Patient Reported Outcome

ePRO: Patient-Centered Care in Action!

App installation user manual for Salesforce CRM users to send assessment forms to patients.

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About Patient Reported Outcome

Patient Reported Outcome (ePRO) is a cutting-edge digital solution designed to revolutionize healthcare by empowering care providers, including healthcare professionals, therapists, and caregivers, in delivering personalized and patient-centered care.

This versatile application streamlines the process of creating, distributing, and managing assessment forms for patients while seamlessly recording and analyzing their responses. Patient Reported Outcome is your trusted partner in enhancing patient care, improving treatment outcomes, and facilitating data-driven decision-making.

Pre-requisites

You must have Salesforce Health Cloud edition with Omni Studio package pre-installed in your Salesforce Org.

How to Download the App

Installation of Patient Reported Outcome App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

1.1. In a new browser tab, open **AppExchange**.
1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect.**
1.4. If you see the Choose a Username page, click **Log In with a Different Username**. If you see a login page, skip to the next step.
1.5. Enter your Salesforce username and password, then click **Log In**.
1.6. Click on **Link Account**.

Steps to Install Application to Salesforce Org -

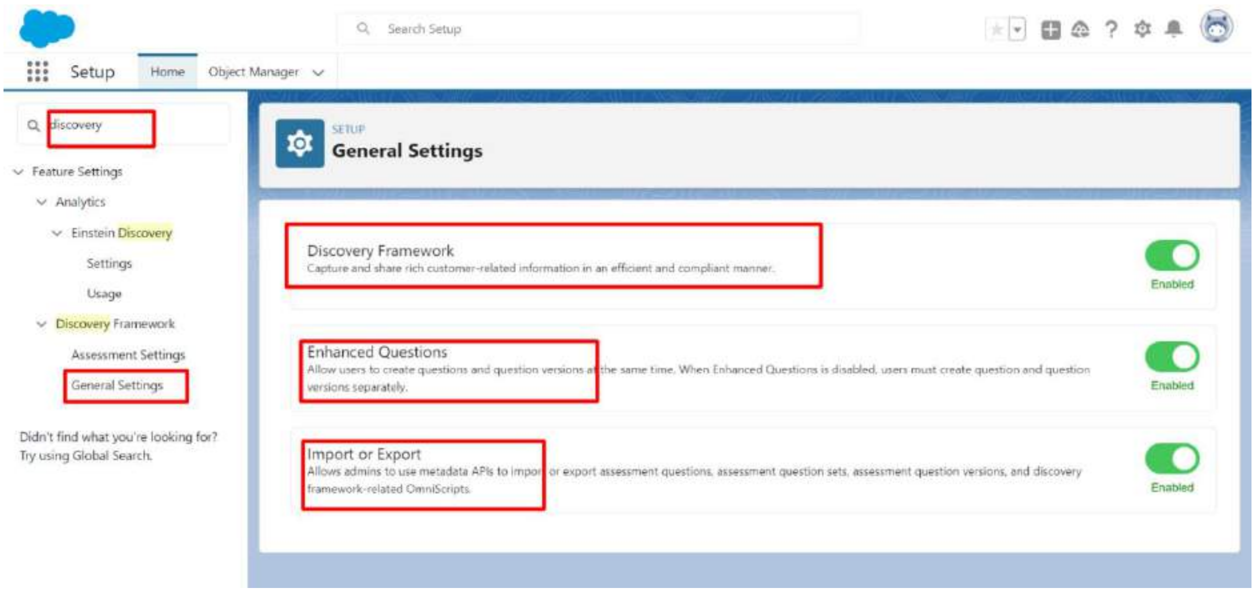
2.1. In a new browser tab, open **AppExchange**.
2.2. Search for **Patient Reported Outcome**.
2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
2.4. Click on the **Patient Reported Outcome** App Name.
2.5. Now click on **Get it Now** button.
2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.
2.7. In Install in Production, you will see all the connected salesforce accounts.
2.8. If you cannot find the username for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section **Error! Reference source not found**.
2.9. Choose the username and click **Install in Production**.
2.10. You will see a page where you can confirm your details.
2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to Terms and Conditions.
2.12. Click on **Confirm and Install**, it will take you to the login screen.
2.13. If you want to Install in Sandbox then click on **Install in Sandbox** button.
2.14. You will see a page where you can confirm your details.

2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.
2.16. Click on **Confirm and Install** it will take you to the login screen.
2.17. Provide your login credentials and select for which users you want to install the application.
2.18. After that application installation will start.

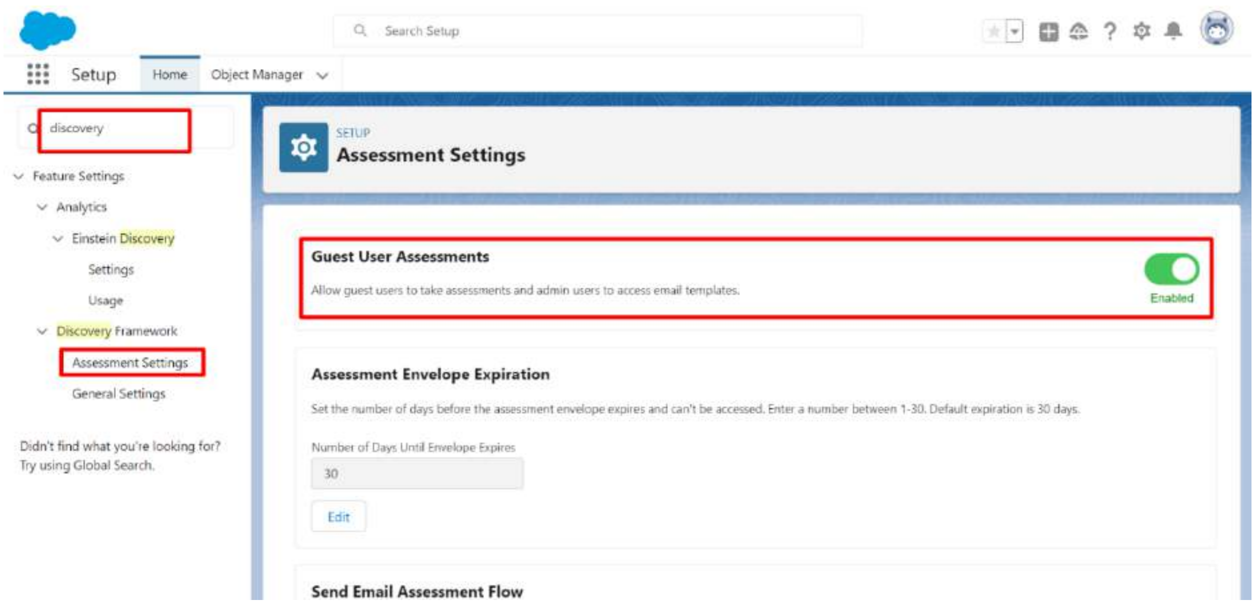
***We strongly recommend not using any file that you receive from any unauthorized source or any other source not mentioned above.**

Steps before using Patient Assessment Functionality:

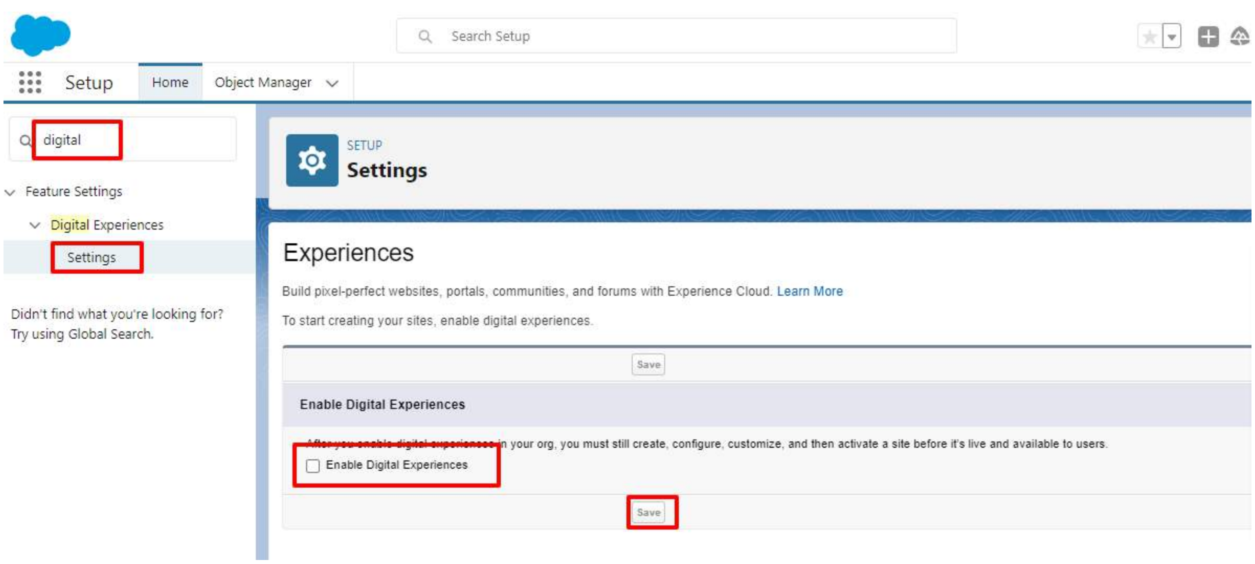
1. Look for Discover framework and click **General setting** in **quick find** from **setup** and **enable** options like **Discovery Framework, Enhanced Questions, Import or Export.**



2. Under **Discovery Framework** click on **Assessment Settings** and enable the **Guest User Assessments**.

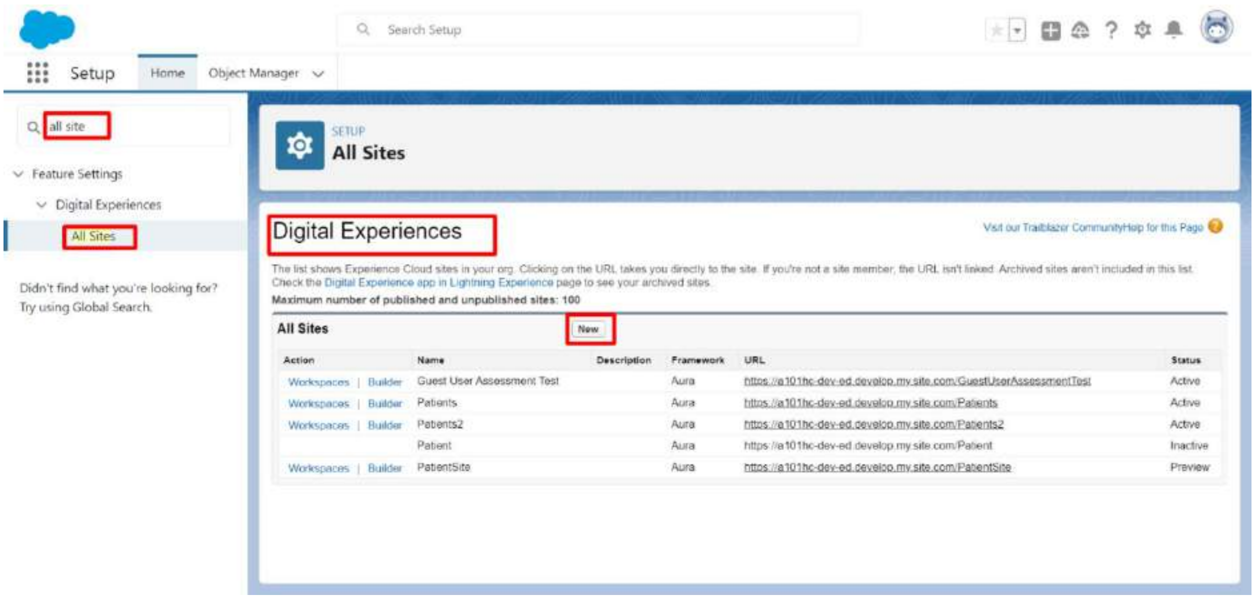


3. Go to **Digital Experiences** and click on **Settings**.
4. Click the checkbox of **Enable Digital Experiences** and **Save** the changes.



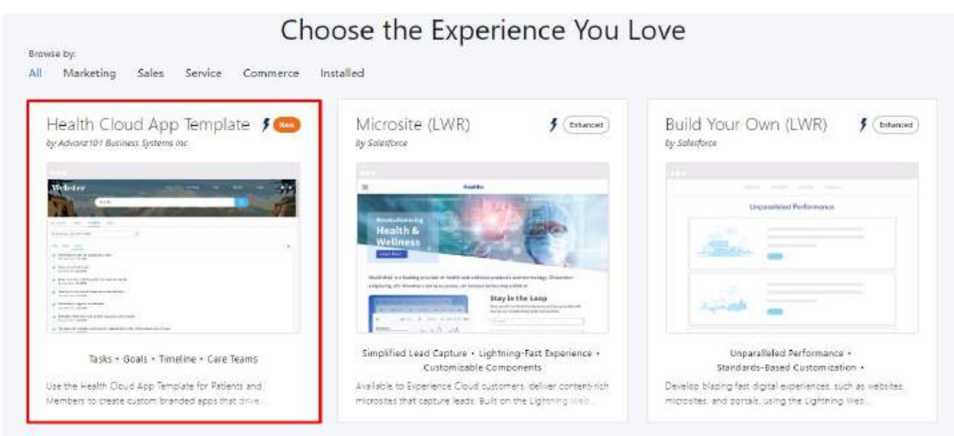
Create a New Experience Site

1. Now to create new site, in **Quick find** search for **All Sites** under **Digital Experiences** and click on **New** button.

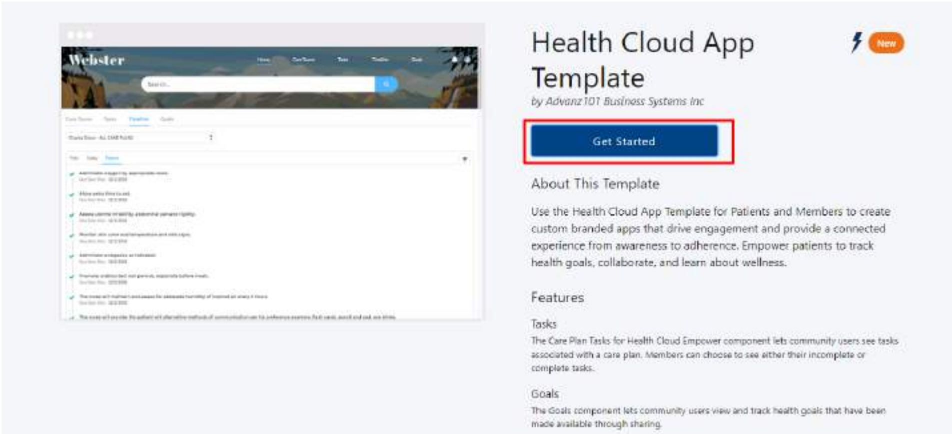


2. After clicking **New**, select **Health Cloud App Template by Advanz101 Business Systems Inc.**

   Note: You can use any other template, except the **LWR** templates.



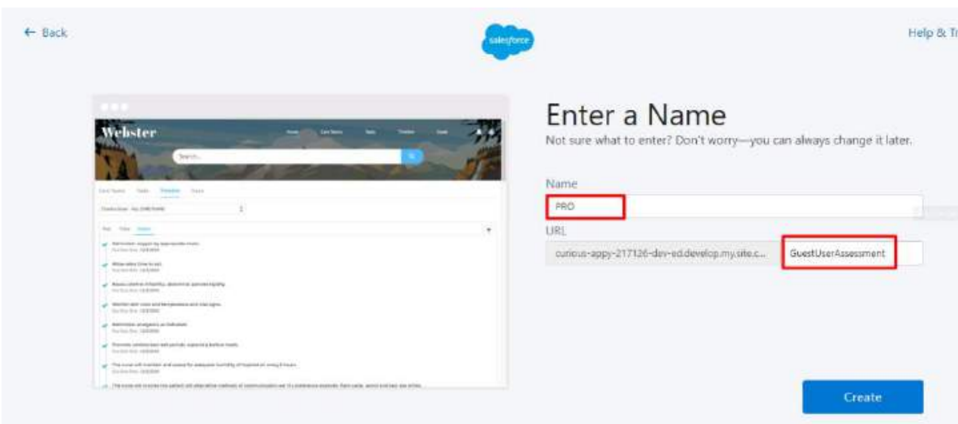
3. Click on Get Started.



4. Enter Name (as per requirement) and URL.

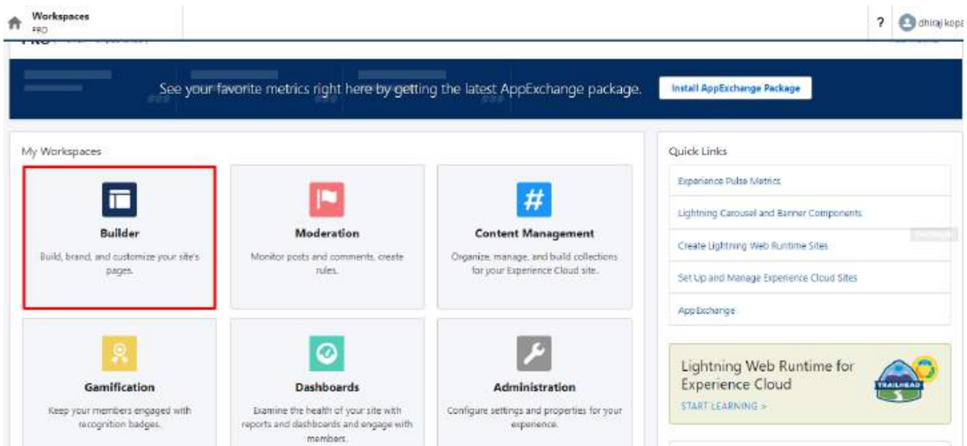
   URL – **GuestUserAssessment (mandatory to use this URL only)**

5. Click **Create**

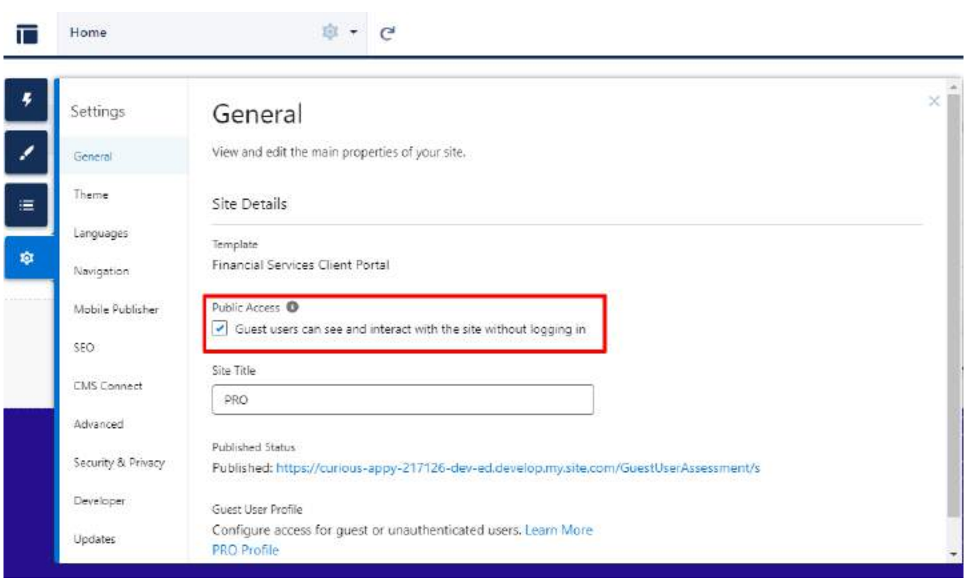


Note – URL appended has to be **GuestUserAssessment** due to dependency on other internal functionality.

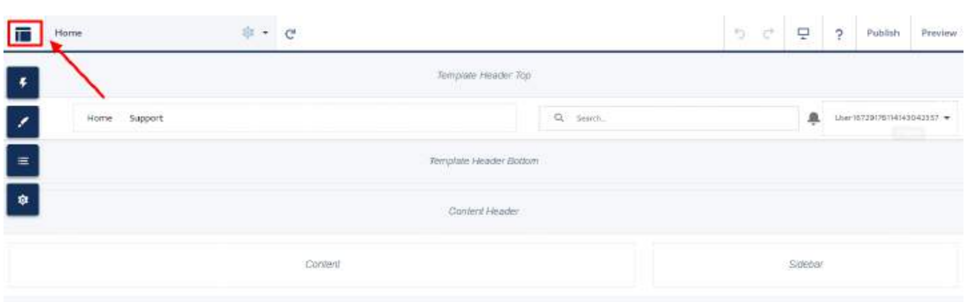
6. Click on **Builder**



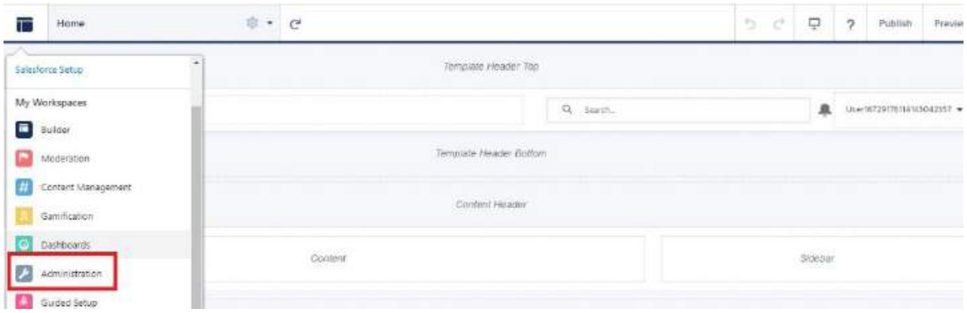
7. Navigate to the gear icon on the left panel and select it. Enable **Public Access** visible under Settings -> General as shown below.



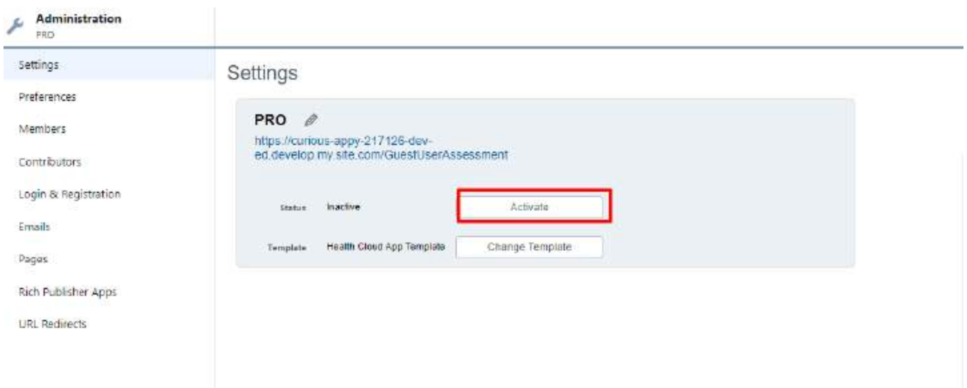
8. To activate page click on the top left corner icon.



9. Click on **Administration**

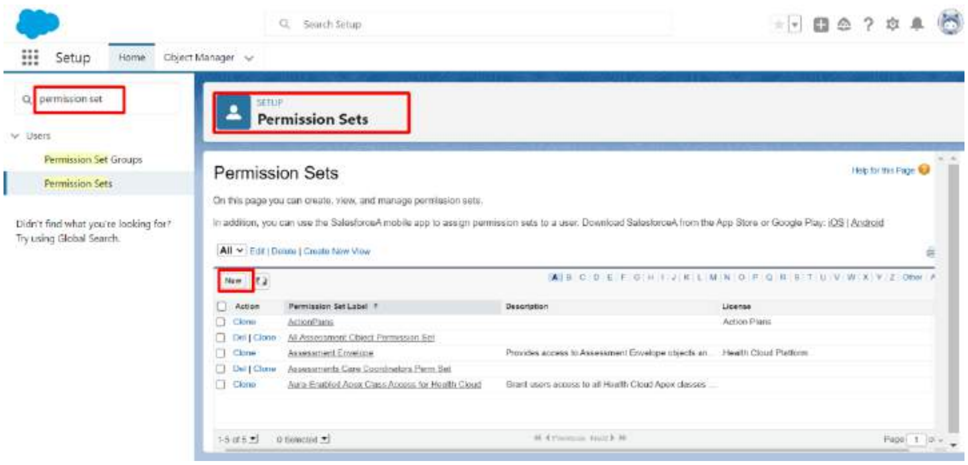


10. Click on **Activate** button then click on **OK**.

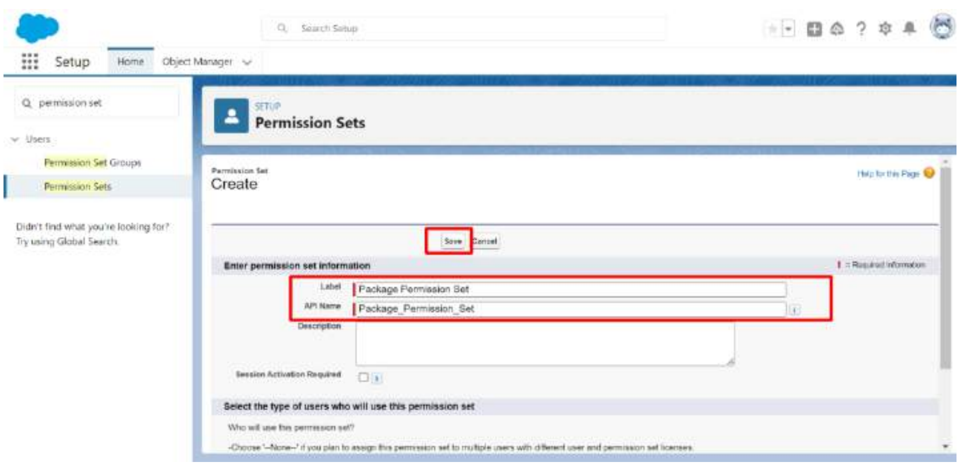


Create Permission Sets

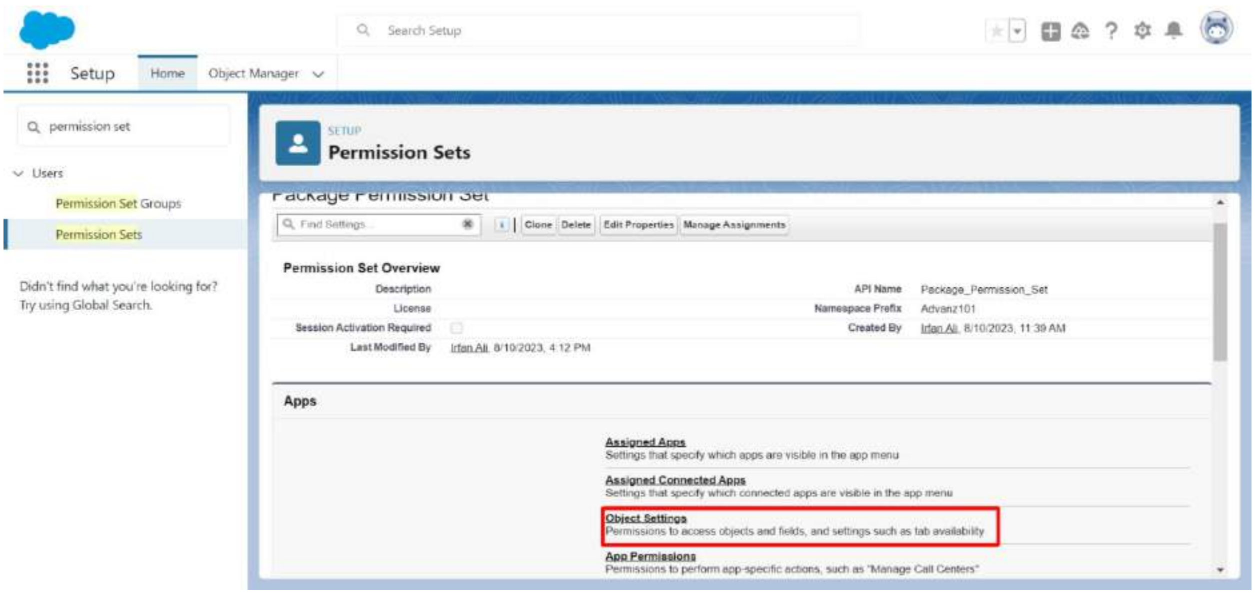
1. To create permission set, search for **permission set** in quick find box then click on **Permission Sets**.



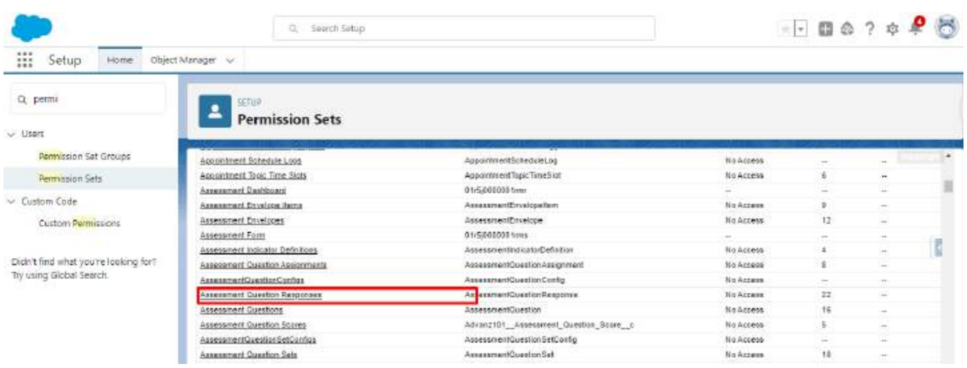
2. We will create an Unlicensed Permission set -
3. To create a new permission set, click on **New** button, give **label** and **API name** and **Save** it.



