Client Onboarding Automation

Gabriel, Karim, 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

Our mentor was very happy with what we got done and was confident that the client would be happy with what we have

The only criticism he had was we really need to implement a front end testing mechanism
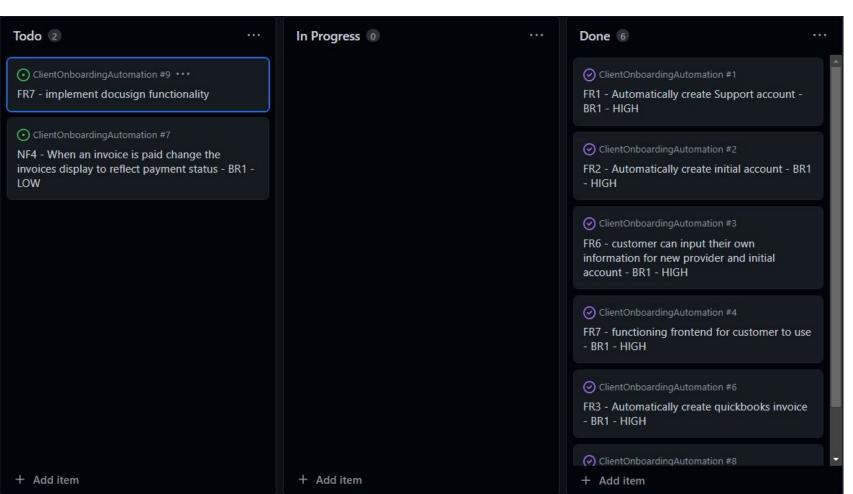
Client Feedback

Our Client was very happy with our third iteration and confirmed that it will be a significant help to him.
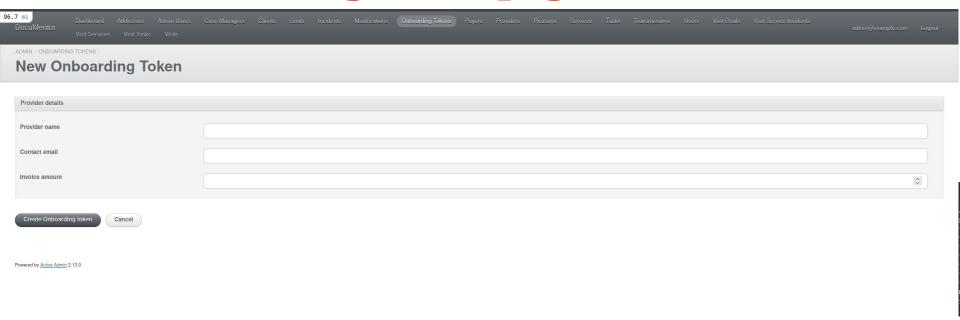
When asked about if there is anything else to add he said that everything he wanted is implemented, but he will ask another coworker, Jeff, if there is anything else that needs to be added/automated

He said "I am not easily impressed and I am very impressed with this. I did not expect it to look this good." He said he was speechless.

Iteration 4 Features

Todo 2

⊘ ClientOnboardingAutomation #9 •••
FR7 - implement docusign functionality

⊘ ClientOnboardingAutomation #7
NF4 - When an invoice is paid change the invoices display to reflect payment status - BR1 - LOW

In Progress 0

Done 6

⊘ ClientOnboardingAutomation #1
FR1 - Automatically create Support account - BR1 - HIGH

⊘ ClientOnboardingAutomation #2
FR2 - Automatically create initial account - BR1 - HIGH

⊘ ClientOnboardingAutomation #3
FR6 - customer can input their own information for new provider and initial account - BR1 - HIGH

⊘ ClientOnboardingAutomation #4
FR7 - functioning frontend for customer to use - BR1 - HIGH

⊘ ClientOnboardingAutomation #6
FR3 - Automatically create quickbooks invoice - BR1 - HIGH

⊘ ClientOnboardingAutomation #8

+ Add item

Create onboarding token page

DocuMentor

Dashboard   Addresses   Admin Users   Case Managers   Clients   Goals   Incidents   Modifications   Onboarding Tokens   Payers   Providers   Reasons   Services   Tasks   Transmissions   Users   Visit Goals   Visit Service Incidents   Visit Services   Visit Tasks   Visits

admin@example.com   Logout

ADMIN / ONBOARDING TOKENS /

New Onboarding Token

Provider details

Provider name

Contact email

Invoice amount

[Create Onboarding token]   [Cancel]

Onboarding Token created successfully

DocuMentor

Dashboard   Addresses   Admin Users   Case Managers   Clients   Goals   Incidents   Modifications   Onboarding Tokens   Payers   Providers   Reasons   Services   Tasks   Transmissions   Users   Visit Goals   Visit Service Incidents

Visit Services   Visit Tasks   Visits

admin@example.com   Logout

ADMIN / ONBOARDING TOKENS /

mknudsen762@gmail.com

Edit Onboarding Token   Delete Onboarding Token

Onboarding token was successfully created.

