HOW TO GUIDE: MEDICAL AND REHABILITATIVE SUPPLY ORDER MANAGEMENT APP

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DATA MODEL AND APP OUTLINE

15% of total clinic expenses are made up of medical supplies and rehabilitative equipment. It is imperative that clinics remain properly stocked with the necessary medical supplies and equipment needed to provide optimal patient care. Thus, creating a Salesforce custom app that provides and tracks medical supplies and rehabilitation equipment orders for physical therapy clinics would prove to be of great value. Unlike traditional episodes of care associated with primary care physicians or specialists, episodes of care associated with physical rehabilitation consist of 2-3 visits per patient, for an average of 6-8 weeks. With such a high frequency of patient visits, it is imperative that clinics remain adequately stocked with the necessary medical supplies needed to render these services.

This manual will serve as a comprehensive technical training guide, providing step by step instructions to individuals on how to build a custom medical and rehabilitative supply management app within Salesforce. This app will assess the supply needs of outpatient clinics, process orders, and allow consumers to specify the types of medical equipment needed to optimize patient care.

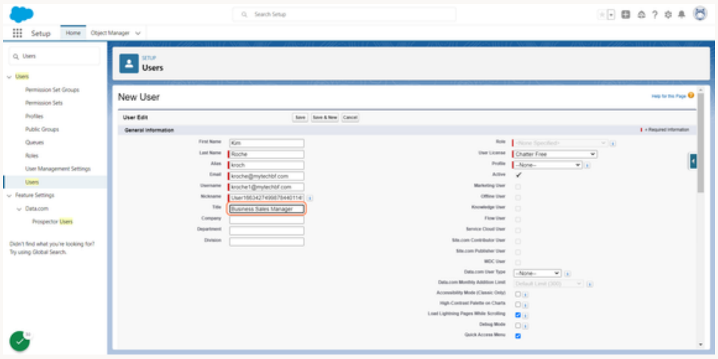
USERS & PROFILES

Create the following 3 users and profiles:

- Business Sales director: responsible for managing and overseeing the business sales managers, securing and onboarding potential clients (i.e. clinics/hospitals) and assigning them to different managers.
- Business Sales Manager role: responsible for managing each large account and delegating tasks to the business sales associates.
- Business Sales Associate: responsible for directly fulfilling supply orders associated with each client account

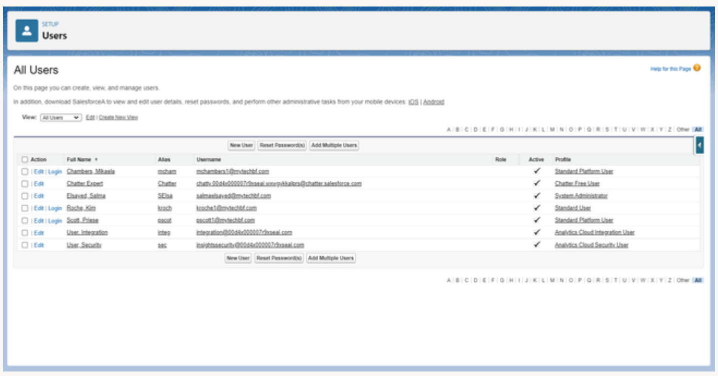
Create Users

1. Log into Salesforce
2. From **Setup** > enter **Users** in the Quick Find box > Select **Users**
3. Click **New User**
    a. Fill out the required fields (i.e. Name, email, username etc.)
    b. Note: Salesforce will automatically populate a username and nickname after the email is entered



4. Click **User License**
    a. Select **Standard Platform** User from the drop-down menu when creating the business sales director and business sales associates users
    b. Select **Marketing User** from the drop-down menu when creating the business sales manager user

5. Ensure the **active** checkbox is selected to allow the user to access the account
6. Click **Save**



USERS & PROFILES

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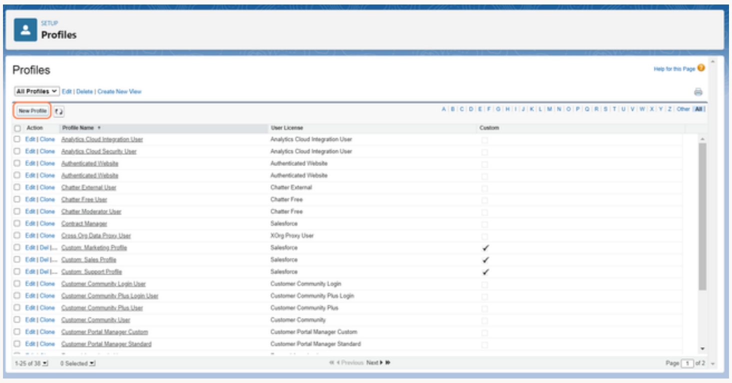
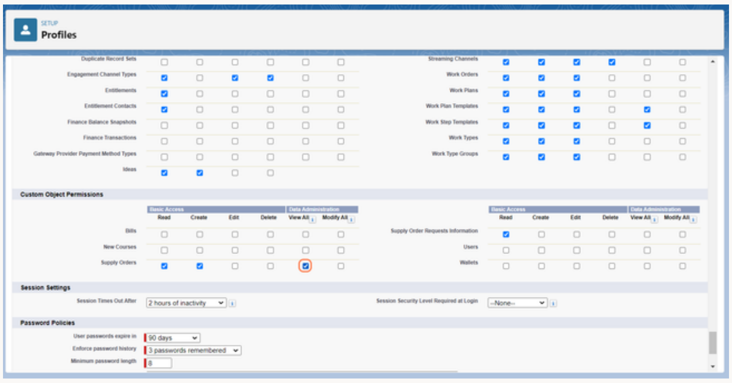
Create Profiles

