Iteration 5 - Subscription Manager

Connor, Drew, Davis, Eyvn, Conner

Team Member Info

Drew Heiss - adheiss@bsu.edu

Connor Yeager - cjyeager@bsu.edu

Conner Um - cmum@bsu.edu

Davis Knight - davis.knight@bsu.edu

Evyn King - ecking@bsu.edu

Client Information

Company

moneytree®

People

Nathan Householder (nathan.housholder@trustasc.com)

Patrick Spencer (patrick.spencer@trustasc.com)

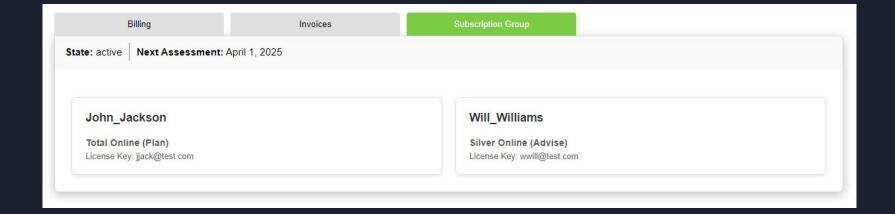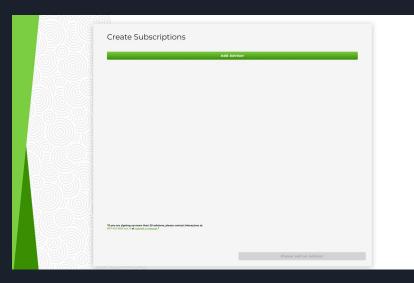Matthew Garret (matthew.garrett@trustasc.com)

Mentor

Evan Knapke

Iteration Five Features

- Subscription Group Overview tab
- Bulk Signup steps
- Create custom fields from Onboarding submission
- Dashboard finishing touches
- Dashboard packages

Subscription Group Overview tab

Billing	Invoices	Subscription Group

State: active | **Next Assessment:** April 1, 2025

John_Jackson

Total Online (Plan)
License Key: jjack@test.com

Will_Williams

Silver Online (Advise)
License Key: wwill@test.com

Bulk Signup steps

Create custom fields from Onboarding submission

```csharp
[HttpPost("CreateMetadata/{resourceId}")]
public async Task<IActionResult> CreateMetadata(int resourceId, [FromBody] JObject requestBody)
{
    var metadataList = new List<MaxioMetadata>();

    foreach (var property in requestBody.Properties())
    {
        metadataList.Add(new MaxioMetadata { Name = property.Name, Value = property.Value.ToString() });
    }

    try
    {
        var createdMetadata = await _maxioService.CreateMetadata("customers", resourceId, metadataList);
        return Ok(createdMetadata);
    }
    catch (Exception ex)
    {
        // Log the exception or handle it as needed
        return StatusCode(500, $"Internal Server Error: {ex.Message}");
    }
}
```

Dashboard finishing touches

State: active | **Next Assessment:** April 1, 2025

Aggregated Invoice Subtotals ~~Total Online (Plan)~~

Card Number: XXXX-XXXX-XXXX-1111

Expiration Month: 6

Expiration Year: 2027

Address 1: 3133 Paradise Cir

Address 2 (optional): Not Specified

First Name: John

Last Name: Jackson

City: Newburgh

State: IN

Zip: 47630

Dashboard packages

```ts
<template>
  <div id="plan-dashboard"></div>
</template>

<script setup lang="ts">
import { onMounted} from 'vue';
import { createPlanDashboardApp } from 'plan-dashboard';

let planDashboardApp;

onMounted( hook: () => {
  planDashboardApp = createPlanDashboardApp(73050399);
  planDashboardApp.mount( rootContainer: '#plan-dashboard');
});

</script>
```

Mentor FeedBack

- Mid-teration
  - Multiple products in bulk signup is not necessary.
  - Focus on bugs since the main features are mostly complete.
  - Keyboard shortcuts would be a good addition for the modal.
  - Format numbers on the invoice chart.
- Before Client Meeting
  - Subscription Group Overview looks awesome.
  - The onboarding form will be a good start when the project transfers over.
  - Overall, great job on the project this entire year.

Client Feedback

Feedback:

- The Subscription Group Overview addition will be great for the future of the company.
- The invoice chart showing single dots when trialing is a great addition
- The Onboarding form should create a new customer and then add custom fields after.
- Billing modal textboxes should populate with placeholder text values rather than just. background text.
- Nathan is thrilled with what we have developed and believes users will love the software we have built.

Client Feedback

Results of client using the software:

- Nathan used the software in person at Accutech, and tested all of our software and its features.
- Nathan used the software for about 10 minutes and was overall extremely happy with it and gracious of the work we have done.
  - It seemed very straightforward and easy for him to use.
- One slight issue was that when Nathan edited the credit card information, he left some fields blank due to misleading placeholder text, which caused the validation to fail when submitting, so he had to go back and fill in the missing information.

Teamwork

Davis: Worked on the Bulk Signup steps feature, Subscription Group Overview backend, various dashboard bugs, and backend tests.

Drew: I worked on the Subscription Overview frontend, several bugs, the chart updates, and packaged the dashboards to be npm installed in any external project.

Conner: I worked on the Custom Metafield backend which included a new API function and endpoint.

Connor: Hooked up endpoint to frontend from Conner Um's work., and shortcuts.

Evyn: Worked on adding modal shortcuts