## Opportunity Dashboard ( Pop-up Screen for Drag and Drop)

A pop-up screen will appear when user tries to move Patient from one stage to another.

1. Only valid destination stages are shown to user for change ( As per Rule attached)
2. Appointment date and slots are shown based on calendar selection
3. Appointment date & time should be greater than today’s date & time
4. On save, close the pop-up and refresh the dashboard so that the changed card appears under appropriate stage on top (recently modified)

Latest File for Rules –

Visit\_Stage\_Appointment\_StatusRuleBook-V0.6.xlsx

## Opportunity Dashboard Enhancements (Dashboard Display)

Design as per Marvel page

<https://marvelapp.com/prototype/c4d89fd/screen/77921931>

## Appointment Dashboard

* Sorted on pending, Confirmed, Cancelled and Appointment date – time (latest on top)
* Display all appointments / opportunities except (stages) “New Leads”, “Hot Leads”, “Completed” and opportunity status = OPEN (Lost, Abandon and Won shouldn’t be shown)

**Actions**

* Pending Appointment can be changed to Confirm or Cancel
* On confirmation,
  + Change Appointment status = Confirmed or Cancelled
  + Stage – Appointment Confirmed or Appointment Cancelled
  + Ensure that the appointment date – time > current date - time
  + Change the colour of the row and appropriately sort the same
* Export
* Export selected records in stated format and store the file at destination directory with appropriate file name
* Destination directory (default as download else user selected)
* File Name - <Page\_Title\_YYYYMMDD\_TIME (Min\_Sec)>

## SMS Templates

* Display all the SMS templates (default sorting – created on descending)
* Show Template Name, Body Text, Created On, Created By, Updated on, Updated by, System Template(Y/N)
* Sorting on template name, created on, updated on
* Search based on template name, reset search to display all templates
* Select all for export, pagination, number of rows on page, column setting should also work

**Edit SMS template**

* User can change the template name if its allowed else its display only field
* User can cut-paste the tags (as instructed) to create the body text
* Show number of characters used to create SMS text

## Mail Templates

* Display all the Mail templates (default sorting – created on descending)
* Show Template Name, cc, Subject, Body Text, Attachment, Created On, Created By, Updated on, Updated by, System Template(Y/N)
* Sorting on template name, created on, updated on
* Search based on template name, reset search to display all templates
* Select all for export, pagination, number of rows on page, column setting should also work

**Edit Mail template**

* User can change the template name if its allowed else its display only field
* User can cut-paste the tags (as instructed) to create the body text
* Attachment can be viewed, deleted and added again

## Send SMS

**Send platform specific SMS to patient**

* Triggers (Stage change) when system has to send SMS to Patients
* Patient Registration (new lead)
* Appointment requested (Appointment requested)
* Appointment Confirmed (Appointment Confirmed)
* Appointment Cancelled (Appointment Cancelled)
* Use the appropriate SMS template based on the trigger points / Stage changes
* Get data for replacing the tags used in SMS body text
* Send SMS and log the same as activity?

**Send platform specific eMail to patient**

* Triggers (Stage change) when system has to send eMail to Patients
* Patient Registration (new lead)
* Appointment requested (Appointment requested)
* Appointment Confirmed (Appointment Confirmed)
* Appointment Cancelled (Appointment Cancelled)
* Use the appropriate eMail template based on the trigger points / Stage changes
* Get data for replacing the tags used in email subject and body text
* Send email and log the same as activity?

## View Contacts

**Display all Contacts**

* Ensure that only 2 / 3 tags are shown on screen
* If there are more tags, those should be shown on tool tip
* Sorting using column heading, Pagination, No of rows on 1 page, Column Settings, Selection of all rows or specific row for Edit and Export should work

**Export**

* Export selected contacts in stated format and store the file at destination directory with appropriate file name
* Destination directory (default as download else user selected)
* File Name - <Page\_Title\_YYYYMMDD\_TIME (Min\_Sec)>

**Edit Contact**

* First Name and Last Name as separate fields
* Apply same rule that was applied while Patient registration