



# Client Onboarding Automation

Gabriel, Karim, and Michael



# Team Member Information

Gabriel Chandler

Karim Mahfouz

Michael Knudsen

# Client Information

Documentor - Electronic visitation verification

Documentor is a company that provides services to care givers, while integrating with state requirements.

Their services help providers track their time, set goals and makes complying with state regulations easier.

# Mentor Feedback

- Look into front end testing software similar to Selenium but for rails
- Docker deployment
- Make sure software is deployable

# Client Feedback

- Iteration 3 features will be getting quickbooks integrated and working
- William really appreciates what all we have gotten done and still believes that if we were to "cut funding" this would still be functional enough to still use. It would cut down his work and still help and that we are moving in the direction we need to be.
- Likes the ideas we have for iteration 3
- May have a product team come work locally that we can use.

FR6 - customer can input their own information for their new provider and initial account

FR7 - functioning frontend for customer to use

ADMIN / Onboarding Tokens

Onboarding token was successfully destroyed.

Batch Actions ▾

<input type="checkbox"/>	ID	Provider Name	Contact Email	Created At	Updated At	Status	Provider	Email	Invitation Token	Invitation Created At	Invitation Sent At	Invitation Accepted At	Invitation Limit	Invited By Type	Invited By
<input type="checkbox"/>	<a href="#">92c7e99e-3927-476d-8051-2fddc878bd422</a>	hello	asf@uadhj.com	December 05, 2022 01:06	December 05, 2022 01:06	idk									

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New Onboarding Token | Docu x +

127.0.0.1:3000/admin/onboarding\_tokens/new

A

ADMIN / ONBOARDING TOKENS /

New Onboarding Token

Provider details

Provider name

Contact email

Create Onboarding token

Cancel



Onboarding Token Details	
PROVIDER NAME	karim
CONTACT EMAIL	kmahfouz@bsu.edu
CREATED AT	December 07, 2022 22:38
UPDATED AT	December 07, 2022 22:38
STATUS	EMPTY
PROVIDER	828a4689-1462-42ed-be61-729ba70ab6f8
EMAIL	kmahfouz@bsu.edu
INVITATION TOKEN	14df1a921ad7068309f44f53f843616aecce8a88eeb88b7a5f8df39406a2a529
INVITATION CREATED AT	December 07, 2022 22:38
INVITATION SENT AT	December 07, 2022 22:38
INVITATION ACCEPTED AT	EMPTY
INVITATION LIMIT	EMPTY
INVITED BY TYPE	EMPTY
INVITED BY	EMPTY

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Wed 12/7/2022 5:38 PM

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# Planned Iteration 3 Features

**Client Onboarding Automation Iteration 3**

View 1 | + New view

Filter by keyword or by field

Todo <span>3</span>	In Progress <span>0</span>	Done <span>4</span>
<ul style="list-style-type: none"><li>ClientOnboardingAutomation #6 FR3 - Automatically create quickbooks invoice - BR1 - HIGH</li><li>ClientOnboardingAutomation #8 FR4 - Automatically retrieve billing information from client - BR1 - MEDIUM</li><li>ClientOnboardingAutomation #7 NF4 - When an invoice is paid change the invoices display to reflect payment status - BR1 - LOW</li></ul>		<ul style="list-style-type: none"><li>ClientOnboardingAutomation #1 FR1 - Automatically create Support account - BR1 - HIGH</li><li>ClientOnboardingAutomation #2 FR2 - Automatically create initial account - BR1 - HIGH</li><li>ClientOnboardingAutomation #3 FR6 - customer can input their own information for new provider and initial account - BR1 - HIGH</li><li>ClientOnboardingAutomation #4 FR7 - functioning frontend for customer to use - BR1 - HIGH</li></ul>

# Funny haha slide

“You’re really telling me that this ship is called the Challenger?”

- Christa McAuliffe, 11:38 a.m.  
January 28th, 1986