Now, create profiles for the business sales manager and business sales associate users

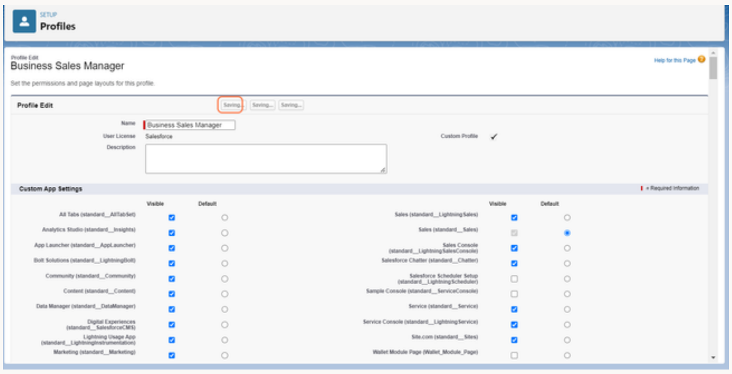
1. From **Setup** > enter *Profiles* in the Quick Find box > Select **Profiles**
2. From the list of profiles select **Standard User** > Click **Clone**
3. Type “*Business Sales Associate*” for Profile Name > Click **Save**
4. Click **Edit** and scroll to Custom Object Permissions
    a. Check **Read, Create** and **View** all for the Supply Orders Object (see page
    b. Check **Read** for the Supply Order Requests Information
5. Click **Save**





For the Business Sales Manager profile

1. From **Setup** > enter *Profiles* in the Quick Find box > Select **Profiles**
2. From the list of profiles select **Marketing User** > Click **Clone**
3. Type “*Business Sales Manager*” for Profile Name > Click **Save**
4. Click **Edit** and scroll to Custom Object Permissions
    a. Check **Read, Create, Edit, Delete** and **View all** for both the Supply Orders and Supply Order Requests Information Objects (see page
5. Click **Save**

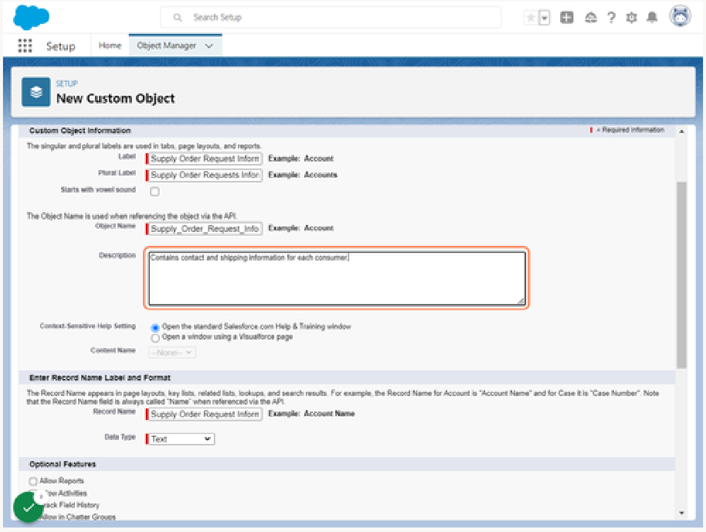


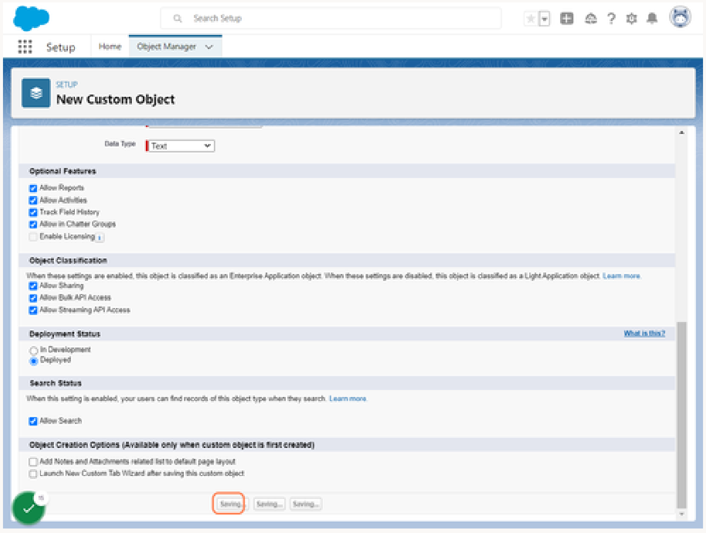
CUSTOM OBJECTS

- Create the custom object that will contain information regarding the clinical consumer
- Create the custom fields associated with the custom objects

Create Custom Objects

1. From **Setup** > click on **Object Manager** > Click **Create** > Click **Custom Object**
2. Fill out the required fields as follows:
    a. **Label**: Supply Order Requests Information
    b. **Plural Label**: Supply Order Requests Information
        i. Note: Object name will popular automatically when this field is selected
    c. **Description**: “Contains contact and shipping information for each consumer.”
3. Check off all **optional features** (Allow reports, allow activities, track field history, Allow in chatter group)
4. Check **Deployed** under Deployment Status
5. Check **Allow Search**
6. Click **Save**
7. Repeat the steps above to create the Supply Orders custom object
    a. **Label**: Supply Order
    b. **Plural Label**: Supply Orders
    c. **Description**: “Contains the specific supplies ordered by each consumer account.”



