Iteration 2 - Subscription Manager

Connor, Drew, Davis, Evyn, 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
  - Progress on the front end is well-organized, with tasks sectioned off for efficient distribution.
  - We should hold off on implementing Hubspot communication for now, until we get further information
  - Positive feedback from Evan on our current progress and plan for the rest of the iteration.
- Before Client Meeting
  - Discussed updates and client queries; praised for updated Docker documentation.
  - Helped us with an optimal method for pulling subscription information.
  - He helped us come up with potential implementations of a simple login for customer ID retrieval.
  - He discussed Jira rules and automated test setups for us.
- Resulting Changes
  - Changed what we use to pull information, now using customer ID instead of the original plan to use license key
  - Decided to potentially use URL params to get Customer ID in the future

Client Feedback

Feedback:

- The subscription manager dashboard was positively received; considered a great development.
- The client suggested considering separate dashboards for different product types like 'Advise' and 'Plan'.
- Encouraged to show invoice history on the dashboard if feasible.
- Bulk Signup feature for core and additional products deemed "perfect as is."

Resulting (Planned) Changes:

- Explore the possibility of creating separate dashboards for different product subscriptions.
- Integrate invoice history display into the subscription manager dashboard.
- Continue maintaining the current functionality and design of the Bulk Signup feature.
- Await further clarifications on payment information editing and its reflection in Maxio.

Client Feedback

Results of client using the software:

- The new additional products/components support in bulk sign up successfully reflected in Maxio.
- Subscription manager dashboard effectively displays additional products attached to core product subscriptions.
- Client queries and discussions revealed key areas for future focus, including payment method editability and information display on the dashboard.
- Nathan to provide further guidance in the next meeting regarding payment editing and product dashboard separation.

Iteration Two Features

- Subscription Manager
  - Dashboard
    - Display Clients Subscription Information
  - Billing Panel
    - Display & Allow Editing of Billing Information
- Response Model for new API calls
- Add additional product support to Bulk Signup
- Fix Iteration I Bugs
  - Edit Advisor - Product Selection Repopulation

Subscription Manager Dashboard

Allows the current Advisor to view their general subscription information based on a customer ID

John Doe				
Dashboard				
Billing				

SUBSCRIPTIONS

Total Payment Due	Next Payment Date	Last Payment Date	Total Subscriptions
$1345.00	12/16/2023	12/2/2023	1

Total Online (Plan)
*Core Product
Account Aggregation **ON**

$1345
Next Payment: 12/16/2023

Response Model for New API Calls

Calls two Maxio endpoints, oops through the response for relevant data, and creates a new JSON model for it.

```
"subscriptions": [
    {
        "subscriptionDetails": {
            "id": 70296443,
            "product": [
                "id": 5802271,
                "name": "Total Online (Plan)"
            ],
            "state": "trialing",
            "trial_started_at": "2023-12-02T19:57:34-05:00",
            "trial_ended_at": "2023-12-16T19:57:34-05:00",
            "activated_at": null,
            "created_at": "2023-12-02T19:57:34-05:00",
            "updated_at": "2023-12-02T19:57:36-05:00",
            "current_period_started_at": "2023-12-02T19:57:34-05:00",
            "current_period_ends_at": "2023-12-16T19:57:34-05:00",
            "payment_collection_method": "automatic",
            "total_revenue_in_cents": 0,
            "product_price_in_cents": 134500,
            "product_price_point_id": 755152
        },
        "components": [
            {
                "component": [
                    "id": 668808240,
                    "name": "Account Aggregation",
                    "kind": "on_off_component",
                    "unit_name": "on/off",
                    "enabled": true,
                    "currency": "USD",
                    "allocated_quantity": 1,
                    "component_id": 1357380,
                    "component_handle": "account_agg",
                    "allow_fractional_quantities": false,
                    "subscription_id": 70296443,
                    "recurring": true,
                    "upgrade_charge": null,
                    "downgrade_credit": null,
                    "description": "This subscription has account aggregation enabled.",
                    "archived_at": null,
                    "price_point_id": 1396531,
                    "price_point_handle": "original",
                    "price_point_type": "default",
                    "price_point_name": "Original",
                    "use_site_exchange_rate": true,
                    "product_family_id": 1413724,
                    "product_family_handle": "money-tree-software-ltd-billing-plans",
                    "display_on_hosted_page": false,
                    "created_at": "2023-12-02T19:57:34-05:00",
                    "updated_at": "2023-12-02T19:57:34-05:00"
                ]
            }
        ]
    }
]
```

Subscription Manager Billing Panel

Allows the current Advisor to view & edit their billing information

Product Selection Repopulation

Fixed the Iteration I bug where the edit advisor feature was not selecting the advisor's initial product selection

Create Subscriptions

Advisor: John Doe

Email: johndoe@gmail.com

Phone: 1234567890

Company: None

Product: Moneytree Plan

Add Advisor

Edit Advisor

First Name*
John

Last Name*
Doe

Email*
johndoe@gmail.com

Phone*
1234567890

Organization*
None

Core Products
- Moneytree Plan
- Moneytree Advise
- Merit

Additional Products
- Aggregation

Update Advisor   Cancel

Add Additional Products

Added support for Moneytree additional product selection & corresponding data displaying in the Advisor's Dropdown

Core Products

- ⦿ Moneytree Plan
- ◯ Moneytree Advise
- ◯ Merit

Additional Products

- ☑ Aggregation

Core Products

- ◯ Moneytree Plan
- ◯ Moneytree Advise
- ⦿ Merit

Username*

admin

Advisor: John Doe

Email: johndoe@gmail.com

Phone: 1234567890

Company: None

Product: Moneytree Plan

Additional Products: Aggregation

Planned Iteration 3 Features

- The ability to edit payment information in the billing panel
  - This could involve implementing subscription groups to support Bulk Signup
- Retrieve and display invoice history in the dashboard
- Add support for multiple core products in the dashboard
- Add ability to edit a subscription
  - This would include something like adding an additional product to their subscription

Retrospection

Sacrifices:

- We sacrificed "completeness" when it comes to the billing info panel. We realized we may need to rework how subscriptions are grouped, so we pushed it off to get more client feedback.
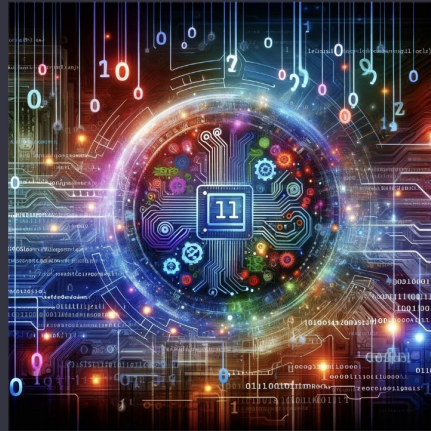
How we plan to approach the next iteration:

- Create plan for subscription groups, related to editing billing info.
  - This will depend on Client feedback we should get next week
- Keep a better flow of communication with client. The further we get into this project, we just keeping having more and more questions related to Maxio, which many times the client does not have a direct answer for right away

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