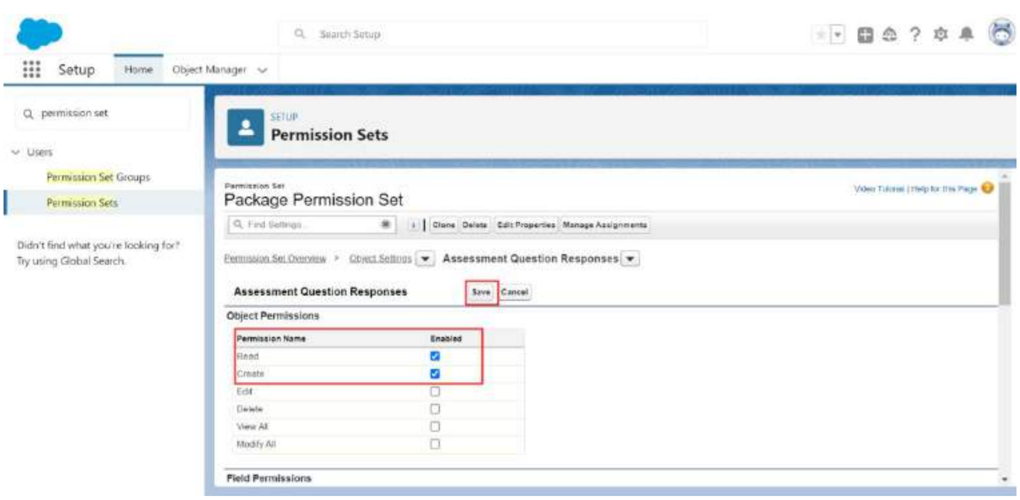
4. Staying on the same page, click on **Object Settings.**



5. Select **Assessment Question Responses**



6. Then click **edit** and **check** the checkbox before **Read, Create**.
7. Click **Save**.



8. Similarly follow above steps for below Objects.

- **Assessment Questions**: Permission to be granted – **Read**
  (If already Read permission is present then no need to change)

Assessment Questions	Read	15	--

- **Assessment Question Versions**: Permission to be granted - **Read**
  (If Read permission is already present then no need to change)

Assessment Question Versions	Read	22	--

- **Assessments**: Permission to be granted - **Read, Create**

Assessments	Read, Create	18	--

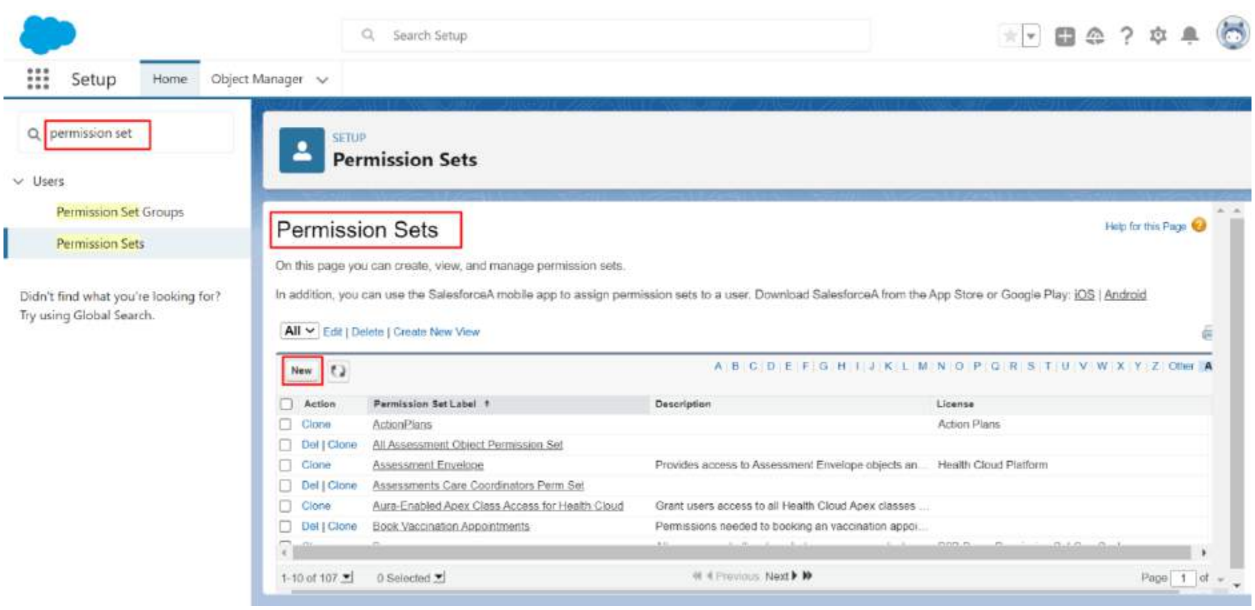
- **Assessment Responses**: Permission to be granted - **Read, Create**

Assessment Responses	Read, Create	6	--

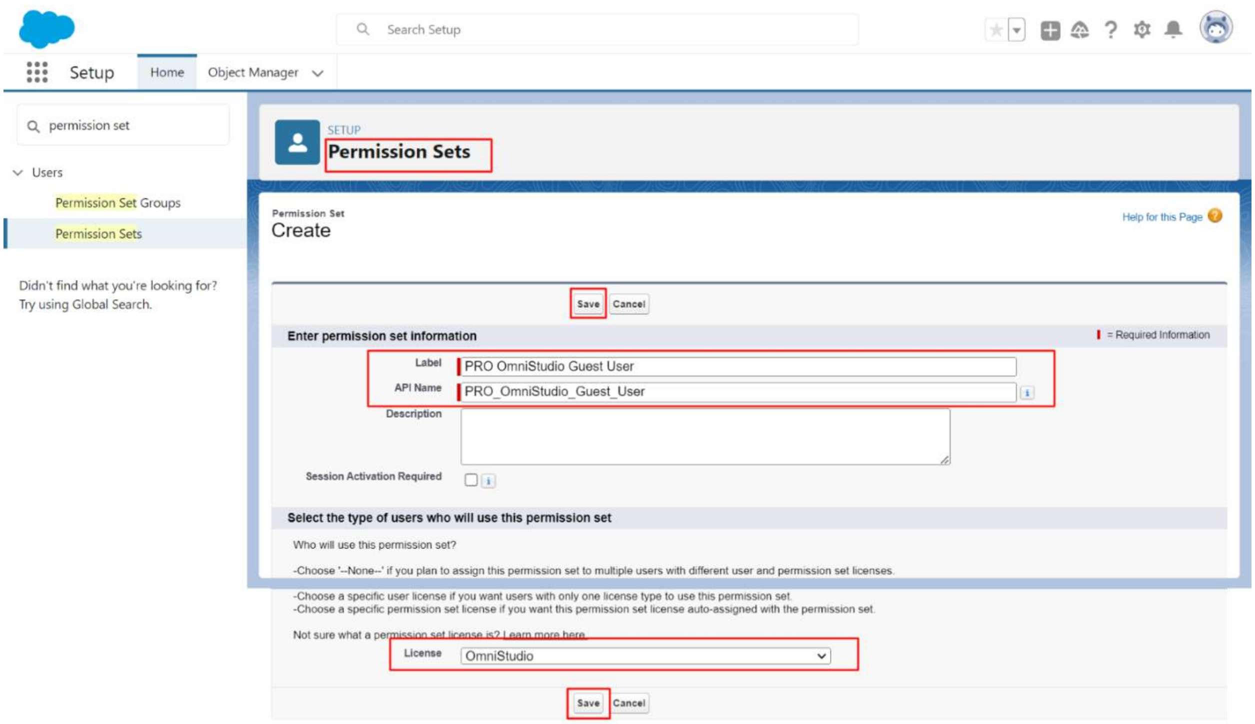
- **Vlocity DataRaptor Batch Queue**: Permission to be granted - **Read, Create**

Vlocity DataRaptor Batch Queue	Read, Create	7	--

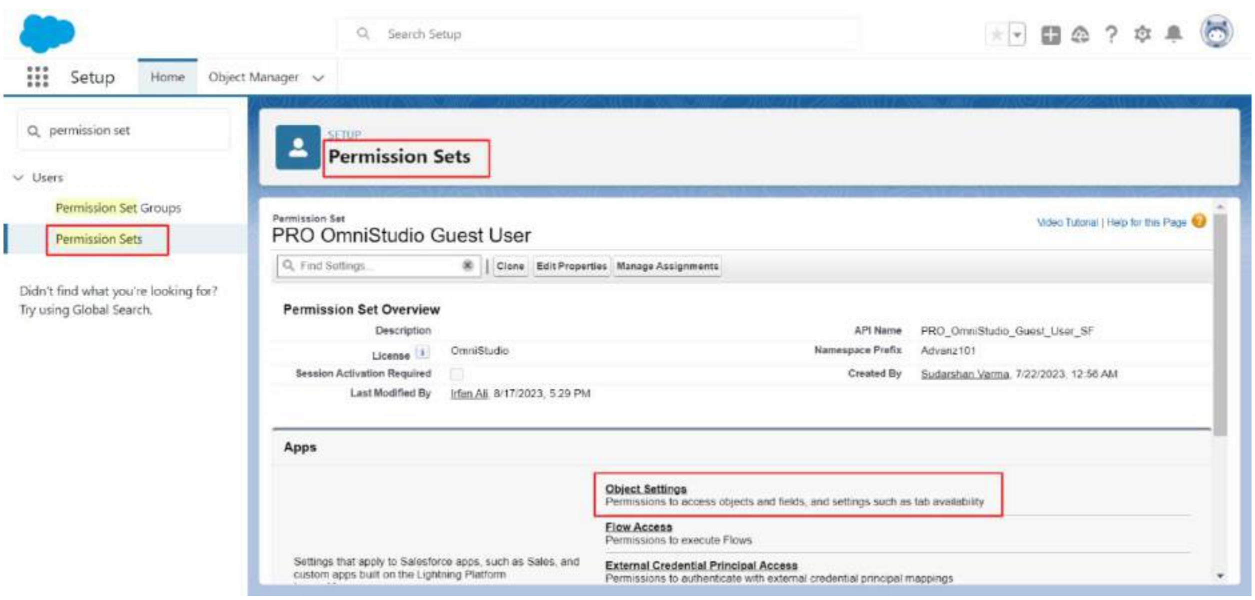
9. Create **Omnistudio Licensed** Permission set
10. To create a new permission set, click on **New** button.



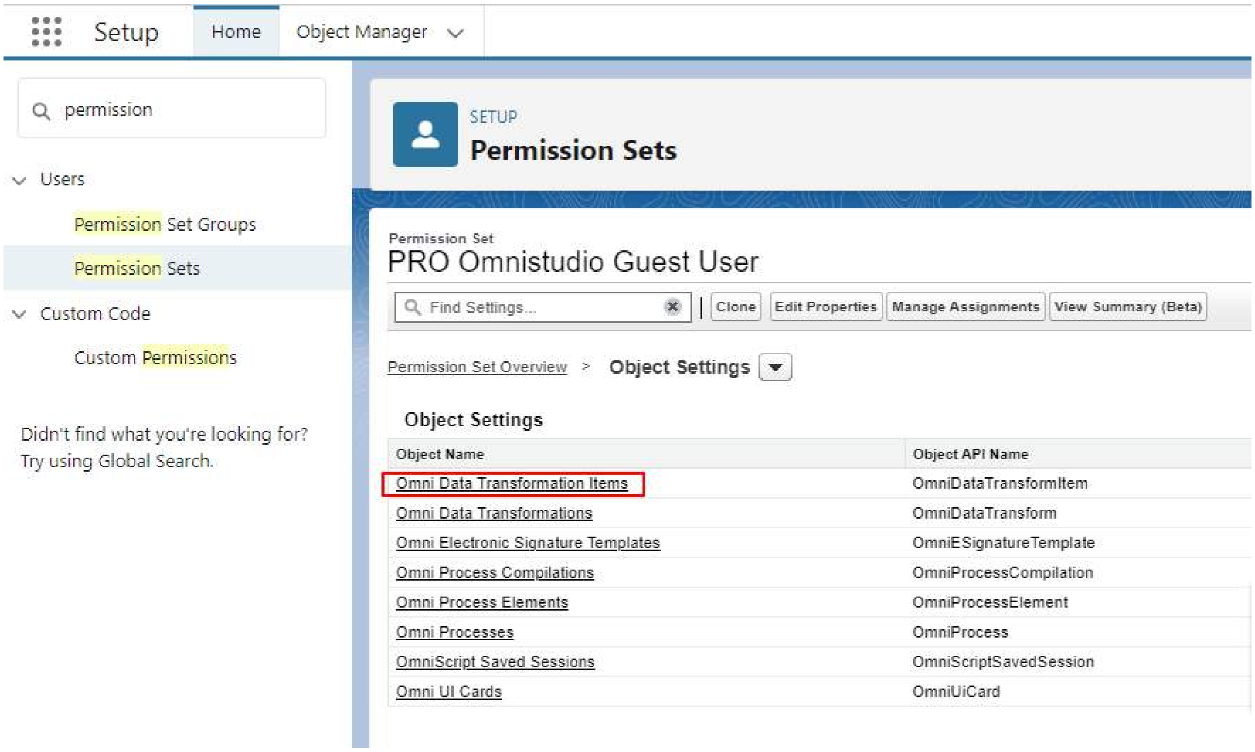
11. Give **label** and **API name,** select **Omnistudio** license and **Save** it.



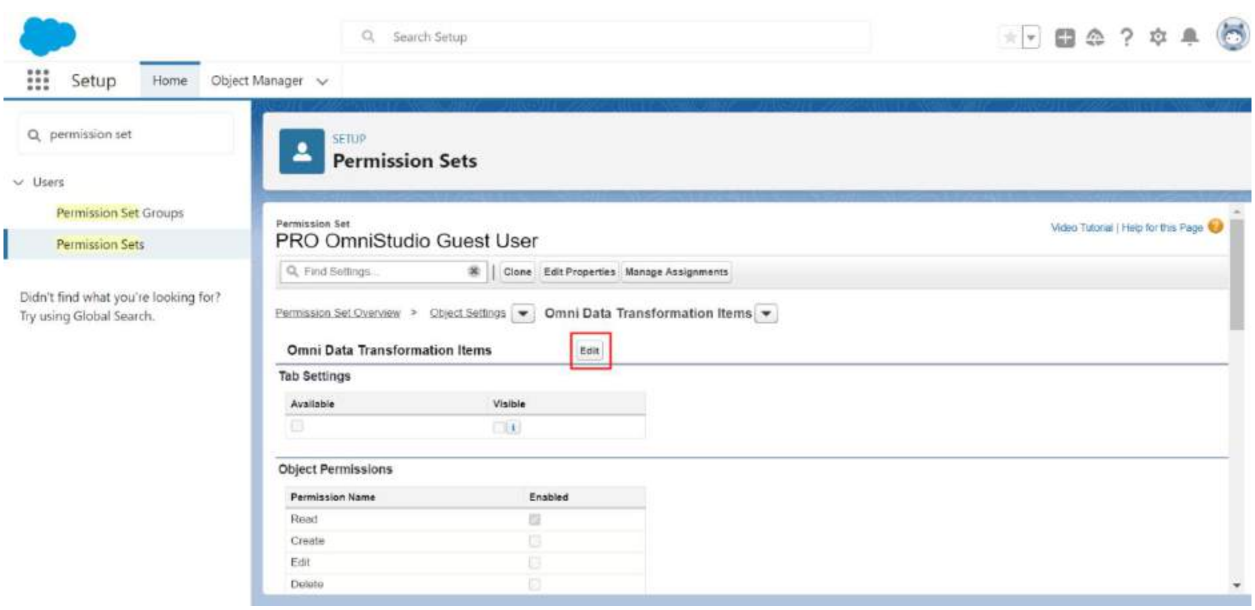
12. While staying on the same page, Click on **object settings**.

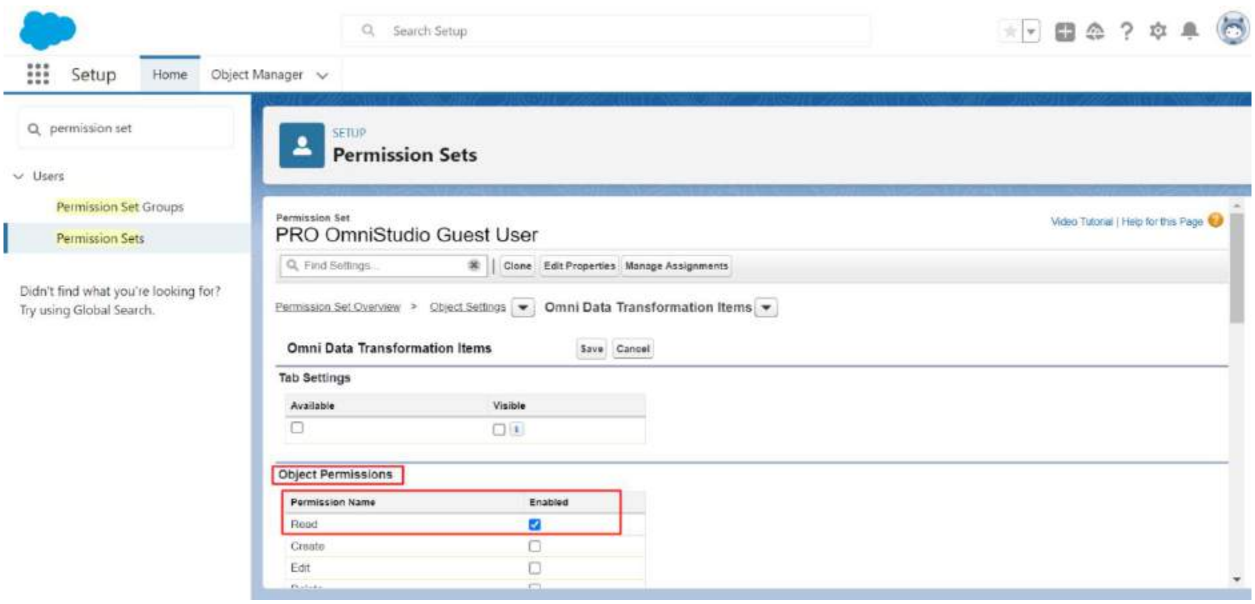


13. Click on **Omni Data Transformation Items.**

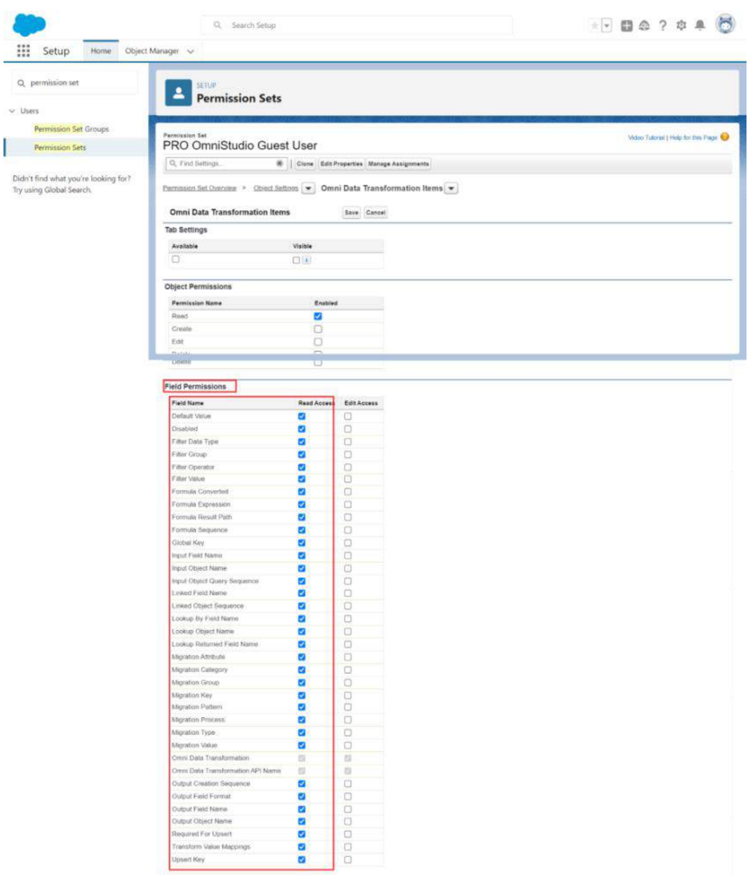


14. Click the **Edit** button to edit **Object Permissions** and then enable **Read** Object permission.

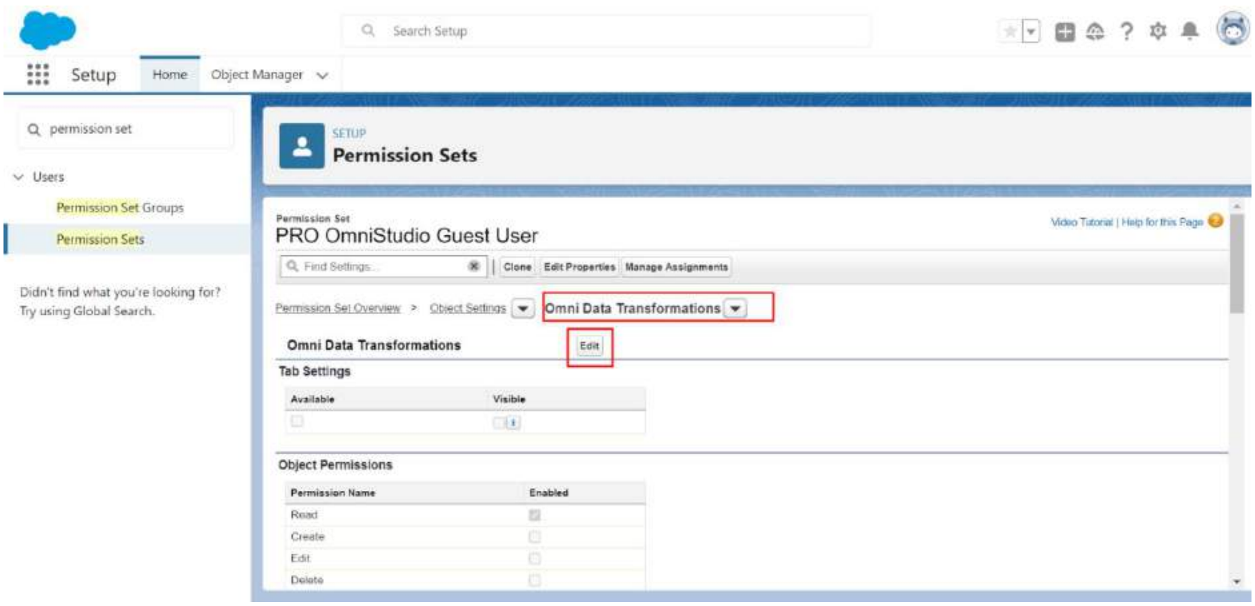




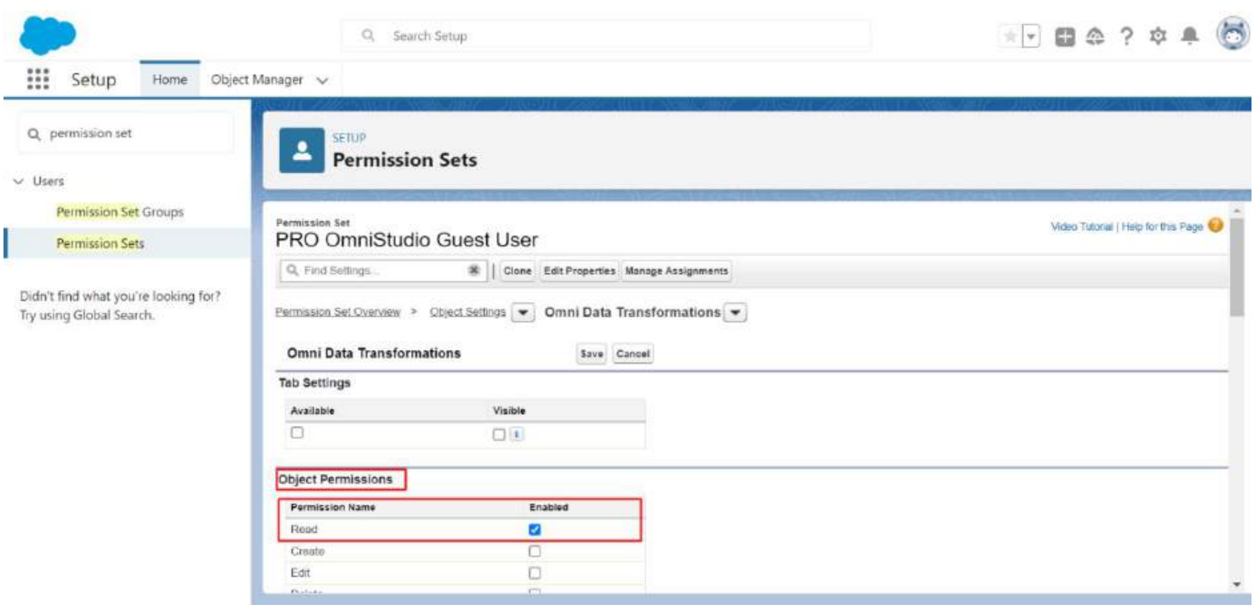
15. For **Field Permissions** click **Read Access** at header to select all and then click **Save.**



16. Go back to object setting and click on **Edit** button on **Omni Data Transformations.**



17. Under **Object Permissions** enable **Read permission.**

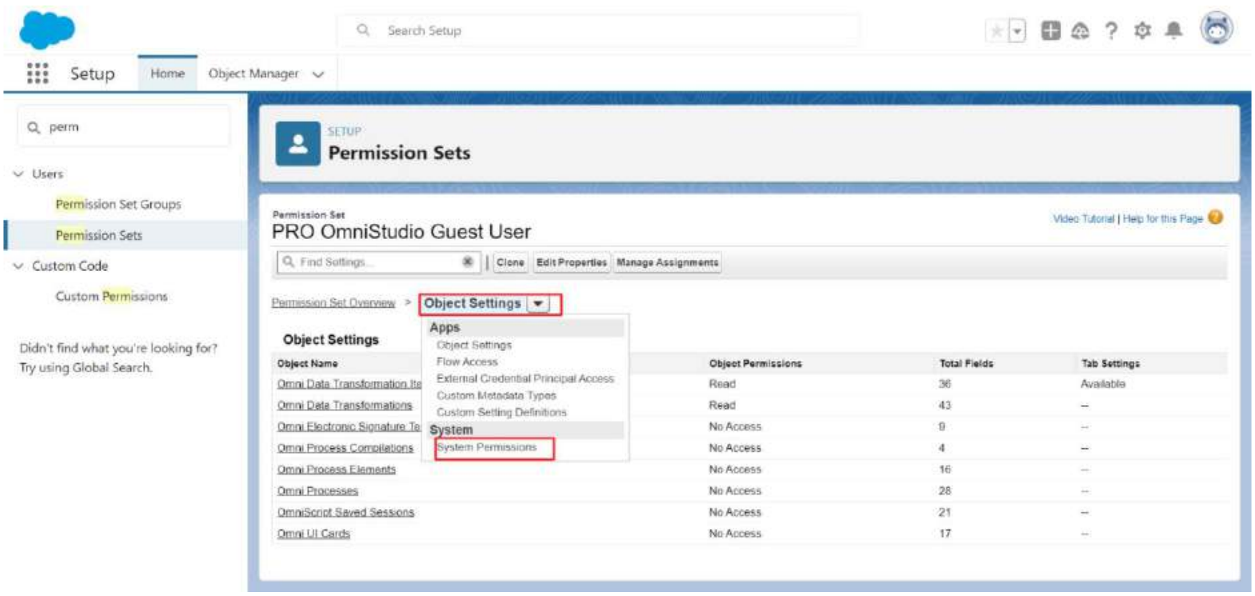


18. For **Field Permissions** click **Read Access** at header to select **all** and then click **Save**.

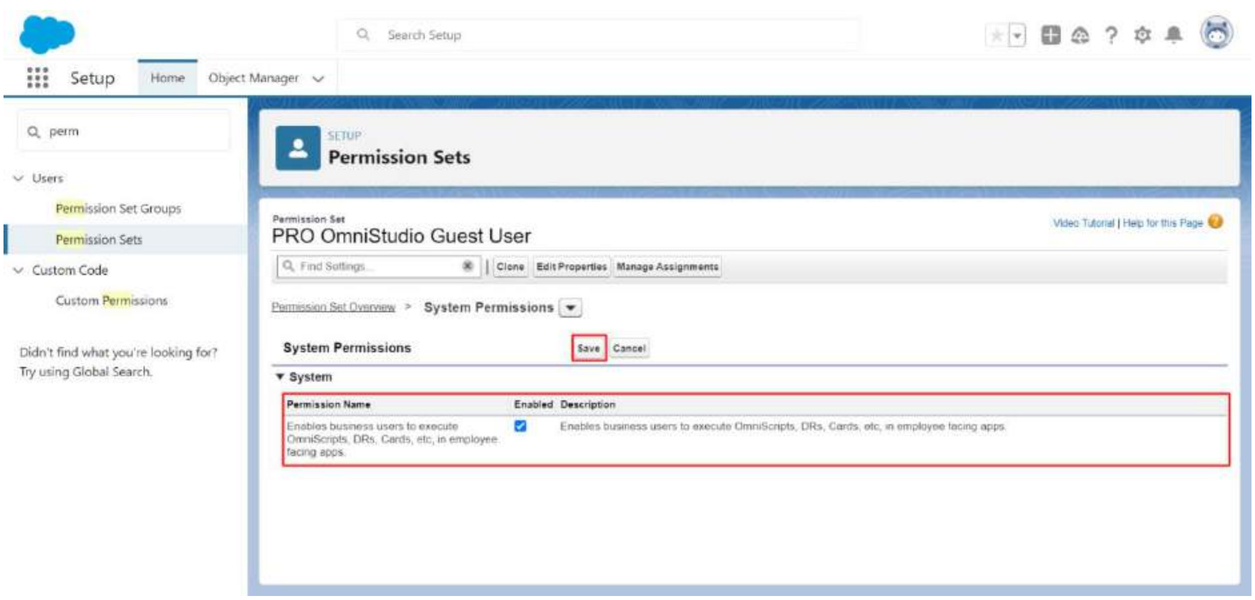
Field Permissions

Field Name	Read Access	Edit Access
Active	☑	☐
API Name	☑	☑
Assignment Rules Used	☑	☐
Batch Size	☑	☐
Deleted On Success	☑	☐
Description	☑	☐
Error Ignored	☑	☐
Expected Input JSON	☑	☐
Expected Input Other Data	☑	☐
Expected Input XML	☑	☐
Expected Output JSON	☑	☐
Expected Output Other Data	☑	☐
Expected Output XML	☑	☐
Field Level Security Enabled	☑	☐
Global Key	☑	☐
Input Parsing Class	☑	☐
Input Type	☑	☐
Namespace	☑	☑
Null Inputs Included in Output	☑	☐
Output Parsing Class	☑	☐
Output Type	☑	☐
Override Key	☑	☐
Owner	☑	☑
Preprocessor Class Name	☑	☐
Preview JSON Data	☑	☐
Preview Other Data	☑	☐
Preview Source Object Data	☑	☐
Preview XML Data	☑	☐
Process Super Bulk	☑	☐
Required Permission	☑	☐
Response Cache Time-to-Live In Minutes	☑	☐
Response Cache Type	☑	☐
Rollback On Error	☑	☐
Source Object	☑	☐
Source Object Default	☑	☐
Synchronous Process Threshold	☑	☐
Target Output Document ID	☑	☐
Target Output File Name	☑	☐
Type	☑	☑
Unique Name	☑	☑
Version	☑	☑
XML Declaration Removed	☑	☐
XML Output Tags Order	☑	☐

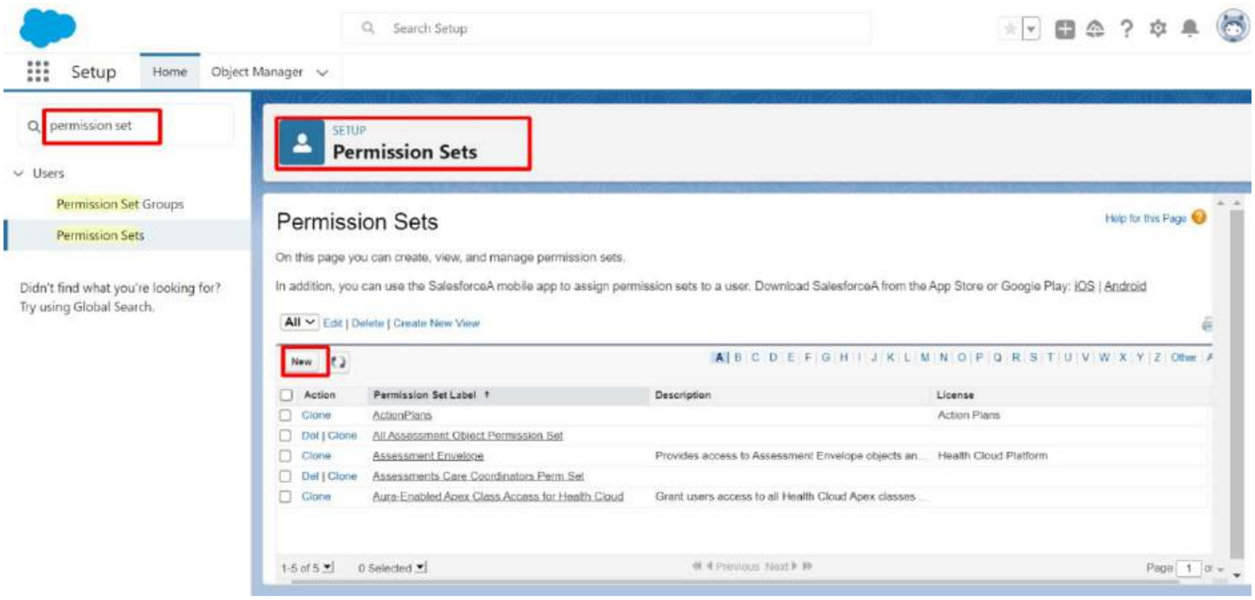
19. While staying on the same screen, click on **System Permissions** from the Object Settings dropdown menu.



