# Smart Appointment Booking – CRM Project

## Phase 1: Problem Understanding & Industry Analysis

* Goal: Understand what we are building and why.

### 1. Requirement Gathering

• Studied the manual process of hospitals and clinics where appointments were handled with registers and phone calls.  
• **Identified problems:**  
 – Double bookings.  
 – Missed appointments due to no reminders.  
 – No proper tracking of workload.  
 – No centralized reporting.  
**• Finalized requirements:**  
 ○ Online patient appointment booking.  
 ○ Auto-assign doctors based on specialization and availability.  
 ○ Enforce daily appointment limits for doctors.  
 ○ Reject booking if slots are full.  
 ○ Send confirmation/rejection emails.  
 ○ Send reminder notifications one day before appointment.  
 ○ Doctors update status after completion.  
 ○ Admin dashboards for workload, patient flow, and trends.

### 2. Stakeholder Analysis

• Patients – Book appointments and receive notifications.  
• Doctors – View/manage appointments and update completion status.  
• Admin/Clinic Manager – Oversee bookings, manage resources, generate reports.

### 3. Business Process Mapping

Patient books appointment → System checks doctor availability → Appointment confirmed/rejected → Email sent → Reminder notification sent → Doctor updates status → Admin monitors reports.

### 4. Industry-specific Use Case Analysis

* Healthcare faces high patient load, inefficient manual processes, and communication gaps. The smart appointment solution addresses these by:  
  – Automating scheduling and avoiding overlaps.  
  – Improving patient communication with reminders.  
  – Enforcing doctor workload limits.  
  – Providing insights to management via dashboards.

### 5. AppExchange Exploration

Reviewed Salesforce Health Cloud & Appointment apps. Final choice: build a custom appointment booking solution to demonstrate Salesforce Admin + Developer concepts.

## Phase 2: Org Setup & Configuration

* Goal: Prepare Salesforce environment.

### 1. Salesforce Editions

Used Salesforce Developer Edition Org for implementation.

### 2. Company Profile Setup

Configured clinic information, local time zone, and INR currency for reporting.

### 3. Business Hours & Holidays

* Set hospital working hours (9 AM – 5 PM).
* Added weekends and public holidays to restrict booking.

### 4. Fiscal Year Settings

* Enabled Standard Fiscal Year (Jan–Dec) for reporting.

### 5. User Setup & Licenses

Created users: Admin/Manager, Doctors, Patients (Community/Portal).

### 6. Profiles

* Admin – Full access.
* Doctors – Manage appointments.
* Patients – Limited access for booking.

### 7. Roles

Hierarchy: Admin/Clinic Manager → Doctors → Patients.

### 8. Permission Sets

Created additional permission sets for doctors to access reports/dashboards.

### 9. OWD (Org-Wide Defaults)

Appointments – Private.  
Doctors – Public Read Only.  
Patients – Private.

### 10. Sharing Rules

* Appointments shared with Admin role automatically.

### 11. Login Access Policies

* Doctors restricted to login 9 AM – 5 PM.
* Admin – full access.
* Patients – 24x7 access.

### 12. Dev Org Setup

* Developer Org used as sandbox for building and testing.

### 13. Sandbox Usage

* Documented process for Sandbox → Production deployment in real-world usage.

### 14. Deployment Basics

* Prepared Change Sets for moving configurations. Documented SFDX/VS Code deployment methods.