Standard Operating Procedure

1. Patient Inquiry and Contact Creation

Receptionist:

- **Receive Inquiry:**
  - For phone calls or walk-ins, navigate to the **Contacts** tab in the CRM.
- **Create New Contact:**
  - Click the **New Contact** button.
  - Enter all necessary patient details in the corresponding fields.
- **Assign Tags:**
  - Select the newly created contact using the checkbox.
  - Assign a tag to indicate the contact source (e.g., "Call").
  - Add an action description for the tag based on clinic preferences.

2. Opportunity Management

Receptionist:

- **Move to the Opportunities Tab:**
  - Switch to the **Opportunity** tab in the CRM.
- **View New Leads:**
  - Newly created contacts will appear as a NEW LEAD under the DIRECT ENQUIRY pipeline.
- **Update/Book Appointment:**
  - Click on the opportunity (patient name) to update or book an appointment using the top-left button.
- **Status Update:**
  - Move the opportunity from the NEW LEAD stage to HOT or DISQUALIFIED as needed.

3. Day of Appointment

Receptionist:

- **Check Attendance:**
  - On the appointment day, if the patient does not show up, move the opportunity to the NO SHOW stage.
  - If the patient shows up, move it to the SHOWED stage.
- **Automatic Pipeline Transition:**

- The opportunity will automatically move to the OPERATIONS pipeline.

4. Consultation Process

Doctor:

- **Access Patient Information:**
  - Use the CONTACTS tab to search for and open the specific patient contact.
- **Update Client Details:**
  - In the NOTES section, the doctor can:
    - Add tasks for other staff members.
    - Upload images or scanned documents of the patient.
    - Update the next appointment date.
- **Document Recommendations:**
  - Note whether the patient should be provided with supplements
  - Ensure the next appointment date is mentioned, if not already updated.

5. Notifications Management

Receptionist:

- **Check Notifications:**
  - Monitor new appointment bookings, inquiry submissions, and message notifications under the NOTIFICATIONS button (bell icon on the top-right of the page).
- **Mobile App Access:**
  - Receptionists can view all updates, messages, bookings, and inquiries through the mobile app as well.
- **Online Appointments:**
  - Handle online appointment bookings under the appointment booking pipeline.