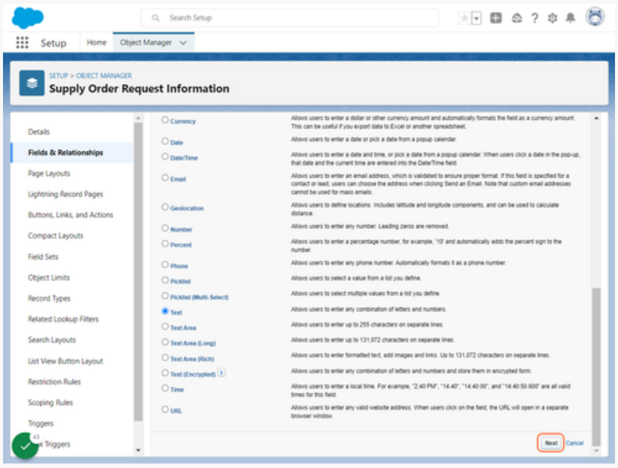


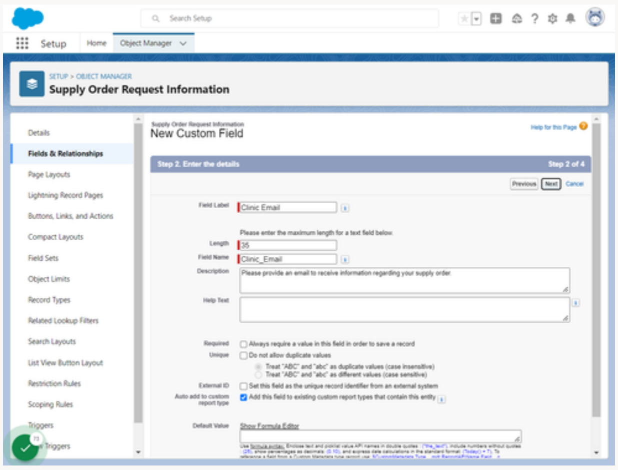
CUSTOM FIELDS

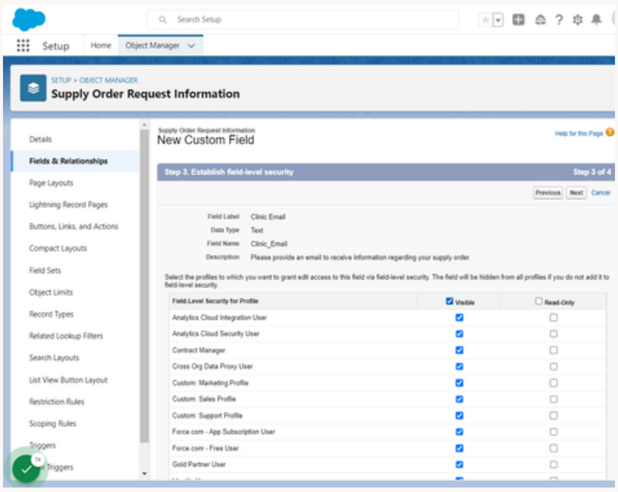
- Create the custom fields associated with the custom objects

Create Custom Fields

1. Under the Supply Order Requests Information and Supply Orders objects, click **Fields & Relationships**
2. Click **New** and create the following fields for the **Supply Order Requests Information** Object:
   a. **Name** (Text)
   b. **Clinic Address** (Text Area)
   c. **Clinic Phone Number** (Phone)
   d. **Clinic Email** (Text)
   e. **Clinical Specialty** (Picklist)
      i. Select "Enter values, with each value separated by a new line"
         1. Type "Orthopedics Pediatrics Geriatrics Home Health Neurology Oncology Pelvic Floor " into text area, each on a separate line
   f. **Order Status** (Picklist)
      i. Select "Enter values, with each value separated by a new line"
         1. Type "Complete and Incomplete " into text area, each on a separate line
   g. **Shipping Date** (Date)
3. For the Supply Orders object, create the following custom fields:
   a. **Name** (Master Detail Relationship)
      i. Select **Supply Order Requests Information** as the Related to object
   b. **Evaluation Tools** (Picklist)
      i. Type "Digital Time, Tape Measure, 8" Goniometer, Blood Pressure cuff etc. " into text area, each on a separate line
   c. **Gels, Lotions, Creams** (Picklist)
      i. Type Ultrasound Gel, Lotion, Hawk Grips Emollient, and Deep Prep" into the text area
   d. **Medical & Surgical Supplies** (Picklist)
      i. Type "Blue Nitrile Gloves, Vinyl Gloves, and Sterile Gauze" into the text area
   e. **Resistance Bands** (Picklist)
      i. Type "Yellow, Red, Green, Blue, and Black" into the text area
4. Ensure field level security is **visible** for all profiles
5. Follow the prompts and click **Save**





