Client Onboarding Automation

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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.
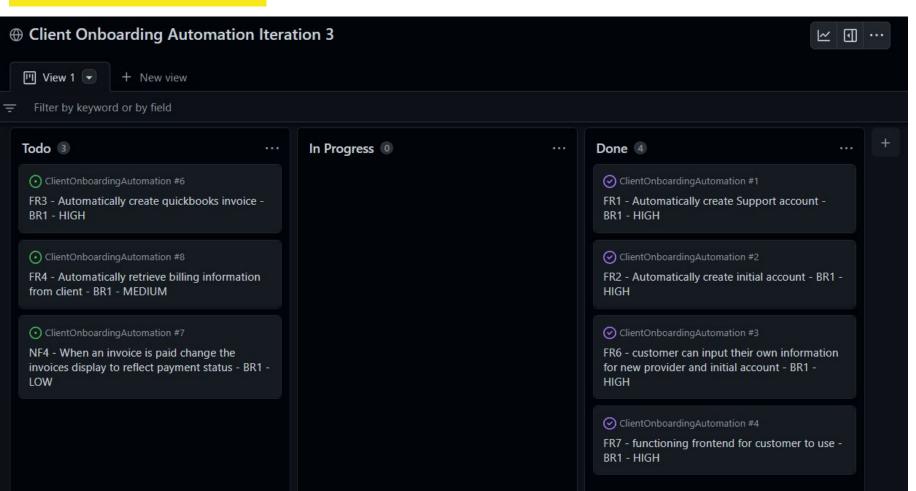
Mentor Feedback

- Make sure to keep testing all of your code
- Figure out docker for next iteration
- Talk to William about exaclty how he sends invoices and how he implements the payment link
- Maybe try to switch the app away from ruby to make the future development easier
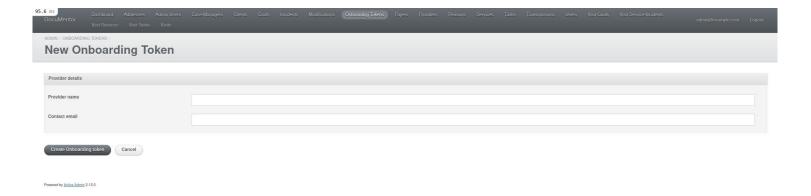
Client Feedback

Our Client was very happy with our third iteration and confirmed that it will be a significant help to him.

Based on his feedback, we are going to add a field to let him give customers discounts.

Iteration 3 Features

⊕ Client Onboarding Automation Iteration 3

View 1 ▾ | + New view

≡ Filter by keyword or by field

Todo 3

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

⊙ ClientOnboardingAutomation #8
FR4 - Automatically retrieve billing information from client - BR1 - MEDIUM

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

In Progress 0

Done 4

⊘ 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

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

Create Onboarding token   Cancel

Powered by Active Admin 2.13.0

Onboarding Token created successfully

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

Invite email

You've been invited to DocuMentor! Inbox ×

DocuMentor info@yourdocumentor.com via mg.appdevproject.com
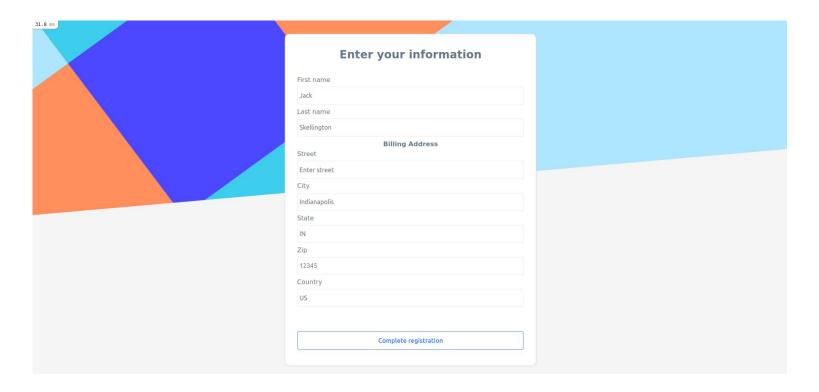to me ▼

Hello,

Someone has invited you to join their team on DocuMentor. Accept the invitation through the link below.
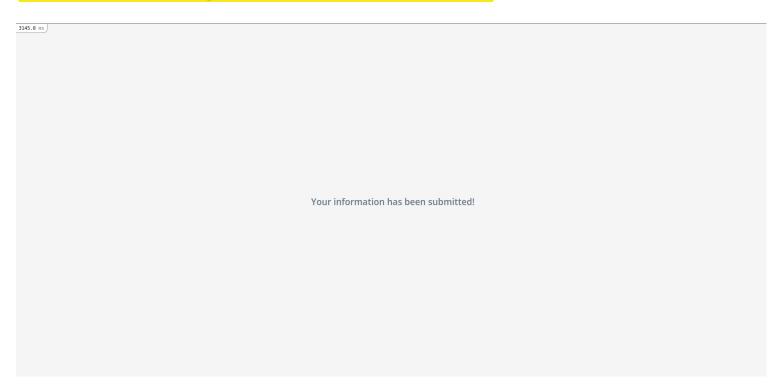
Accept invitation

If you don't want to accept the invitation, please ignore this email. Your account won't be created until you access the link above and set your password.
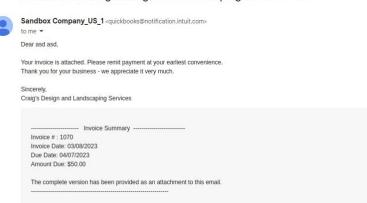
↩ Reply   ↗ Forward

Invite Forum

Invite Forum upon successful submit

3145.8 ms

Your information has been submitted!

Invoice sent for onboarding

Planned 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

Client Benefit

Now instead of having to create each invoice, by inviting the initial provider, the invoice is made and sent to the new provider automatically. William was very happy with this development and emphasized how much time this will save him.

We also have the client enter in all of the information for their invoice payment info.

Silly goofy ah