Client: Mr. Ravi Bhavnani

Consultation #	Stage in Development	Feedback from Client (Summary)
1	Planning	The software should effectively enable the purchase and sale of positions, as well as deletion of accounts and positions. The program should be: - Intuitive and Simple to use without advanced knowledge - Provide the ability to monitor real-time stock prices - Be able to be used independently (without using third-part services) - Provide main functionality of a portfolio manager (buy, sell and delete positions; create and delete accounts).
2	First Prototype: Skeleton UI (Design)	The program is starting to resemble a well-thought out application; many of the controls are intuitively placed. However, there are multiple refinements to be made to increase the useability and accessibility of the program.
3	Second Prototype: Selling Stocks	The program provides fair functionality when it comes to buying and selling positions. However, if the user is not careful, it can result in the program crashing and/or providing a bad experience (eg. purchasing a valid stock, but not the one intended by the user)
4	Final Review (complete consultation included)	The app provides an intuitive UI, and is easy and quick to navigate. However, it would be enhanced by a few better design tweaks to make the program further usable and accessible, and also a few more features such as the ability to delete positions and accounts.

Client Consultation Notes (2nd Interaction):

<u>App's functionality:</u>
- **shows list of accounts**
- **shows contents (positions) of an account**
- **edit (rename) an account (nice to have)**
- **delete an account (nice to have)**

<u>Price information (for a symbol)</u>
Get current price (when market is *open*) - must-have
Get historical price (open, low, high, close) - nice-to-have
Get price chart - nice-to-have

<u>Symbol finder (nice-to-have)</u>
Get stock symbol for a company

During this interaction, I outlined different discussed functionality and we decided on the priority of each (whether a given feature is **nice-to-have** or essential for the functionality of the program. This was to decide the order in which each feature should be implemented.

Ishan Shastri <ishansshastri@gmail.com>

User feedback

1 message

Ravi Bhavnani <ravib@ravib.com> Fri, Mar 4, 2022 at 8:18 PM
To: Ishan Shastri <ishansshastri@gmail.com>

LIKE
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(1) Splash screen - makes me feel that I'm in full control of the app
(2) Like the user interface - it's simple and intuitive (I don't have to scan the UI to find information. Everything seems to be where I expect it to be)
(3) Like the separators in the File menu - makes the menu easy to comprehend
(4) Like that the portfolios are in alphabetical order - makes them easy to find.
(5) Like that I'll be able to see my sold positions (which are of historic interest)
(6) Like that the Buy Position dialog validated the buy price
(7) REALLY like the buy confirmation dialog because it displays the full security name!!
(8) I like the information displayed in the summary panes. Like that the panes automatically update on buy and sell.
(9) I like the alternate row colors in the positions list because it makes the list easy to read.
(10) I like the validation in the Sell Position dialog.
(11) The Sold tab is very helpful - displays just the right amount of information.
(12) I really like that I can do a partial sale of a position.
(13) I like that the app is snappy (fast). Also like that it displays an hourglass cursor when busy (e.g. fetching prices).
(14) I like that on window resize/maximize, the geometry of the panes is maintained.
(15) I like that the Positions list (and the summary panes) update instantaneously when I scroll through the accounts list.

IMPROVEMENT OPPORTUNITIES
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1 - Not sure what the list on the left contains. Would have liked a title "Accounts:" above list.
2 - Would have liked a Delete Portfolio command (because I created a portfolio by mistake)
3 - Inconsistency between "File | New Portfolio" command and the corresponding "New Account" dialog. Would have prefered a consistent use of either "portfolio" or "account".
4 - I bought a security while looking at my sold positions. After purchase, would have been nice for the view to automatically switch to the held positions.
5 - The "Change" column in the Held view should be named "Gain" (because "Change" implies change in price since yesterday)
6 - App should automatically select the first portfolio/account (if one exists) so that I don't have to do this manually
7 - When I attempted to sell a position, the selected position was no longer highlighted (i.e. displayed as selected). Would have been nice for the list to always show its selection.
8 - Would have liked to see a confirmation dialog before I did a destructive operation like "Delete Position", to reduce the chance of me deleting the wrong position.
9 - Was curious about the blank space between the Accounts/Portfolios list and the summary pane below it.

--Ravi