



**Industry:** Health Cloud  
**Products Used:** Sales Cloud  
**Integration:** Web forms

A healthcare/diagnostic company which captures the health related information for the Patient and perform the tests which are required for the Customer. Customer's need to be communicated via Email and SMS for their facilitation.

### **Challenges**

- Placeholder to capture the Patient details from day one
- Missing health workers 360-degree view of their patient and tests performed on them
- No Central Repository in terms of tests for the Patient that can be reviewed at any point of time
- Access to the critical information required on the fly over phone/website
- Automation of Jotform for registration purpose was missing
- Missing process of sending SMS to Patients family to apprise them on the status

### **Solution**

- Flexibility of capturing information and Custom solution was developed for creating "Jotform" and process around it.
- Solution was made a manner that every test performed for the Patient can be downloaded as a PDF as well as can be accessible over the email.
- Salesforce Sites was designed and enabled such that at any point of time, information is completely available.
- Solution was articulated and designed with various Reports/Dashboards as per the business requirements
- Responsive customization to meet industry and company-specific requirements in term of processes and data capturing.

### **Result**

- Increasing Operational Efficiencies
- Information is in Real-Time and up-to-date and.
- Customization to meet industry and customer-specific requirements in term of processes and data capturing.
- Complete 360-degree information for the Customers/Patients

## High Level– Depicting the Process

