

AMC - Patient Email

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Objective: This document describes the functionality and working of the **AMC – Patient Email** project. This document also tells about the estimate of project.

Functionality:

1. **User & Group Management:** Only Admin users will be able to add/edit/delete groups with permissions and assign users into groups.
2. **Template Management:** Eligible user (identified by the group permission) will be able to add/edit/delete templates.
Templates are of two types:
 - a.) **Master templates:** This kind of templates serve as header and/or footer of an email which will be editable at any time by eligible user.
 - b.) **Email templates:** This kind of templates serve as body of an email which will have text formatting tools and integrate with master template to form a complete email.

Templates will contain some sort of fields which are driven from a Tag selector, and will be replaced with real values at the time of email is sent.

3. **Attachments:** These can be attached in group (multiple files within folder) and/or as individual with any email being sent.
4. **Send Email:** User will be able to select pre stored master template and email template and will be able to edit the email body, select attachments and send email.
5. **Email Automation:** There will be a feature to send email without showing preview mode. Here user does not want to select the template and then craft message. Every required information will be sent via URL already and will form email and send automatically and will alert of the success or failure.
6. **Notifications:** Proper notification of email delivery. Also alerts user if there is no 'To' address available to send mail.
7. **View Sent Emails:** Emails sent to contacts (patients) would be visible into View page and will be able to resend/forward.
8. **Save Draft:** If email is saved as draft then a task will be created under user name in CRM with predefined text which can be finished at later stage.

Working/Flow:

1. All the communication between CRM and email portal will be by means of URLs.
2. Every URL will contain user name and patient id so that we know the recipient and sender.
3. Based upon URL pattern proper portal view will be visible like Send email, view emails etc.
4. Admin users will be provided the dashboard with handy options to manage Groups, Users and templates.
5. Any user eligible to maintain templates (master/email) will be able to create/edit templates.
6. Templates created by any user will be visible in global templates list.
7. There will be option to de-activate and delete templates.
8. User eligible to send email will need to select master and email templates and then make necessary changes into template body and preview if he wishes and finally send.
9. Notification/Alerts will be shown in the following conditions
 - a. Delivery of message will be shown either success or failure.
 - b. If there is no recipient of email that is "To" field is empty then it will be alerted and Send Email button will be disabled, in that case user needs to manually enter "To" address and then he will be able to send email.
10. User will have ability to attach files with the emails which can be attached as grouped and/or individual. Files within folder selected will all be attached as normal (without zip).
11. All email sent will be stored into the CRM and be visible in **"Sent Emails"** tab.
12. Emails seen in **"Sent Emails"** tab will be sender specific means a user will see only those emails which are sent by him only.
13. User will have ability to resend/forward the email listed in the **"Sent Emails"** tab but will not be able to select the different email template or any other value from Tag selector. Templates can only be selected when sending new email.
14. User may save an email as **"Draft"** which will create a **"Task"** under user name in CRM. This Draft can later be altered and sent.
15. All emails saved as Drafts will also be visible in **"Drafts"** tab which are again user specific.
16. As soon as Draft is sent as mail, it will be removed from the **"Drafts"** tab.
17. Email templates will have some fields which will behave as placeholders and will be replaced with real values identified by the patient id.
18. Any changes made in Master/email template will show effect in future emails. All sent emails will be saved as HTML and no template settings and tag selector values will be saved in DB separately.
19. In case of Email automation, URL will express the template names and patient id so that email body can be constructed without having templates to select, and it will not ask for preview before sending mail and will show the status of delivery once email is sent.
20. Every email being sent except 'Automated' emails will have feature of Preview which will allow user to have an idea of the actual mail being sent and gives chance to alter the email before it is actually sent.

Estimate:

Duration: 3.5 Weeks

Note: If your management does not agree for 3.5 weeks then still I need min 3 weeks to complete the above listed tasks.