



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

Mid-iteration:

Suggestion: Switch from simple forum to complex portal

Changes: Switched from simple forum to complex portal

Suggestion: Polish our business requirements

Changes: added more detail to BR

Iteration 1:

Figure out how to implement tests

Figure out iteration 2 features before meeting with client



Client Feedback

Mid-iteration:

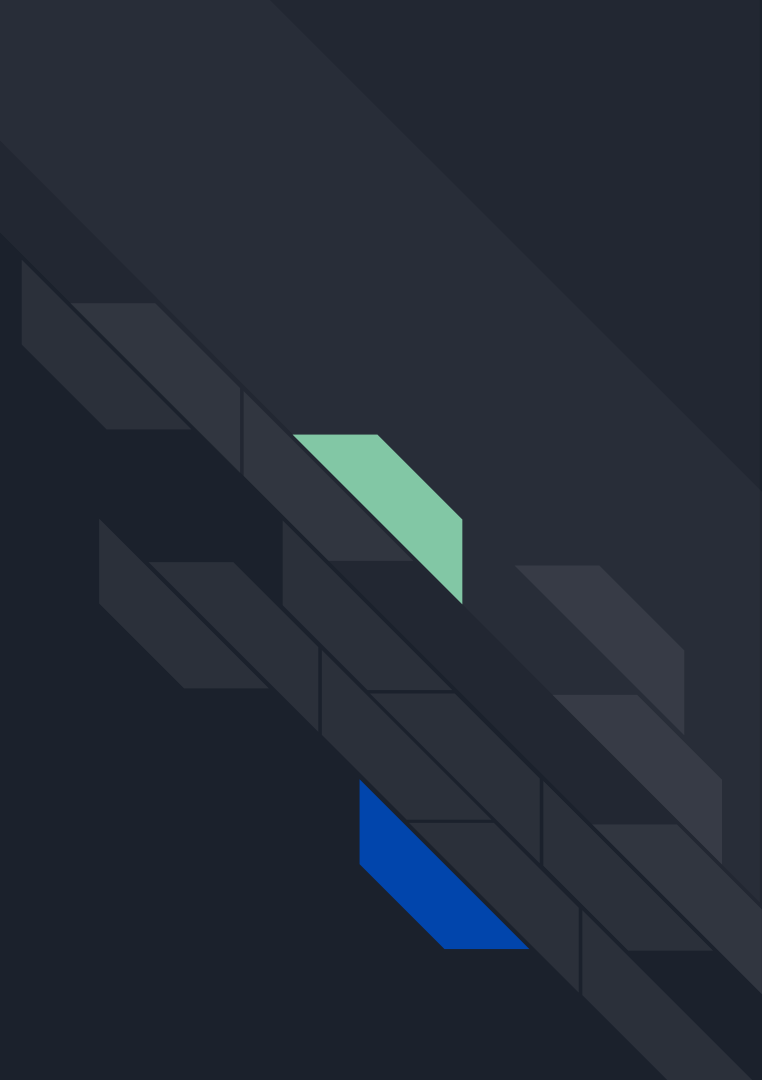
The client agreed with most of our design decisions. He emphasized the need for simplicity and gave us feedback regarding how to serve information to the user. The current plan is to have a mini webapp that gives the client updates on the status of their onboarding

First Iteration:

William really liked how far we have gotten and how we managed to make the project work with some of their things being in a mediocre state. He says that this iteration already will save lots of time.

FR1 - Automatically
create Support account
- BR1 - HIGH

FR2 - Automatically
create initial account -
BR1 - HIGH



New Provider

Provider details

Name*

test2

Initial email

test2@test.com

Sandbox Provider/Account/Entity ID

Sandbox username

Sandbox password

Create Provider

Cancel

tester2

Edit Provider


Delete Provider

Provider was successfully created.

Provider Details

SANDATA PROVIDER	EMPTY
SANDATA USERNAME	EMPTY
SANDATA PASSWORD	EMPTY
NAME	tester2
CREATED AT	November 07, 2022 23:29
UPDATED AT	November 07, 2022 23:29
NATIONAL PROVIDER	EMPTY
INITIAL EMAIL	tester@test.com



info=yourdocumentor.com@mg.appdevproject.com on    

To: Chandler, Gabriel

Wed 11/2/2022 5:18 PM

Hi Gabriel,

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The DocuMentor Team



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Planned Iteration 2 Features

Todo 2	In Progress 0	Done 2
<div data-bbox="19 349 608 535"><div data-bbox="19 349 608 404">Draft ...</div><div data-bbox="19 409 608 535">FR6 - customer can input their own information for new provider and initial account - BR1 - HIGH</div></div> <div data-bbox="19 551 608 704"><div data-bbox="19 551 608 606">Draft</div><div data-bbox="19 611 608 704">FR7 - functioning frontend for customer to use - BR1 - HIGH</div></div>		<div data-bbox="1275 349 1893 502"><div data-bbox="1275 349 1893 404">Draft</div><div data-bbox="1275 409 1893 502">FR1 - Automatically create Support account - BR1 - HIGH</div></div> <div data-bbox="1275 518 1893 671"><div data-bbox="1275 518 1893 573">Draft</div><div data-bbox="1275 578 1893 671">FR2 - Automatically create initial account - BR1 - HIGH</div></div>

Funny haha slide



That's a nice set of
dentures you got
there g-ma