APPBUILDER.CLOUD WHITEPAPER IMPLEMENTATION #1

Back Office App for a Medical Concierge Services Company

The Medical Concierge Services company needed to move from a manual Excel back office to a unified software application which integrates with QuickBooks. The result to be improved organization, productivity and oversight of financials.

Key deliverables from appbuilder.cloud were:

- ✓ *Customized invoicing with three types of line items, a summary invoice and two detail invoices.*
- ✓ *Enter data points one time only.*
- ✓ *Formula calculations.*
- ✓ *QuickBooks integration of service list and invoicing.*
- ✓ *Email completed invoices to the user for review and combining with source documents for remittance to the insurance companies or patients.*
- ✓ *Sub customers.*
- ✓ *QuickBooks patient report.*
- ✓ *Appbuilder.cloud Income tax withholding report.*

Roadmap for future deliverables to include:

- ❖ *Document management*
- ❖ *Integration of data feeds from medical providers.*

OVERVIEW

The appbuilder.cloud platform implements the concept of generative software to deliver a custom developed software application through configuration, not programming. This allows the system to change dynamically as requirements change. When new requirements need to be implemented which are outside the abilities of the current platform, the platform is expanded or plugins created to provide unlimited functionality.

Appbuilder.cloud was very pleased to implement this system as the first client build of the appbuilder.cloud platform. During the consultation phase, an agile process was followed where demo versions were created for review and then requirements were modified and the system was reconfigured or the platform expanded resulting in the system now in production. As requirements were solidified and increased, it became clear that the appbuilder.cloud concept of software by configuration is a viable concept. New versions could be completed in hours. It also became clear that adding to the platform to create new functionality was a key feature of the system.

The Objective

> *The one and only purpose of appbuilder.cloud, Inc. is growth through customer satisfaction. There are many cloud solutions available to meet business needs but they can become expensive to implement for small business, especially if more than one system is needed. Often the cloud customer will need in house experts or outside consultants to properly configure and integrate cloud solutions.*

- The appbuilder.cloud solution is different from other cloud solutions. It doesn't know ahead of time what it's going to be.
- Appbuilder.cloud does nothing out of the box and therefore can do unlimited tasks once it's configured.
- Appbuilder.cloud provides no or low cost consulting and configuration as a loss-leader service.
- The appbuilder.cloud customer pays a month to month subscription fee for usage.

The Need and the Solution

> *We received a call from the outside accountant about a need to integrate complex Excel invoices with QuickBooks. The accountant had all but given up finding a solution provider. The existing solution was to manually enter the already completed invoices into QuickBooks.*

- Goal #1: Meet the initial stated need.
- Goal #2: Consult with the medical concierge services company to refine and add to requirements.
- Goal #3: Deliver on 100% of finalized needs using the appbuilder.cloud platform.

Execution Strategy

A combination of email communication and Skype meetings were used to communicate the client requirements and demonstrate updates to the system. Sample invoice documents were provided by the client. After each meeting or email request, the solution was implemented and the client was notified that the new features were available for testing.

Project Deliverables

Following is a partial list of system deliverables

Deliverable	Description		
Views and Entities	**Entity**	**View**	
	Billing Vendor	Medical Provider	
	Client	Client	
	Invoice	Invoice	
	Line Item	Expense	
	Line Item	Case Management	
	Line Item	Cost Containment	
	Line Item	Tax Withholding	
	Patient	Patient	
Reports	Invoice Summary		

	Case Management detail
	Cost Containment detail
	Expense detail
QuickBooks Pull Integrations	Service List, Customer Terms, Invoice balance
QuickBooks Push Integrations	Invoices, Customers, Sub Customers
Action Buttons	Push Clients to QuickBooks, Email Unsent Invoices, Push Invoices to QuickBooks, Get QuickBooks Invoice Balance

EXPECTED RESULTS

We expect our solution to: increase the productivity of staff, provide improved accuracy, allow for oversight of staff's activities, allow for up to date financial reporting. In summary, this appbuilder.cloud build will be a back office system which enables the client's business to thrive.

Financial Benefits

- Result #1: Faster payment from insurance companies.
- Result #2: Improve productivity.
- Result #3: Eliminate redundant tasks.
- Result #4: Reduction of data entry mistakes.
- Result #5: Tax withholding report.

Technical Benefits

- Result #1: One system means only one system to train on.
- Result #2: Cloud solution means work from office, home or while traveling is all the same.
- Result #3: Data backups handled by appbuilder.cloud through Amazon web services.

CONCLUSION

The delivered system was a success for both the Medical Concierge Services company which was able to get all of their needs met and for AppBuilder.cloud who had a successful first implementation of the platform.

AppBuilder.cloud has proven that it can be a competitor in the cloud business services space and is looking forward to the challenges to come!

Considering an appbuilder.cloud solution for your business? Send your requirements to support@appbuilder.cloud today and let us build a system for you.

Want to work for appbuilder.cloud? A part time commissionable technical sales internship is available. You will be trained on client consulting and configuration of systems. Contact us at support@appbuilder.cloud for details.