Cheetah Sign

Iteration 4

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New Features: Client Page

- Allows administrators to create clients and record them
- Keeps track of name and email

- **Administrators can better track clients to ensure accuracy when emailing.**

Add New Client

Client name

Chris Redfield

Client Email

credfield@email.com

Clients

Add New Client

Client	Email		
Chris Redfield	credfield@email.com	Edit	Delete

Cancel   Add Client

New Features: Updated Send Functionality

- Allows Documents to be sent via manual entry OR through recorded through a client
- Allows for quicker sending of multiple documents to one client

- **This keeps the document sending efficient and concise, organizing documents by client.**

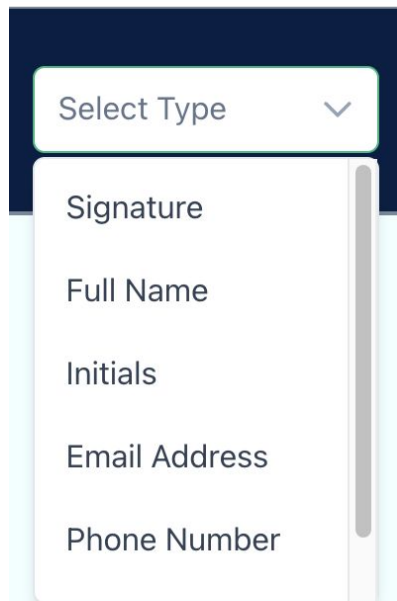## Upload Documents

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Quick Enter Client:

| Client name... | Client Email... |

Quick Send

Pick From Client List:

Choose an option:

Please select a client

Chris Redfield

Send

New Features: Multiple Boxes + Types

- You can choose a type of input for your text boxes
- You can place multiple text boxes on multiple pages

- **This allows for support of bigger documents that require multiple inputs, which is important for Accutech's clients.**

Select Type ⌄

Signature

Full Name

Initials

Email Address

Phone Number

Full Name

Signature

Initials

Feedback

Mentor Feedback

- Everything looks great
- Make sure to be careful about leaving in GUI for planned features - only try and implement GUI when the feature if fully functional

Client Feedback

- Issues with the boxes are to be expected (but even DocuSign has issues rendering elements)
- Liked the client feature since it could be integrated with Accutech's existing client database instead of a local database
- The scope of field types is good right now, we don't need to add more
- "Still ahead of where we expected you to be"

Changes made after meeting:
- UI/UX refinements to match user assumptions about the progression of actions

For future iterations:
- The date of the signature needs to be associated with the signature
- Possibility of a form that gets filled out and then the document is populated and rendered instead of displaying a preview

Client Use

Josh:
- Refresh button in document builder doesn't work
- Preview of the boxes is getting rendered outside of the document
- Feedback on user actions is not always in the most obvious place, unsure if actions went through sometimes

Ryland:
- Suggested to move edit button directly to the document to guide the user
  - Noticed that Josh wanted to edit directly after uploading the document

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Teamwork

Levi
- Development of the client page and client sending
- Implemented more testing and test coverage of the back end
- Refactoring the back end to separate "endpoints" and "services"

Riley
- Document Builder multiple text boxes and input types
- Document uploading UI updates w/ Tia
- All frontend tests

Tia:
- Development of client page and document uploading UI
- Helped with front-end testing
- Focus on documentation and presentation for iteration 4

Fifth Iteration Features

01

PDF Builder Improvements

- Make box placement accurate for all viewports
- UI updates

02

PDF Form Completion

- Give the user a form to fill out all of the placed boxes
- PDF exporting after completion

03

PDF Emailing

- Add ability to send out PDFs to real emails, rather than catching them for development

04

Client Autofill

- Information kept by a client can be suggested as an autofill value when signing documents

Random slide