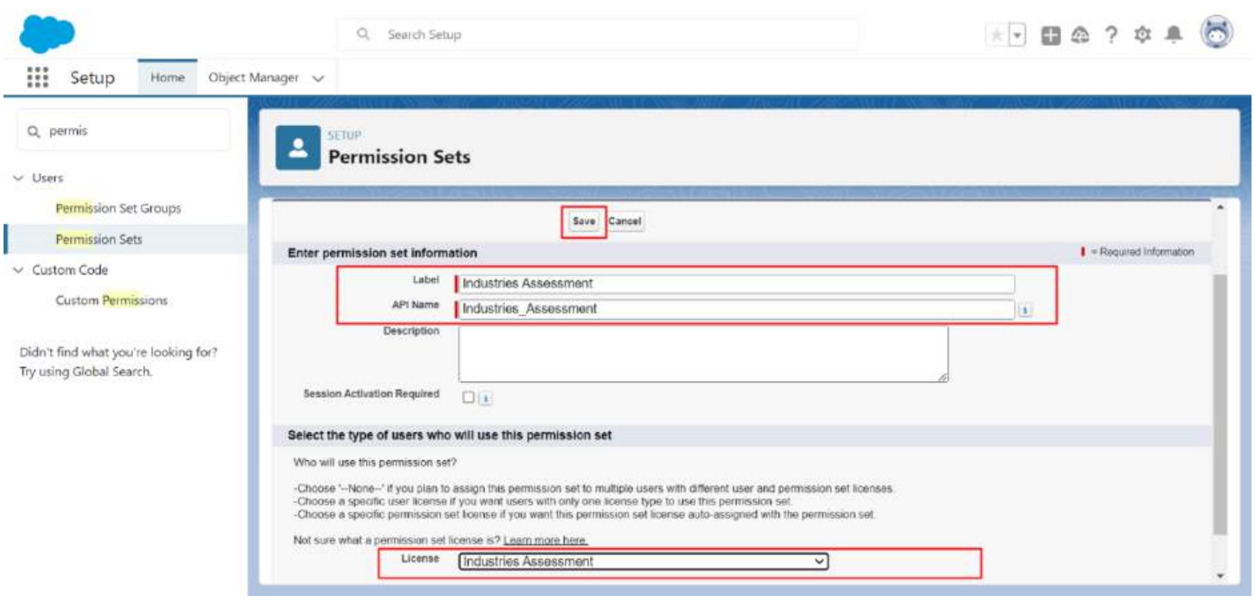
20. Click Edit and then Click the checkbox for **Enables business users to execute OmniScripts, DRs, Cards, etc, in employee facing apps,** click **Save.**



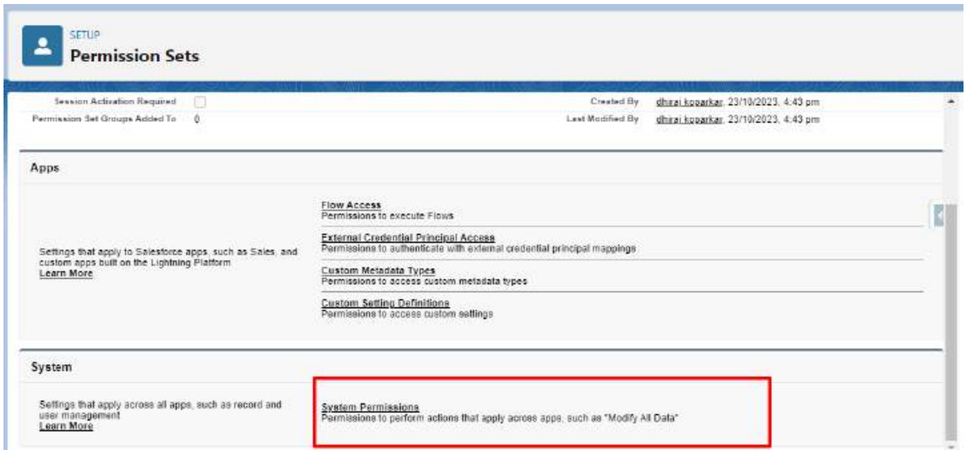
21. Click **Save** on the Permission change Confirmation screen.
22. For **Industries Assessment License** Permission set -
23. To create a new permission set, click on **New** button.



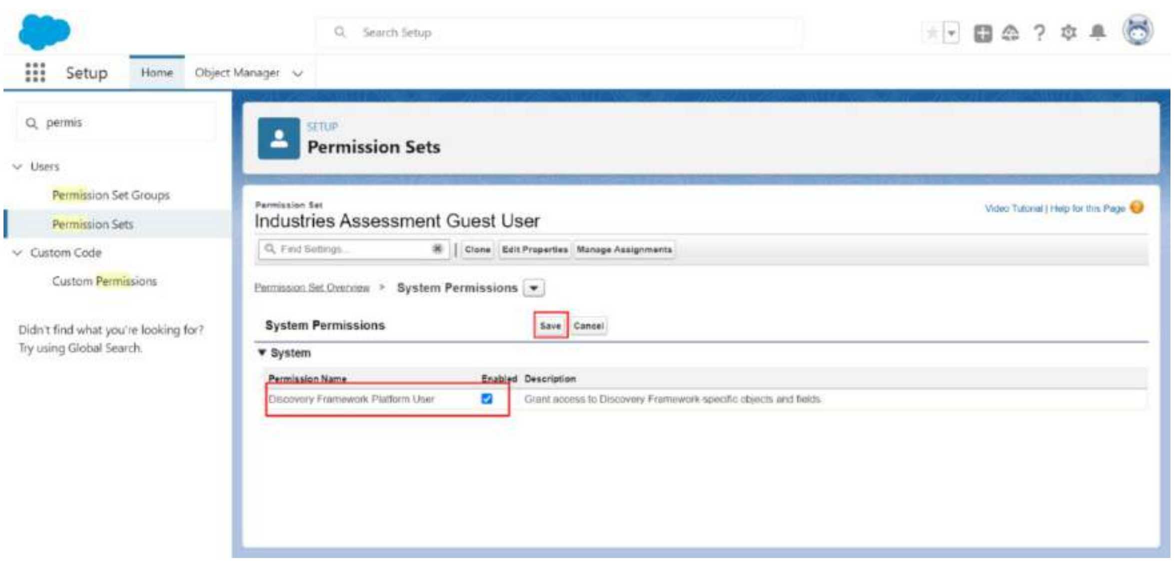
24. Give label and API name, select **Industries assessment** license and **save** it.



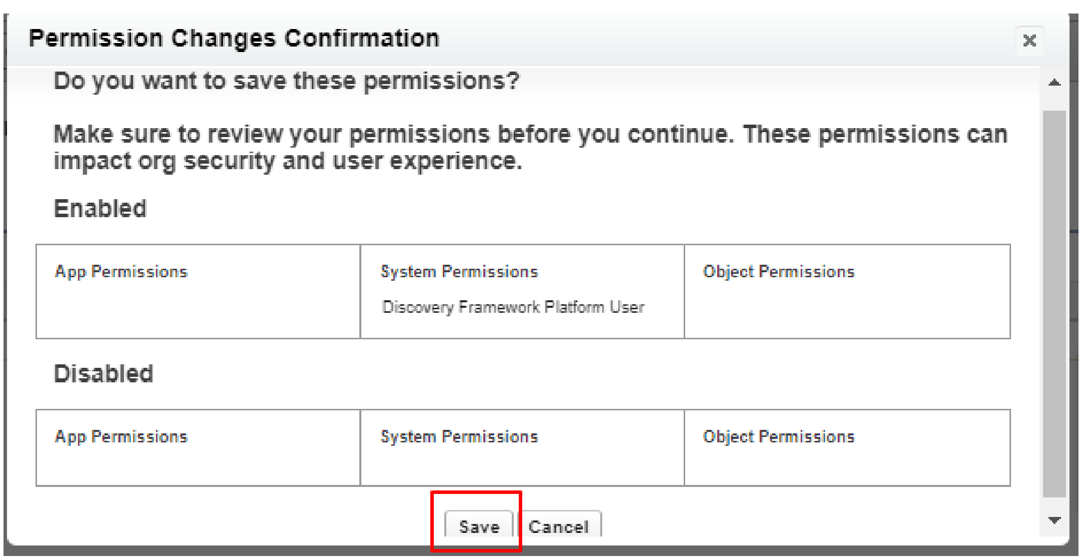
25. Click on **System Permissions.**



26. Click **Edit** and enable **Discovery Framework Platform User** then click **Save**.



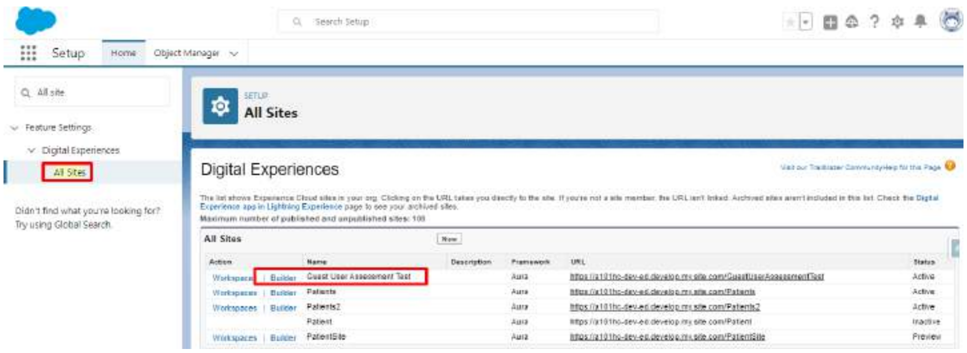
Permission changes confirmation modal will appear. Click **Save** to confirm.



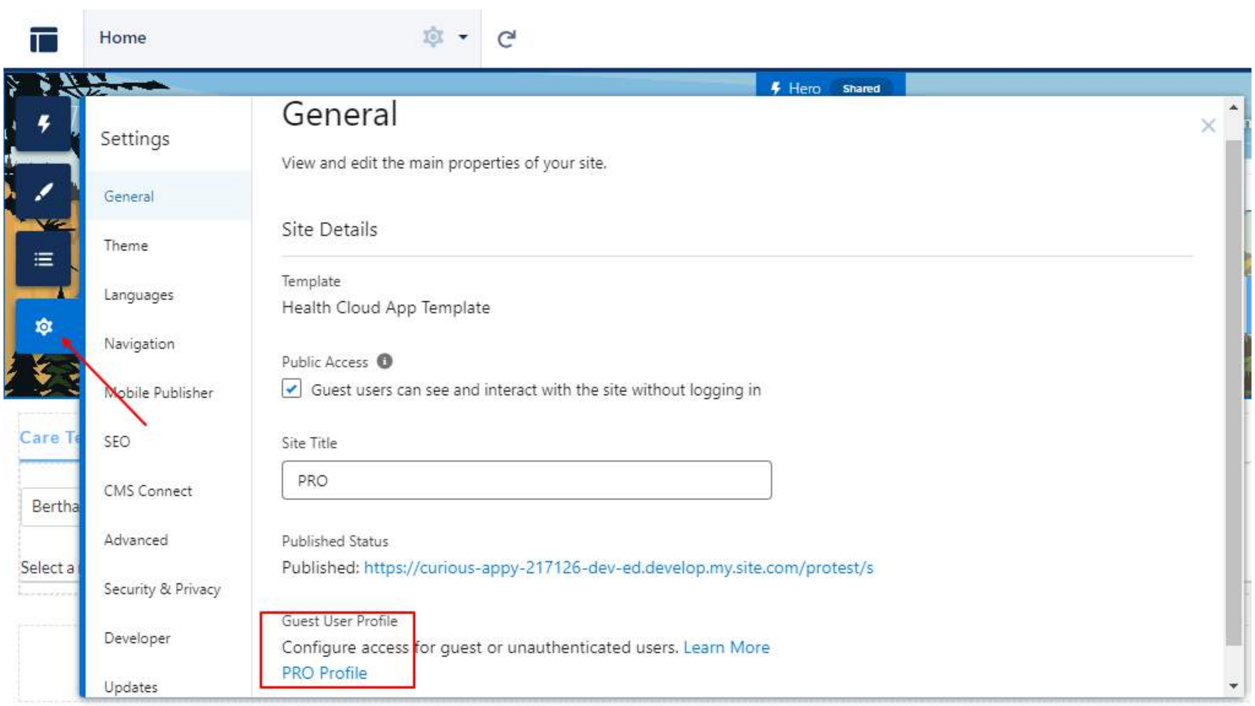
Assign Apex Classes and Permission sets to Guest User

Assign Apex Classes

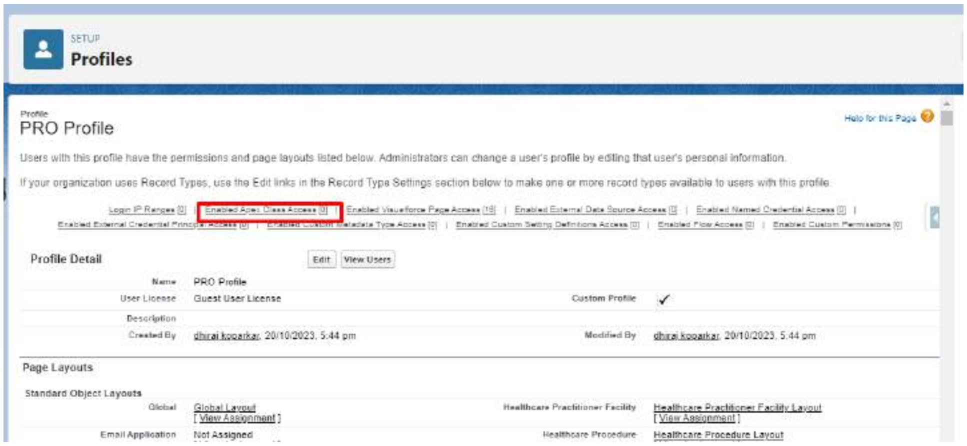
1. Go to **Setup**, in quick find type all sites and click on **All Sites**.
2. Click on **Builder** of your experience site.



3. Select **Guest User Profile** from Setting (gear icon)

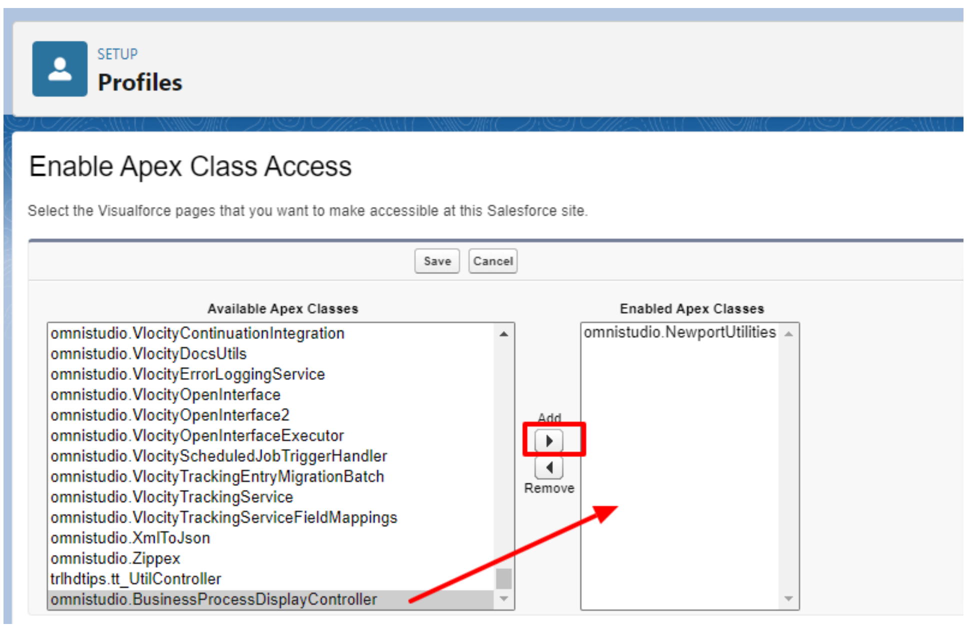


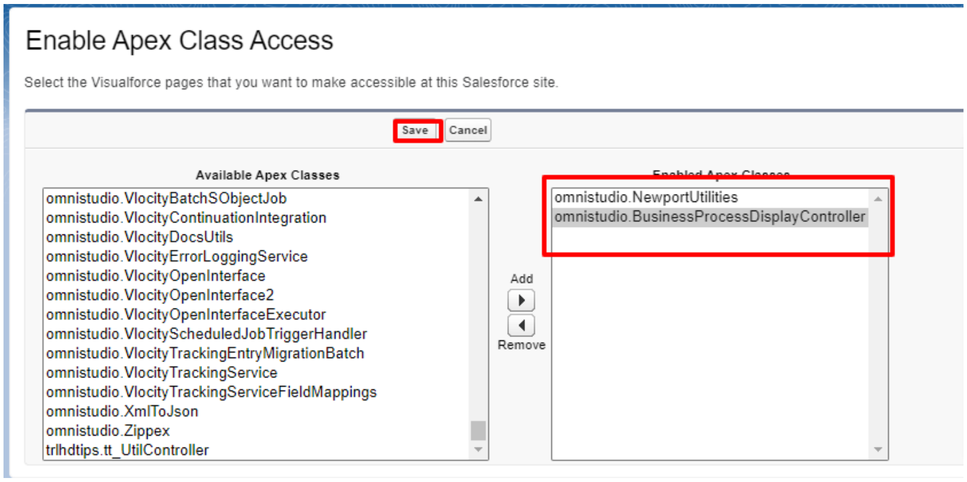
4. Give **Apex class** permission to guest user (here we need to give **'omnistudio.Business ProcessDisplayController', omnistudio.NewportUtilities** class access) using the following steps.
5. Click on Enable Apex class



6. Edit Apex class Access

7. Search that class and move to Enable Apex classes.

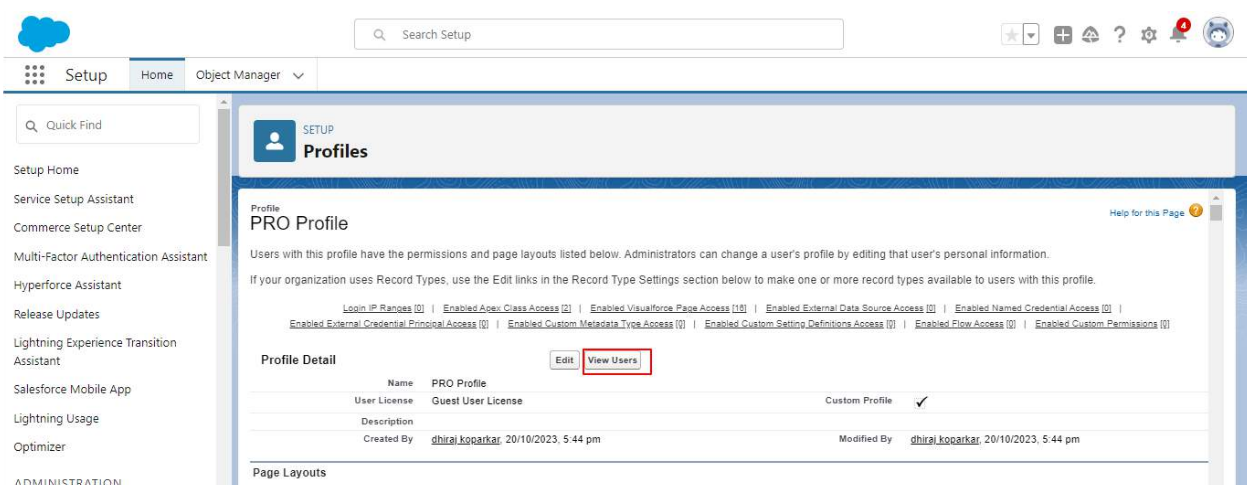




8. **Save** it.

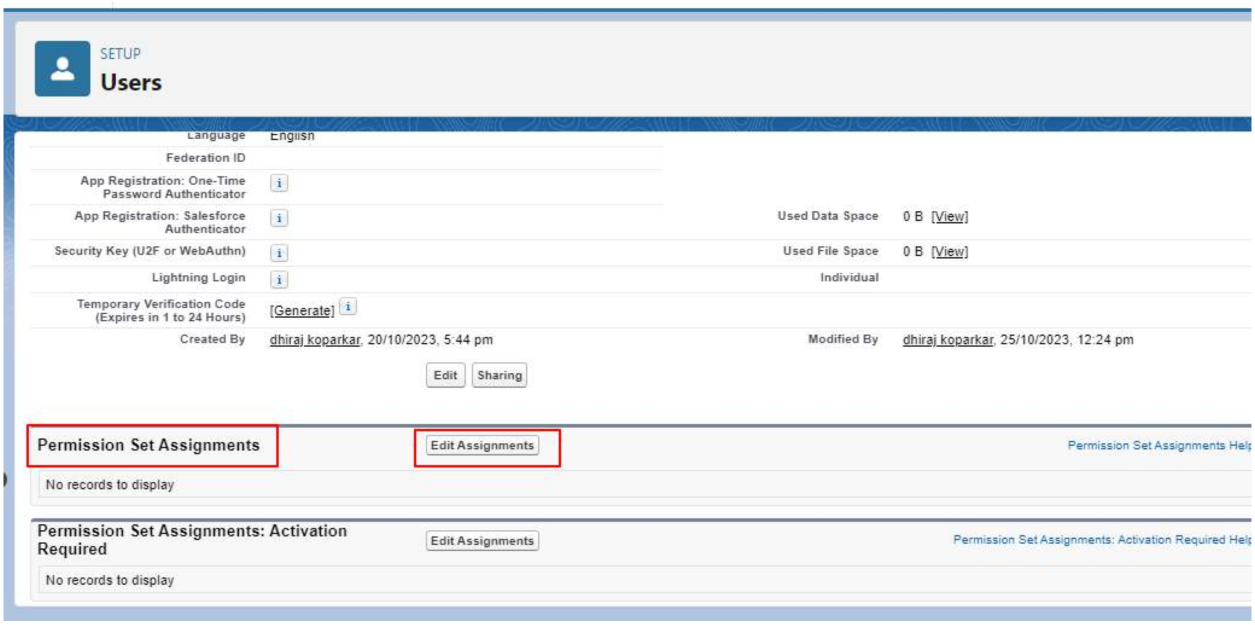
Assign Permission Sets:

1. Click on **View sers**

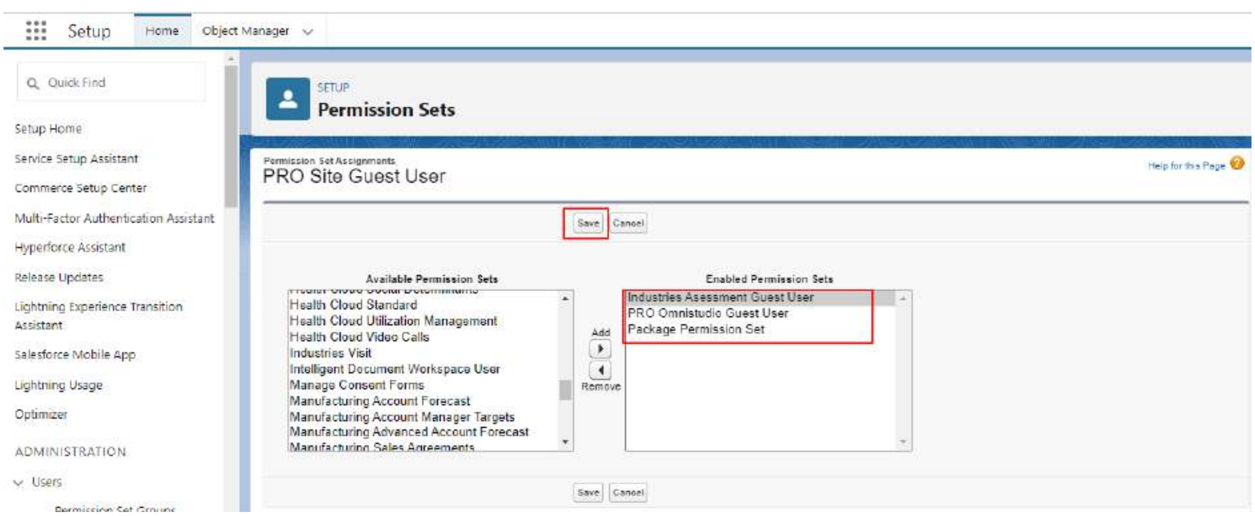


2. Click on the Site Guest User (in this case it is Site Guest User, PRO but it will be Site Guest User along with your site name)

