Iteration 1 - Subscription Manager

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Client Information

Company

People

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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  - Documentation looks good, but our section on our backend was out of date in development.md.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 wasnt 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:

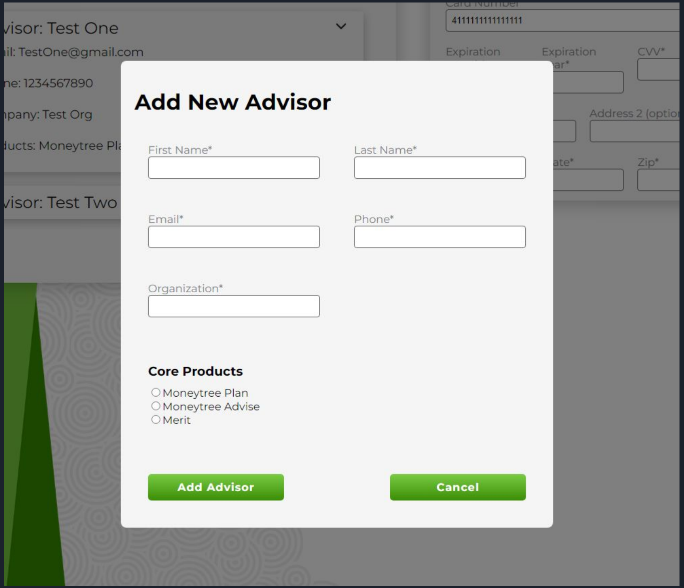
- Client found the signup easy to use.
- The only issue was when editing the advisor information, the selected product was not populated, so it had to be re-selected.
- Ultimately, the client was able to create a couple of new advisors in Maxio.

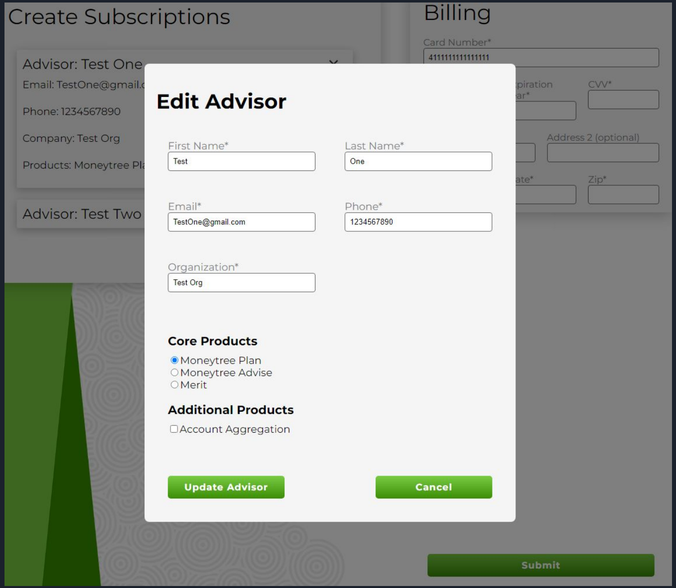
Iteration One Features

- 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

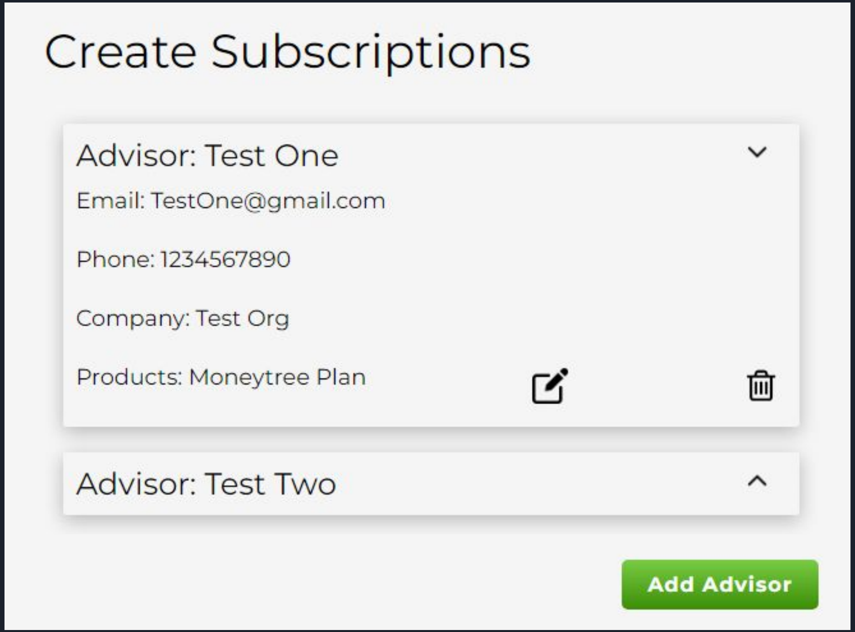
The modal is reused for adding or editing an advisor. It is renamed accordingly, and when editing, the information is repopulated into the modal.



