VIEWPOINT INNOVATIONS

Recommendation & first actions

Connect scheduling and billing without replacing both tools.

Prepared by: ViewPoint Innovations

Example scenario: a small service business

THE QUESTION

The team copies completed appointments into its billing tool. Should it connect the existing tools or replace them with a new system?

OPTIONS CONSIDERED

- **Keep the manual process:** no setup project, but the team still re-enters every appointment.
- **Connect the existing tools:** test whether their APIs support the required records and exceptions.
- **Replace both tools:** a larger change involving data migration, training, and a new daily workflow.

> **Recommendation for this example**
> Check the existing tools' integration options first. A limited connection may solve the duplicate-entry problem with less disruption. If the required data or access is unavailable, revisit replacement options before approving a build.

FIRST THREE ACTIONS

1. **Operations:** document one appointment-to-invoice example, including corrections and cancellations.
2. **Technical reviewer:** check API access, field mapping, provider costs, and failure handling.
3. **Business owner:** compare the scoped connection estimate with the replacement option.

WHAT NEEDS CONFIRMATION

Tool access, record ownership, permitted data use, and the cost of implementation. This brief does not authorize software changes.

Fictional example showing the form of an advisory recommendation. It is not a customer project, completed assessment, or approved implementation plan.