3. Click on **Edit Assignments** in Permission Set Assignments section

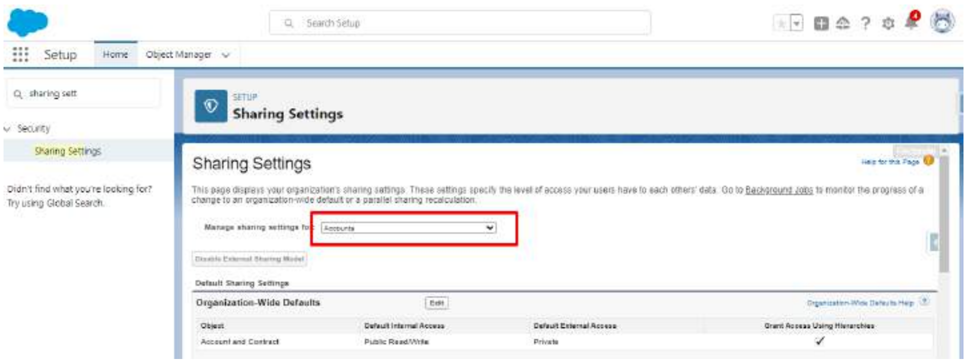


4. Add all the 3 permission sets which you created and click **Save**

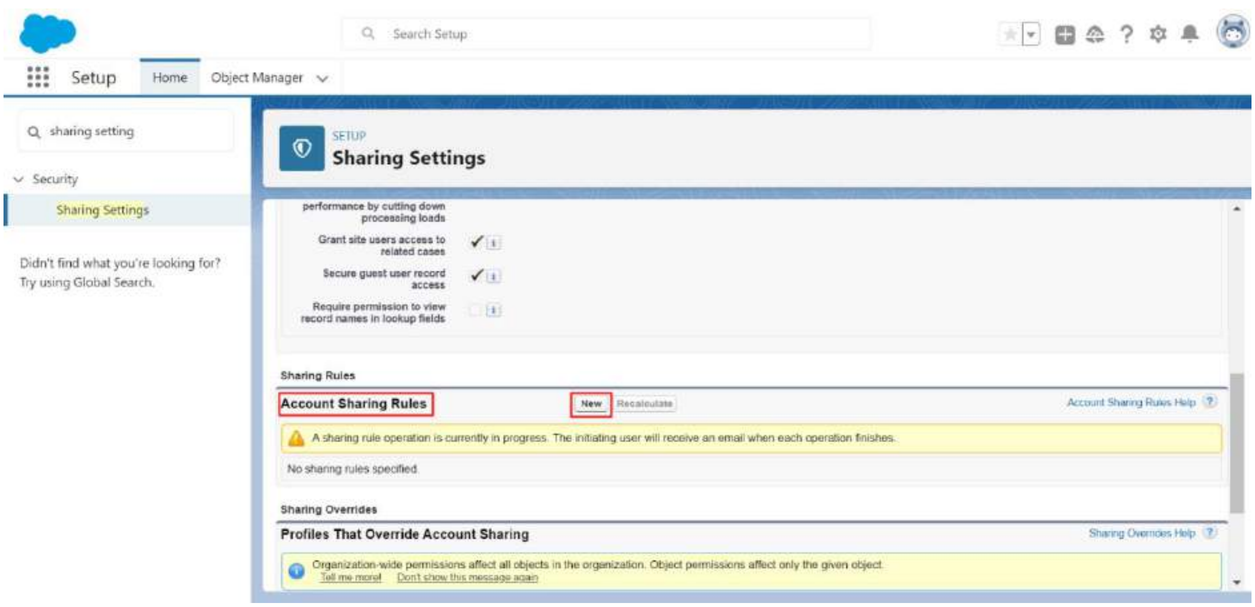


Sharing Settings

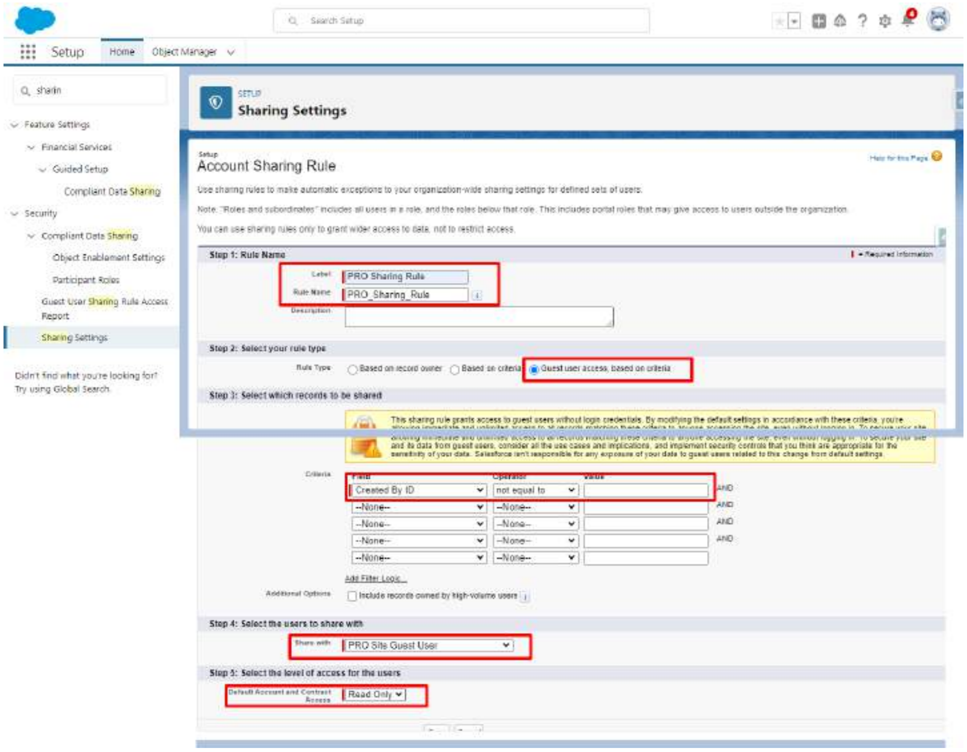
1. To create sharing setting, go to **Sharing Settings** from **Quick Find**
2. Select **Accounts** object from the dropdown menu



3. Click on the **New** button under **Account Sharing Rules.**



4. Give name and label.
5. Select your Rule type "**Guest user access based on criteria**"
6. Add **criteria**, like **Created by ID not equal** to **null (keep blank)**. **Share** this rule with **new guest user** that you created while creating site and **Default Account and Contract Access** should be **Read Only,** then Save it.



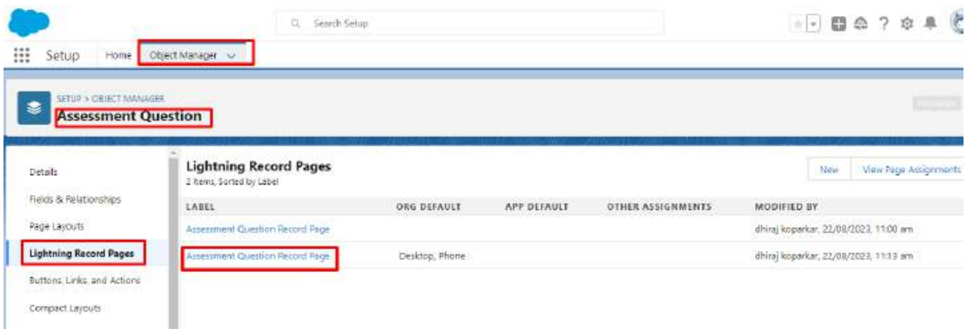
7. Follow the same steps for creating 'sharing setting' as done for **Account**, for the following objects:

- **Assessment Questions**
- **Omni Data Transformations**
- **Omni Processes**
- **Vlocity DataRaptor Batch Queues**
- **Assessment Responses**

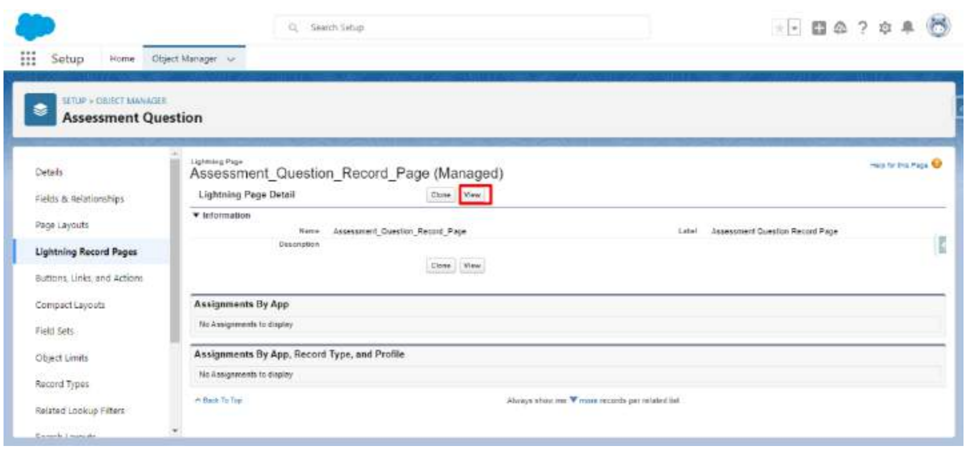
PRO objects settings

Activate Assessment Question Record Page

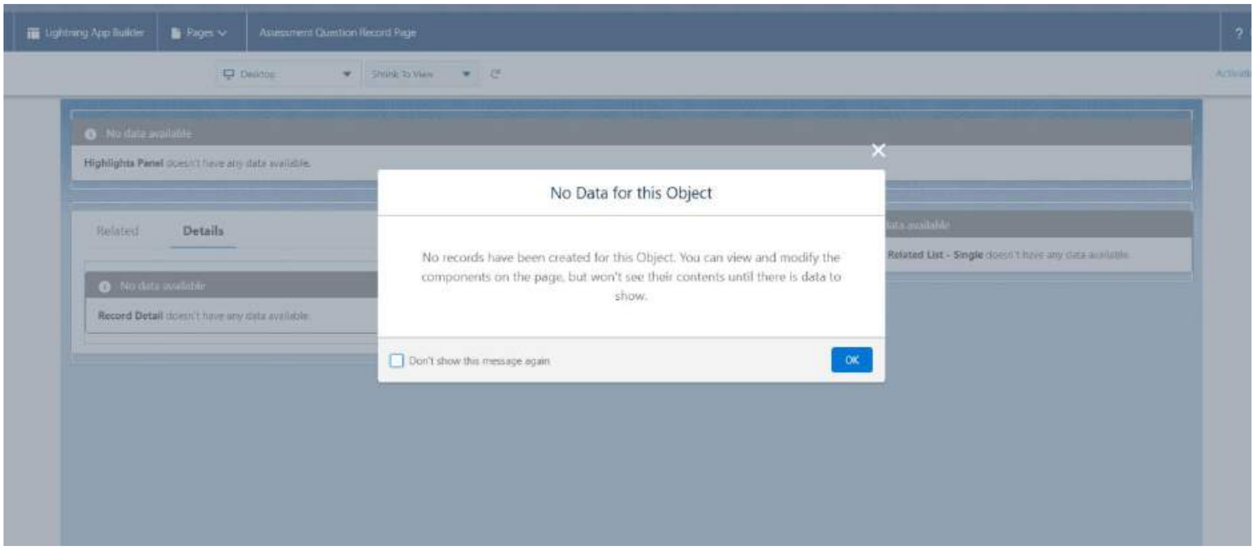
1. Go to setup -> object manager -> assessment question -> select Lightning Record Pages
2. Click on the page which is created after installing the app (most recent) and if there is only one page then click on it.



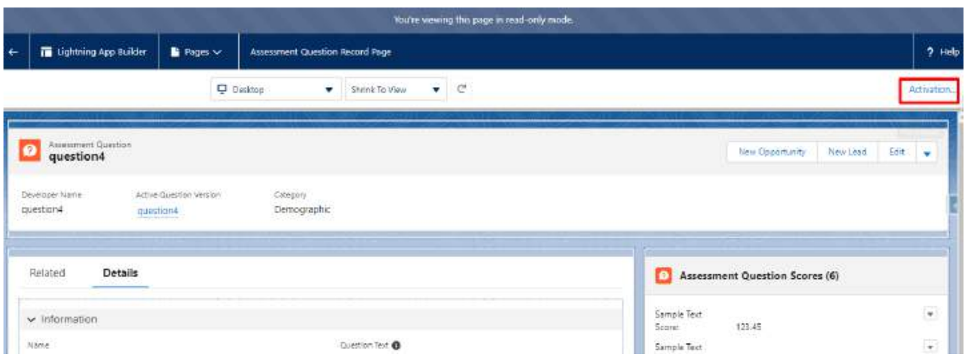
3. Click **View**



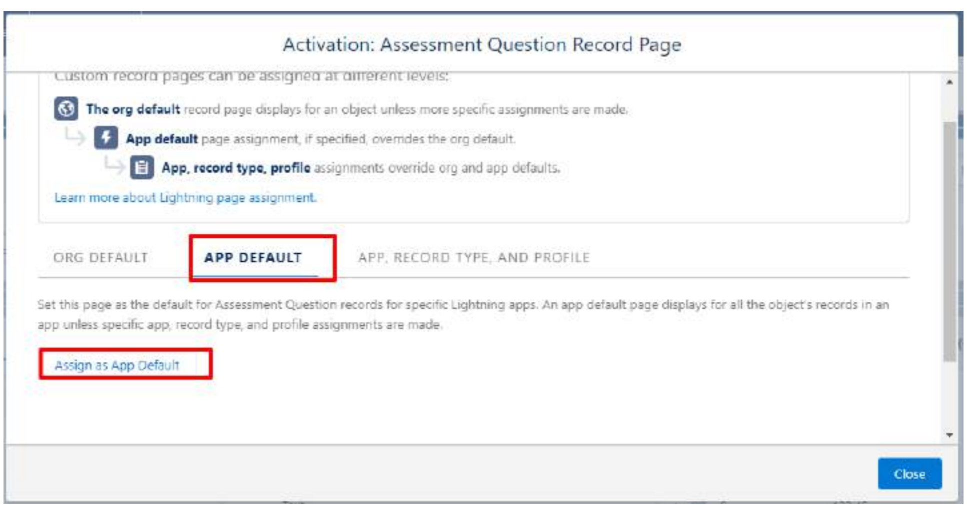
4. If there is no Assessment Question record then you will see "**No data for this object**" message, click on **OK** and proceed.



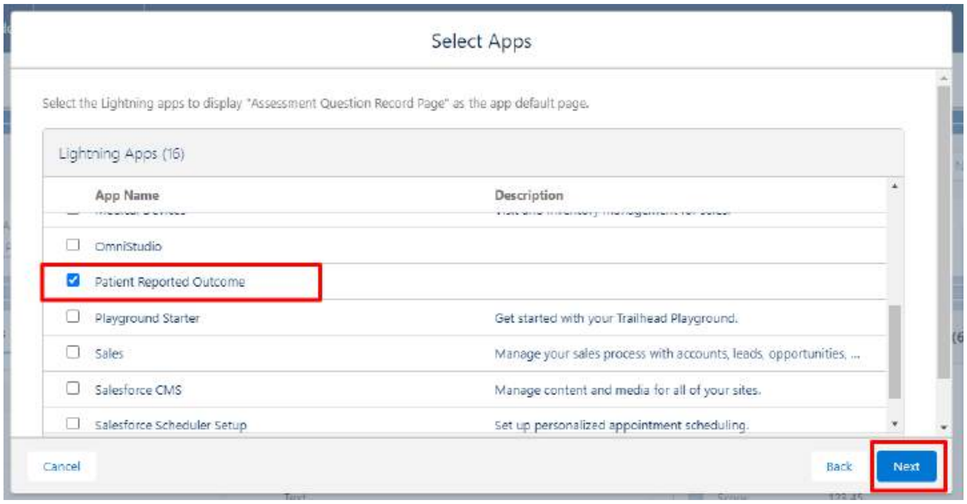
5. Click on **Activation**.



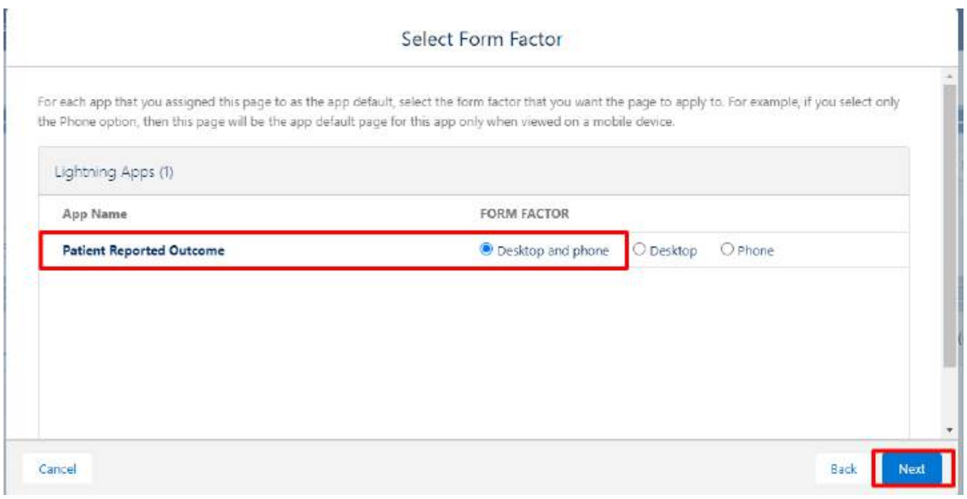
6. Click on App default and then click **Assign as App Default**



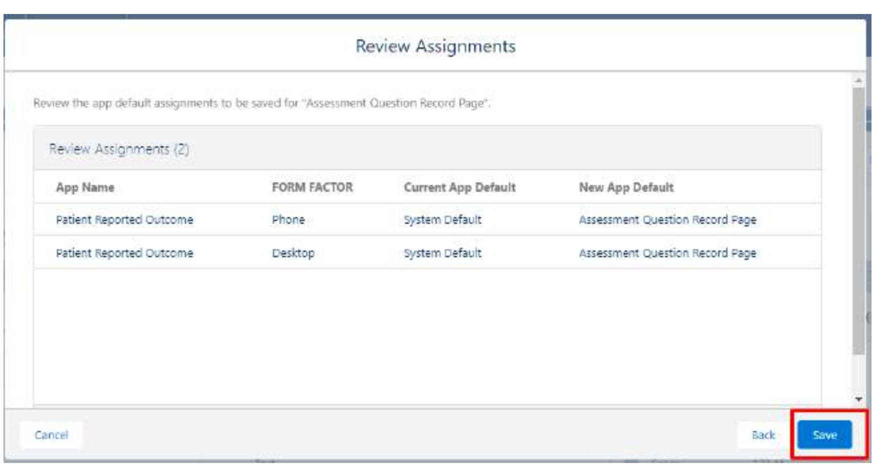
7. Select **Patient Reported Outcome**
8. Click on **Next**



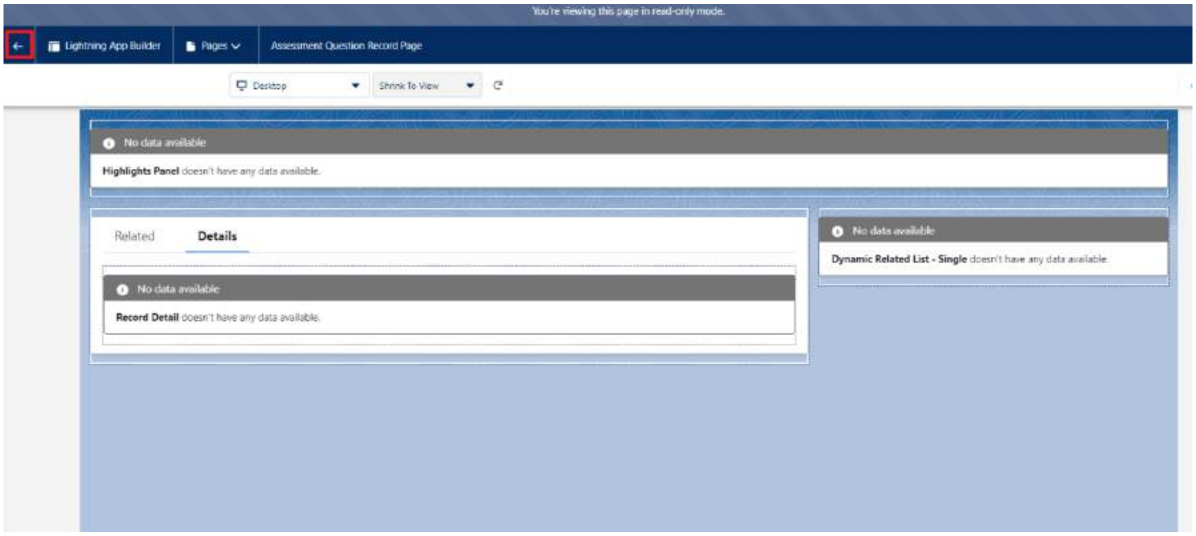
9. Select **Desktop and Phone**
10. Click on **Next**



11. Click **Save**

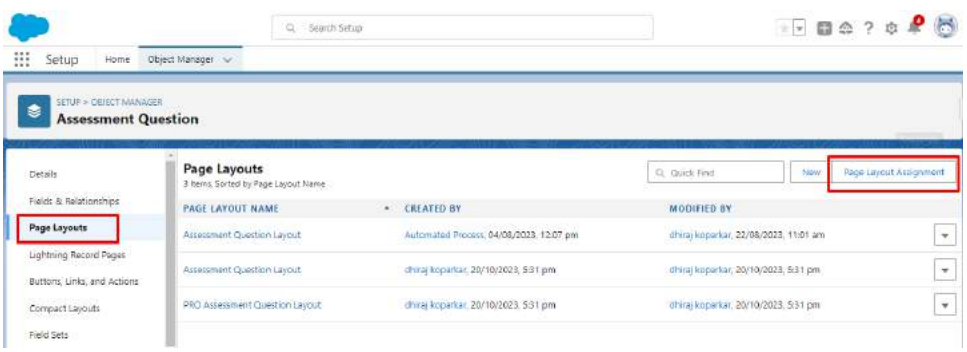


12. Click the **Back arrow**

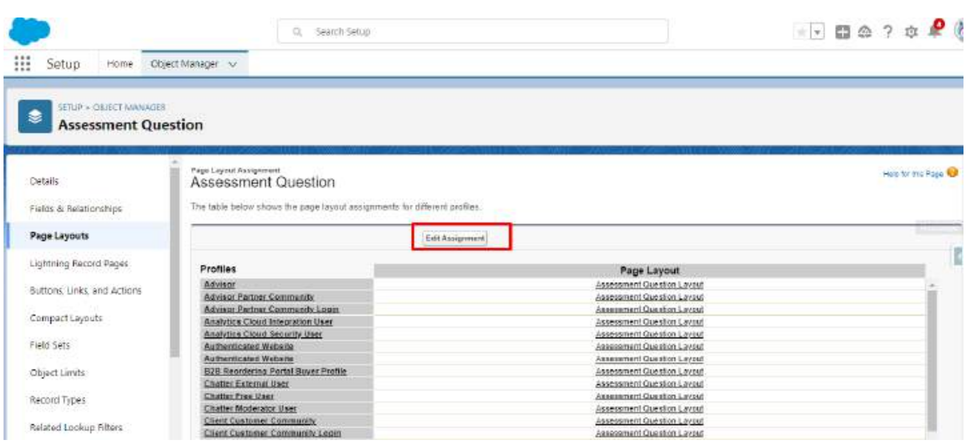


Assign assessment question page layout

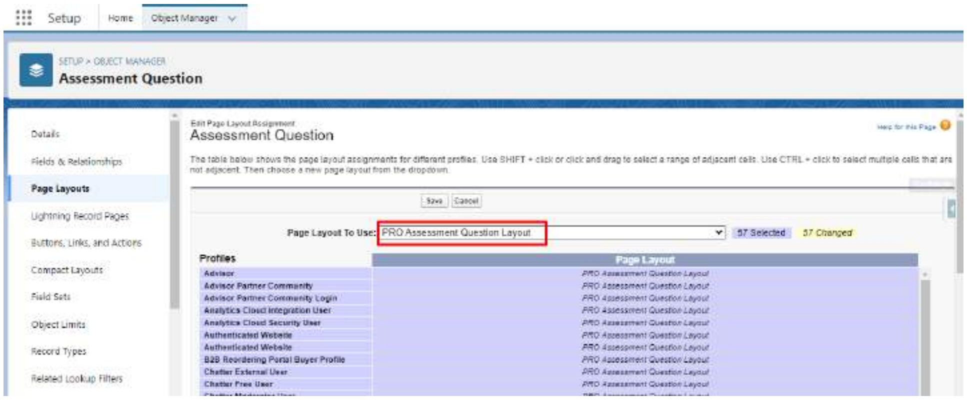
1. Select **page layouts** and then click on **Page Layout Assignment**.



2. Click on **Edit Assignment**.

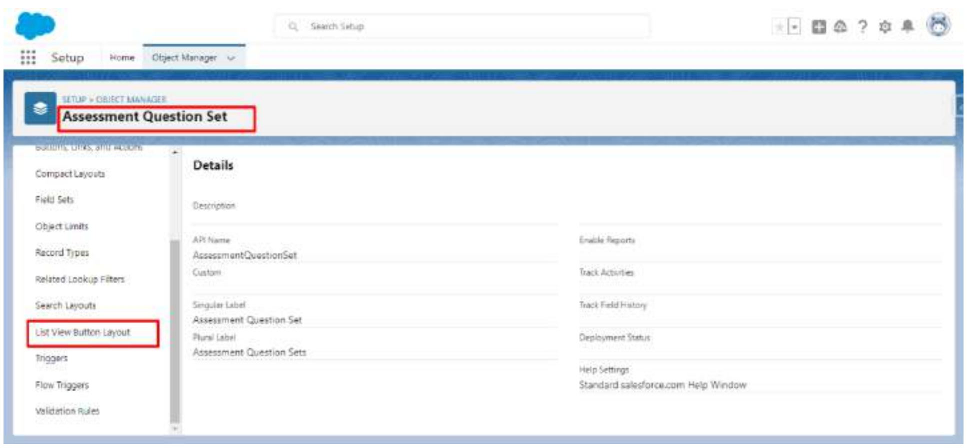


3. Then select profile according to requirement of user then select **PRO assessment question layout** from dropdown, and then click on the **Save** button.

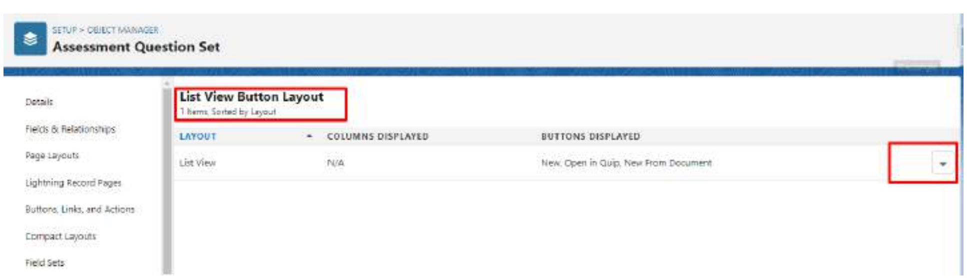


Assessment Question Set Setting

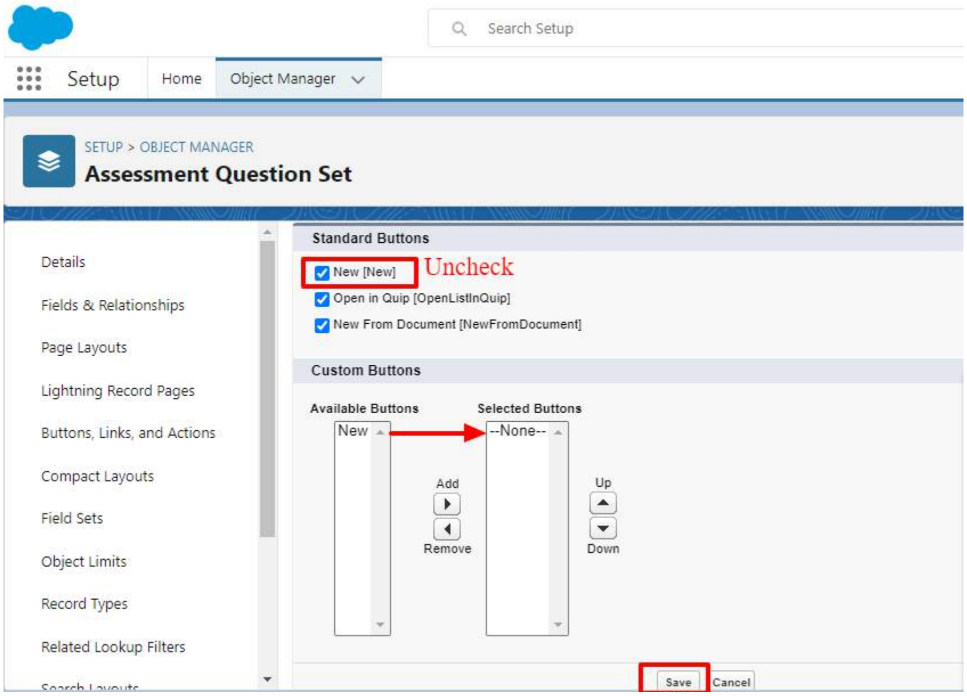
1. Go to Setup -> Object Manager -> Assessment Question set
2. Click on **List View Button Layout**



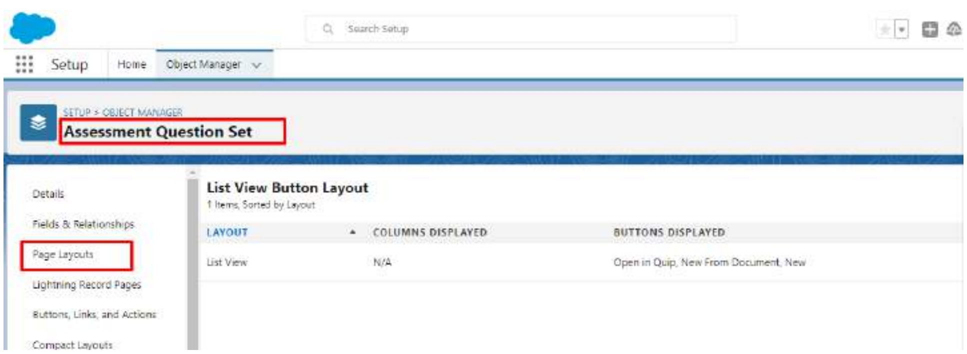
3. Click on **Edit**



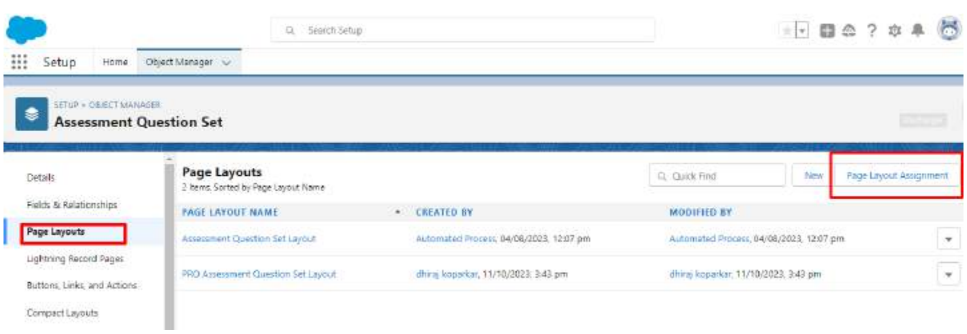
4. Uncheck the new checkbox and then move **New** button from available buttons to selected buttons.
5. Click **Save**



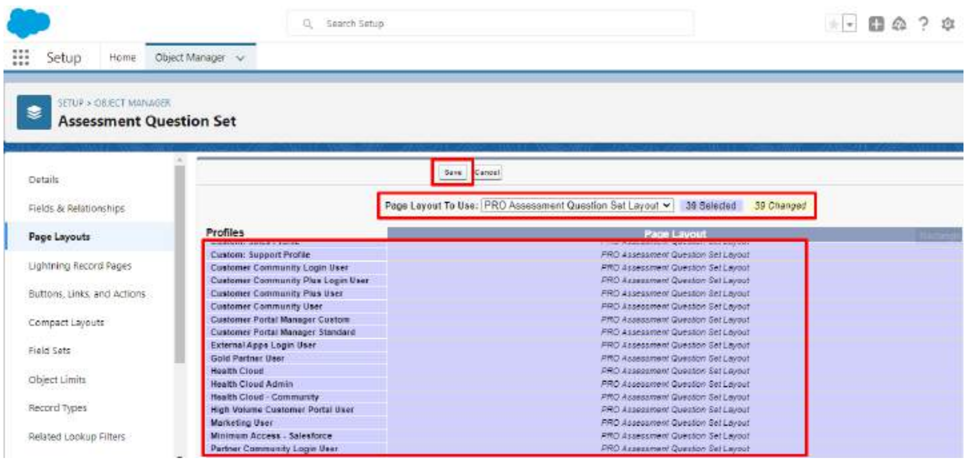
6. Now click on **Page Layouts**



7. Click on **Page Layout Assignment**

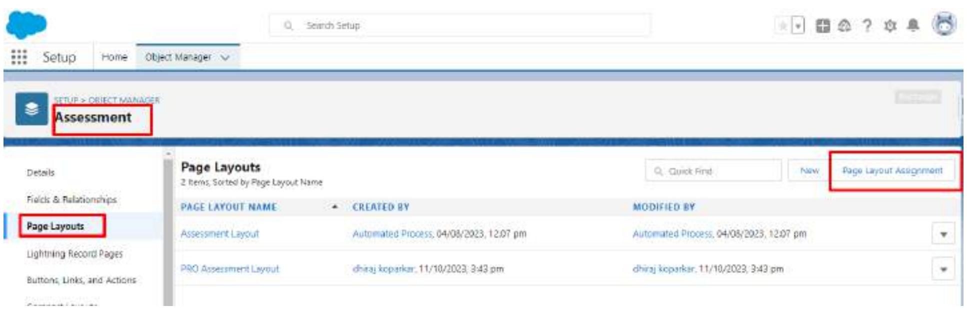


8. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Assessment Question Set Layout** from dropdown and click on the **Save** button.

