Subscription Manager

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Client Information

Company

People

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Mentor

Evan Knapke

Business Requirements

Bulk Sign Up

The system must support the bulk sign-up of users. Currently, the manual, one-by-one entry of user information is time-consuming. It should handle the registration of large groups, accommodating 5, 10, 100, or more advisors in a single sign-up.

Unified Subscription View

Users must be able to view and manage all their Moneytree subscriptions in one centralized location. This aims to enhance the user experience by consolidating subscription data and making it easily accessible.

Subscription Modification

Users must have the flexibility to modify their subscription details. Currently, there is no streamlined way to do this. Whether they need to upgrade, add another service, or make other adjustments, users should find this process easy to do.

Use Cases

UC1: View Subscription Details

Reason: Users need to view details of their subscriptions.

Actors: Advisor

Flow:

A. Advisor logs into system
B. Advisor navigates to the subscription management page
C. System retrieves and displays the advisor’s subscription details

Business Req: Unified Subscription View

Use Cases Cont.

UC2: Bulk Sign-up of Advisors

Reason: Bulk sign-up feature is essential for larger organizations. Eliminates one-by-one registrations

Actors: Advisor

Flow:

A. Account manager navigates to bulk sign-up page
B. Account manager enters details of first advisor
C. Account manager uses the interface to dynamically add more advisors
D. Account manager submits form
E. System processes the data and registers the advisors

Business Req: Bulk sign-up

Use Cases Cont.

UC3: Modify Subscription Details

Reason: Users may need to adjust their subscription details based on preferences

Actors: Advisor

Flow:

A. Advisor Logs Into System
B. Advisor Navigates to the subscription modification page
C. Advisor makes desired changes
D. System updates the subscription data and reflects the changes in Maxio

Business Req: Subscription Modification

Requirements

Subscription Management

- **Easy-to-Use Interface**: View and update subscriptions
- **Flexibility**: Add or remove subscriptions
- **Data Sync**: Real-time updates in Maxio
- **Limited Core Changes**: Restrict modification of core product
- **Premium Add-Ons**: Enable addition of premium services

Account Management

- **Payment Flexibility:** Update preferred payment methods

Bulk Sign-Up

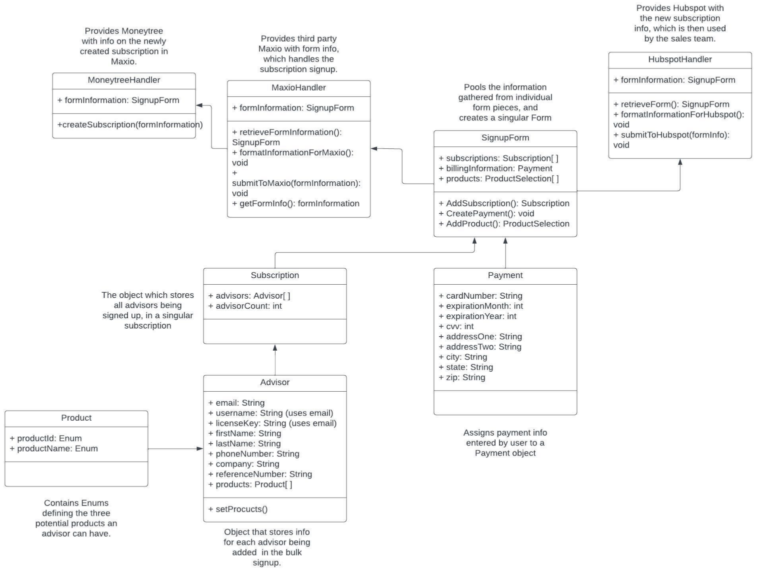
- **Dynamic Interface:** Add multiple advisors easily
- **Multi-Platform Updates:** Sync with Maxio and Hubspot
- **Payment & Product Options:** Customizable payment and product choices for advisors

Non-Functional Requirements

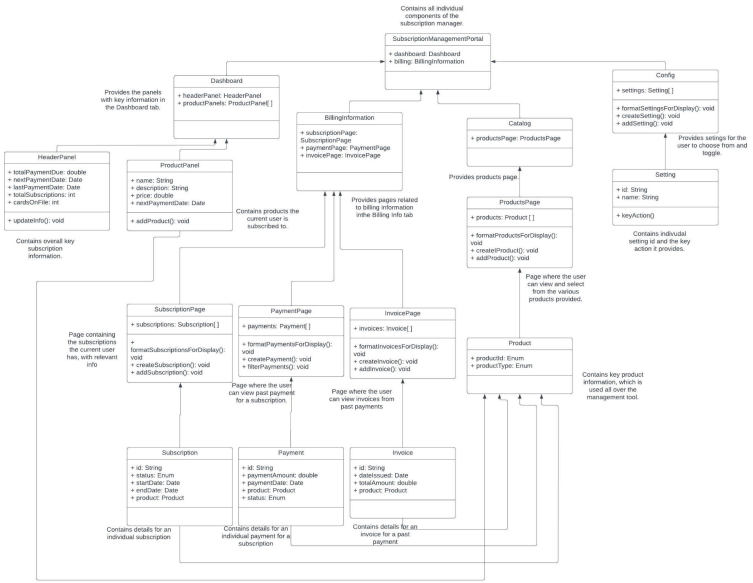
- **User Experience: Intuitive UI, clear workflow**
- **Performance: Quick loading, responsive**
- **Integration: Seamless with Maxio & Hubspot**
- **Scalability & Security: Handle high user volume, secure data storage**

