Evan Knapke

Iteration Four Features

- Edit Billing Information
- View Customer Information
- Edit Customer Information
- Updated Dashboard Layout
- Invoice Subtotal Chart
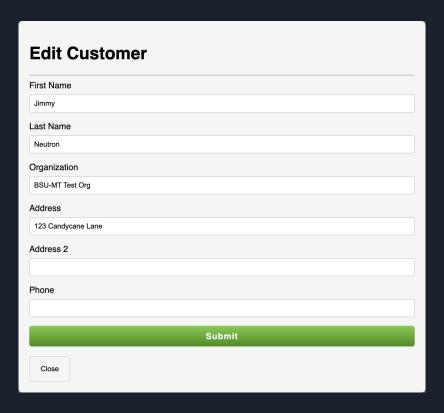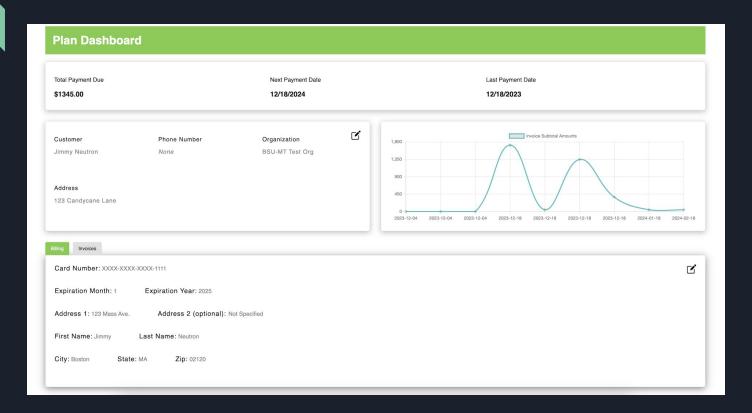- Onboarding Info Collection (Start)

Edit Billing Information

Edit Billing

Card Number

XXXX-XXXX-XXXX-1111

Expiration Month

10

Expiration Year

2027

CVV

First Name

Davis

Last Name

Final

Address 1

Orange St

Address 2 (optional)

City

Cleveland

State

OH

Zip

29292

Submit

Close

View Customer Information

Customer

Jimmy Neutron

Phone Number

None

Organization

BSU-MT Test Org

Address

123 Candycane Lane

Edit Customer Information

Edit Customer

First Name

Jimmy

Last Name

Neutron

Organization

BSU-MT Test Org

Address

123 Candycane Lane

Address 2

Phone

Submit
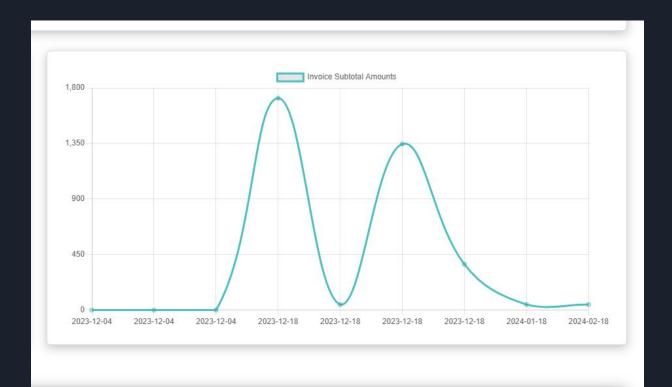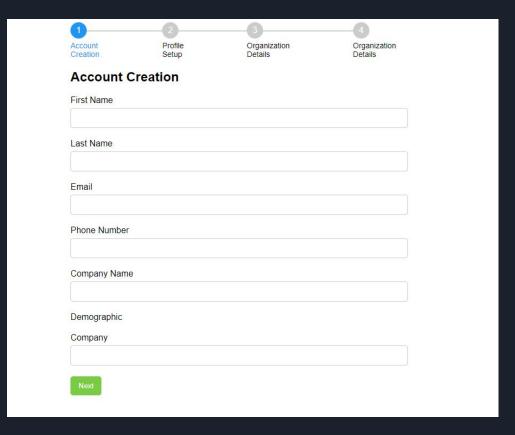
Close

Updated Dashboard Layout

Invoice Subtotal Chart

Onboarding Info Collection (Start)

Mentor FeedBack

- Mid-teration
  - Evan said our layout changes looked clean
  - We discussed backend rewrites, and Evan said it may not be worth sacrificing time if our API already works fine
  - Evan said our modal component was nice, since it is generic
- Before Client Meeting
  - Evan said our dashboard looks "great"
  - Evan said our edit modals were nice since they are consistent with each other
  - Evan said the dashboards will probably end up looking identical eventually
- Resulting Changes
  - We plan to hold off on backend rewrites until potentially later in the last iteration
  - We plan to update dashboards to mostly consistent with each other, style wise

Client Feedback

Feedback:

- Our subscription manager dashboard looks great.
- Bulk signup can be altered to be more intuitive, by giving an order to things.
- We can experiment with the invoice chart and making it more detailed for each product.
- Incorporate different colors to distinguish products on the chart.

Resulting (Planned) Changes:

- Update Bulk Signup to be a two step process, to ensure there is an order of what to do.
- Make sure the order is intuitive, meaning the user will naturally do the correctly intended "first step".
- Make the invoice chart more detailed.

Client Feedback

Results of client using the software:

- The client, Matt in this case, used the software in person at Accutech, and tested all of our software and its features.
- Matt used the software for about 15-20 minutes, and thought the software was super clear to use.
    - Specifically, he thought the dashboard was clear to use. When using Bulk Signup he instinctively started filling out form fields, which is intended to be the second step of bulk signup.
- He tried to add both the expiration month and year into the same field, even though they are labeled differently, so that is something to keep in mind in each of our projects.

Planned Iteration 5 Features

- Take in and save customer information (Onboarding Project)
  - Front end components to take in information
  - Front end validation
  - Backend endpoints to pass and save data for the customer
- Take in and save metadata (Onboarding Project)
  - Front end components to take in information
  - Front end validation
  - Backend endpoints to pass and save data for the customer
- Dashboard Finishing Touches (Subscription Manager Dashboard)
  - Plan with client, and update unique colors/styles for the different dashboards
  - Adjust customer info and billing info component to look better
  - Separate reload functions for customer info and billing info
- Bulk Signup steps
  - Make it clear that the first step of Bulk Signup is to add advisors, and the second is to enter billing information.

TEAMWORK