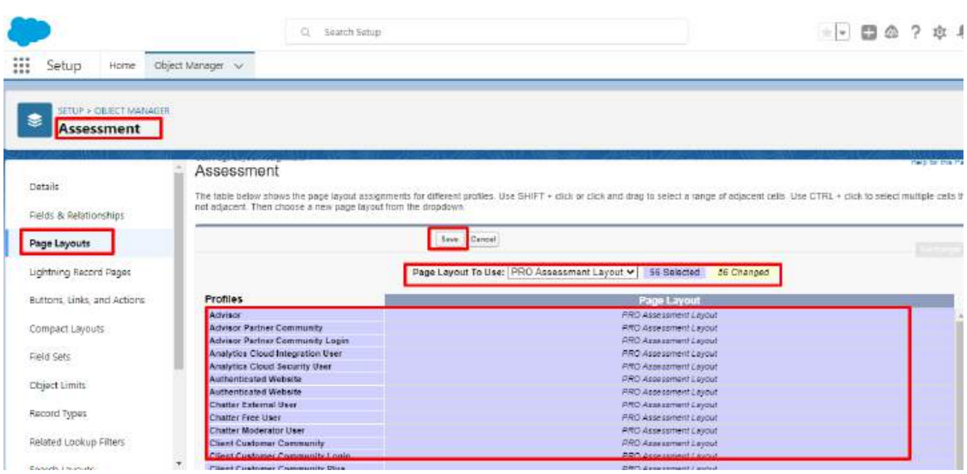


Assessment Setting

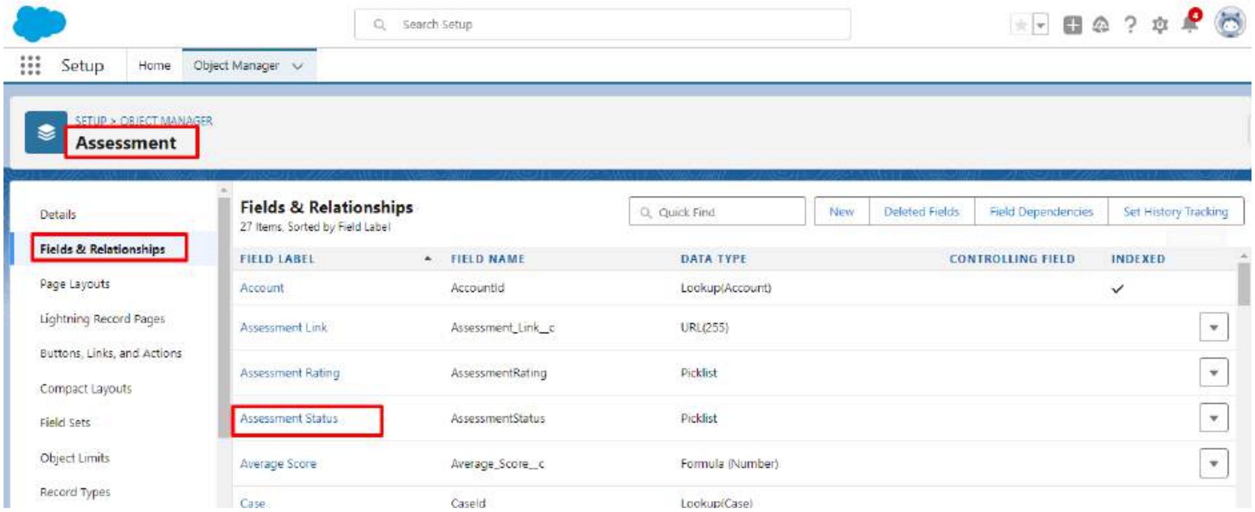
1. Go to Setup -> Object Manager -> Assessment
2. Click on Page Layout then click on Page Layout Assignment.



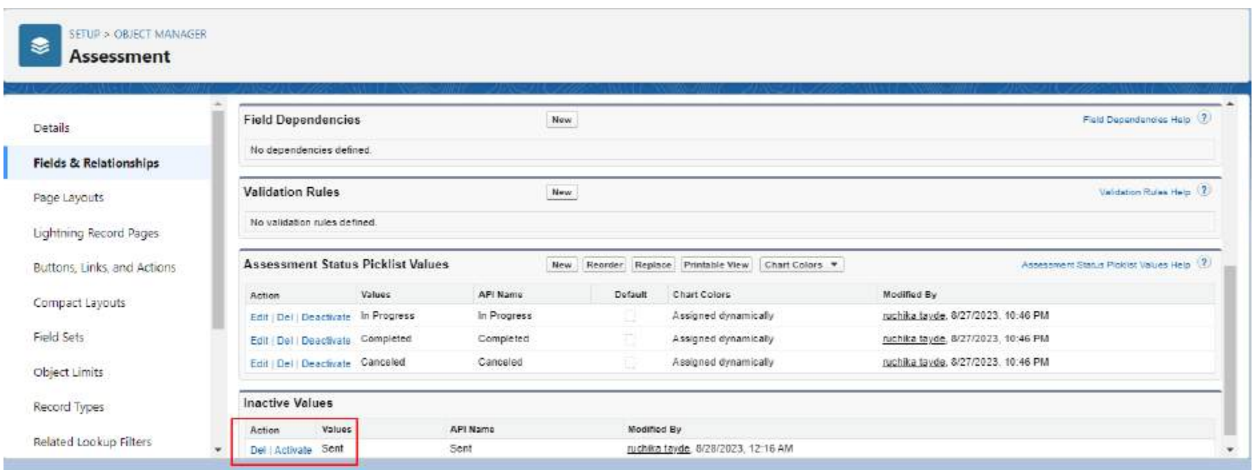
3. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Assessment Layout** from dropdown and click on the **Save** button.



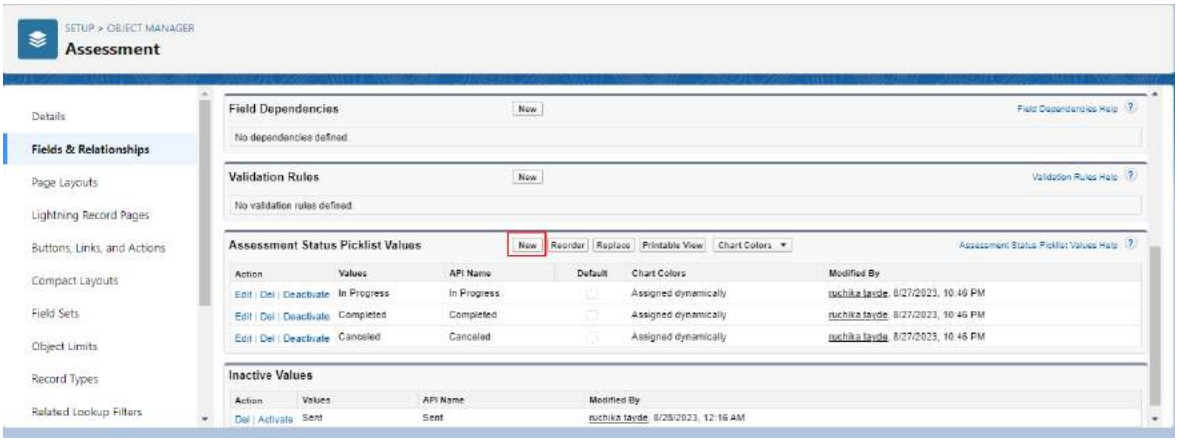
4. Click on **Field & Relationships** and then click on **Assessment Status**



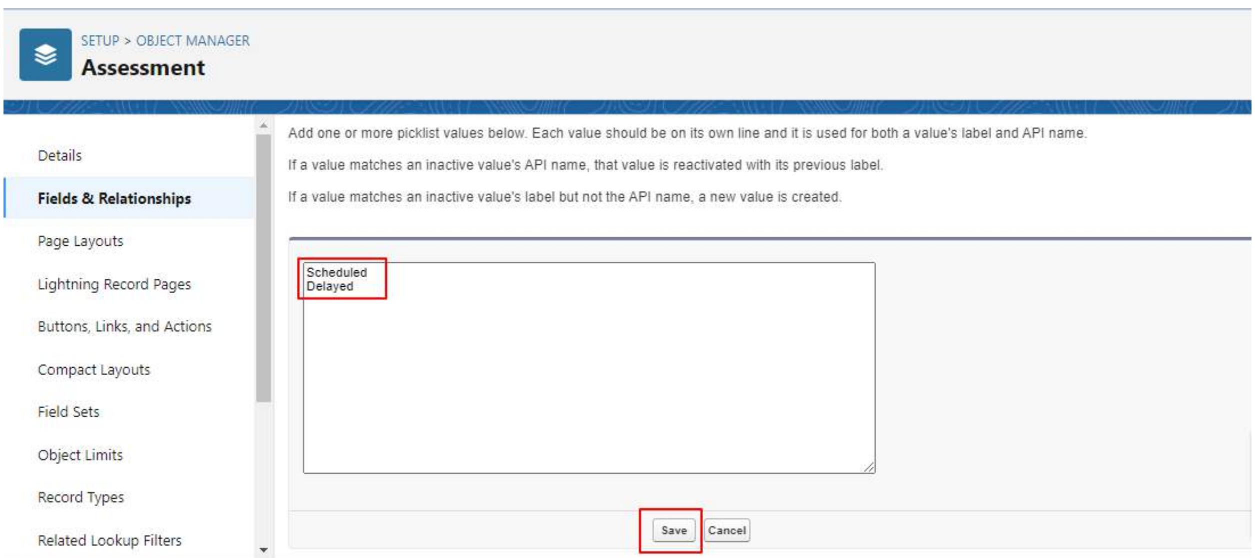
5. Scroll down and click on **Activate** on **Sent** value



6. Click on **New** on **Assessment Status Picklist Values**

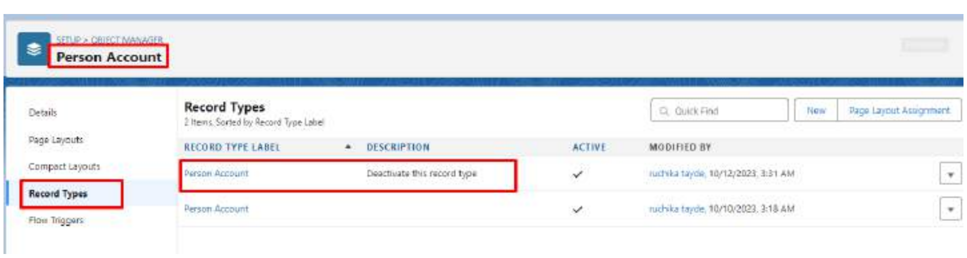


7. Add **Scheduled and Delayed**
8. Click on **Save**



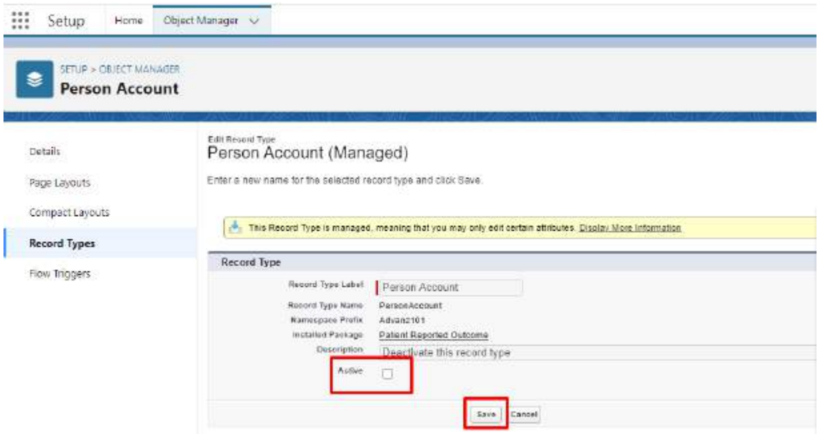
Person Account Setting.

1. Go to Setup -> Object Manager -> Person Account
2. Click on **Record Type**

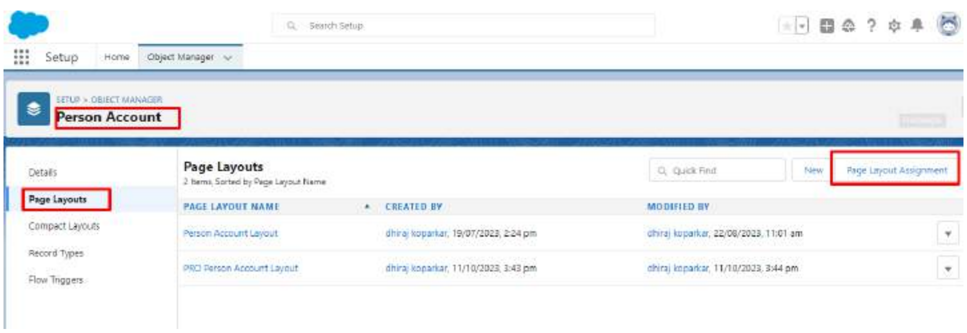


3. Edit the record type with description **Deactivate this record type**.

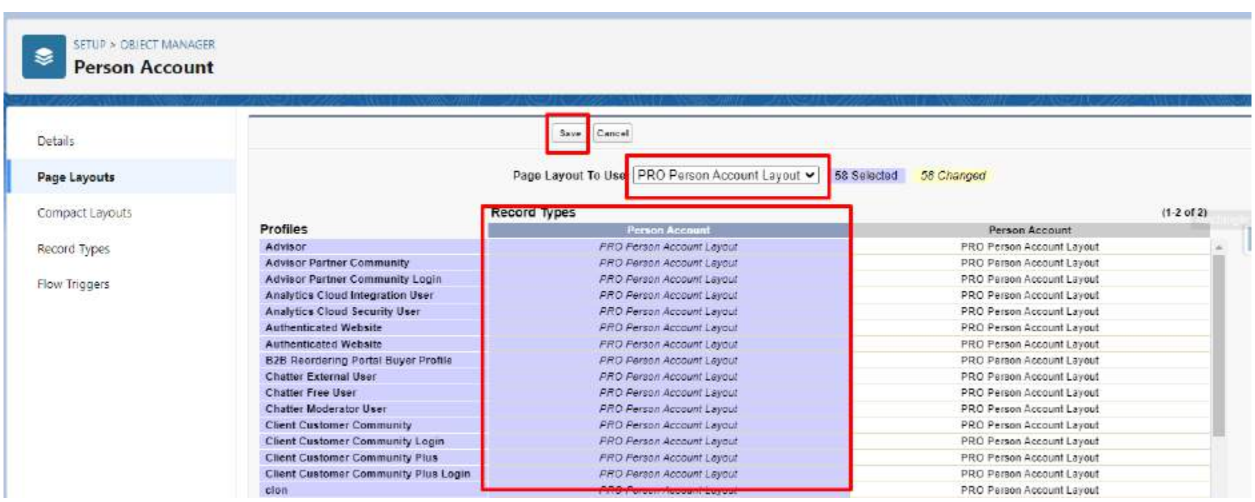
4. Deselect **Active** checkbox and click on the **Save** button.



5. Click on **Page Layouts** then click on **Page Layout Assignment**.

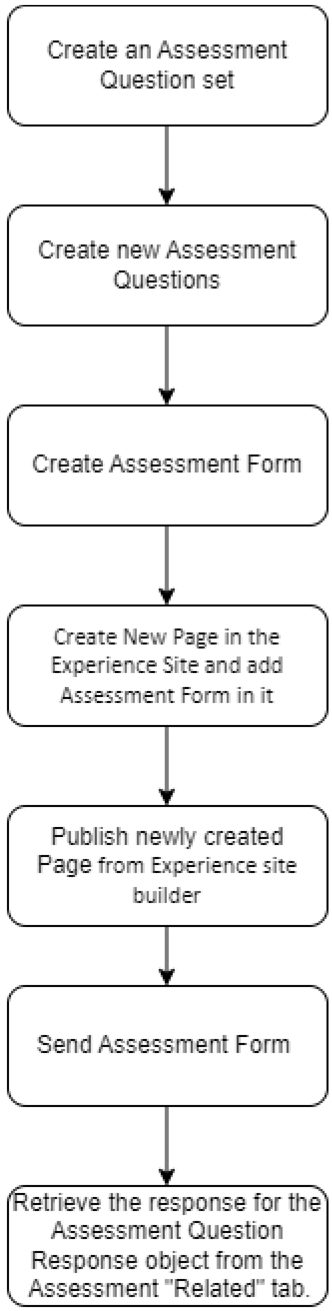


6. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Person Account Layout** from dropdown and click on the **Save** button.



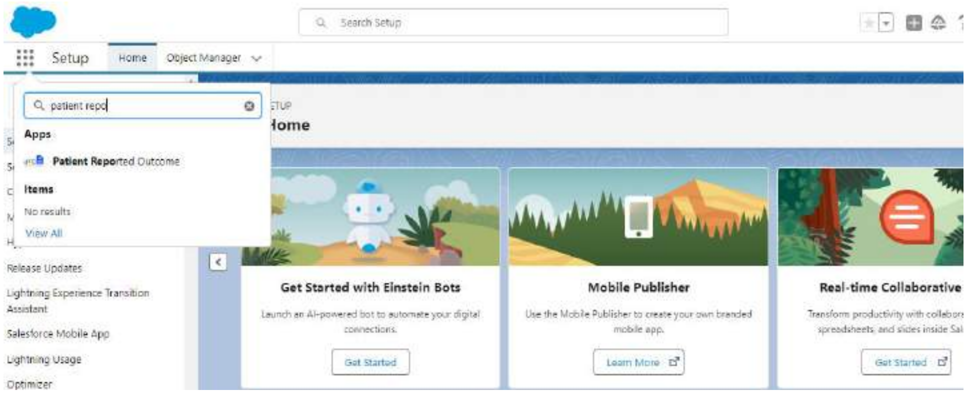
Functionality

Process Flow



Go to Patient Reported Outcome app

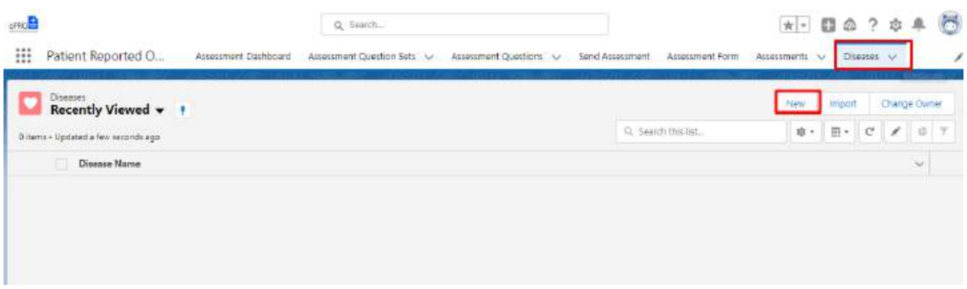
1. Click on **App Launcher** and find the Patient Reported Outcome app.



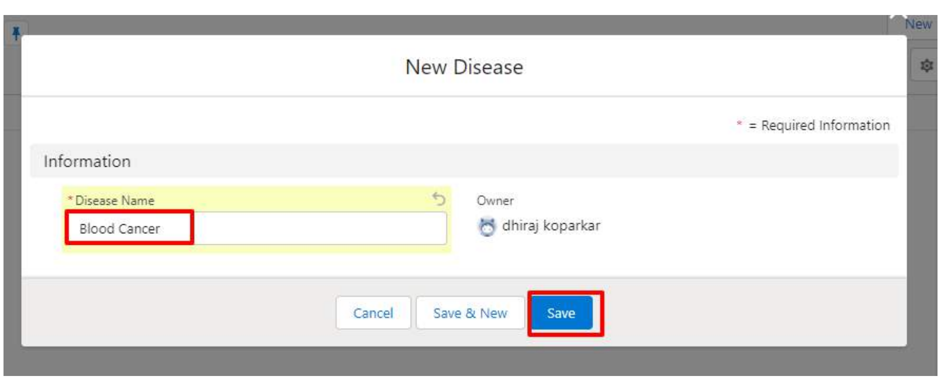
Create Disease

This feature can be used to assign diseases to the person Account and Assessment Question Set thereby mapping disease to patients and vice versa. This helps to send assessments to a group i.e. the disease group.

1. Click on the Disease tab in Patient Reported Outcome App.
2. Click **New**



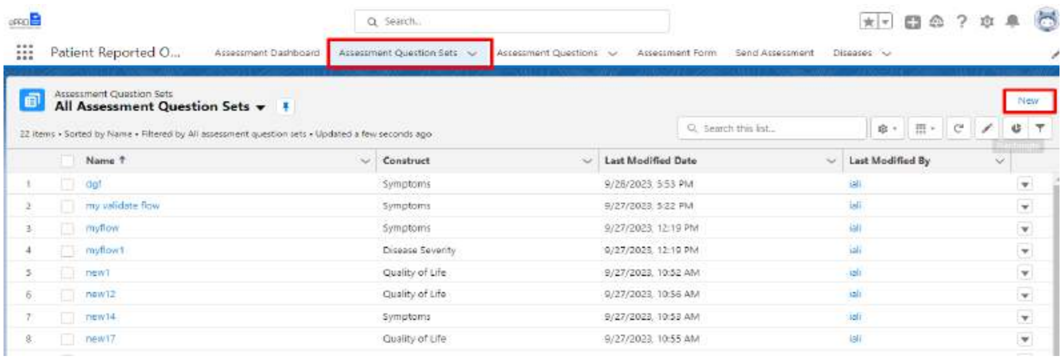
3. Click **Save**.



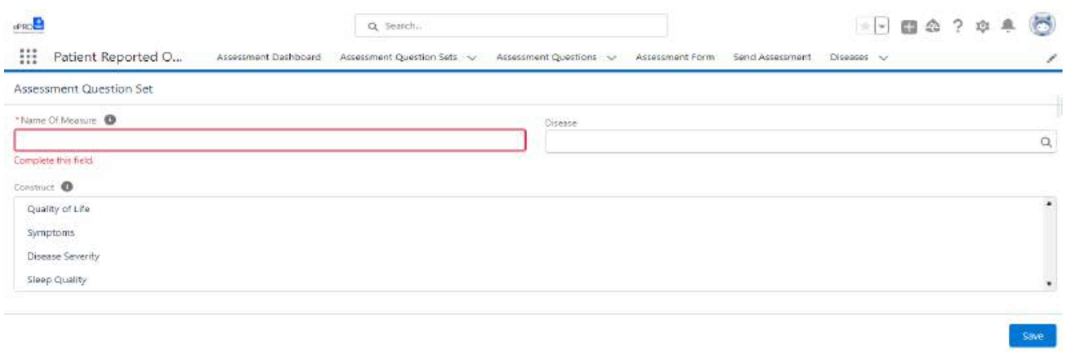
Create Question Set

To facilitate the efficient addition of multiple questions within a form, you can create a "question set" and allocate all the desired questions for that specific form to this question set. You can also make different sets for different forms. For example: you can create a question set for Sleep Apnea disease and add all the questions related to sleep apnea in the question set and this will help you while creating assessment forms where you can just write the name of question set and with one click add all the questions in the assessment form for Sleep Apnea.

1. Click on **Assessment Question Set** tab.
2. Click **New** and Enter name, construct and select disease.

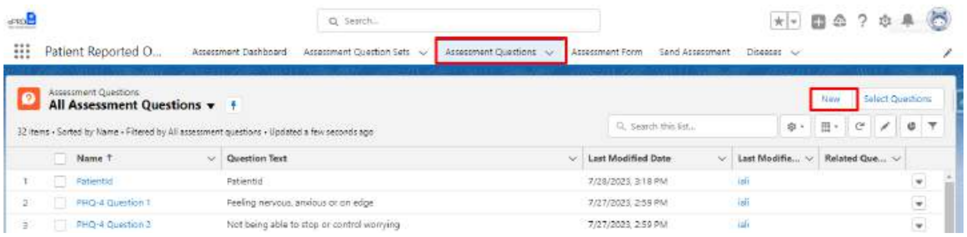


3. Click **Save**.



Create Assessment Question

1. Go to “**Assessment Question**” tab and click **New**.



2. Create first Question for PatientId (required for internal functionality)

   Add name Question: **PatientId**

   Select Data Type: **Text**

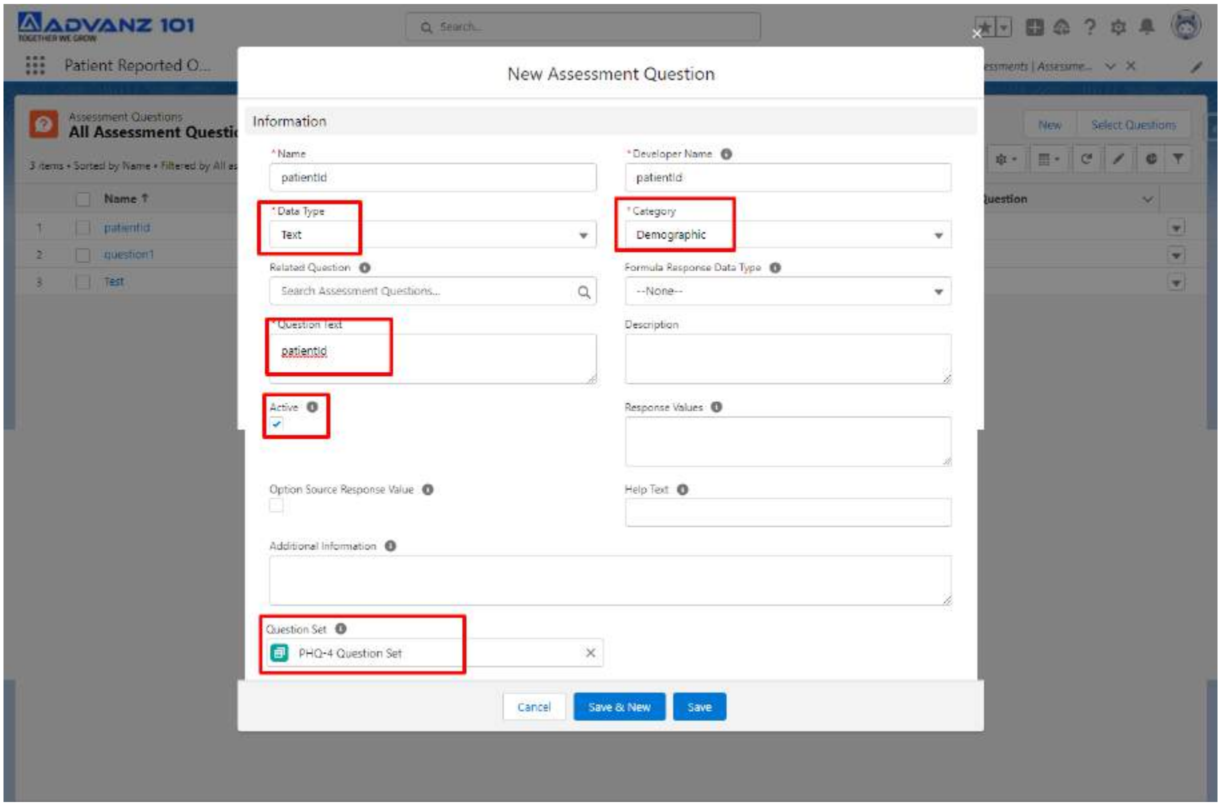
   Category: **Demographic**

   Question Text: **PatientId**

   Enable **Active** checkbox

   Add question(s) to your question set.

