

SALESFORCE CAPSTONE PROJECT

PHASE - 1: Problem Understanding & Industry Analysis

TITLE: Smart Health Appointment & Patient Tracker

Background of the Project

Managing healthcare appointments and patient data remains a significant challenge for hospitals and clinics, leading to scheduling conflicts, prolonged wait times, and limited visibility into hospital performance. Traditional methods often rely on manual processes, which lack automation and centralized tracking, resulting in inefficiencies in staff scheduling and patient management. Salesforce provides a scalable CRM-based platform that can enhance appointment booking, doctor scheduling, patient tracking, and reporting through automation and real-time dashboards.

Objective of the Project

The aim is to develop a Salesforce application that allows patients to book appointments conveniently, enables doctors to manage their availability and schedules effectively, and provides administrators with comprehensive tools to monitor overall hospital or clinic performance through impactful automation and intuitive reports.

Requirement Gathering

Patient Management (Custom Object: Patient)

- Fields: Name, Age, Gender, Contact, Email, Medical History (Text)
- Purpose: To centralize patient data for easy access and management by authorized hospital staff.

Appointment Management (Custom Object: Appointment)

- Fields: Date, Time, Doctor (Lookup to User), Status (Scheduled, Completed, Cancelled)
- Linked to Patient object for easy reference.
- Automates scheduling, status tracking, and appointment management.

Doctor Management (Custom Object: Doctor)

- Fields: Name, Specialization, Available Timings
- Allows doctors to update profiles and set available appointment slots.

Automation (Flow Builder / Workflow)

- Auto-sends confirmation emails when an appointment is booked.
- Sends reminder emails 1 day before scheduled appointments.
- Helps reduce appointment no-shows and ensures better communication.

Stakeholder Analysis

- **Patients:** Users who can book and manage appointments, view schedules, and maintain medical history.
- **Doctors:** View and manage their appointments, update availability, and access patient information.
- **Administrators:** Oversee appointments, generate reports, monitor performance, and configure workflows.

Business Process Mapping

- Patient data entry and record creation.
- Appointment scheduling by patients, linked with both patient and doctor records.
- Appointment status updated through completion or cancellation.
- Automated email communication for appointment confirmations and reminders.
- Real-time reporting dashboards to visualize appointment volumes, doctor workloads, and patient visit trends.

Use Case and Industry Relevance

The system addresses cross-industry needs for efficiency and operational transparency in healthcare. It streamlines patient-doctor interactions and improves hospital workflow by providing timely data, patient history, and appointment management supported by Salesforce automation features.