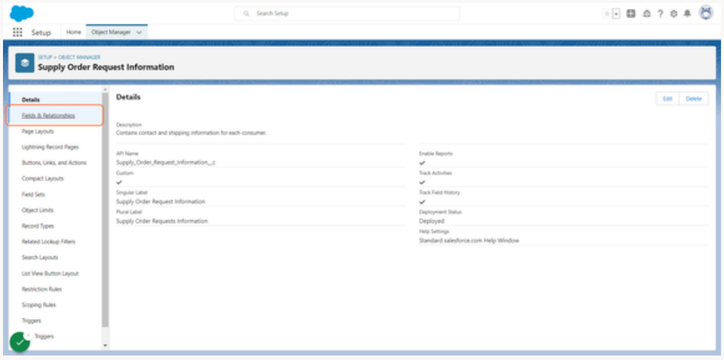


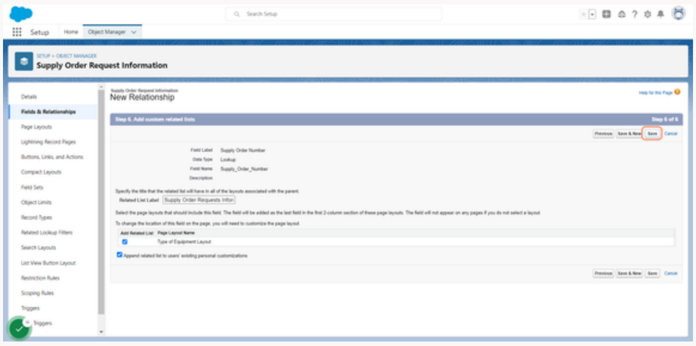
CUSTOM LOOK UP FIELDS

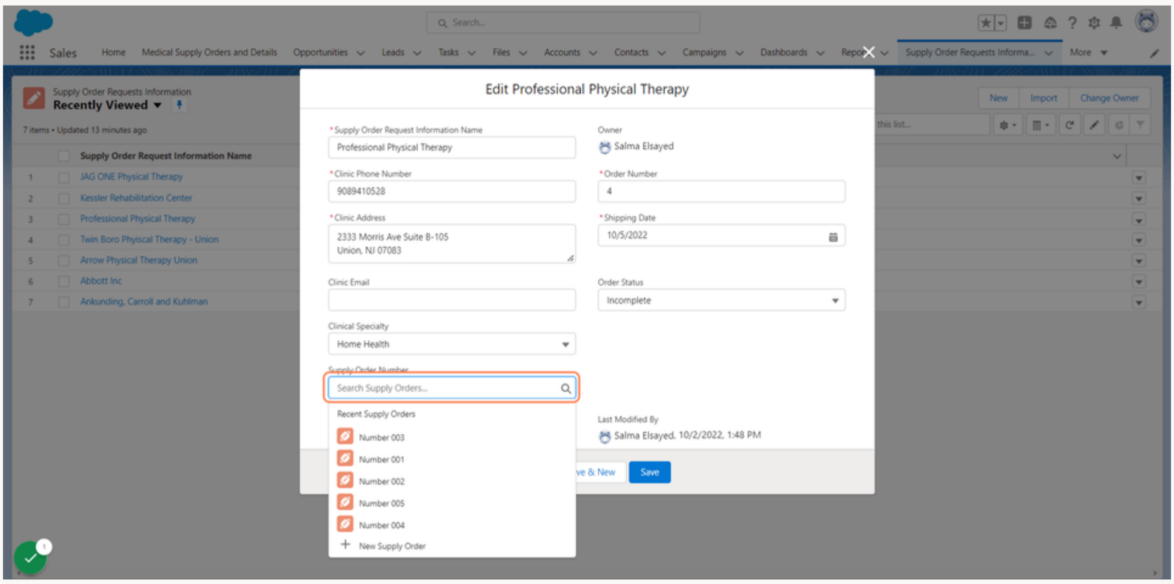
- Create a look up field so that a look up relationship exists between the Supply Order Requests Information and Supply Orders object, allowing users to select the order number related to the consumer account

Create a Custom Look Up Field

1. From **Setup** > Click on **Object Manager** > Select the **Supply Order Requests Information** object
2. Click on **Fields & Relationships** > click **New**
3. Select **Lookup Relationship** for Data Type > Click **Next**
4. Select **Supply Order** as the Related to object > Click **Next**
5. Type *"Supply Order Number"* as the Field Label > Click **Next**
6. Check **Visible** to ensure that this field is visible to all profiles > Click **Next**
7. Click **Save**





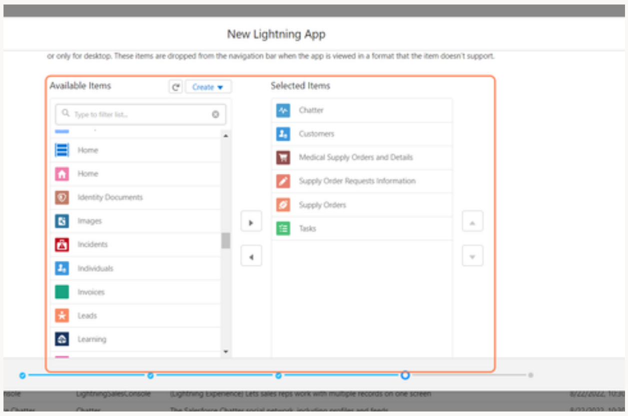


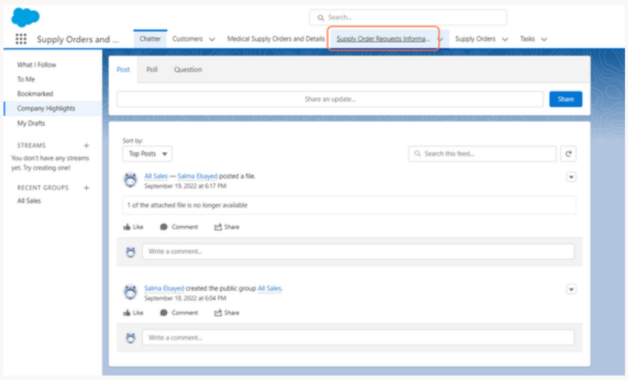
LIGHTNING APP & RECORD PAGE

- Create a lightning app that provides the business director, managers, and associates with every they need to know to fulfill supply orders.
- Create a record page to give users a customized view for each object's records