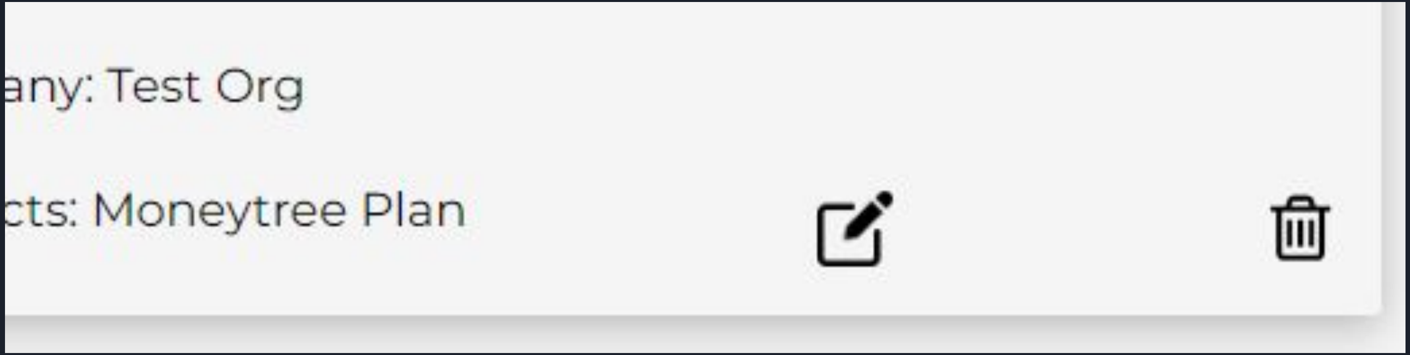


Advisor Info Dropdown

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



Edit and Delete Buttons

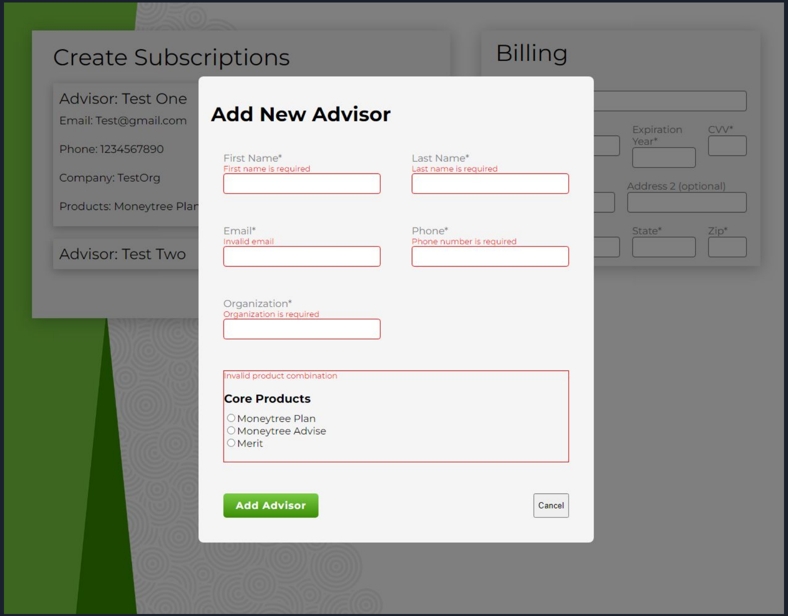


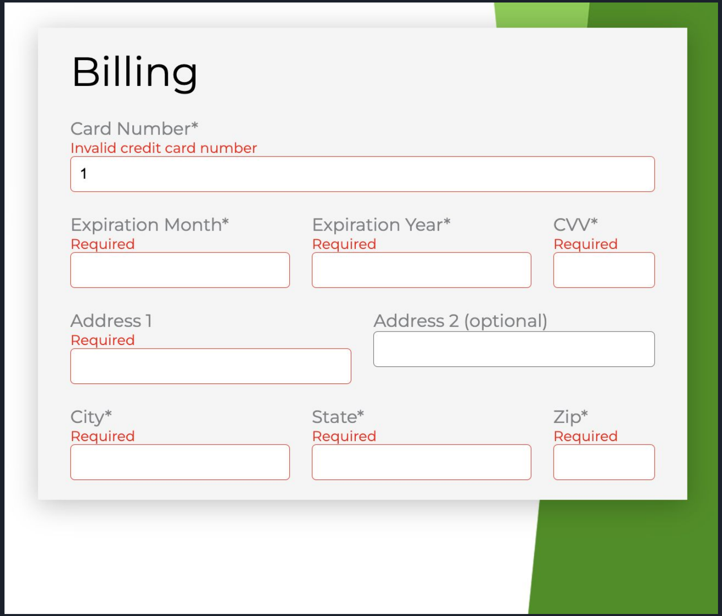
Billing Info Panel

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

