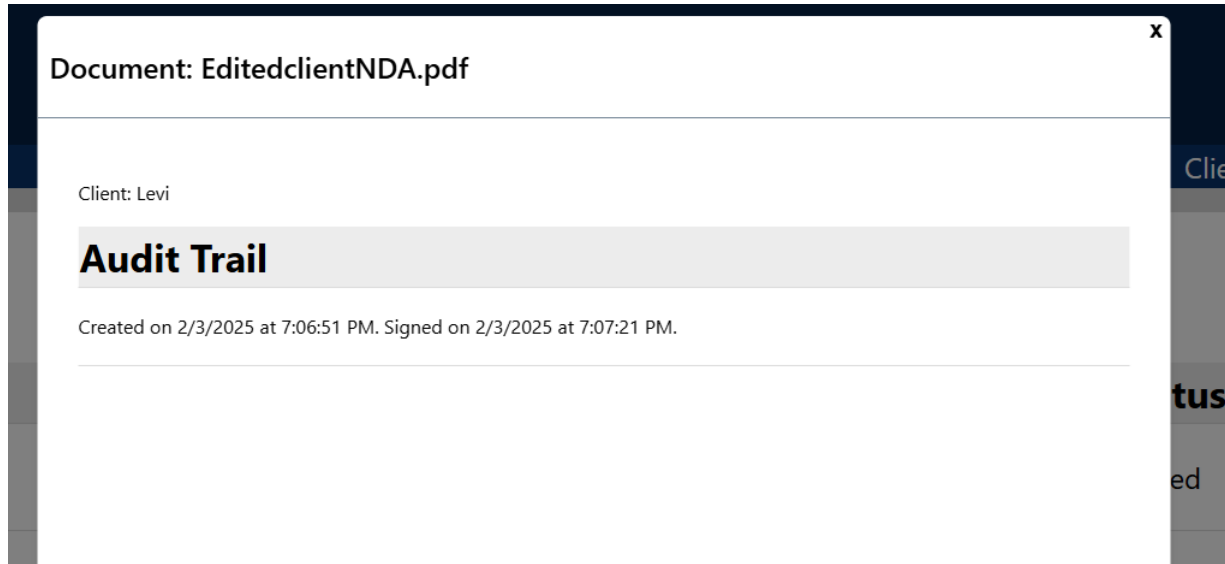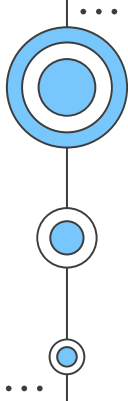# Cheetah Sign

Iteration 3

Levi Shelley, Riley Jamison, Tia Self
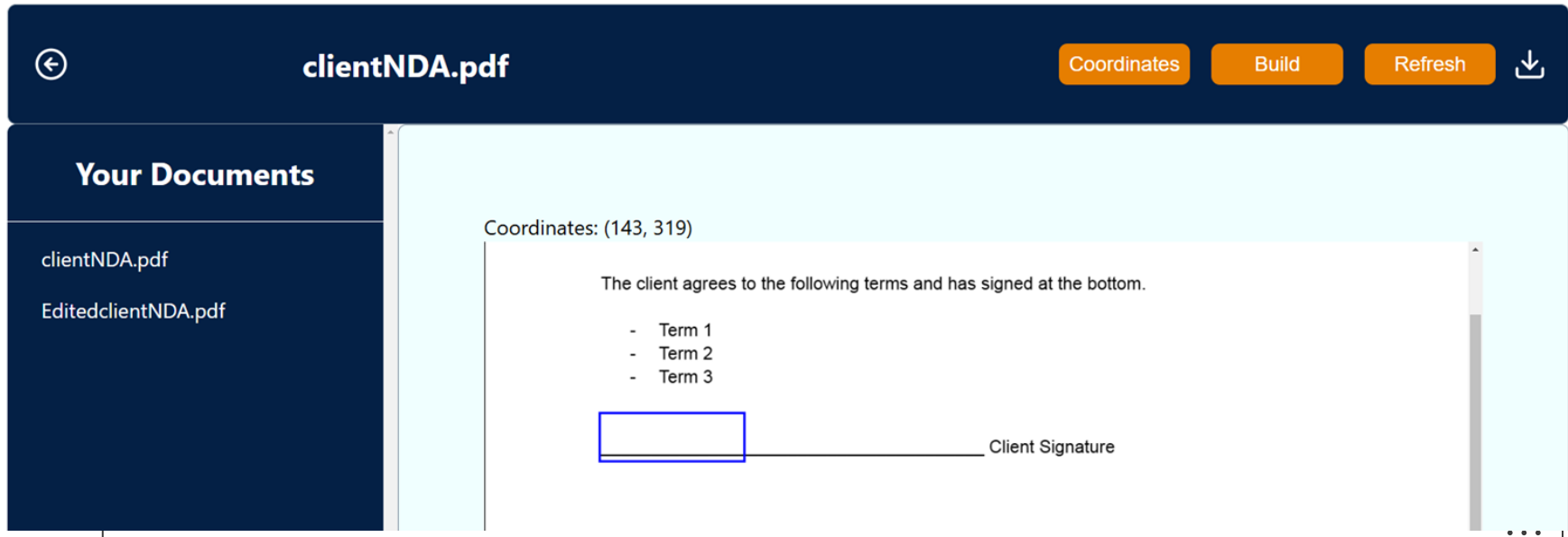
New Features: Audit Trail

- Shows off the time that the job was created and signed
  - Can be accessed by clicking on the job name

- **This is the "tracking" portion of the business requirement, so admin users know where the job is currently held.**

Document: EditedclientNDA.pdf

x

Client: Levi

Audit Trail

Created on 2/3/2025 at 7:06:51 PM. Signed on 2/3/2025 at 7:07:21 PM.

Clie

tus

ed

New Features: Document Builder

- Able to click to create the text box!
- Much easier to create edited documents without committing.

- **This improves the "sending" document process, making a more straightforward and intuitive experience.**

New Features: Dynamic Updates

- Uploaded and deleted documents will move immediately
    - No refreshing required

- **This improves everything about handling documents, making it less confusing when "zombie" documents exist**

My Documents

Document
📄 clientNDA.pdf
📄 EditedclientNDA.pdf

Feedback

Mentor Feedback

- Happy with how the group has come together to problem solve
- Doing a good job at listening to client demands and making changes according to what was emphasized by the client

Client Feedback

- Very happy with the document builder so far
  - Multiple signing fields is a critical feature they would like to see implemented
  - Implementing auto filled fields for client information was also emphasized
- Happy with the smaller quality of life UI changes
- Browser compatibility for Safari specifically is important as many of their clients use it
  - They would rather we prioritize refining the document builder and implementing multi fields over the browser compatibility

Teamwork

Levi
- Implemented audit trail
- Configured testing and pipelines

Riley
- Reactive page rendering
- Updated the UI of document builder
- Refined signing and textbox placement on documents

Tia:
- Updated styling to UI elements
- Implemented alert messages for sending emails and uploading docs

Fourth Iteration Features

01   Clients Page

- Store commonly used information (ssn, address, name, etc.)
- Pick from a list of clients instead of manually entering the fields to send documents

02   Multiple Signing Fields

- Allow for multiple textboxes to be placed in the document builder

03   Classify Text Fields

- State what kind of information the text field should hold for the client

Random slide (optional)