Create a Lightning App

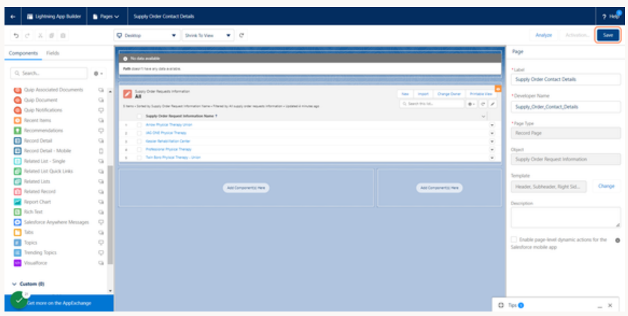
1. From **Setup**, enter *App* in the Quick Find box, then select **App Manager**
2. Click **New Lightning App**
3. Complete the steps using the Lighting App Wizard to create an app with the following parameters
    a. **App Name**: Supply Orders and Details App
    b. **Description:** This App will contain information regarding the consumer and the supply order specific to their clinic.
    c. **Utility Items:** Add Chatter Feed, List View, and Notes
    d. **Navigation Items:** Add Chatter, Customers, Medical Supply Orders, Supply Order Requests Information, Supply Orders and Tasks
    e. **Assigned to User Profile:** System Administrator, Business Sales Associate and Business Sales Manager
4. Click **Save** and **Finish** to exit the wizard





Create Record Page

1. From **Setup**, enter *App Builder* in the Quick Find box, then select **Lightning App Builder**
2. Click **New**
3. Select **Record Page** and start stepping through the wizard
4. Name the page *Specific Order Details* and select **Supply Orders** as the object
5. Choose the **Header and One Region** as the page template > Click **Finish**
6. Add **List View** and **Flow** to the page
7. This page can be customized to display information regarding specific supply orders. Let's customize the page to show consumer accounts that ordered resistance bands.
8. Under Set Component Visibility, click **Add Filter**
    a. **Field:** Supply Order
    b. **Operator:** Contains
    c. **Value:** Resistance Band
9. .Click Save and the Activate
10. Click on **Assign as App Default** > Select **Sales and Sales Console**
11. Click **Save**

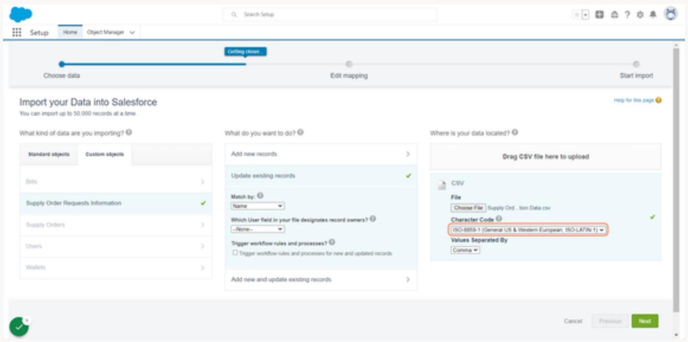


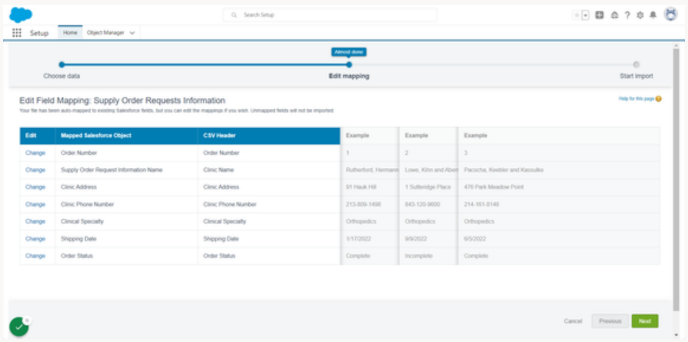
IMPORT DATA

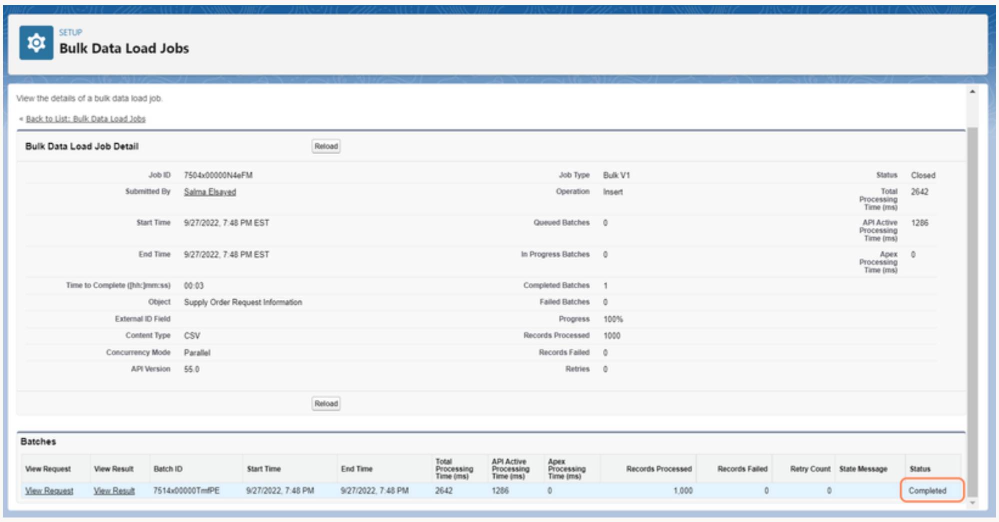
- Import a csv file that contains information pertaining to the Supply Order Requests Information custom object, containing details regarding consumer accounts.

