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

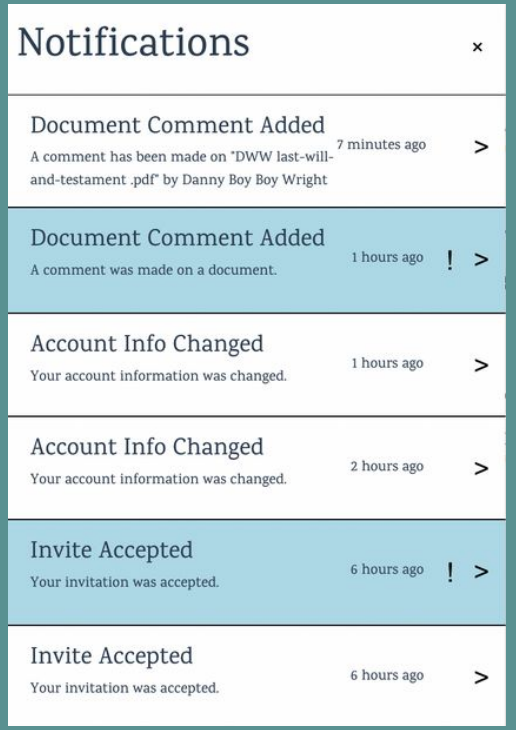
Client Feedback

- 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

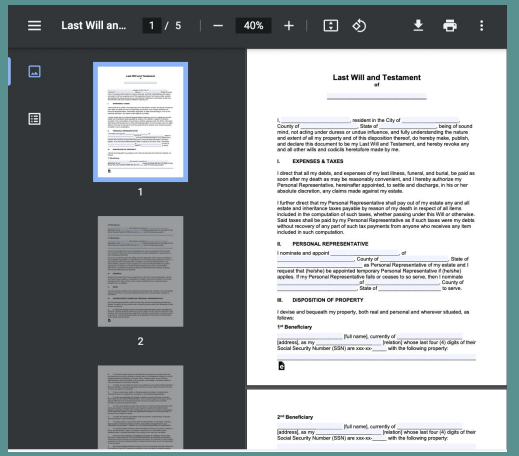


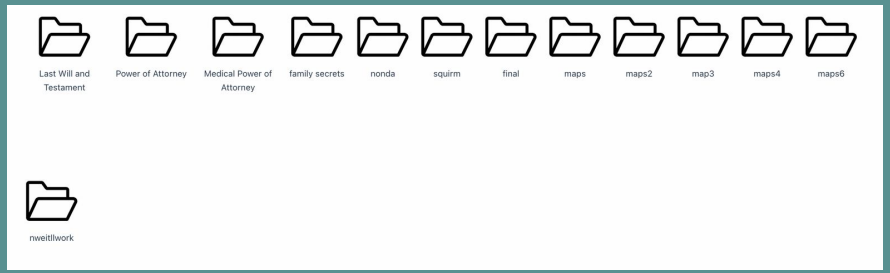
Comments

- 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

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.

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