

# 2021-08-10 Client Meeting #1

## Date

11 Aug 2021

## Attendees

- Dylan Leon
- Kritnand Suwanna-Arj
- Mattias Anderson
- Pak Ho Wong
- Junkai Xing
- Jiacheng Ye

## Goals

- Establish requirements for the project
- Create rough outline of future plans

## Discussion items

Time	Item	Notes
19:30	Introductions	
19:32	Received outline of project	<ul style="list-style-type: none"><li>• Personal CRM</li></ul>
19:35	Received requirements	<ul style="list-style-type: none"><li>• Card view of clients</li><li>• Can be organized into custom lists of cards</li><li>• Each card can have tags which provide some information</li></ul>
19:40	Q&A of specifics of product	<ul style="list-style-type: none"><li>• Design</li><li>• Function</li><li>• Platform</li></ul>
19:45	Future meetings schedule	<ul style="list-style-type: none"><li>• No specific times as of yet</li><li>• One before 1st sprint ( Week 8 )<ul style="list-style-type: none"><li>• Possibly week 5</li></ul></li></ul>
19:50	End of Meeting	

## Notes

### Requirements

- Card view of clients
- Can be organized into custom lists of cards
- Each card can have tags which provide some basic (categorical) information

### Design

- Simplistic
- (Dark Green)?
- Simple information on cards
  - Names, Numbers, Business

### Function

- Each card can be clicked for more detailed information
- Cards can exist without being organized into list

- List can be completely customized
  - name of list
  - who is placed in these lists
  - how list is organized
- Scrolling is dependent on platform
- Accounts are unnecessary
- Searches can be done in the same place
  - Name, Number, Tags can be searched for in the same bar

#### **Possible Platforms**

- Android mobile app
- Webpage

#### **Other**

- Create lists based on tags
  - not requirement