Domain Model

Bulk Signup



Subscription Manager



TechStack

Front End

Vue.js (https://vuejs.org/), a Javascript framework used for building modern web applications. This was chosen for our tech stack simply because the client requested that we use it in the project.

Possible Libraries: Element UI, Vue Router, Vuex, Vuetify, etc.

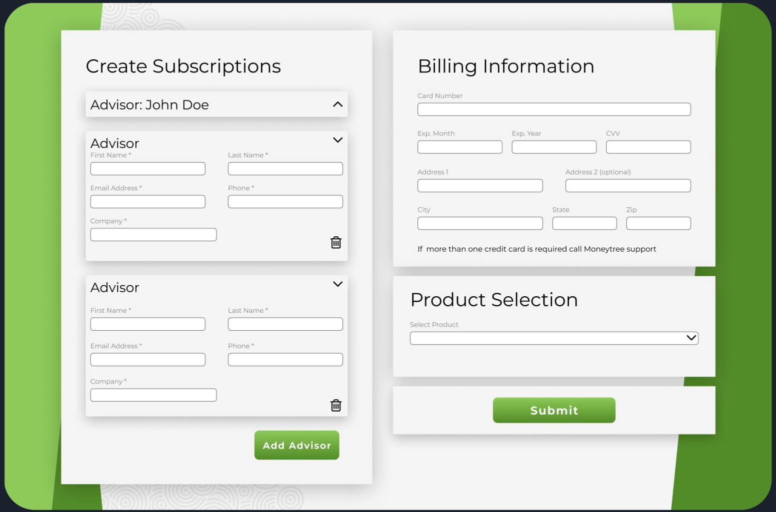
Back End

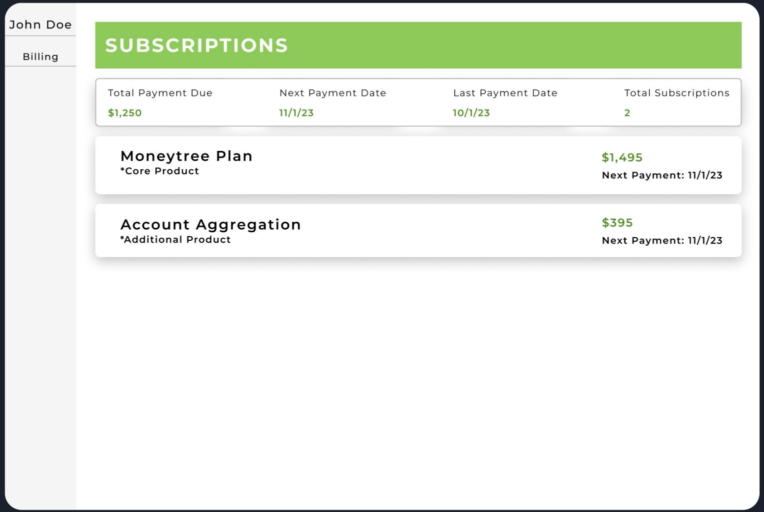
.NET (https://dotnet.microsoft.com/en-us/), supports several languages, we will use C#. We chose this for our tech stack because the client requested that we use it in the project.

Database

PostgreSQL. (https://www.postgresql.org/). The client requested that we either use Microsoft SQL Server, or PostgreSQL. After some research on the pros and cons of each, we are choosing to PostgreSQL.

