# ­­my clinic

# Smart Appointment Booking – CRM Project

## Phase 1: Problem Understanding & Industry Analysis

* Goal: Understand what we are building and why.

**Problem Statement:** Hospitals and clinics often manage appointments manually, which leads to double bookings, missed appointments, and lack of proper tracking for doctors. Patients are not notified properly, and admins cannot generate clear reports on hospital operations.

**Proposed Solution:** A Salesforce-based Appointment Booking System that allows patients to book appointments online, auto-assigns doctors based on specialization and availability, enforces daily limits per doctor, sends confirmation/rejection emails, reminds patients a day before, and provides dashboards for admins.

### 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

Salesforce AppExchange offers healthcare-related applications such as Salesforce Health Cloud and Appointment Scheduler. These apps provide advanced scheduling, patient record management, and telehealth features. For this project, a simplified custom solution is built to demonstrate Salesforce concepts (Admin + Developer) while addressing core appointment booking challenges.