Import Data

1. From **Setup**, enter *Data Import Wizard* in the Quick Find box, then select **Data Import Wizard**
2. Click **Launch Wizard!**
3. Click **Custom Objects** > Select the **Supply Order Requests Information** object
4. Click **Add new records**
5. Select a CSV file for upload, in this case, select the *Supply Order Information Data* file > Click **Next**
6. Click **Map** next to the unmapped fields to ensure that data fields match the object fields
7. Click **Next** > Click **Start Import**
8. Check import status:
    a. From Setup, enter “Bulk Data Load Jobs” in the Quick Find box, then select Bulk Data Load Jobs. The user who starts the data import receives a status email when the import is completed.



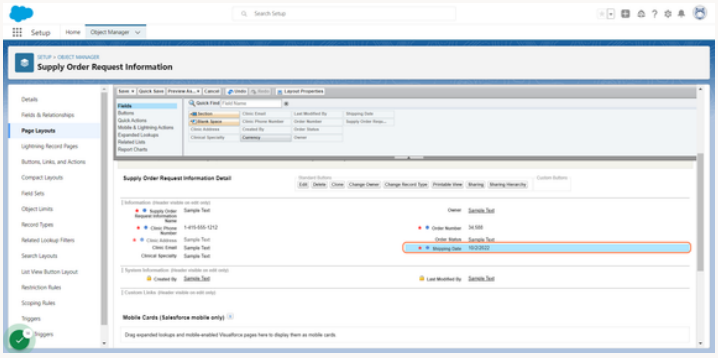




PAGE LAYOUTS & LIST VIEWS

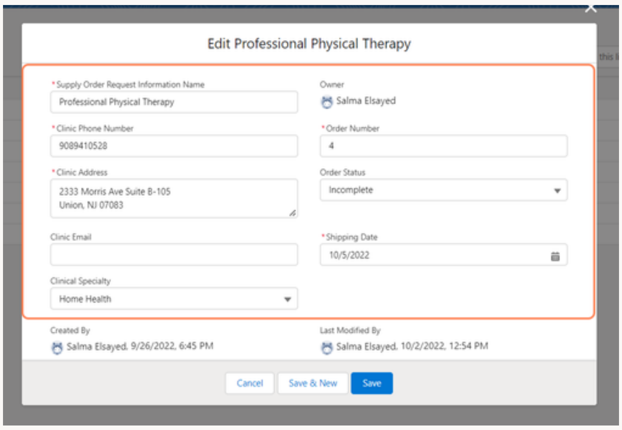
- Customize the Supply Order Requests Information page to optimize the user experience
- Customize a list view that allows users to view a list of solely completed orders

Customize a Page Layout

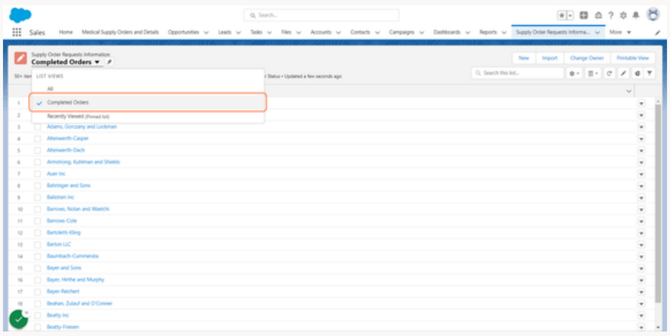


1. From **Setup** > Click on **Object Manager** > Select the **Supply Order Requests Information** object
2. Click on **Page Layouts** > **Edit**
3. Under Information, drag **Order Number, Shipping Date** and **Order Status** to the right-hand column
4. Click **Save**

Customize a List View



1. From the **App Launcher**, find and select the **Sales** app and select the **Supply Orders Requests Information** tab
2. From the list view controls (gear icon), select **New**
3. Name the list *Completed Orders*
4. Select *All users can see this list view*
5. Click **Save**
6. Click **Add Filter** and fill out the fields as follows:
   a. **Field:** Order Status
   b. **Operator:** equals
   c. **Value:** Complete
7. Click **Done** and **Save**

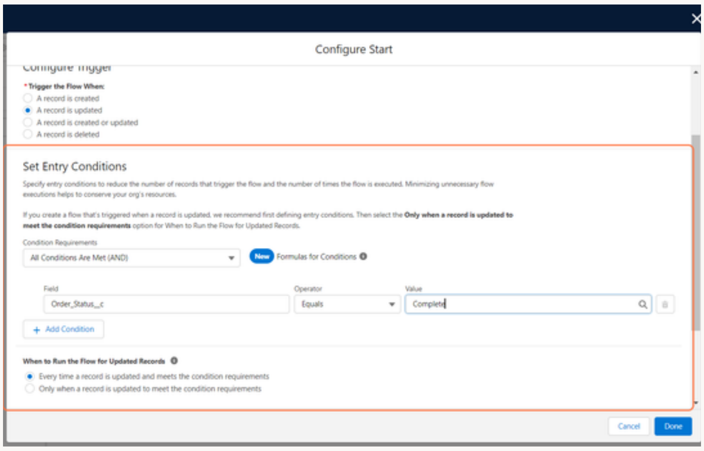


FLOWS & EMAIL NOTIFICATIONS

- Create a flow that is triggered when supply order status is updated to complete. This flow will then trigger an email notification to be sent to the consumer notifying them that their order has been completed and will arrive on the shipping date they selected.