Prototype





Youtube Figma

First Iteration Features

Create Sign-up Interface:

A. Create add advisor popup modal
B. Validate form info on front end
C. Create added advisor dropdown component

Create Payment Information Interface:

A. Validate payment information format
B. Create payment form

Create Product Selection Interface

Reflect Form Submission in Database

Mentor/Client Feedback

Mentor Highlights

- Meetings on 9/22 and 10/9
- Topics: Design Documents, Tech Stack

Key Takeaways

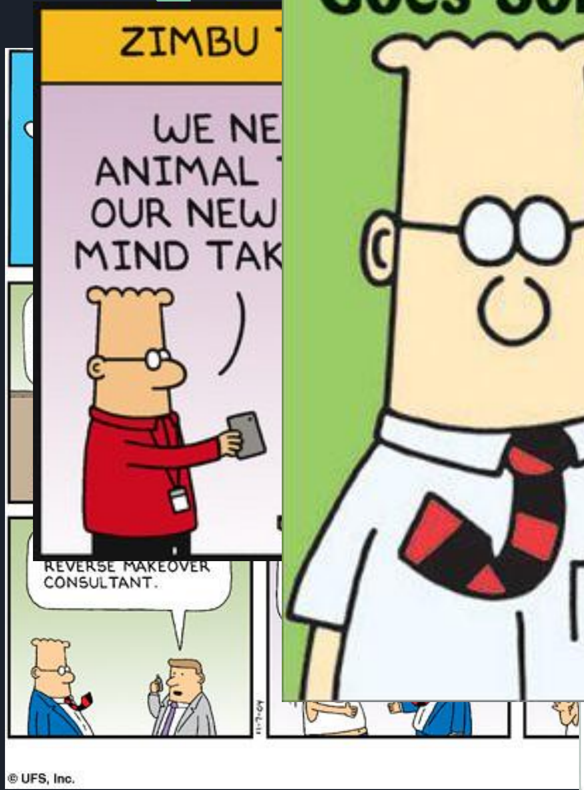
- **Prototype**: Popup Modals over Dropdowns
- **UML Diagram**: Sufficient, Open for Future Adjustments
- **Tech Stack**: Consider Future-proofing with .Net 8

Client Meeting Highlights

- Meetings on 10/5 and 10/9
- Topics: Bulk Sign-Up, Design Items, Tech Stack

Key Takeaways

- **Prototype & Design**: Max 20 advisors in the form, support for .csv uploads in future, disclaimers on payment info, multiple products per advisor
- **Domain Model**: Add handler for Moneytree subscriptions
- **Requirements**: Account Management scope clarification
- **First Iteration**: Client approved Jira tickets, cautioned against over-planning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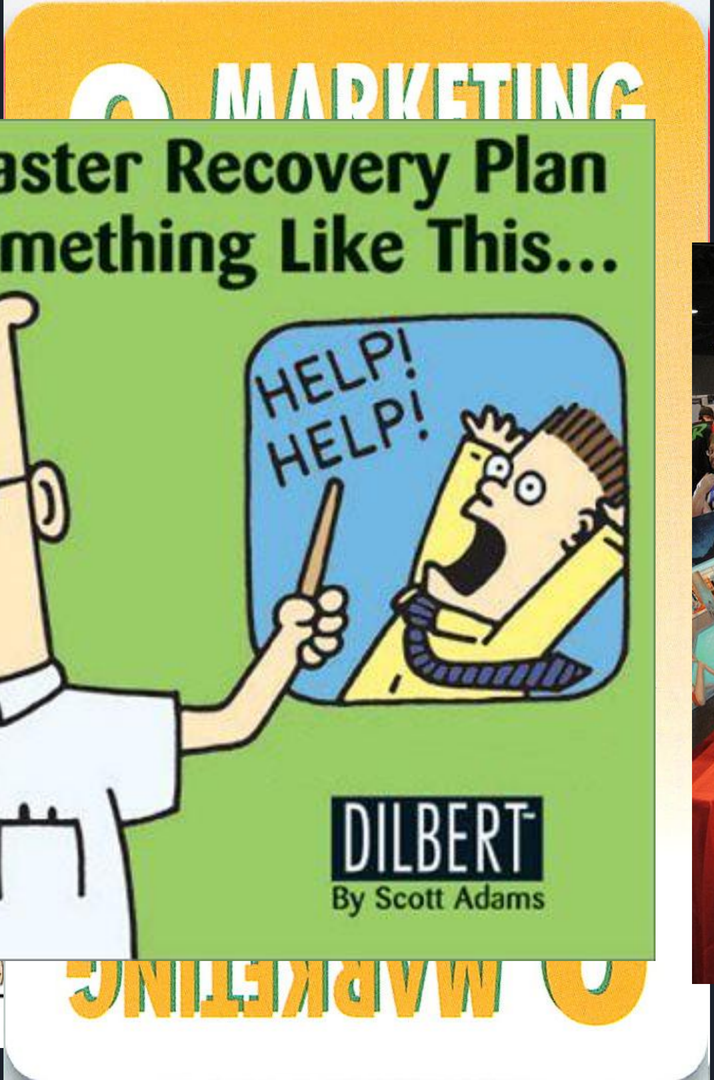
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