3. Click **Save**



Note: It is mandatory to create **PatientId** assessment question record.

Scoring Functionality

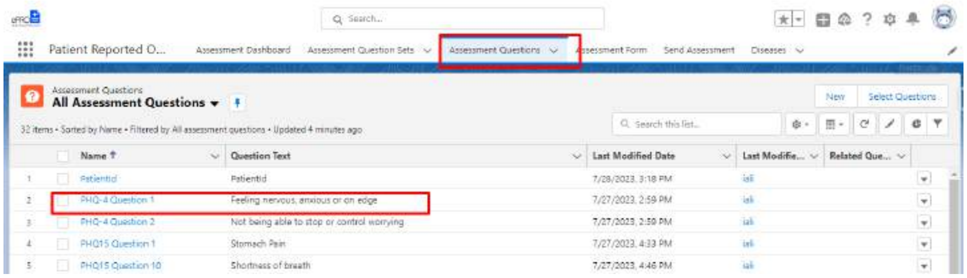
This functionality will help you calculate the score of assessment form submitted by the Patient and will help you in analyzing the data and show which patient is performing well or not.

Note: You should give score only for **Assessment Questions** with **Select** and **Radio** data type.

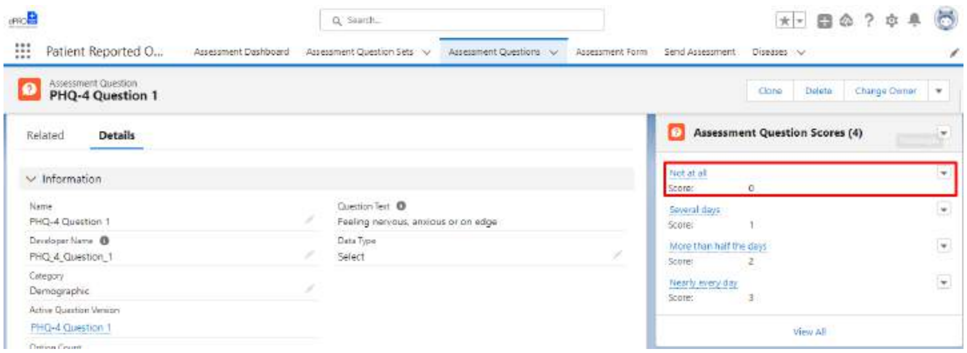
1. To give score to options click on question from **Assessment Question** tab.

Note: Follow same scoring criteria for all the Assessment Questions in a single Assessment Question set. For example, you have given scoring as 1-2-3-4 for a question with 4 options then do not give scoring as 10-20-30-40 for another question. It will make it difficult for you to track the performance of patients.

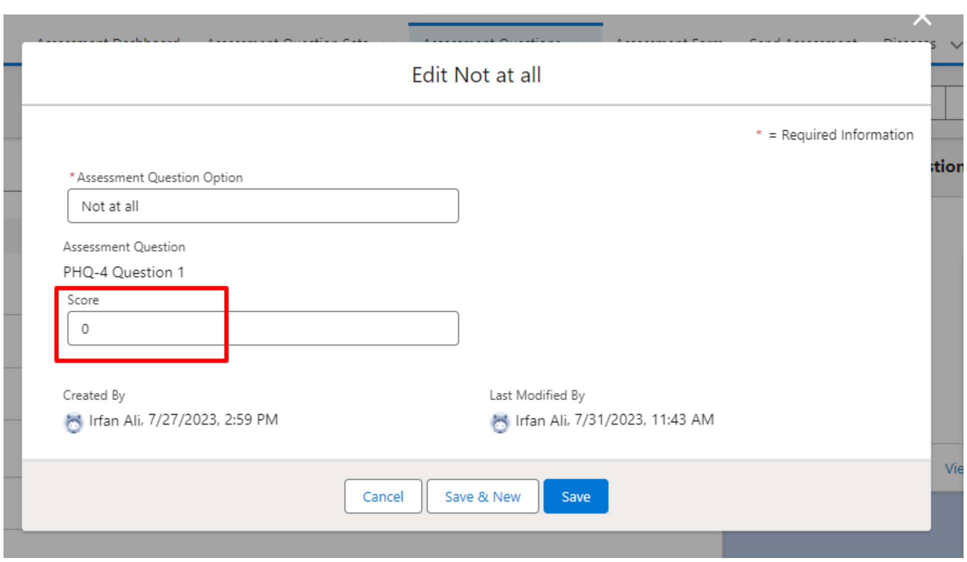
For best results use same scoring criteria for all the assessment questions in all the Assessment Question sets.



2. Edit any option from **Assessment Question Score**.



3. Click drop down arrow beside the response you want to add score to and click edit and give score for that option.
4. Click **Save**



Create Assessment Form

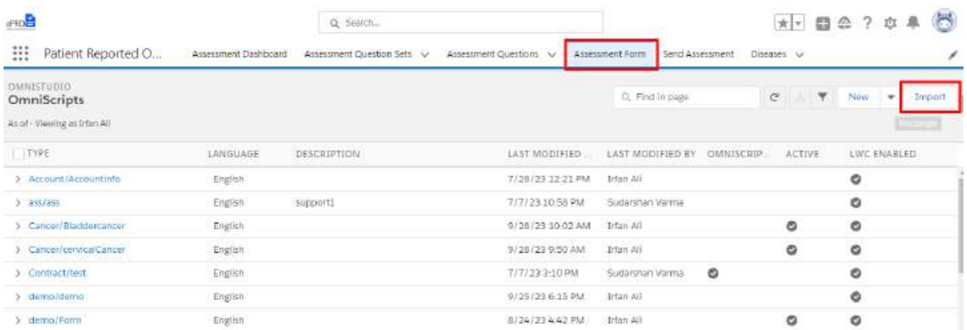
To create the Assessment Form, you need to download the standard form file from the document section.

Note – Newly downloaded file includes all the prebuilt configurations, and this can be reused to create multiple new assessment forms.

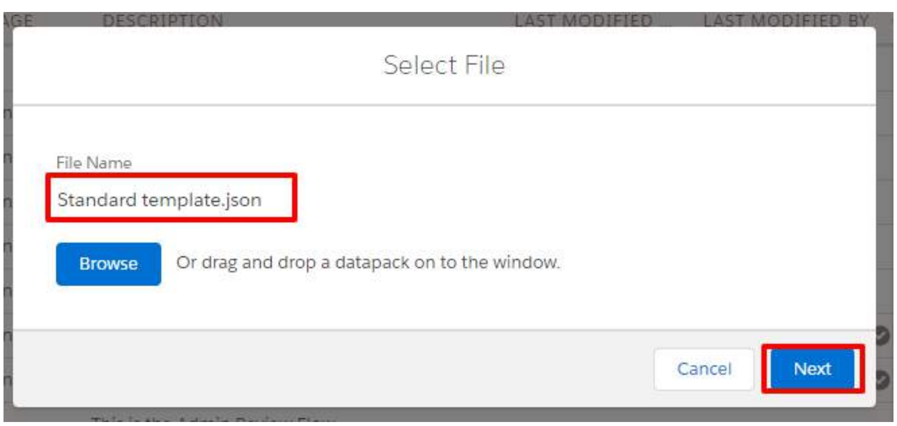
1. Go to “Assessment Form” tab

Note- If you want to create Omniscript Form from scratch without using import please refer ‘PRO Omniscript Form from Scratch’ doc.

2. Click **Import**.

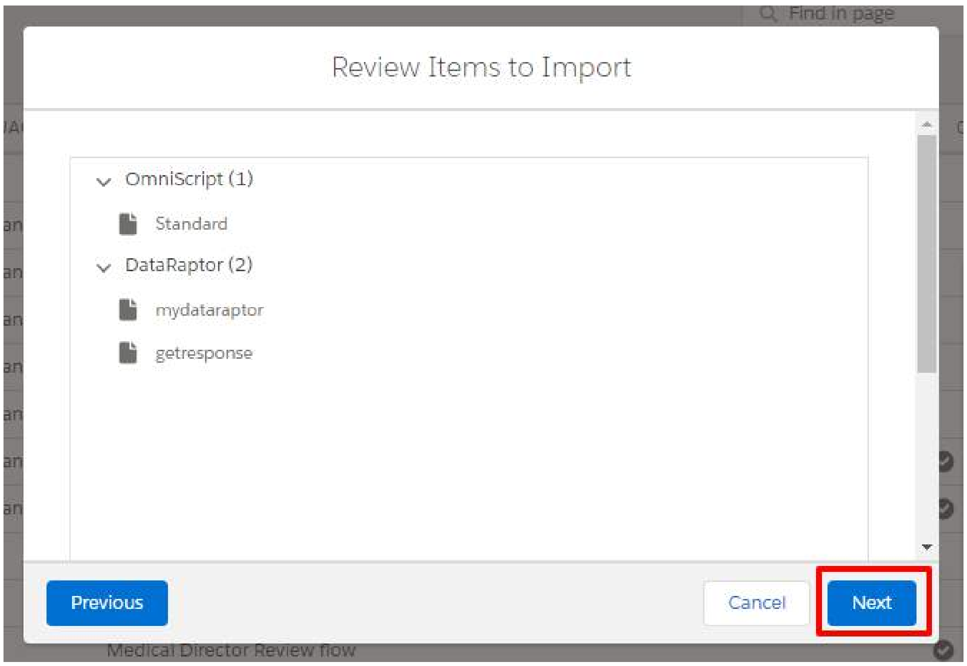


3. Browse the above downloaded document from your device.
4. Click **Next**

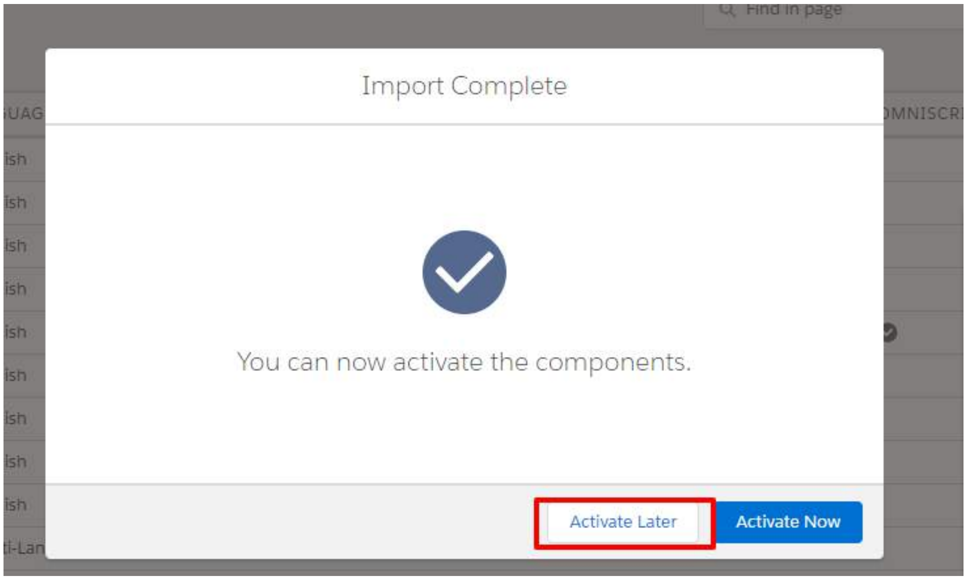


5. Click **Next**

6. Click **Next**



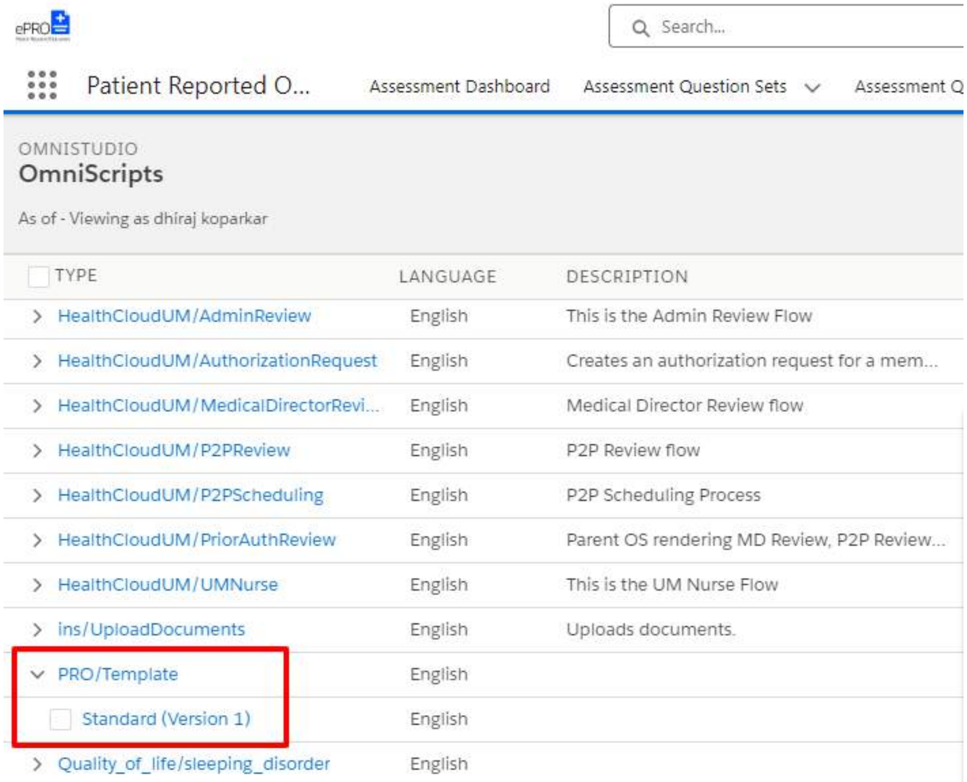
7. Click on **Activate Later**.



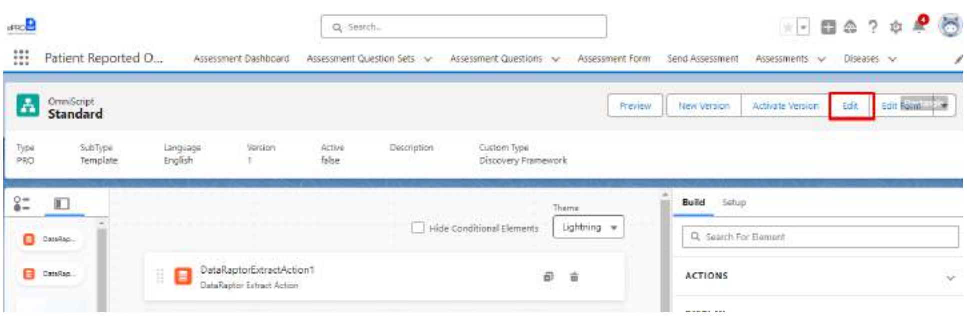
Once Import operation is completed for creating new assessment form, after approximately a minute it will open automatically.

In case it does not open, then you can find it on the same page with the name as "**PRO/Template**" and within it, "**Standard**".

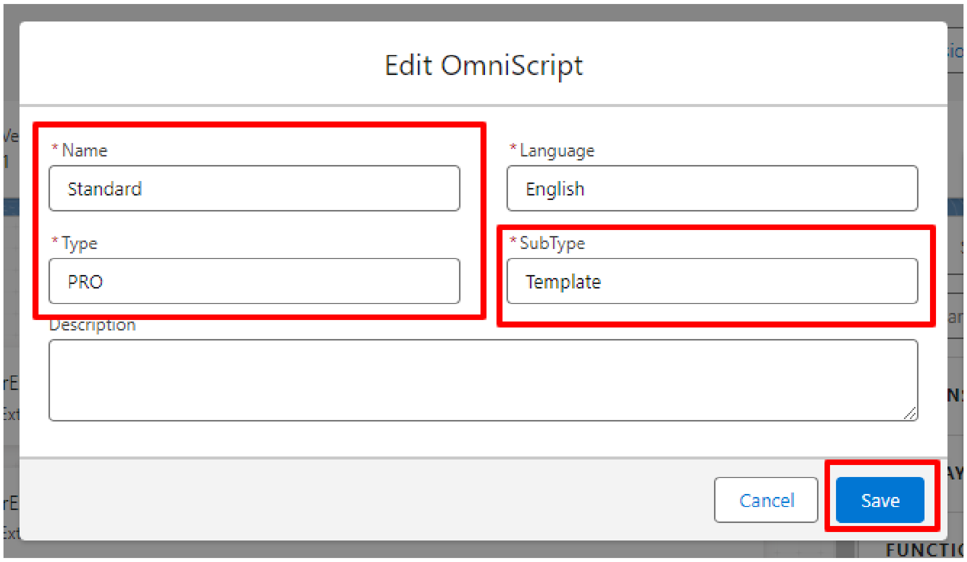
8. Click on "**Standard**"



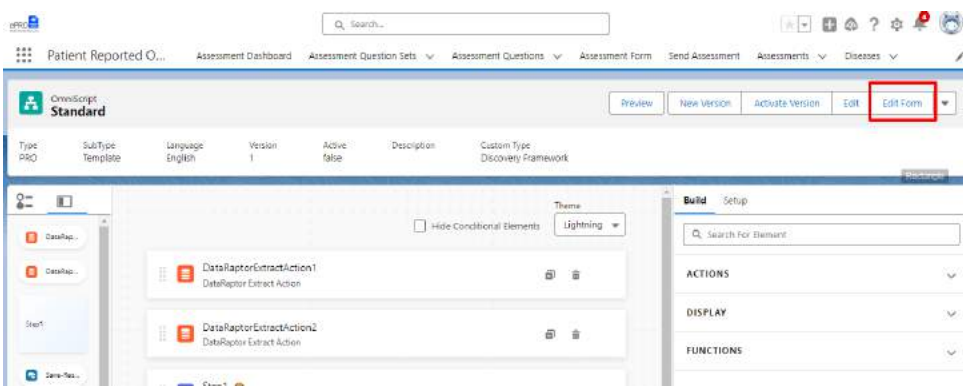
9. Click **Edit** to change the form name according to your requirement.



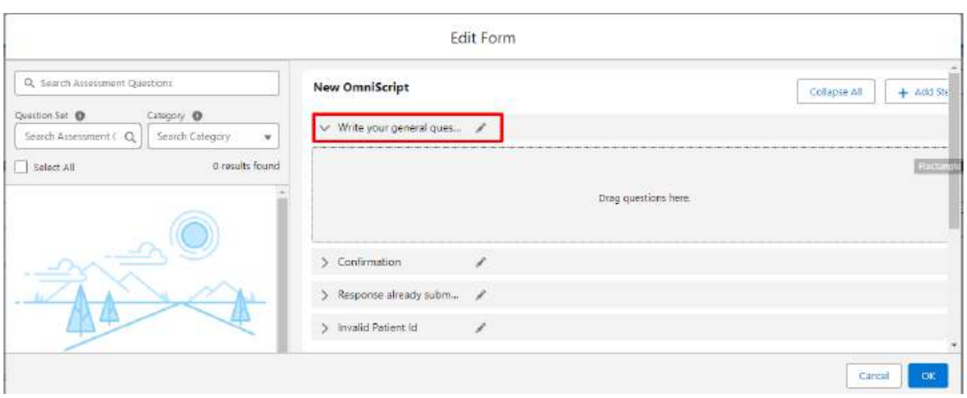
10. Change the name, type and subtype. (Mandatory)
11. Click Save.



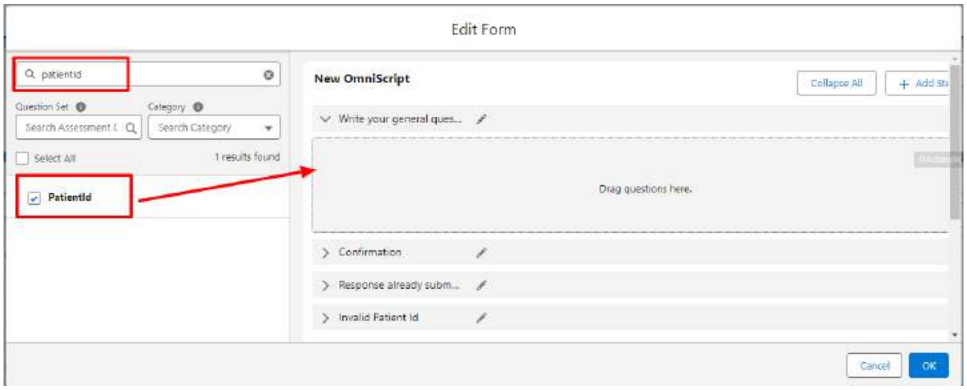
12. To add question in your Form.
13. Click On **Edit Form**.



14. Add your general question for the form.



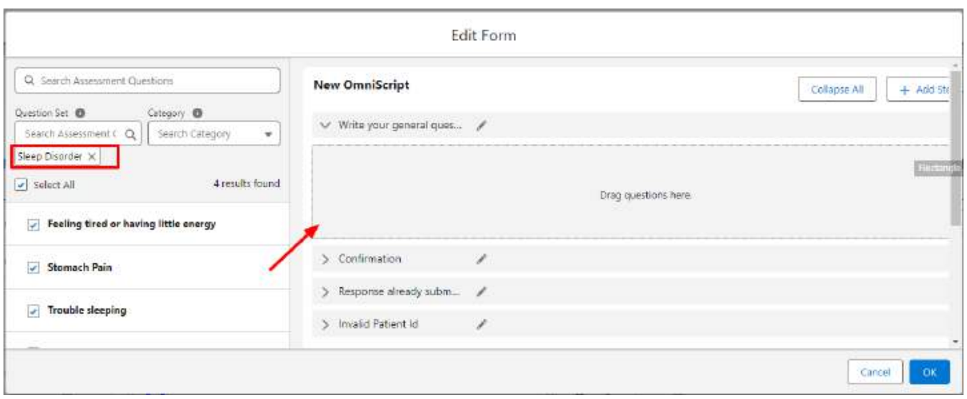
Before adding your Question Don't forget to add **patienid (Required)** question because PatientId will be helpful to create association of Assessment with Patient and for future mapping of data for the report and dashboard.



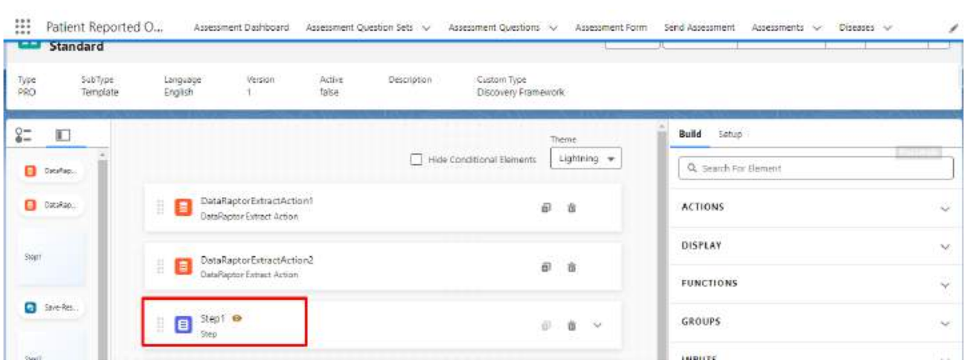
15. Now Add multiple assessment questions using the assessment question set.

Similarly, add all questions or you can also add question set so whatever question in your set so that all appear, and you can add all of them at once.

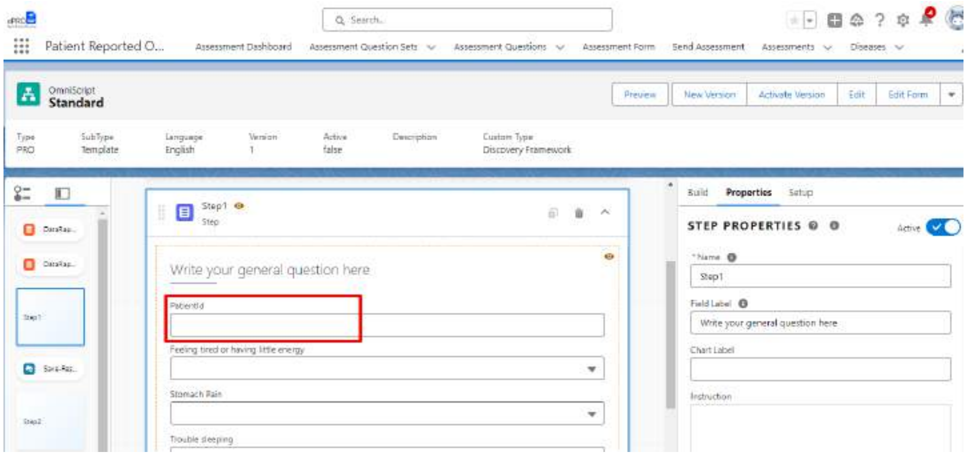
16. Click on **OK**



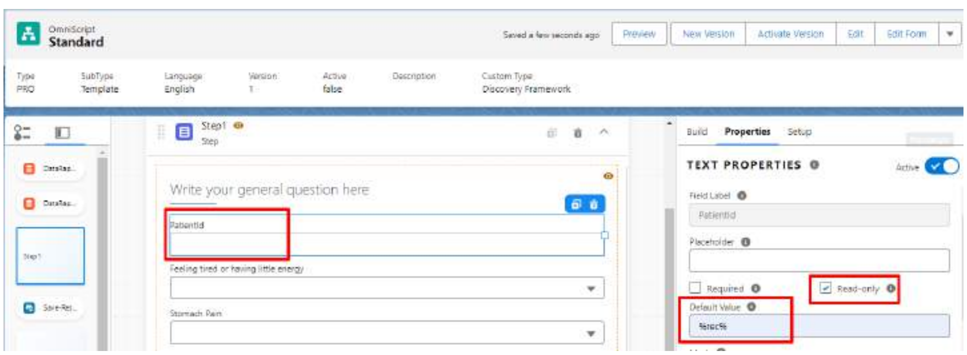
17. Click on **Step1**



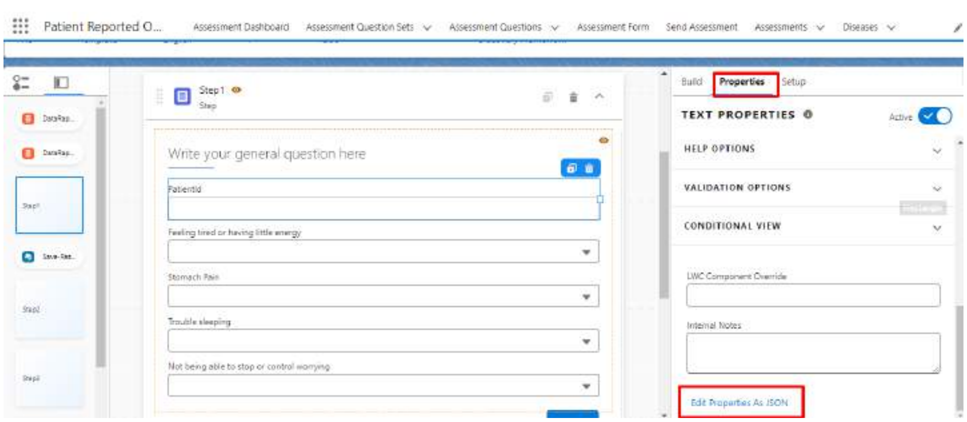
18. Select **PatientId** question from step1 (shown below).



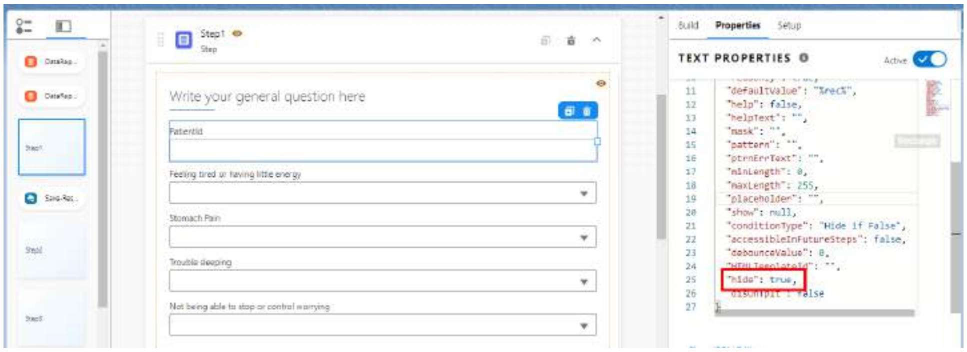
19. Enable **Read only** checkbox.
20. Add **%rec%** in default value.



