

Estate Vault

Iteration 4



Introduction





Team Members

- Cameron Allan
- Landon Hammond
- Peyton Schaefer
- Nate Slagter





Client



- Accutech fulfills its purpose to make great things happen for other people by delivering innovative trust and wealth management technology solutions and exceptional, personalized service to over 200 banks and wealth management companies nationwide.
- Located in downtown Muncie.



Mentor Feedback

- Not many comments from Michael this iteration
- Mentioned that the notifications should be more clear about which messages are read and unread



Client Feedback

- Dan discussed adding a checklist to the website
 - Not forced
 - Displays a progress indicator
- Dan noticed a few small bugs that he wanted changed for next iteration

**Features
Completed**



Notifications

- Notifications are now sent when certain actions are performed
- These messages link back to the relevant item
- Can be marked as unread and read
- Detailed messages to show exactly what changed

Notifications			×
Document Comment Added	7 minutes ago	>	
A comment has been made on "DWW last-will-and-testament .pdf" by Danny Boy Boy Wright			
Document Comment Added	1 hours ago	! >	
A comment was made on a document.			
Account Info Changed	1 hours ago	>	
Your account information was changed.			
Account Info Changed	2 hours ago	>	
Your account information was changed.			
Invite Accepted	6 hours ago	! >	
Your invitation was accepted.			
Invite Accepted	6 hours ago	>	
Your invitation was accepted.			

Comments

- Comments can now be made on documents
- These documents can be resolved or deleted
- Comments can be added both by the owner and any professionals that have access to the document

Comments

Make sure you fill out the fields, this document is totally blank!

Saul Goodman | Today at 1:50:24 PM

[Delete](#) | [Resolve](#)

Hey this is a test!

Saul Goodman | Today at 2:06:19 PM

[Delete](#) | [Resolve](#)

This is great!

Danny Boy Boy Wright | Today at 3:10:30 PM

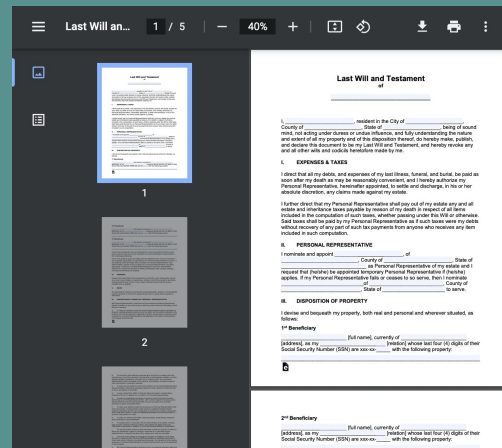
[Delete](#) | [Resolve](#) | [Edit](#)

New comments go here!

[Post Comment](#)

File Preview and Frontend Changes

- Files can now be previewed before downloading, adding comments, and sharing
- New folder structure for files
 - More closely resembles Google Drive, Dropbox, etc.
- Folder structure allows for each tag to be viewed individually



What's Next?



Iteration 5 Features

- Notification Checklist
 - List of items that a client needs to upload to complete their estate
 - Progress indicator for the documents that you've uploaded
- Minor changes
 - Filtering for the notification and tag system
 - Updates to how certain elements are displayed on the frontend



Project Benefit

- The Estate Vault will provide an entirely new service to Accutech customers
 - There is a great need for a more convenient way to store legal documents, especially among the older generations
- Accutech had no products like this before the creation of Estate Vault.



