

Accutech Puma Proposal Generator

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Summary: Our clients Philip Yu, Matthew Garrett, & Trey Gourley wanted an application that would use the data from their API, Accutech Cheetah, to generate a proposal to a potential new customer that would show through a comparison how much better off they would be partnering with Accutech.

Overview: The application uses the data from assets that the user inputs with the help of an OCR to generate a chart that shows how much better you could be doing if you switched to Accutech. The application then shows a side-by-side comparison of your current estimates versus what they could be with Accutech's help.

Tech Stack:

- .NET (asp) core framework
 - C#
 - Flurl
- React framework
 - Javascript
 - CSS framework

Features:

- Autofill
- Cheetah API integration
- Results page
- Login with cheetah credentials
- OCR functionality
- Save for later feature

The screenshot shows the 'Input Assets' form on the left and the resulting table on the right. The form has sections for 'Enter Asset Identifiers in one of two ways:', 'Enter Asset Code and Symbol for Stocks, Mutual Funds, etc.', and 'Enter Asset Quantity and Total Value:'. The table on the right has columns for 'Actions', 'Asset Code', 'Symbol', 'Issue', 'Issuer', and 'Units'. A red arrow points from the form to the table, and another red arrow points from the table to the summary section below.

Ready to submit your current portfolio? Hit "Submit Portfolio" below and then [Click The Link](#) to head over to Accutech to modify the portfolio.

\$ 484,934.46 Portfolio Value Increase
\$ 5,891.01 Monthly Income Increase

Current Portfolio Composition

Money Markets Common Stock Mutual Funds
Loans & Notes Receivables Other



Proposed Portfolio Composition

Money Markets Common Stock Mutual Funds
Loans & Notes Receivables Other



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