SALESFORCE SETUP FOR DIETITIAN LIVE

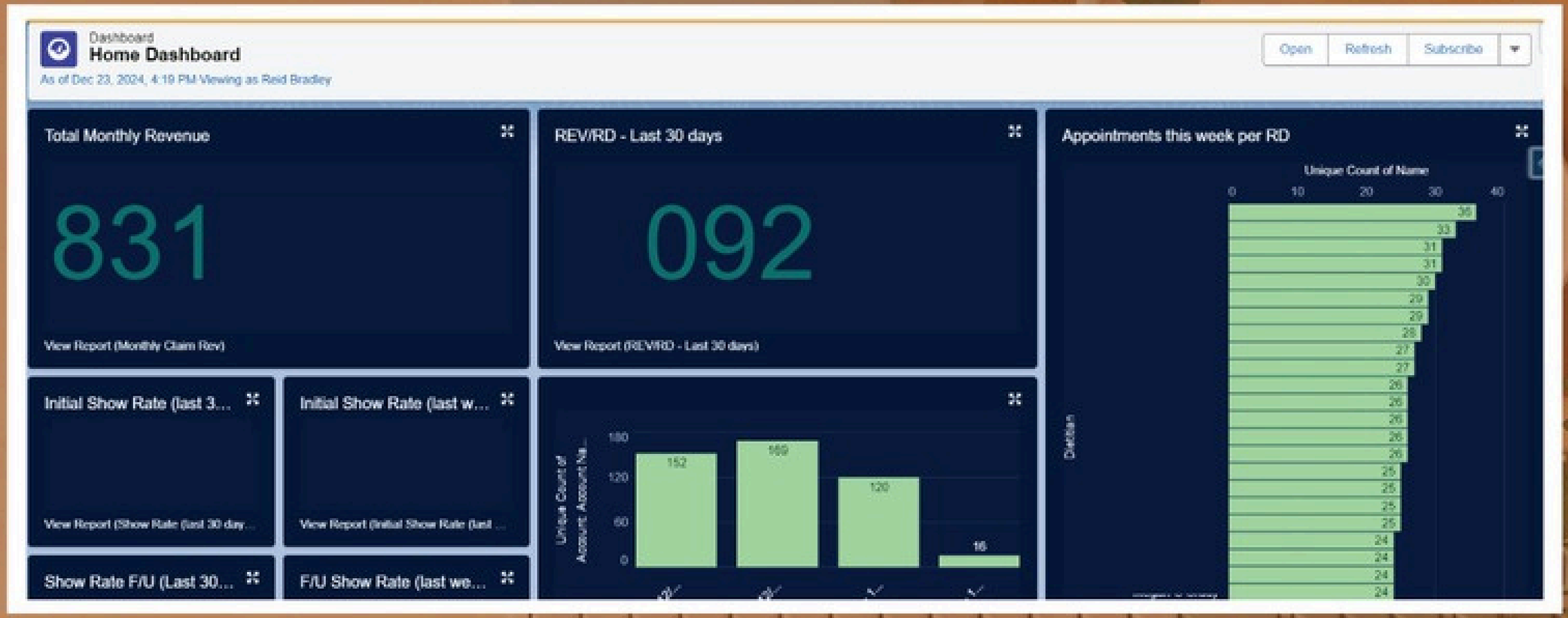
Our remote dietitians provide personalized guidance to help you reach your health goals.

