

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.



Mobile Styling

- 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-and-
testament.pdf

Checklist

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



Dashboard



Documents



Connections



Contacts



Invites

Send Invite

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



EstateVault



Upload a Document



Select File

File

Name:

Tag:

Tag

Upload File



Dashboard



Documents



Connections



Contacts



EstateVault



Contacts



Steezus Christ

Peyton Schaefer



Dashboard



Documents



Connections



Contacts



EstateVault



Dan Wright

danwright@cheetah.com



Manage Account



Log Out

Recent Files

Checklist

● Upload a Last Will and Testament

○ Upload a Letter of Intent

○ Upload a Financial Power of Attorney

○ Upload a Medical Power of Attorney



Dashboard



Documents



Connections



Contacts



EstateVault



First Name

Visible on the home page

Last Name

Viewed by others

Email Address

For notifications and logging in

johndoe123@email.com

Phone Number

For receiving notifications

(123)-456-7890

Current Password

Enter current password to change your password

Enter Current Password

New Password

After entering new password, press 'Change Password' then 'Save Changes'.

Enter New Password



Dashboard



Documents



Connections



Contacts



Mentor Feedback

- 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.



Client Feedback

- 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.



Project's Benefit

- 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

