



Smarter Financial Insights for **Dental Practices**



Team Composition:

2 Senior Engineers
1 QA Engineer
1 Project Manager



Project Duration:

3 months
(fixed scope)



Tech Stack:

React, Node.JS

Project Overview

Engage Advisors simplifies financial management for dental practitioners by integrating **QuickBooks** data into a powerful analytics platform. With **custom Chart of Accounts mapping**, KPI tracking, and peer comparisons, it empowers better financial decisions and strategic planning.

Business Challenges

- **QuickBooks** lacked customization for dental-specific Chart of Accounts.
- **Inadequate data retrieval and poor visualization** limited actionable insights.

Solutions Delivered

- **Custom Chart Mapping:** Drag-and-drop interface enables tailored analytics and organization.
- **QuickBooks Integration:** Real-time data syncing with visual dashboards and summaries for easy interpretation.

Results & Impact

- **Delivered in just 3 months**, exceeding delivery expectations.
- **Seamless QuickBooks sync** provides up-to-date, accurate financial insights.
- **100% automation** in peer group distribution.
- **Enabled 70% improvement** in informed decision-making across users.
- **Broader, more actionable analytics** with both absolute and relative financial views.