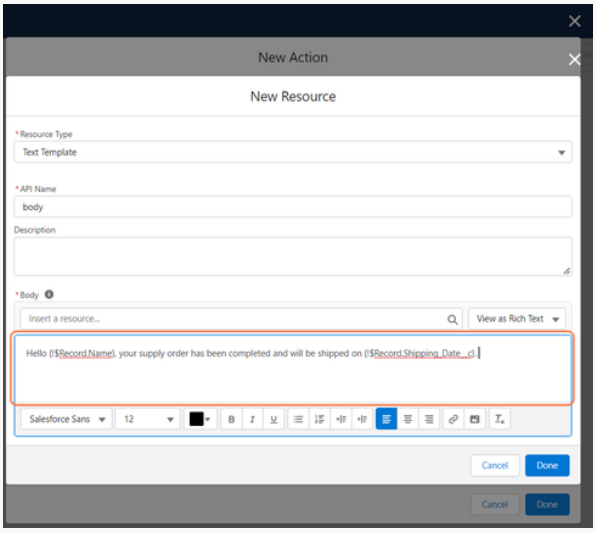
Create a Flow

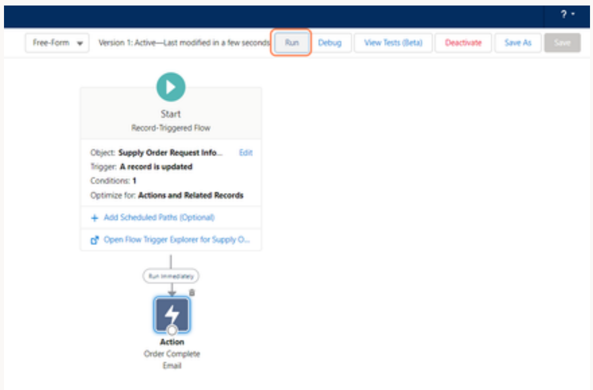
1. From **Setup**, enter *Flows* in the Quick Find box, then select **Flows**
2. Click **New Flow**
3. Select **Record-Triggered Flow**
4. Click **Create**
5. Complete the Configure Start window fields as follows:
   a. **Object:** Supply Order Requests Information
   b. **Trigger the Flow When:** A record is updated
   c. **Set Entry Conditions:** All Conditions Are Met (AND)
      i. **Field**: Order_Status_c
      ii. **Operator**: Equals
      iii. **Value:** Complete
   d. **Optimize the Flow for:** Actions and Related Records
6. Click **Done**



Create an Email Notification

1. Click **Add Action**
2. Select **Send Email**
3. For **Label**, type *Order Complete Email*
4. Click on **Body** > Select **Text Template** for Resource Type
   a. **API Name:** Body
   b. **Type the following:** *Hello (Add Record Name field) your supply order has been created and will be shipped on (Add Shipping Date field).*
   c. Click **Done**
5. Click **Subject** and type *Order Complete*
6. Ensure **Recipient Email Addresses (comma-separated)** is included
   a. Select **Record** > **Owner ID** >**Email**
7. Click **Done**
8. Click **Save**
9. Save the flow as *Order Completed*
10. Click **Debug** > Click **Run** > and then Click **Activate**



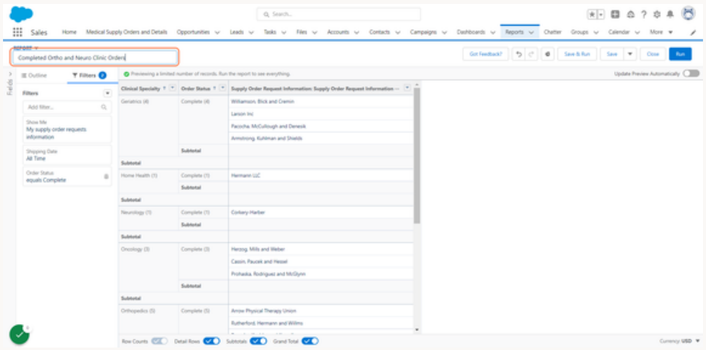


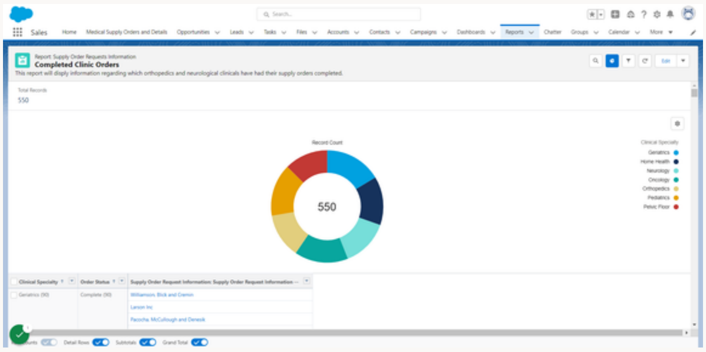
REPORTS & DASHBOARDS

- Create a report that displays information regarding completed clinic orders and sorts them by clinical specialty
- Create a dashboard to display this report

