**Appendix C - Meeting Notes for Client Consultations**

**Notes from Meeting with Client (January 20, 2019)**

* All the functionality works perfectly and as expected except for the uploaded image and document feature
* Intuitive design and easy to navigate around the app
* PDF documents are immediately opened and can be immediately printed which was good
* Design can be improved so that it is more visually appealing as it looks dull
* To-do list that keeps track of incomplete documents can be shown on the home page as a reminder for the user
  + If a certain task/document on the to-do list is clicked, it will directly redirect the user to edit the document so they can complete it
* A temporary “trash” folder that will keep previously deleted documents or clients for a certain amount of time so that they can be restored before permanently erased

**Notes from Meeting with Client (February 3, 2020)**

* Client tested out all of the added functionality, including the previous features that failed (upload image and document) and all functionality listed in the success criteria, works perfectly under different scenarios
* The client suggested that since there are multiple accounts belonging to different employees in the office, this app should be made downloadable for Mrs. Erlina’s employees
  + However, the apps downloaded in Mrs. Erlina’s employees’ individual devices will still be connected to the same database so that everyone’s apps will display the most updated information
* Possibly integrating a calendar feature that can be edited by the whole office
  + Events can be added to the calendar to help her office keep track of deadlines and meetings
* The limit on the upload document feature is too small, which can be restricting especially when Mrs. Erlina is interested in not only uploading tax forms onto the app but also other documents which may be larger in size
  + The app can be improved by allowing for larger file uploads