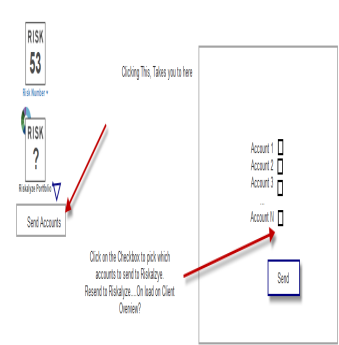
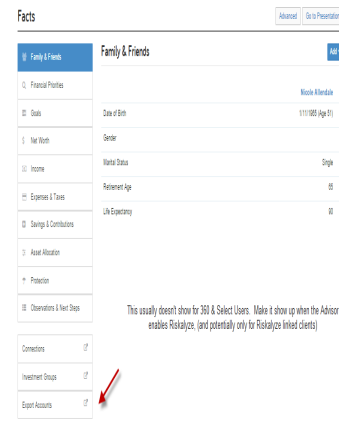
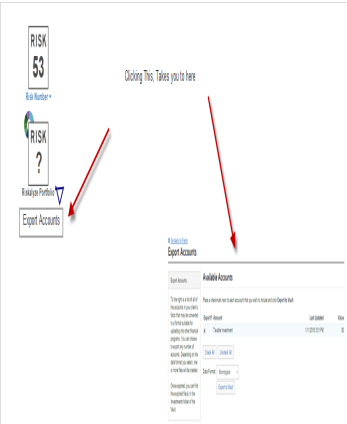


Export Accounts Spike (WIP)

Option	Pros	Cons	Estimate
	<p>Implementing portfolio importing is the best user experience. Users</p> <p>don't have to be concerned with creating and uploading CSV files manually.</p>	<p>Most effort</p>	<p>Creating a Modal to export accounts would be slightly more involved but still easily under two weeks IMO.</p> <p>We would need to extract some classes from ExportAccounts.cs (which we should do regardless of which option we choose) and figure out a better way to get the list of fact changes (it currently uses ClientState.cs). Then create a template and js for the modal.</p>
	<p>Simplest solution</p>	<p>Worst user experience of all of the options. Users have to create and upload CSVs manually. Not obvious that this action is for a Riskalyze import since it is not located near the Riskalyze menu items.</p> <p>There is special knowledge required to generate a correct CSV for Riskalyze. Only accounts with holdings are exported and the user has to choose the eMoney format for the CSV.</p>	<p>Showing the Export link on the Facts Page would be the fastest option. There is some clean up that would need required, but it could be done in under a week.</p>



Still a very simple option. Probably not going to take any longer the previous option given some cleanup that will need to be done.

Exporting accounts screen is only available from the Riskalyze menu. Better than showing the left-hand nav item from the Client Facts screen.

Users still have to download and upload CSV files manually. Users still need special knowledge to

use the UI.

Adding the Export item to the Riskalyze menu would be a similar amount of work as showing the Export link on the Facts page. Doing both would be a reasonable option IMO