Onboarding Token Details

PROVIDER NAME	test provider
CONTACT EMAIL	mknudsen762@gmail.com
CREATED AT	February 06, 2023 22:54
UPDATED AT	February 06, 2023 22:54
STATUS	EMPTY
PROVIDER	bfb44545-4477-4c84-b9d0-700853da655d
EMAIL	mknudsen762@gmail.com
INVITATION TOKEN	ede9c4ef7b27bade5642b36c6b661ec3b7e1183835ca075af1cb895eb325950e
INVITATION CREATED AT	February 06, 2023 22:54
INVITATION SENT AT	February 06, 2023 22:54
INVITATION ACCEPTED AT	EMPTY
INVITATION LIMIT	EMPTY
INVITED BY TYPE	EMPTY
INVITED BY	EMPTY
STREET	EMPTY
CITY	EMPTY
STATE	EMPTY
ZIP	EMPTY
COUNTRY	EMPTY

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DocuMentor info@yourdocumentor.com via mg.appdevproject.com
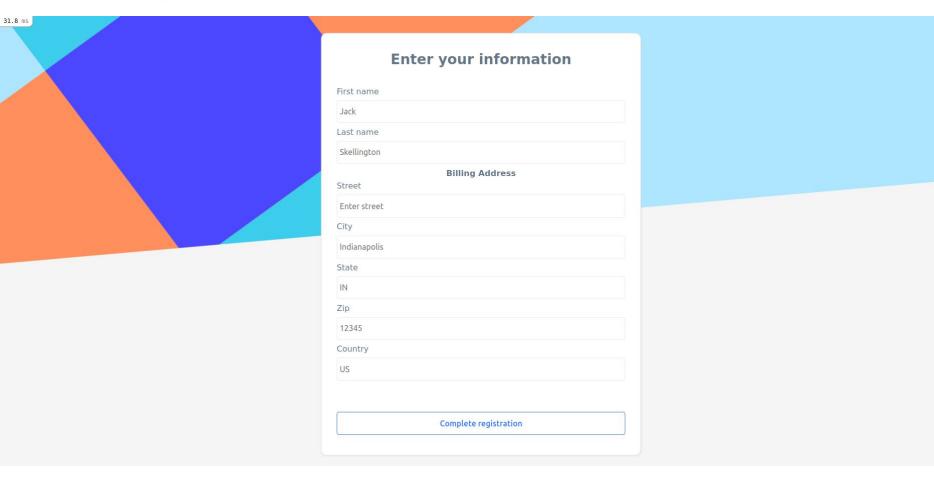
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Enter your information

First name

Jack

Last name

Skellington

Billing Address

Street

Enter street

City

Indianapolis

State

IN

Zip

12345

Country

US

Complete registration

Invoice sent for onboarding

Invoice from Craig's Design and Landscaping Services [Inbox ×]

Sandbox Company_US_1 <quickbooks@notification.intuit.com>
to me ▾

Dear asd asd,

Your invoice is attached. Please remit payment at your earliest convenience.
Thank you for your business - we appreciate it very much.

Sincerely,
Craig's Design and Landscaping Services

```
------------------------  Invoice Summary  --------------------------
Invoice # : 1070
Invoice Date: 03/08/2023
Due Date: 04/07/2023
Amount Due: $50.00

The complete version has been provided as an attachment to this email.
-----------------------------------------------------------------------
```

One attachment • Scanned by Gmail ⓘ

📄 Invoice_1070_fro...

Invoice sent for onboarding

Invoice from Craig's Design and Landscaping Services [Inbox ×]

Sandbox Company_US_1 <quickbooks@notification.intuit.com>
to me ▾

Dear asd asd,

Your invoice is attached. Please remit payment at your earliest convenience.
Thank you for your business - we appreciate it very much.

Sincerely,
Craig's Design and Landscaping Services

```
------------------------  Invoice Summary  --------------------------
Invoice # : 1070
Invoice Date: 03/08/2023
Due Date: 04/07/2023
Amount Due: $50.00


The complete version has been provided as an attachment to this email.
----------------------------------------------------------------------------
```

One attachment • Scanned by Gmail ⓘ

PDF Invoice_1070_fro...

Sign Docusign Document

DocuSign

michael knudsen sent you a document to review and sign.

REVIEW DOCUMENT

michael knudsen
mknudsen762@gmail.com

signer_name,

Please DocuSign Order acknowledgement

Thank You, michael knudsen

Planned Iteration 5 Features

Todo 2

⊙ ClientOnboardingAutomation #10

NF4 - Create Ruby jobs to automatically check for payment processing

⊙ ClientOnboardingAutomation #11 ···

FR3 - Create web portal for generating Oath tokens

In Progress 0

Done 8

⊘ ClientOnboardingAutomation #9

FR7 - implement docusign functionality

⊘ ClientOnboardingAutomation #1

FR1 - Automatically create Support account - BR1 - HIGH

⊘ ClientOnboardingAutomation #2

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FR7 - functioning frontend for customer to use - BR1 - HIGH

⊘ ClientOnboardingAutomation #6

FR2 - Automatically create quickbooks invoice

+ Add item

Client Benefit

The client can now input a specific amount for the invoice price. This allows for then to easily apply discounts for special occasions for potential clients

We also made it so that the contract is automatically sent out when the client is making their account, so they receive the invoice, user creation page, and contract docusign email automatically instead of our client having to do all of that on their end, cutting out a lot of unnecessary work for them

Funny haha slide