Project Description

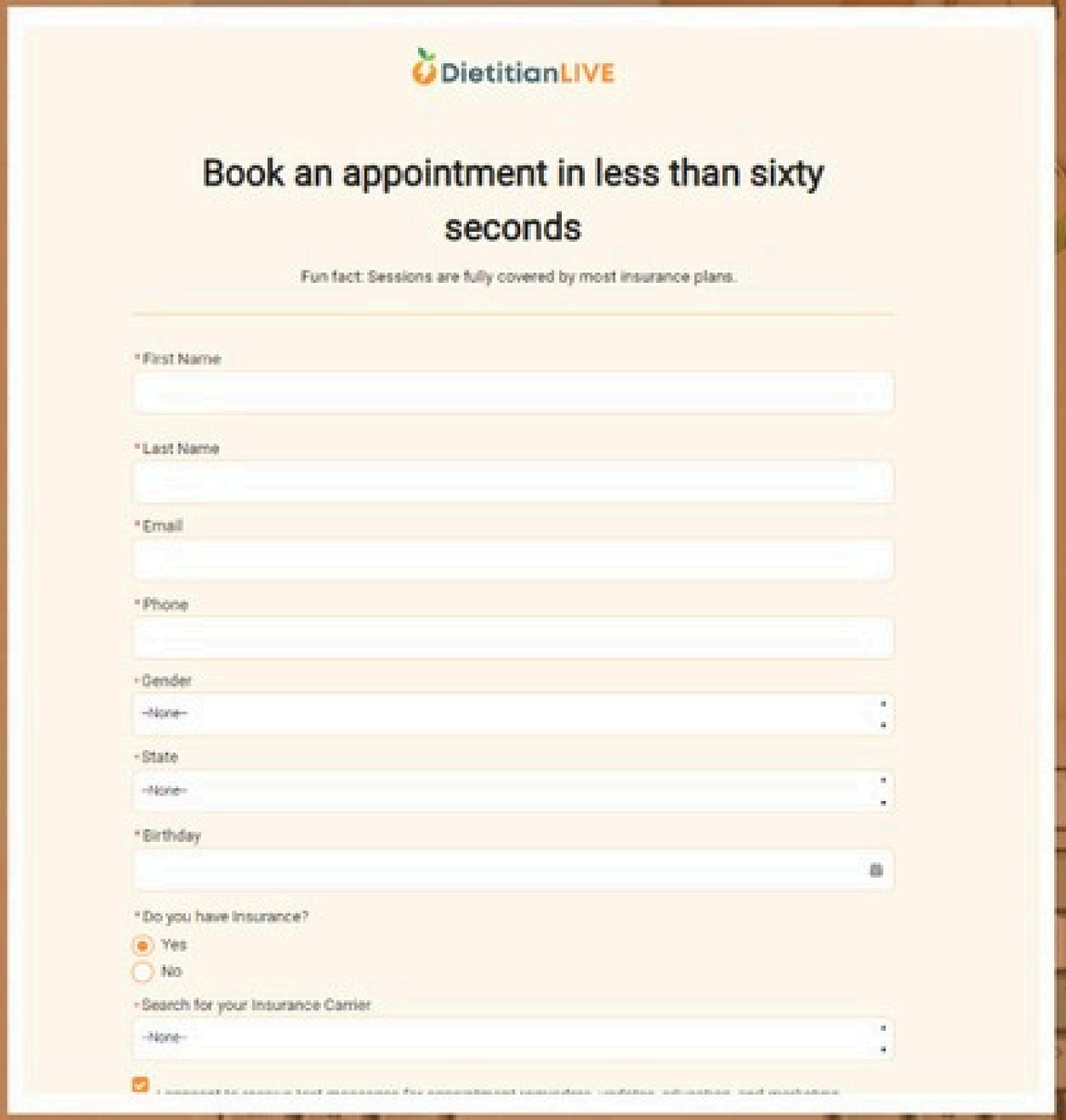
DietitianLIVE

Set up the entire Salesforce org for the Dietitian Live platform, allowing clients to book appointments with available dietitians based on their state and insurance coverage. These appointments should seamlessly integrate with the EHR system, DrChrono.

Reports and Dashboard



Form for Dietitian Appointment



DietitianLIVE

Book an appointment in less than sixty seconds

Fun fact: Sessions are fully covered by most insurance plans.

* First Name

* Last Name

* Email

* Phone

* Gender

--None--

* State

--None--

* Birthday

* Do you have Insurance?

