

TEAM R&I

Client Meeting Agenda

Meeting/Project Name:	2018T2 R&I		
Date of Meeting (DD/MM/YYYY):	01/03/2019	Time:	17:00 – 18:00
Meeting Facilitator:	Liting	Location:	SIS GSR 2-3

1. Meeting Objective

1. Doubts with the upcoming modules
2. Merge of Scope (Stock Management and Wealth Portfolio)
3. UAT before Mid Term

2. Attendees

Name	Attendance	Remarks
Chow Li Ting	Present	-
Teng Shu Yan Rachel	Present	-
Thevakumaren S/O Morgaya	Present	-
Raghavendar Gowri Sankar	Present	-
Mok Hao Ze Benjamin	Present	-
T S Kautham	Present	-

3. Pre-work/Preparation (Documents/Handout to bring, reading materials, etc)

Description	Prepared By:
-	-

4. Agenda and Notes, Decision, Issues	
Topic	Owner
<p><u>Doubts with the upcoming modules</u></p> <ul style="list-style-type: none"> - Loan Module <ul style="list-style-type: none"> o Calculate loans <ol style="list-style-type: none"> 1. Enter the loan type, amount and repayment months 2. Get the relevant info like monthly repayment 3. Enter loan title and collateral if needed 4. Make appointment for schedule manager - A new functionality needs to be created o Make partial repayment <ol style="list-style-type: none"> 1. Select loan account, repayment amount, keeping maturity date? 2. Get new repayment balance, interest amount, monthly instalment, maturity date 3. If maturity date not kept, interest rate increase, maturity date increase by 6 months, change in monthly instalment o Make Full Repayment <ul style="list-style-type: none"> Show repayment amount with penalty, initial loan amount and penalty rate 	Liting
<p><u>Merge of Scope (Stock Management and Wealth Portfolio)</u></p> <p>Wealth management</p> <ul style="list-style-type: none"> - Stock Watch (Use of 3rd party API) - Stock Order Management - Dual Currency Deposit (Bank is the counterparty) - FX Forwards, FX Spot (Bank is the counterparty) - FX Bill Payment (Advance Transfer module) <p>*If the bank is the counterparty then, we do not need to use 3rd party API.</p> <p>Gamification/Knowledge module – if want IS 430 class to do UT then we need to finish this module by mid-term.</p> <p>Relationship Manager Scheduler</p> <p>X-factor (to be discuss further during next meeting)</p> <ul style="list-style-type: none"> - For final UT, we need to do it during summer term where the class of MITB students will be doing the testing. 	
<p><u>UAT before Mid Term</u></p> <p>Mid term – IS 430 class in current term (18/19 T2)</p> <p>Final – MITB class in summer term (18/19 T3)</p>	

5. Action Item		
Action	Owner	Due Date

6. Next Meeting (if applicable)	
Date (DD/MM/YYYY):	08/03/2019
Time	1700 - 1800
Location	SIS GSR 2-3
Objective	Weekly Update