



SALESFORCE CUSTOMIZATION

CASE STUDY

MIGRATION FROM SALESFORCE CLASSIC TO LIGHTNING

Helped a global healthcare solutions provider by developing a real-time **Patient Care System** to capture **data** on a more granular level for **easy communication with patients**

Problem Statement

The client is a global healthcare solutions provider with 15 offices worldwide, servicing over 100 different patient populations. They required a solution for their Nurse Coach Program to place multiple support features together. The client needed to utilize the Lightning Capabilities of Salesforce for improved communication & reporting.

Business Need

A cloud-based platform to:

- Enable nurses to get full patient details instantly
- Provide intensive support to patients
- Enable patient support worldwide, in different time zones & languages

Technology Stack



Solution Approach

- **Nurse Portal:** Implemented a tabbed view in lightning to help them quickly switch on various key info of the patient. Further, various complex Visualforce pages were used with lightning components
- **Salesforce Community:** Provided a platform where HCP's and patients can view key info
- **Business Rule Engine:** Deployed custom solutions to keep the key business indicators that further plugged-in with various business processes
- **Communication Engine:** Enabled communication scheduling based on business rule or a user can send any type of communication manually
- **Integrations:** Utilized various third-party tools for SMS, Fax, Soft Telephony & Data Upload. Custom solutions were also provided using Bulk API and Apex REST API to synch data between other system and Salesforce
- **Force.com Platform:** Used Visualforce Pages, Apex, Triggers, Batch Apex, Scheduled Jobs, etc., extensively
- **Single Sign-On:** Enabled Salesforce as Identity Provider to implement single sign-on at another system

Benefits

- Empowered nurses to check full patient details with a single click
- Employed Business Rule Engine to configure the key business values
- Enabled custom email analytics with a tracking system for real-time viewing of patients interaction info and response
- Improved communication with patients & enabled communication tracker
- Simplified reporting process as data was captured on a more granular level