Front End Validators

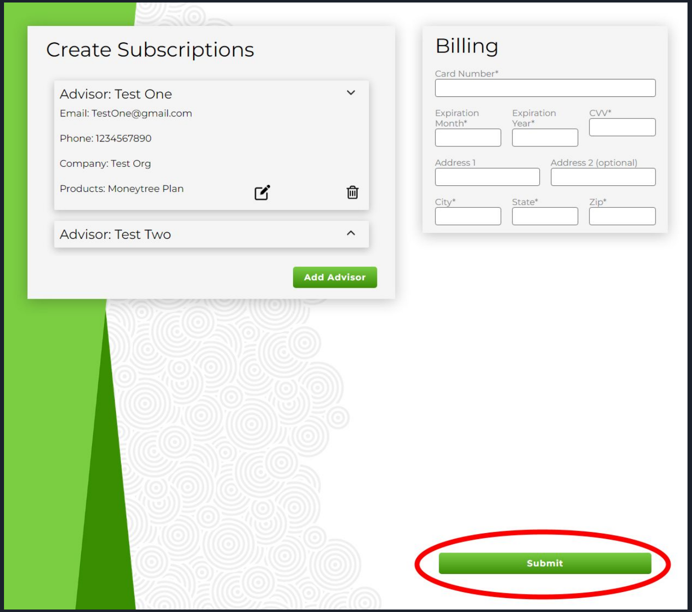
Validation for user information and billing information.

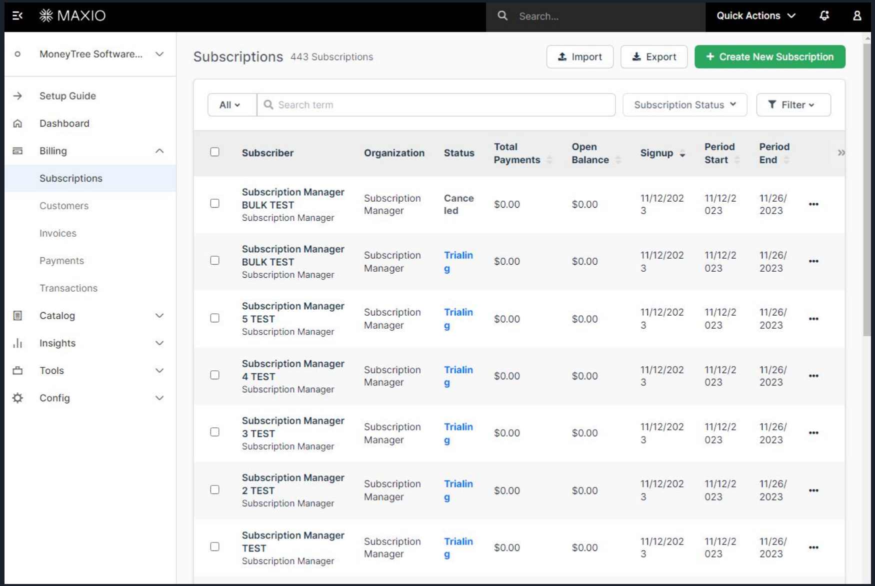




Maxio Subscription Creation

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





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();
}
```