Estate Vault

Iteration 5



Features Completed



Checklist

- Users are now able to see a checklist with specific documents in it.
- Website guides new users to this checklist to ensure that they have their estate in order.
- Checklist is visible on the dashboard.
- Flexible code in the backend to allow for more documents.



- Site is now able to be viewed on mobile devices.
- Functionality is exactly the same as on desktop.
- Pages readapted for ease of use on mobile devices.



Recent Files



last-will-andtestament.pdf

Checklist

- Upload a Last Will and Testament
- O Upload a Letter of Instruction
- O Upload a Financial Power of Attorney
- O Upload a Medical Power of Attorney









Dashboard

Documents

Connections

Contacts

EstateVault





Invites



You have no invites.

Input the professional's email above to send one!

Current Connections

Invite a professional to your network by inviting them using their email in the invites box, or accept an incoming invite to see them here!

From there, you can manage individual access to documents and remove connections.







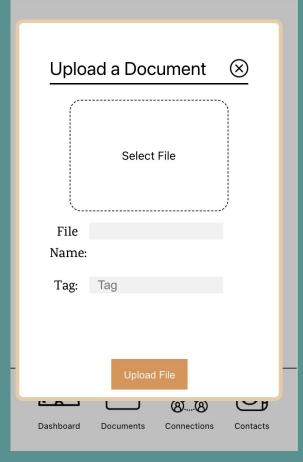


Dashboard

Documents

Connections

Contacts





Contacts









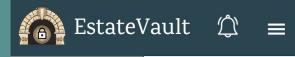


Dashboard

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Recent File

Dan Wright

danwright@cheetah.com

(A) Manage Account

Checklist

- Upload a Last Will a
- O Upload a Letter of Ir
- O Upload a Financial P
- O Upload a Medical Po



Dashboard









Connections Contacts

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er entering new password, press ange Password" then 'Save Changes'

Dashboard

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- We showcased to Michael the backend implementation of the checklist.
- Showed progress made towards full mobile integration of the UI.
- Discussed how we wanted to go about implementing the checklist into the frontend.
- Offered little feedback for us, overall thought that our plans for the overall implementation of the checklist was good.



- Dan mentioned the possibility of having multiple checklists per user in the future, that can be created by either a professional, or the dev team.
- He appreciated how simple it was and how easy it all was to follow.
- He appreciated the prompts on the pages and thought it was a nice way to introduce the user to the system.



- Allows for a more straightforward onboarding process for new users.
- Allows for possible future implementation of custom checklists for different guided content.

Interesting Slide



"Tyler Newlin explains EstateVault to Landon Hammond" 2023, digital, Author; Cameron Allan

Retrospective