Create a Report

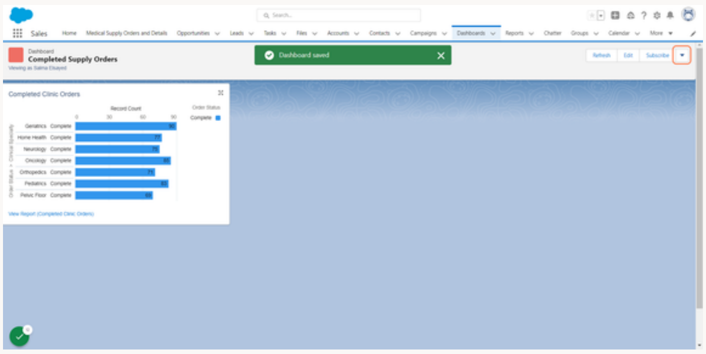
1. From the **App Launcher**, find and select the **Sales app** and select the **Reports** tab
2. Click **New Report**
3. Select **Supply Order Requests Information** for report type
4. Click on **Add Groups** and select **Clinical Specialty** and **Order Status**
5. Click on **Add Columns** and select **Supply Order Request Information Name**
6. Click on **Add filter** and fill out the required fields as follows:
    a. **Filter by:** Order Status
    b. **Operator:** equals
    c. **Value:** Complete
7. Click **Apply**
8. Click **Save**
    a. **Report Name:** Completed Clinic Orders
    b. **Report Description:** This report will display information regarding clinics with completed supply orders
    c. Select **Public Reports**
9. Click **Save** and **Run**
    a. Note: To add a chart component to this report, click on **Toggle Chart** and select the chart display of your choice. In this case, a donut chart was selected to display the data.

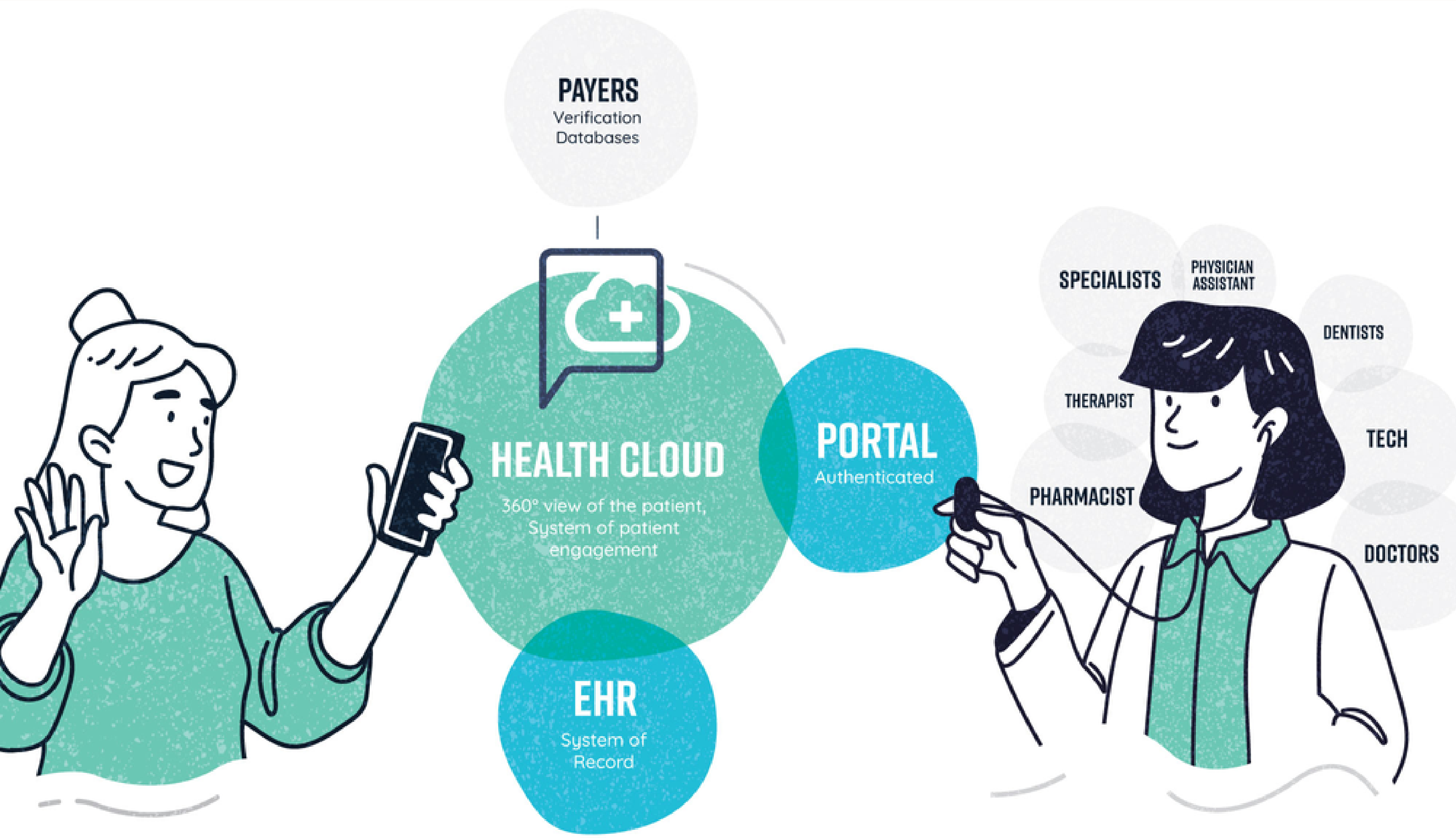




Create a Dashboard

1. From the **App Launcher**, find and select the **Sales app** and select the **Dashboards** tab
2. Click **New Dashboard**
3. Type *Completed Supply Orders* for name and then Click **Create**
4. Click the **+Componenet** button and select the **Completed Clinic Orders** report
5. Choose the **bar chart**
6. Click **Add**
7. Click **Done** and then **Save**





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