21. Select **Edit Properties As JSON** from properties of **PatientId** question.

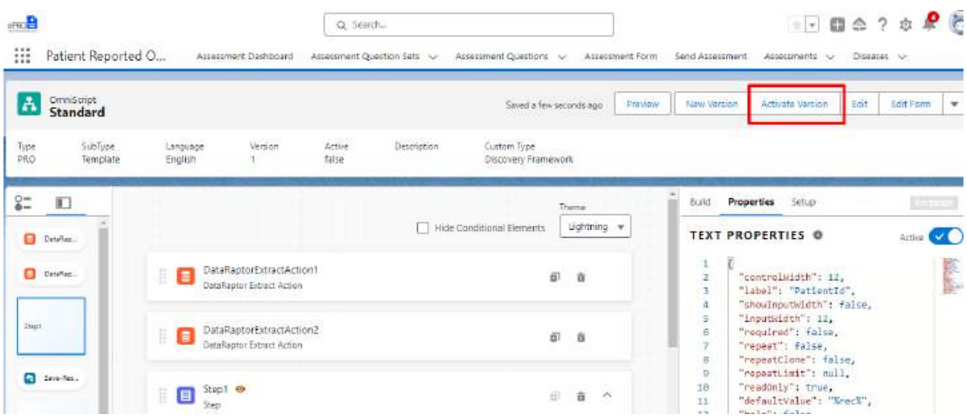


22. Change **hide** from **false** to **true**

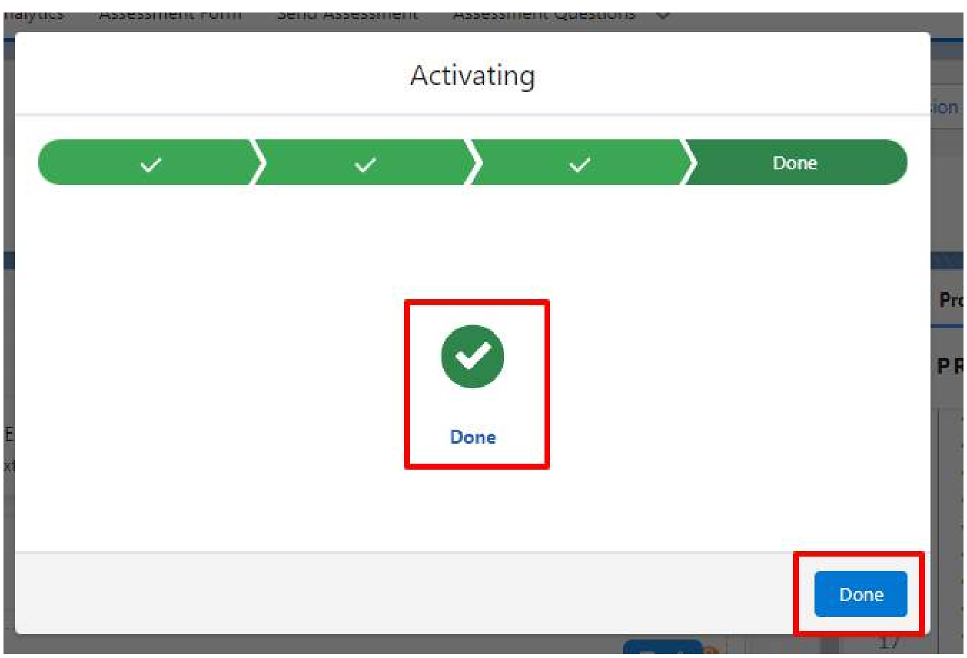


Note: All steps are mandatory for patientid question.

23. Then select Activate Version



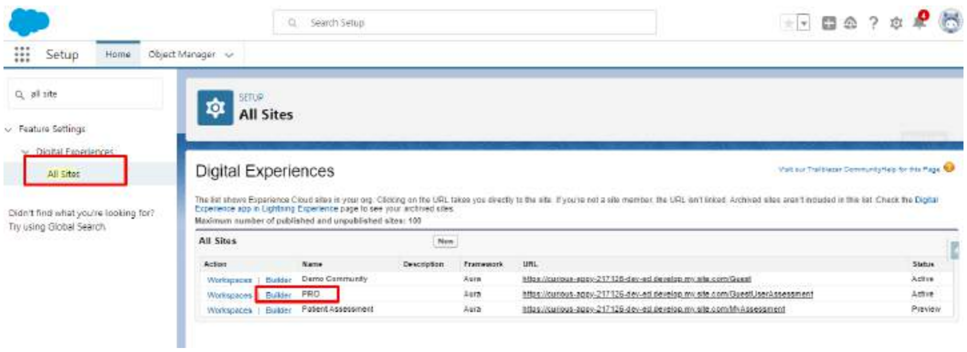
24. Click on **Done**.



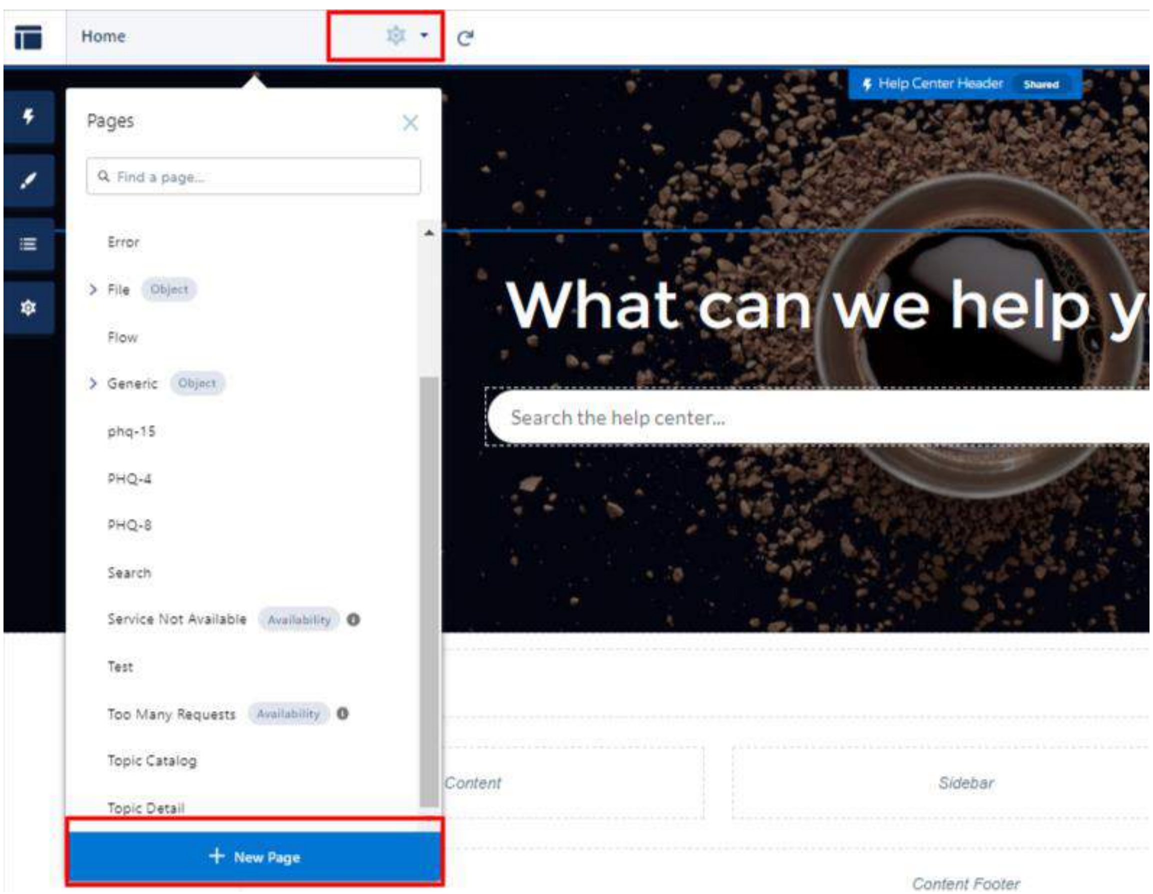
Add Assessment Form In Experience Site

To run Assessment form in any web browser, assessment form needs to be published on web page. For uploading assessment on web page, there are some steps that are necessary to be performed and are mentioned below.

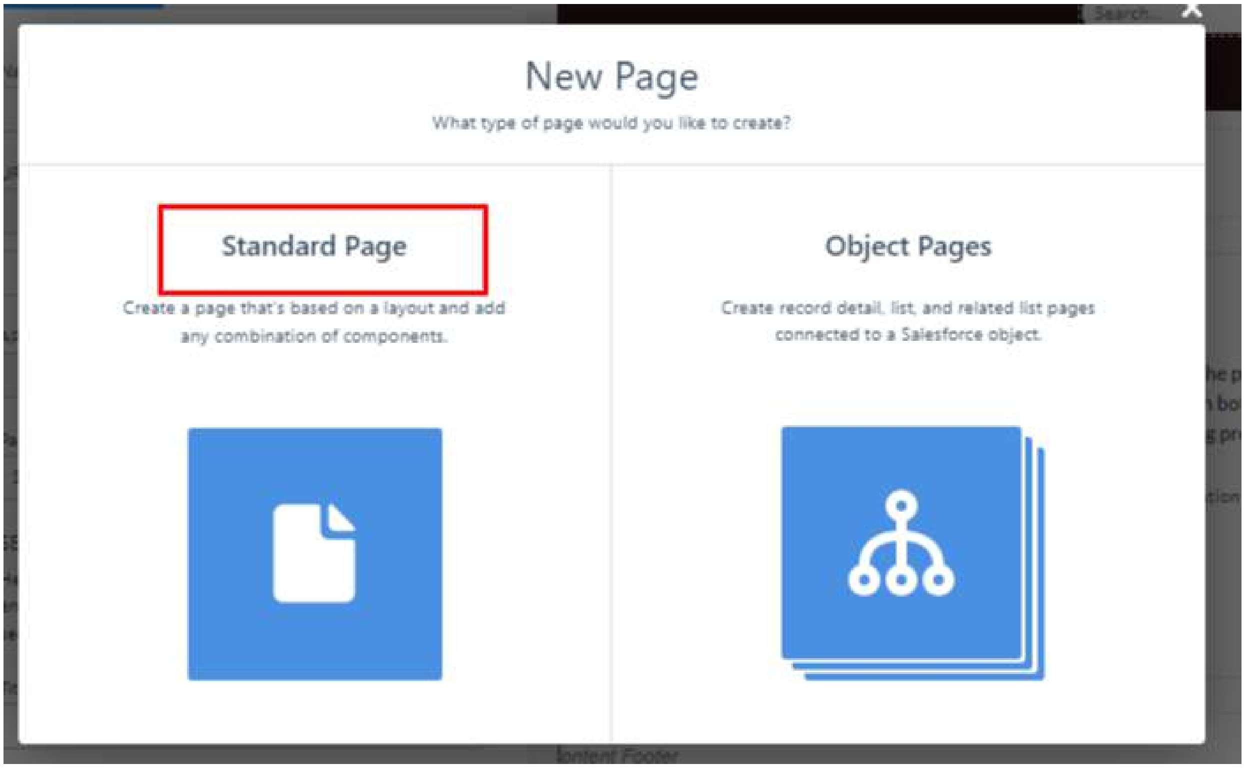
1. Go to Setup -> Search “All site” in Quick Find Box and click **Builder** action beside the name of your site which you created in initial steps.



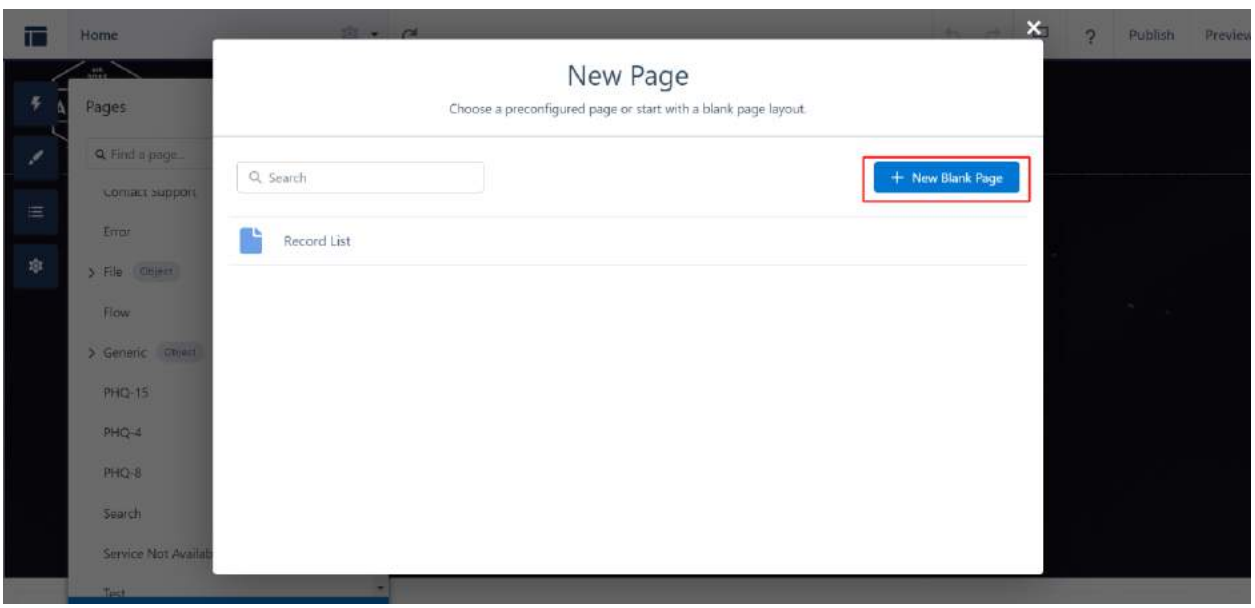
2. Click on dropdown icon and click on new page



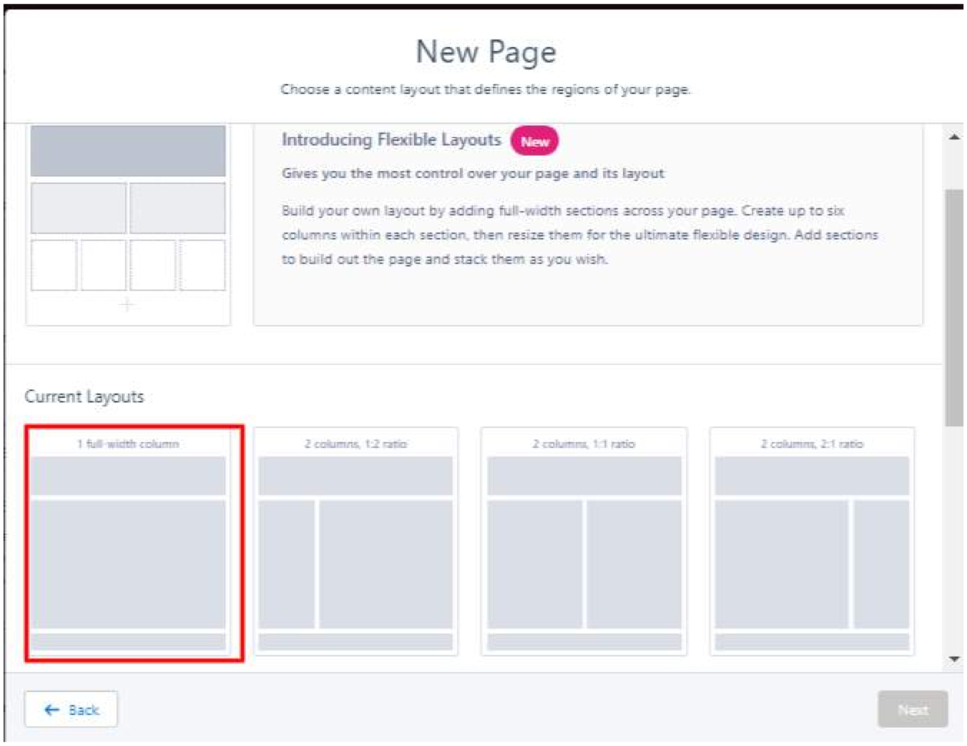
3. Then select **Standard Page**



4. Select **New Blank Page**



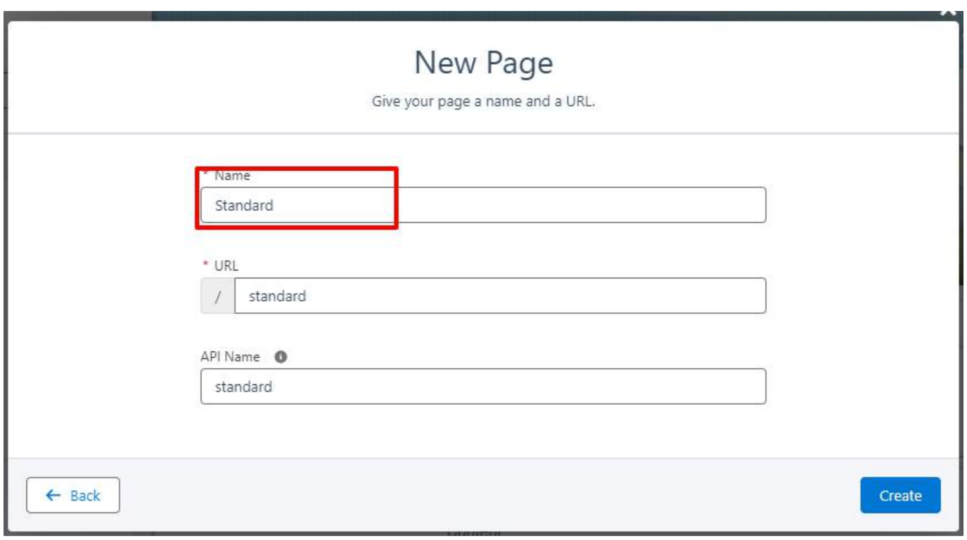
5. Select Page layout for your page



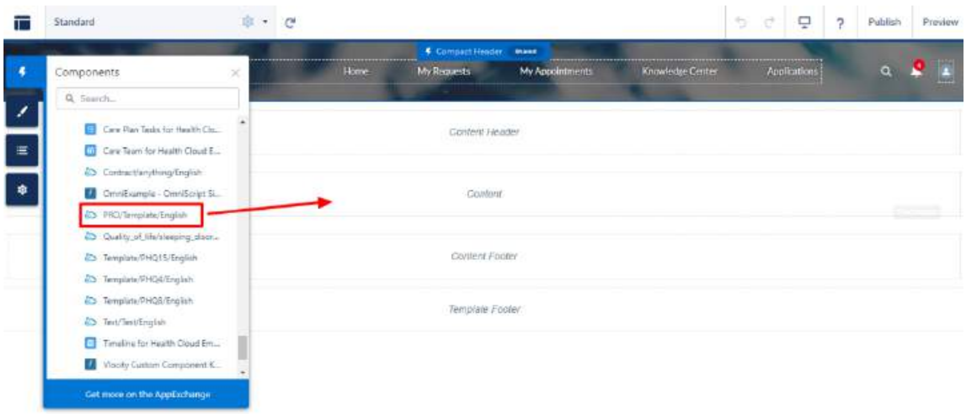
6. Click **Next,** add **Name** and **API Name**.

Note: Name should be same as the name of your Assessment (omniscript) form.

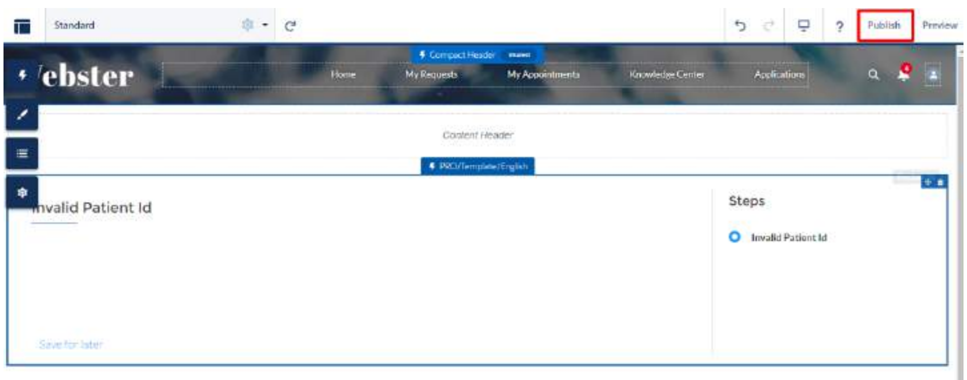
7. Click **Create**.



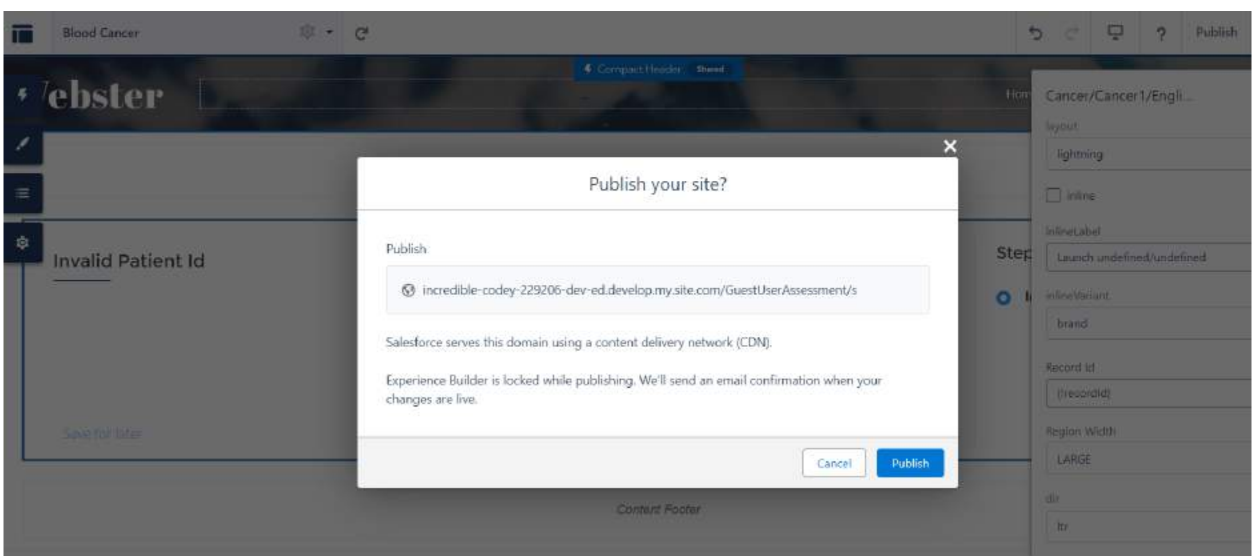
8. Click on **component**, select your **Assessment form** and drag it in **Content** section on your page.



9. Now click on **Publish** button.



10. Click **Publish** again.

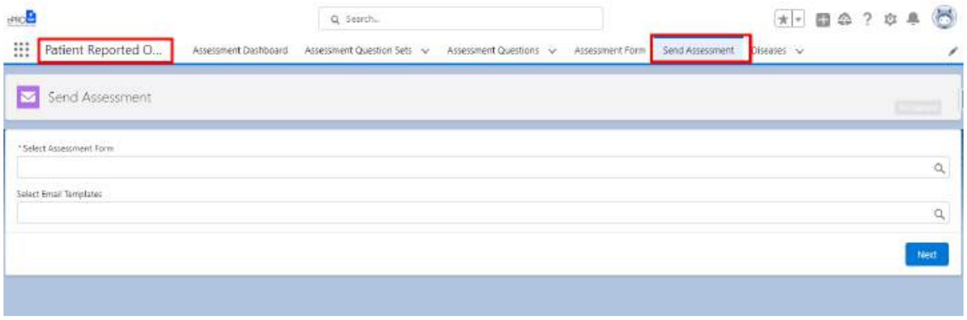


Now you are ready to use Patient Reported Outcome app to send form(s) to patients.

Navigate to Patient Reported Outcome App from the App Launcher.

Send Assessment forms to Patient

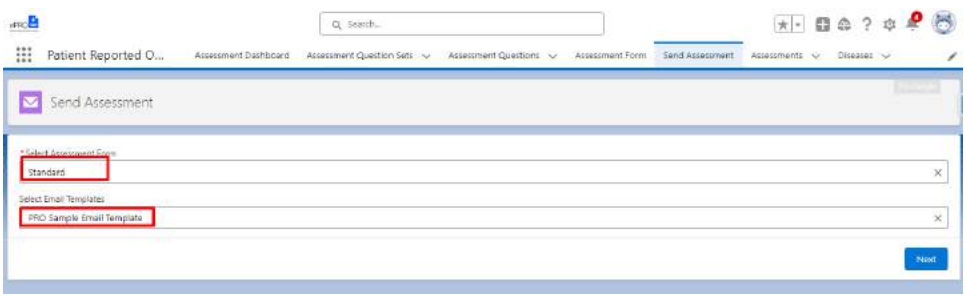
1. Go to **Send Assessment** Tab in Patient Reported Outcome app.



2. Select your **Assessment Form**
3. Select **Email Template as "PRO Sample Email Template"** which is provided in the app package.

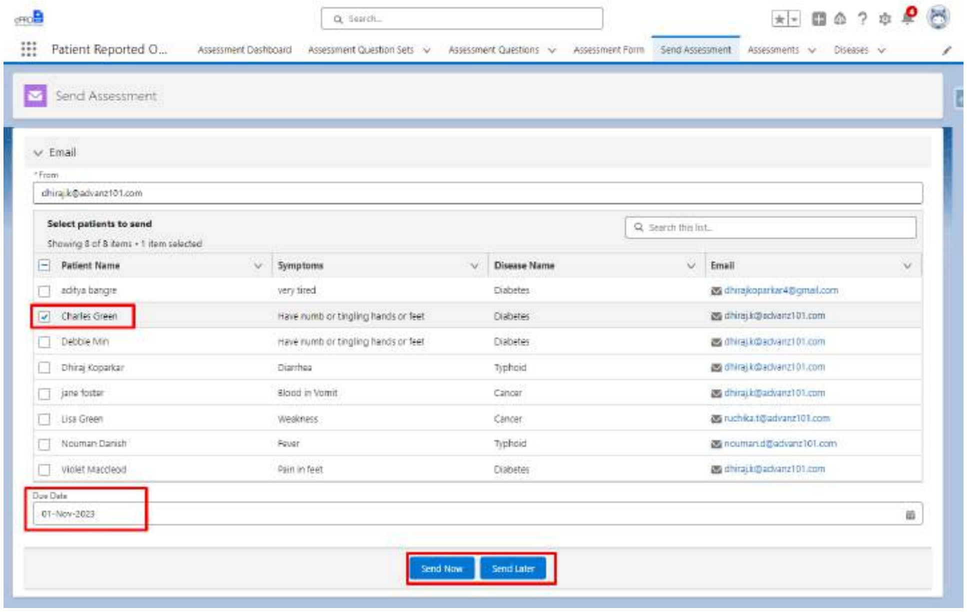
Note: If you want to create your custom email template then you can create it by following the steps which are provided after this section.

4. Click **Next**

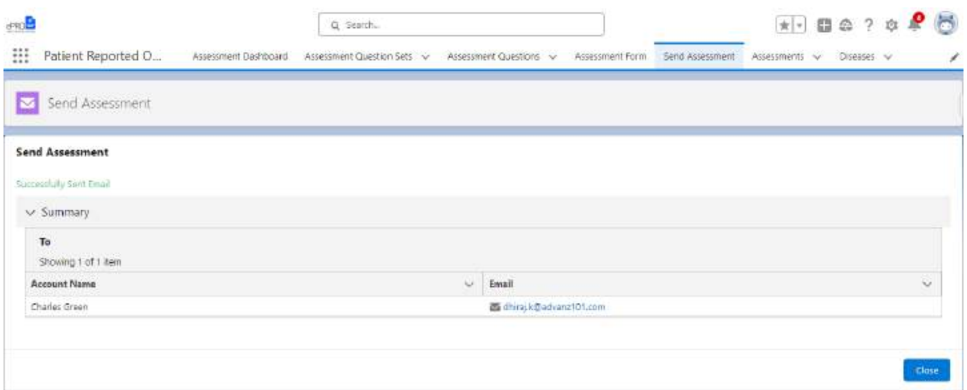


User can choose to change the email if for (From) or keep it as is. The email is by default of the user who is logged into the Salesforce org.

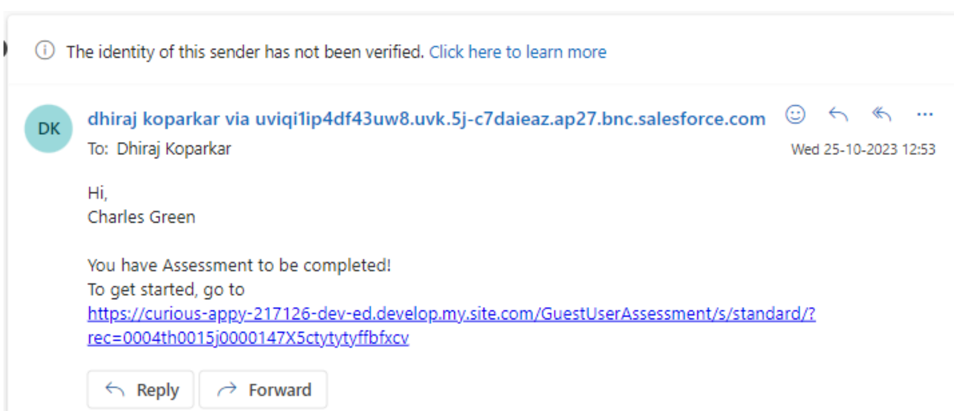
5. User can then select single patient or multiple patients. User can also type disease name in search list and patients associated with only that disease will show up.
6. Due date can then be added as per user convenience, by default it is 7 days after whatever the current date is.