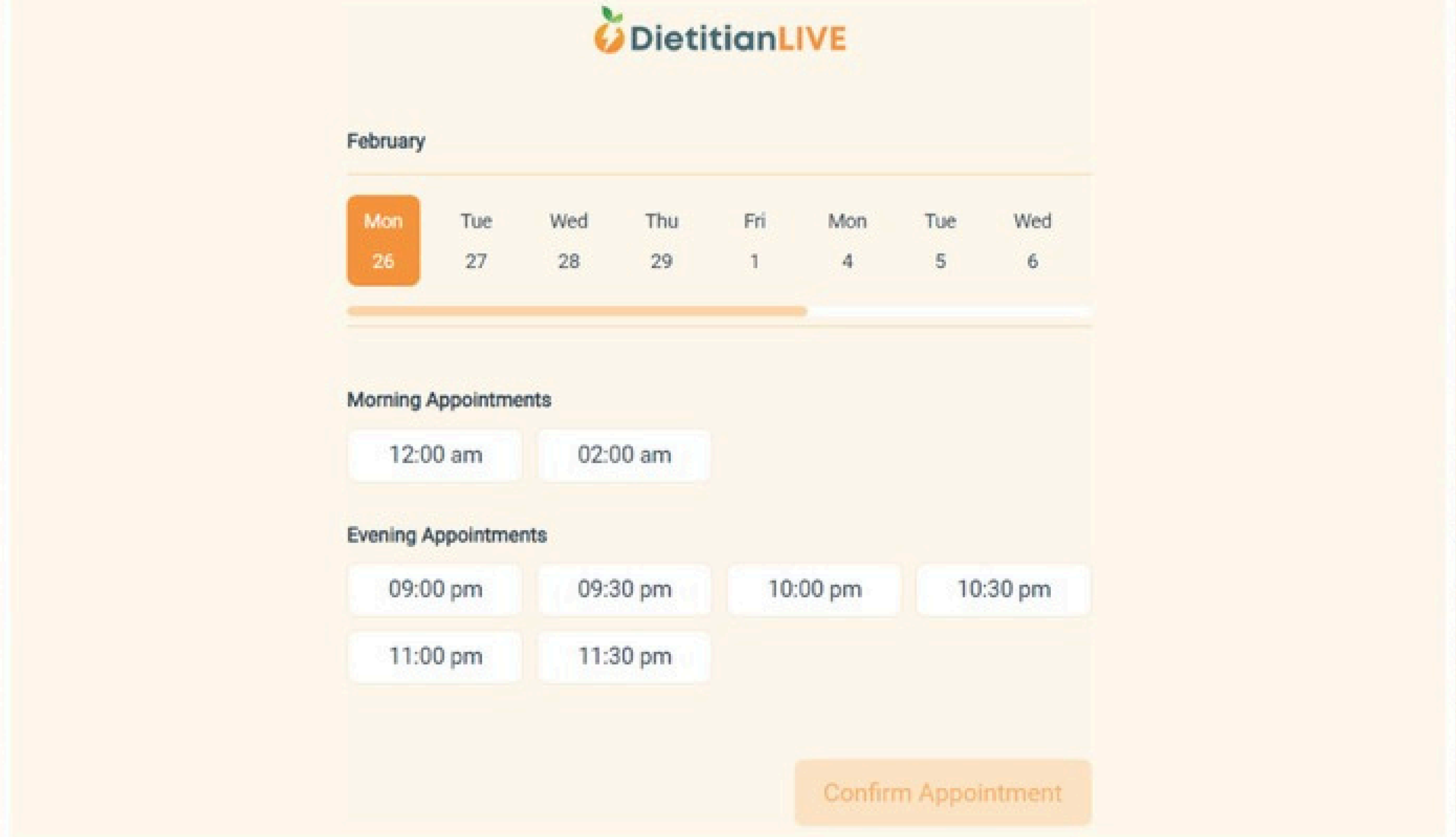
Yes

No

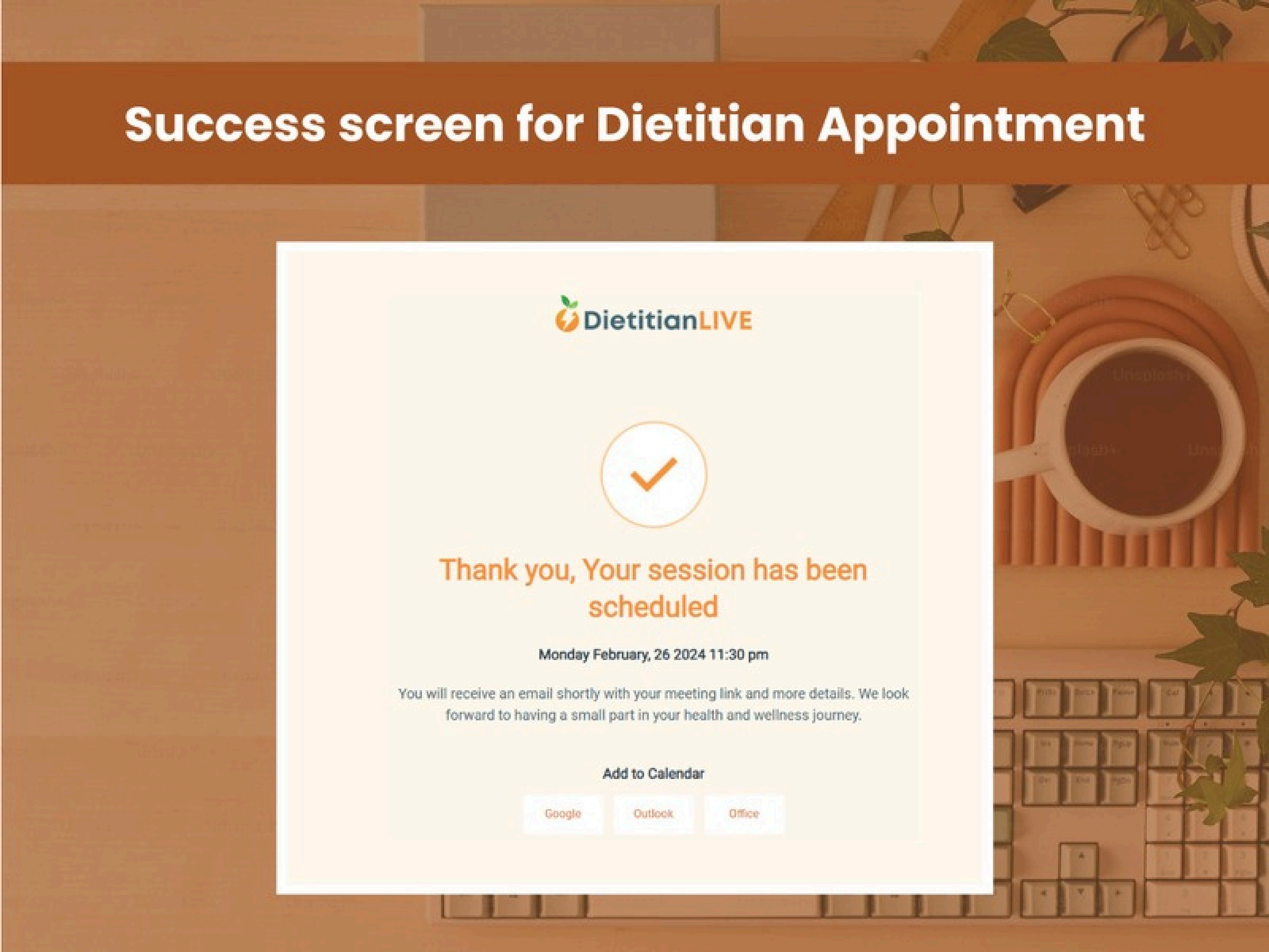
* Search for your Insurance Carrier

