FinQuest Iteration 1

Project and Client Information

- Moneytree - Finquest
- Alex Long
- FinQuest is an auto populating tool designed for financial advisors to use when interacting with a client for the first time. The goal is to have a survey like application that clients will fill out when first working with a financial advisor. The information collected will then auto populate into MoneyTree's financial planning software used by the financial advisor.

Feedback (Mentor)

- Recommends switching json database to MSQL or PostgreSQL
- Add validation and/or limiters on all entry fields
- For cleanliness, he recommended moving CSS to its own file that we instead reference
- For large amounts of questions, he recommended looking into paginating

We plan on incorporating the database suggested and fixing the other things suggested.

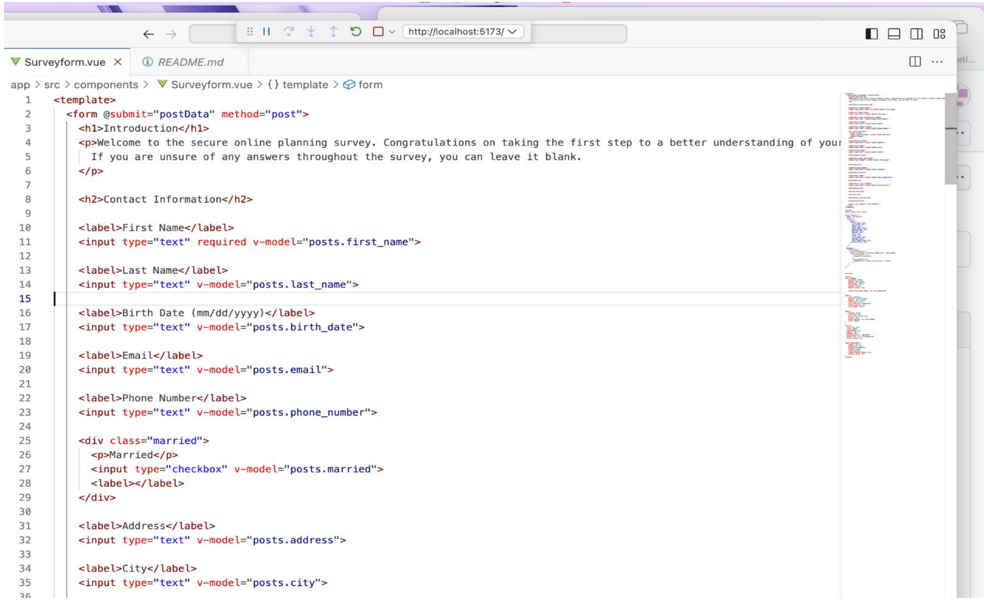
Feedback (Client)

- Not much was expected out of this iteration due to issues along the way
- Prepared resources for team that we can use in order to adhere to Moneytree's vision and standard
- Prefer option for meta-client to save progress in survey
- Gave us a better understanding of what he is wanting the survey to look like in the final stages.

We plan on adding in the sign in feature Alex suggested and trying to make the project look like the design he showed us.

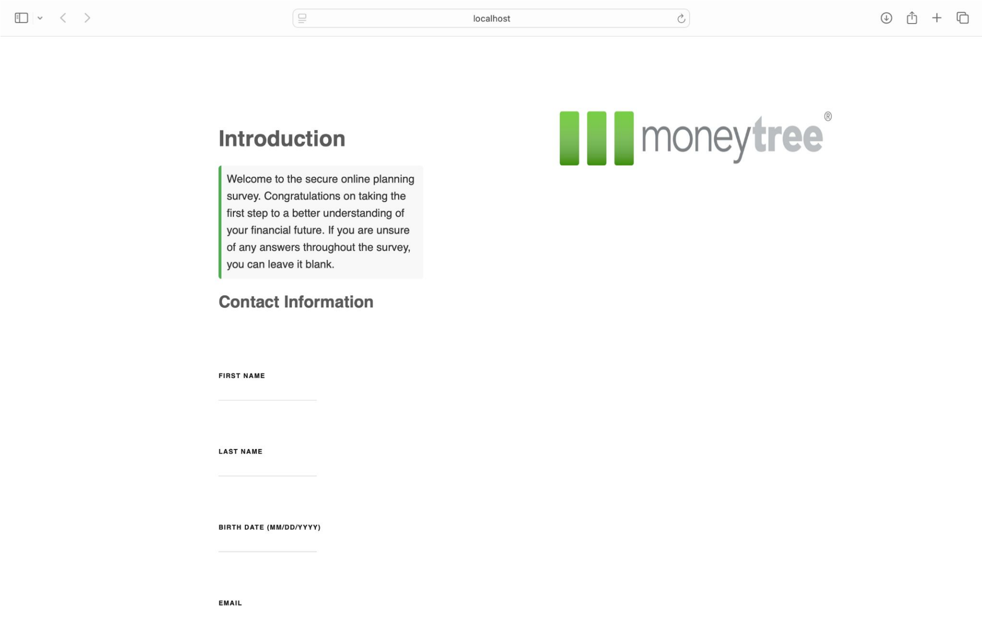
Iteration 1 Features

- Survey for clients
  - This is the format that we used to create the survey.



Iteration 1 Features

- Design for survey (basic)
    - This is the survey we created for the advisors that they will be able to send to their clients. When their clients are done filling it out, they will click the submit button at the bottom and the information they put in will go to the database.



Iteration 2 Planned Features

- Survey Editor
  - This feature allows the advisor to put their company logo on the survey before sending it out to the client.
- Sections for questions field in the survey
  - This will allow advisors to add or take questions off of the survey.
- Replace json server for client server

Retrospection

- Independent team member thoughts
- Sacrifices made for functionality
- Approach for 2nd iteration

Clownfish next to eggs