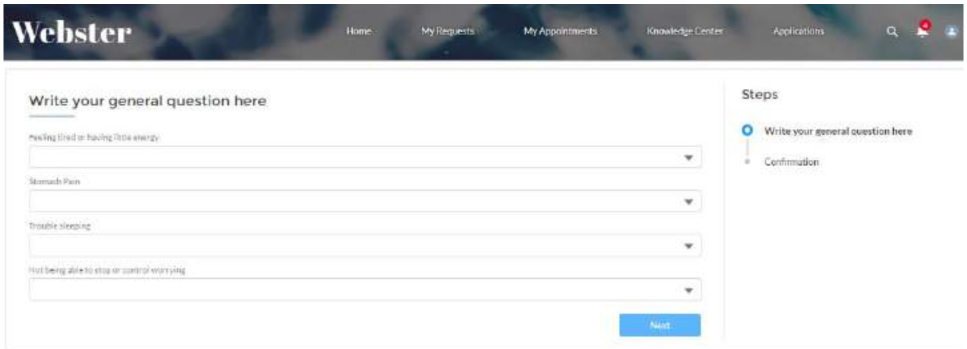
7. Then click **Send Now** or **Schedule Later**.



Assessment form sent successfully.



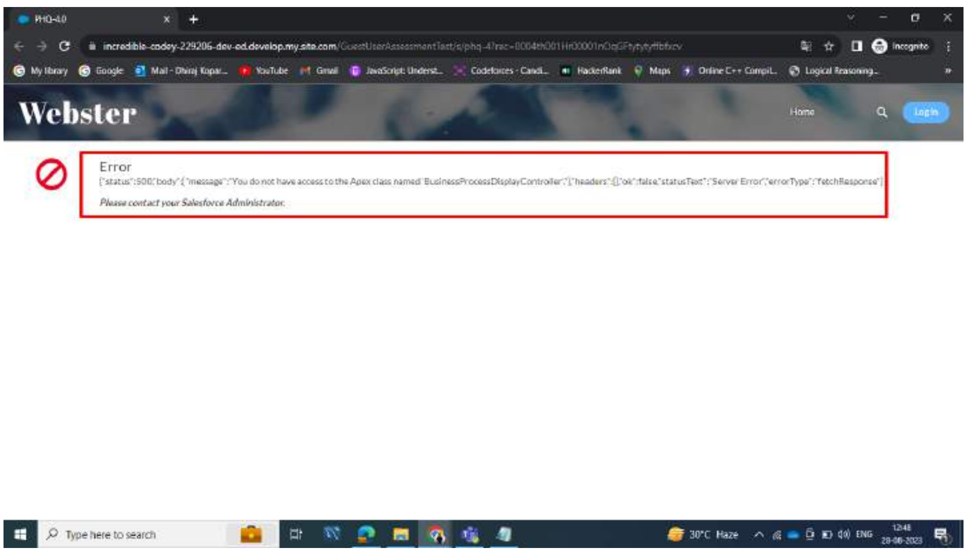
When user will click on URL provided in email, user will be redirected to your assessment form page and from there they can submit the form.



Error Handling

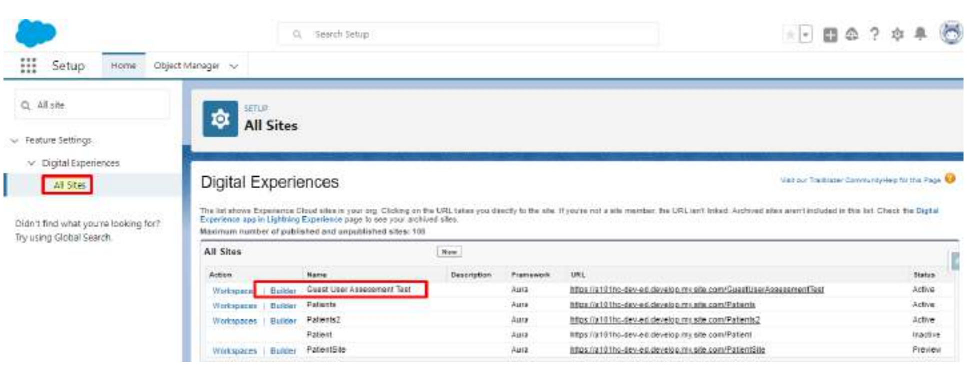
If you face an error of the following type:

("status":500,"body":["message":"You do not have access to the Apex class named **'Business ProcessDisplayController**: "headers":["ok":false,"statusText":"Server Error", errorType": "fetchResponse"] Please contact your Salesforce Administrator.

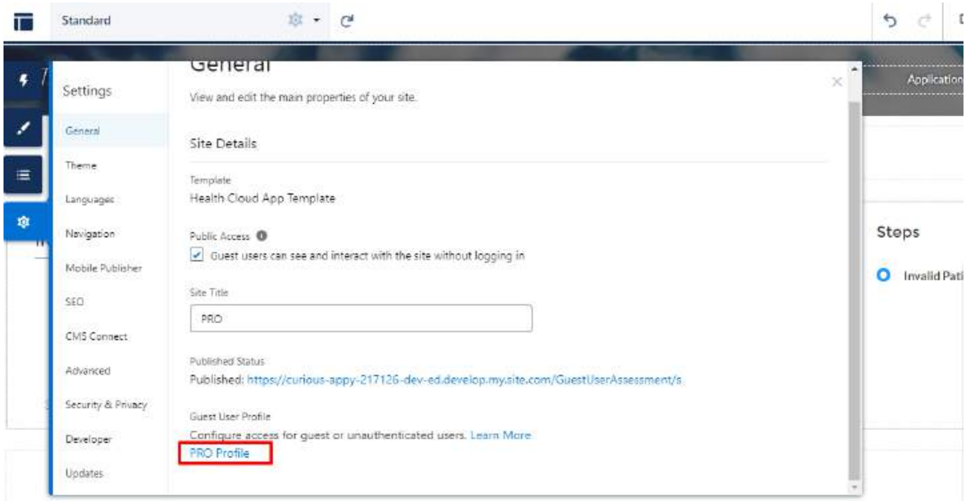


Give apex class permission to guest user(s) using the following steps.

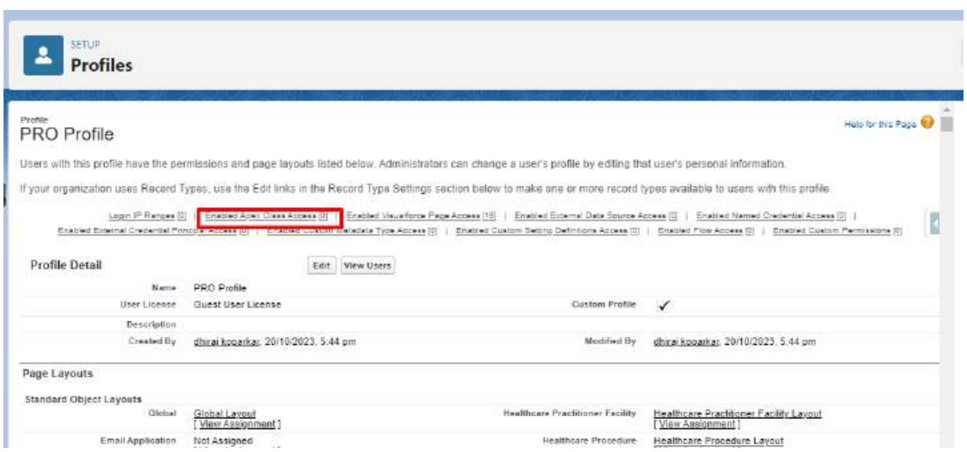
1. Go to All Sites
2. Click on builder of your experience site.



3. Select **Guest User** profile from setting

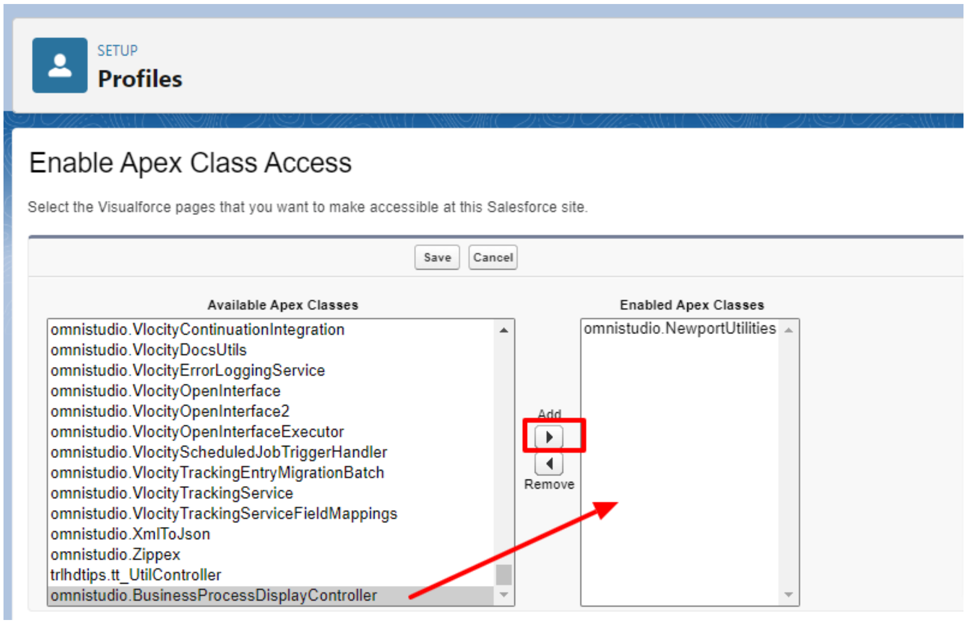


4. Click on **Enabled Apex class access**

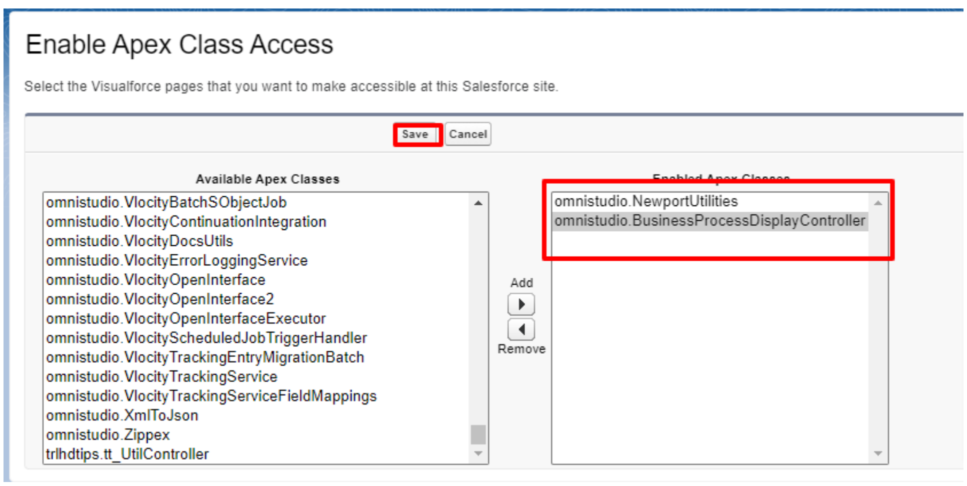


5. Edit Enabled Apex class Access

6. Search that class and move to Enabled Apex classes.



7. Click **Save**

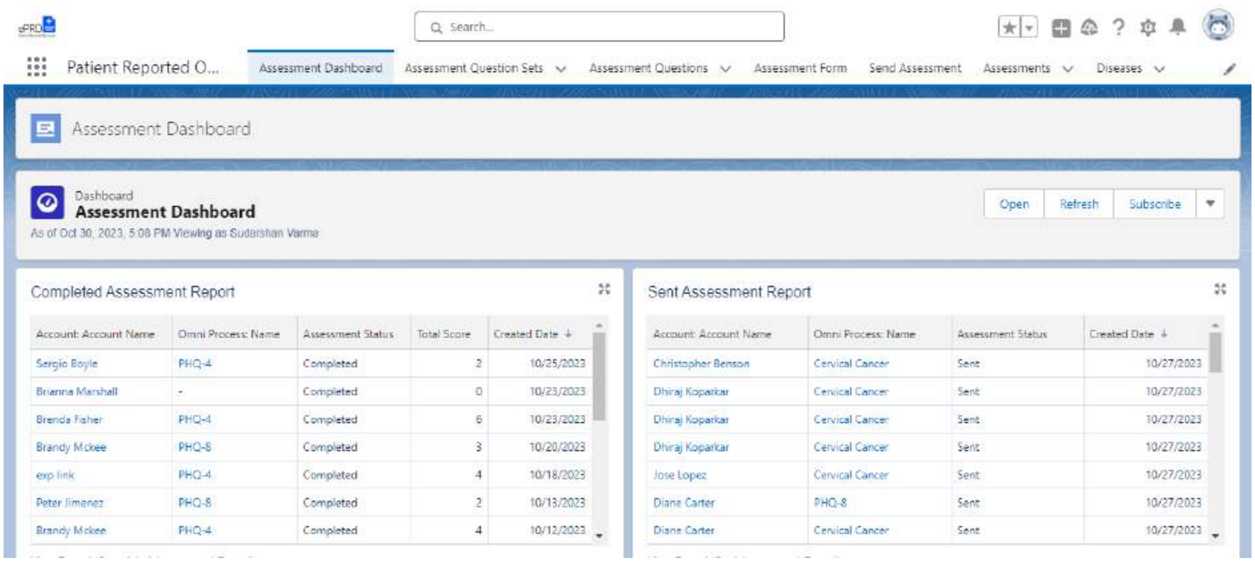


If you face similar error for different classes, follow the above steps for that apex class as well.

Assessment Dashboard

Under the **Assessment Dashboard** tab, there are few components for completed and sent statuses, scores by forms, assessment status, Patients per Disease, and Delayed assessment reports.

1. **Completed Assessment Report** shows all records of assessments with status as **Completed**.
2. **Sent Assessment Report** shows all records of assessments with status as **Sent**.



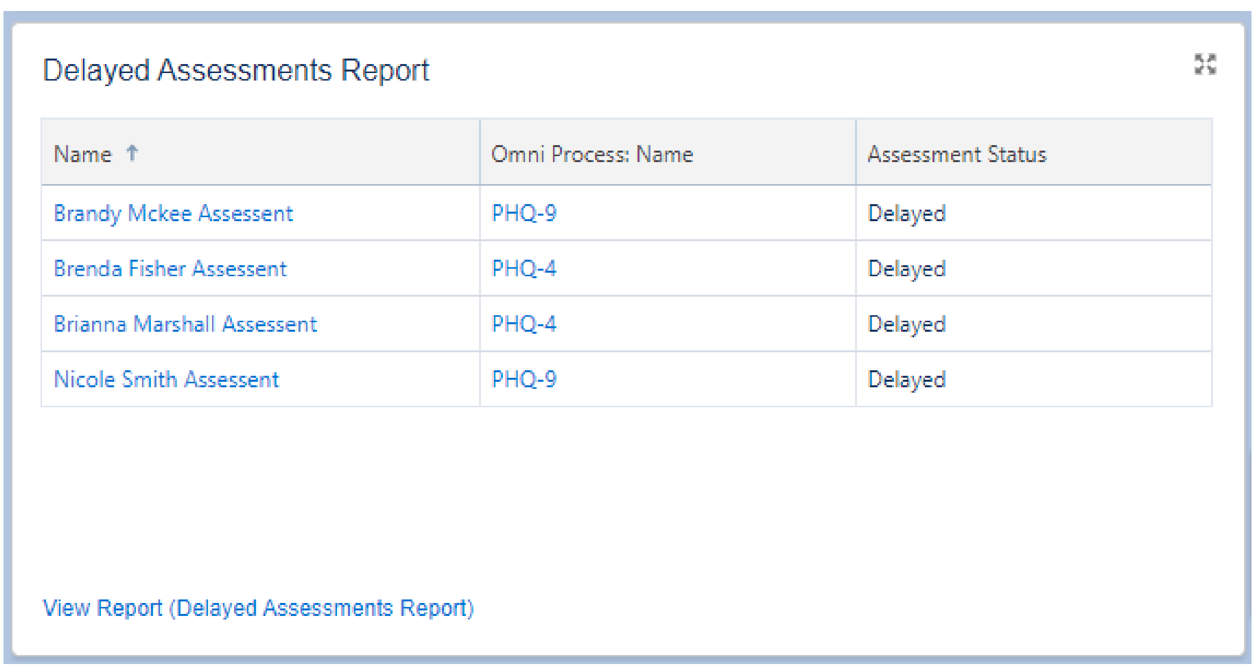
Completed Assessment Report

Account: Account Name	Omni Process: Name	Assessment Status	Total Score	Created Date ↓
Sergio Boyle	PHQ-4	Completed	2	10/25/2023
Brianna Marshall	-	Completed	0	10/23/2023
Brenda Fisher	PHQ-4	Completed	6	10/23/2023
Brandy Mckee	PHQ-8	Completed	3	10/20/2023
exp link	PHQ-4	Completed	4	10/18/2023
Peter Jimenez	PHQ-8	Completed	2	10/13/2023
Brandy Mckee	PHQ-4	Completed	4	10/12/2023

Sent Assessment Report

Account: Account Name	Omni Process: Name	Assessment Status	Created Date ↓
Christopher Benson	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Jose Lopez	Cervical Cancer	Sent	10/27/2023
Diane Carter	PHQ-8	Sent	10/27/2023
Diane Carter	Cervical Cancer	Sent	10/27/2023

3. **Delayed Assessment Report** shows all the assessments with status as **Delayed**

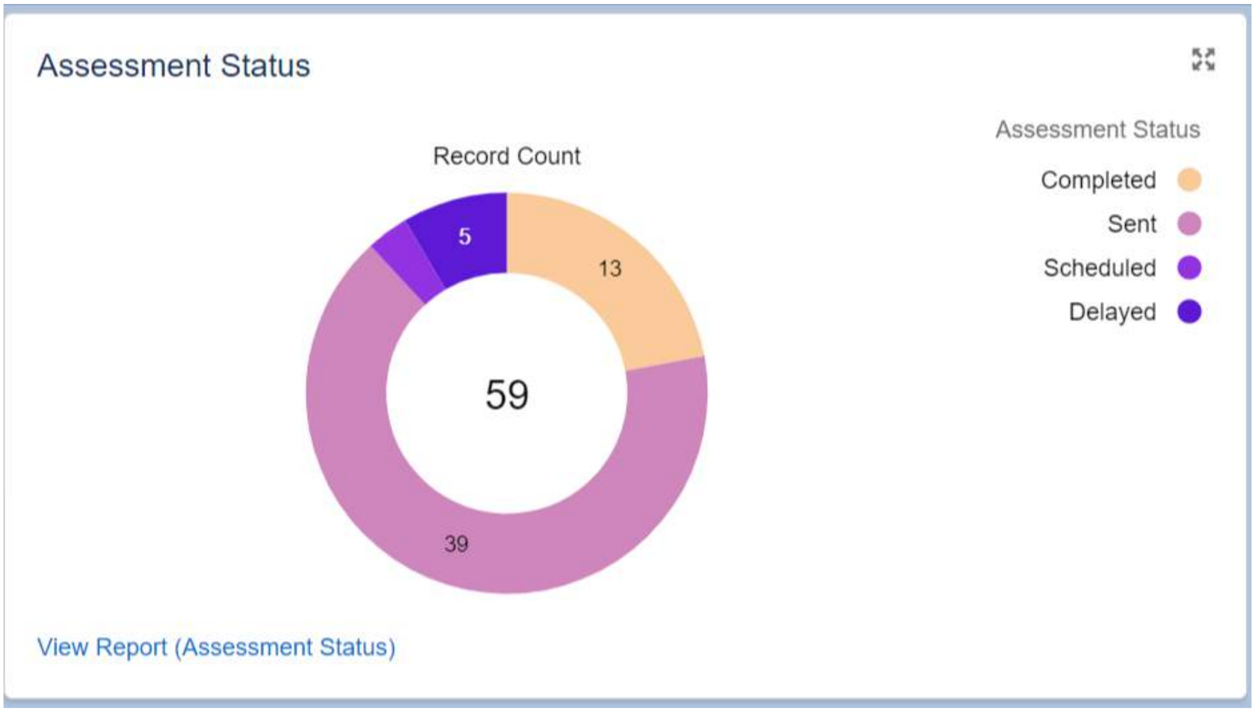


Delayed Assessments Report

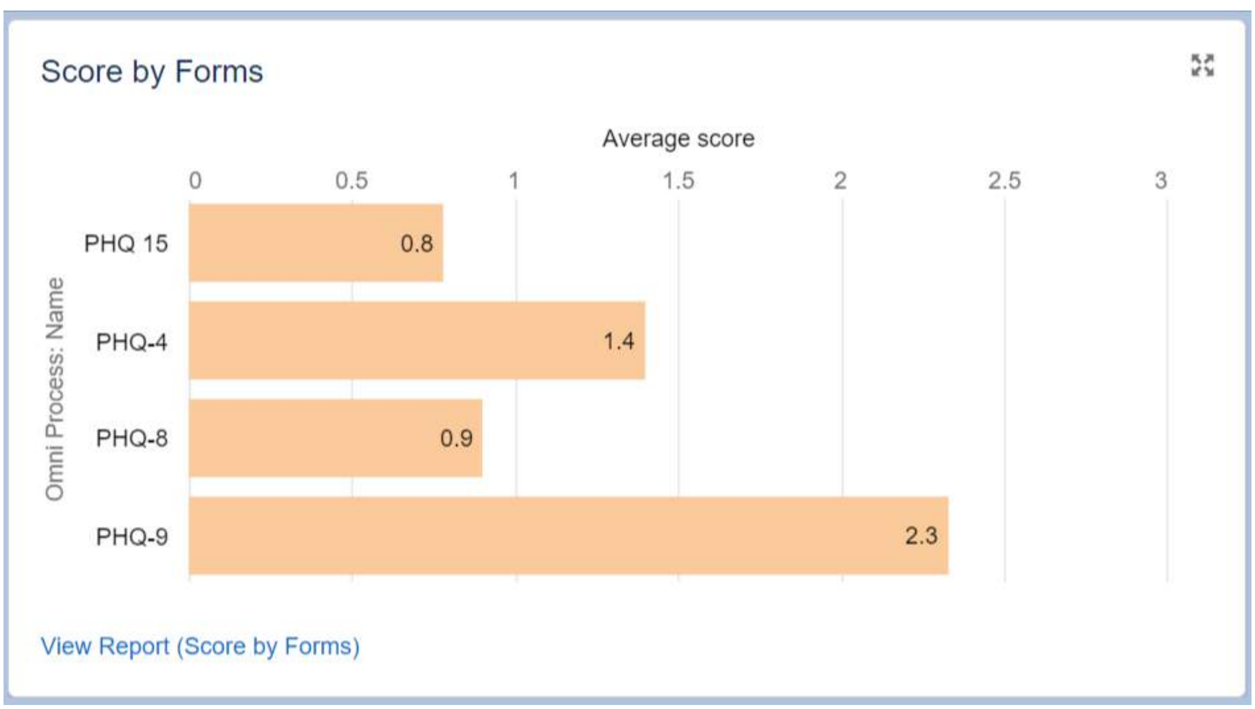
Name ↑	Omni Process: Name	Assessment Status
Brandy Mckee Assessent	PHQ-9	Delayed
Brenda Fisher Assessent	PHQ-4	Delayed
Brianna Marshall Assessent	PHQ-4	Delayed
Nicole Smith Assessent	PHQ-9	Delayed

View Report (Delayed Assessments Report)

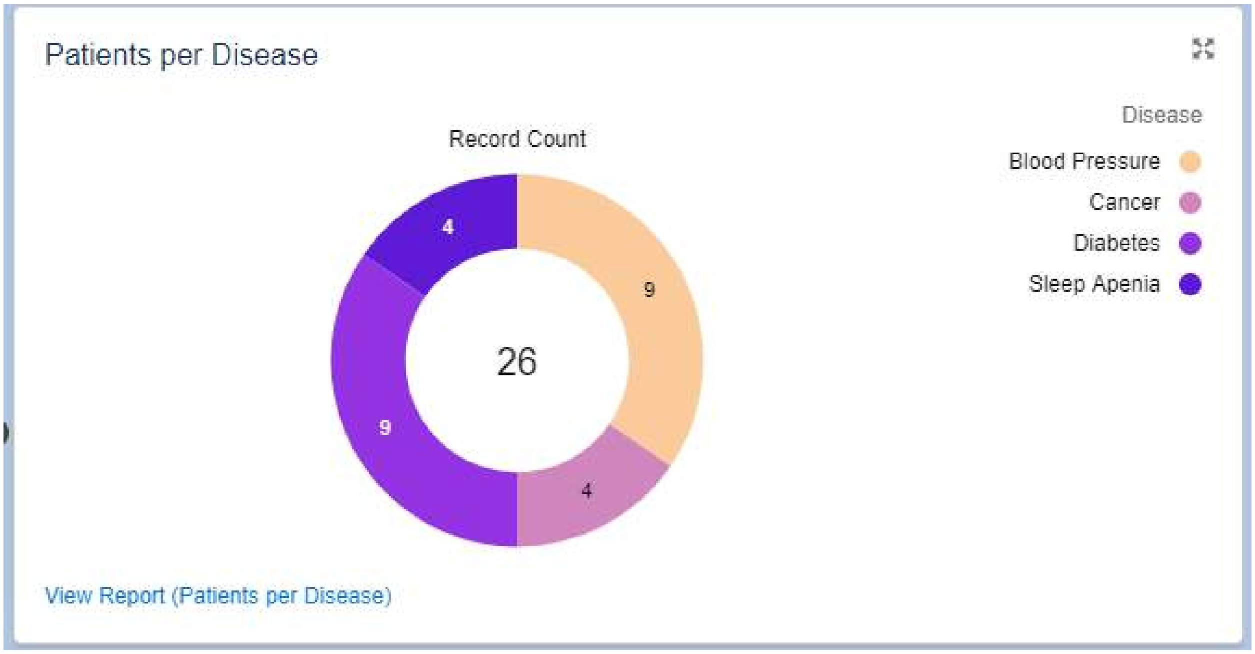
4. **Assessment status** is a Pie Chart which shows statuses of all the assessments.



5. **Score by Forms** is a component which shows the average score of each assessment to evaluate performance.

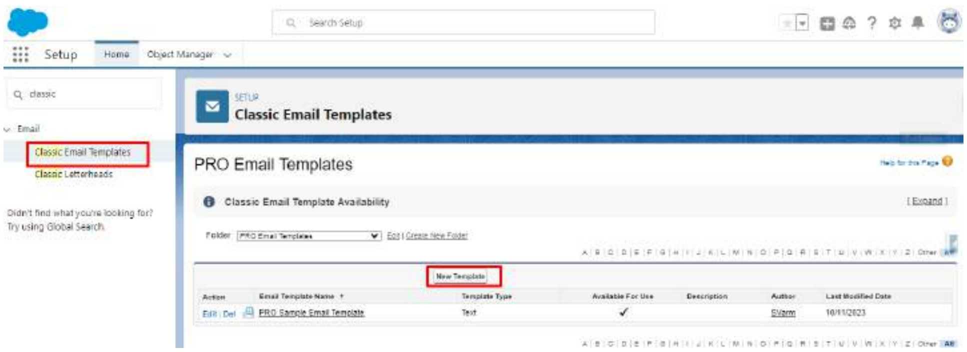


6. **Patients per Disease** report shows number of patients per disease.



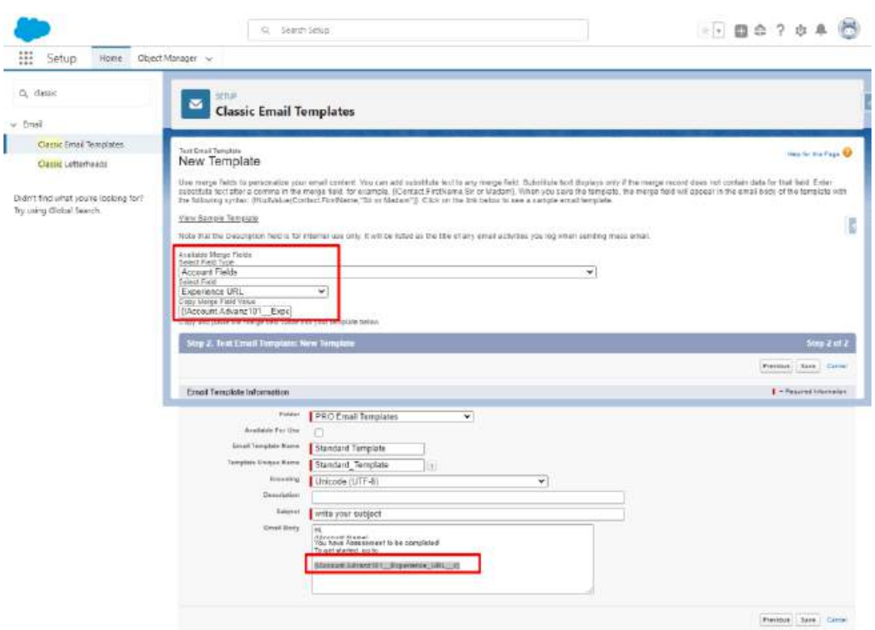
Custom email template for Send Assessment functionality

1. Go to setup -> find classic email template in quick find box -> New Template



2. Select **Text** and click on next button.

3. Add subject and body according to requirement



User is required to copy merge field value **{!Account.Advanz101__Experience_URL__c}** and paste it in Email body so that clickable URL is visible when email is sent.

Other Apps by Advanz101

- **SplitEase**
  Split Service Contract into multiple contracts manually to avoid large cart errors.
- **AutoSplit**
  Split Service Contract into multiple contracts to avoid large cart errors.
- **MergeEase**
  Merge multiple service contracts.
- **PartEase**
  User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items.
- **MoveEase**
  User can transfer assets from one account to another account.
- **EaseQuotePDF**
  Automate quote PDF generation on status change.
- **CaseAutoMail**
  Transform case communication with CaseAutoMail.
- **AccountMerge**
  Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find our Patient Reported Outcome App useful. We would love to hear about our app from you. In case of any query or further clarification, please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us on info@advanz101.com