--None--

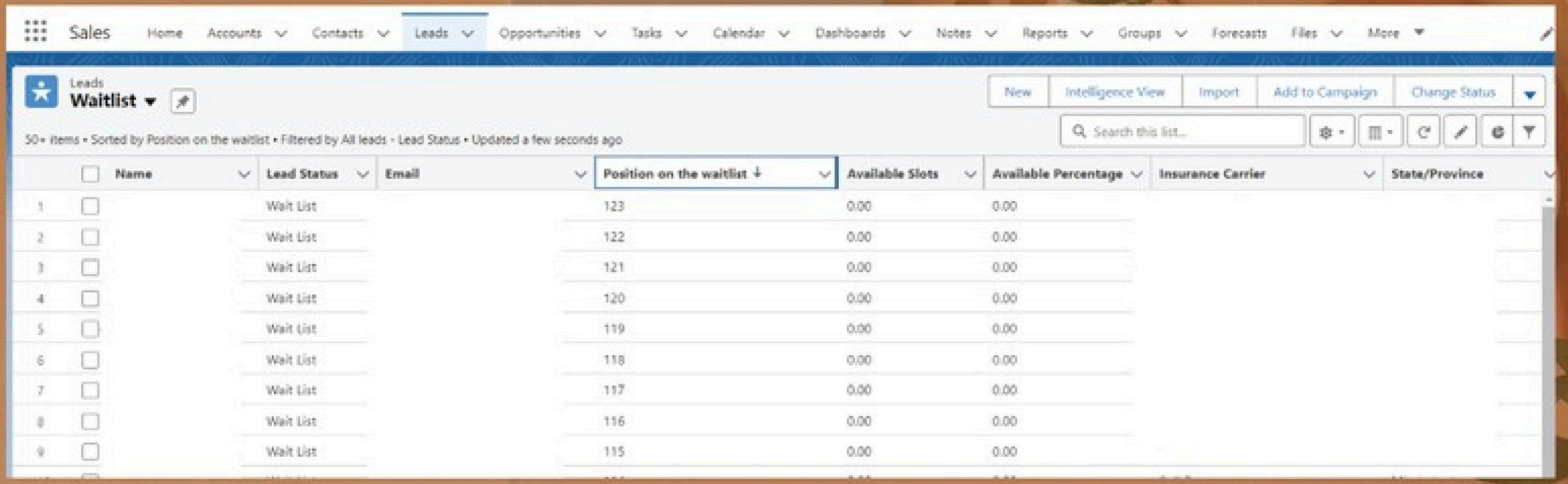
Dietitian Appointment Calendar



Success screen for Dietitian Appointment

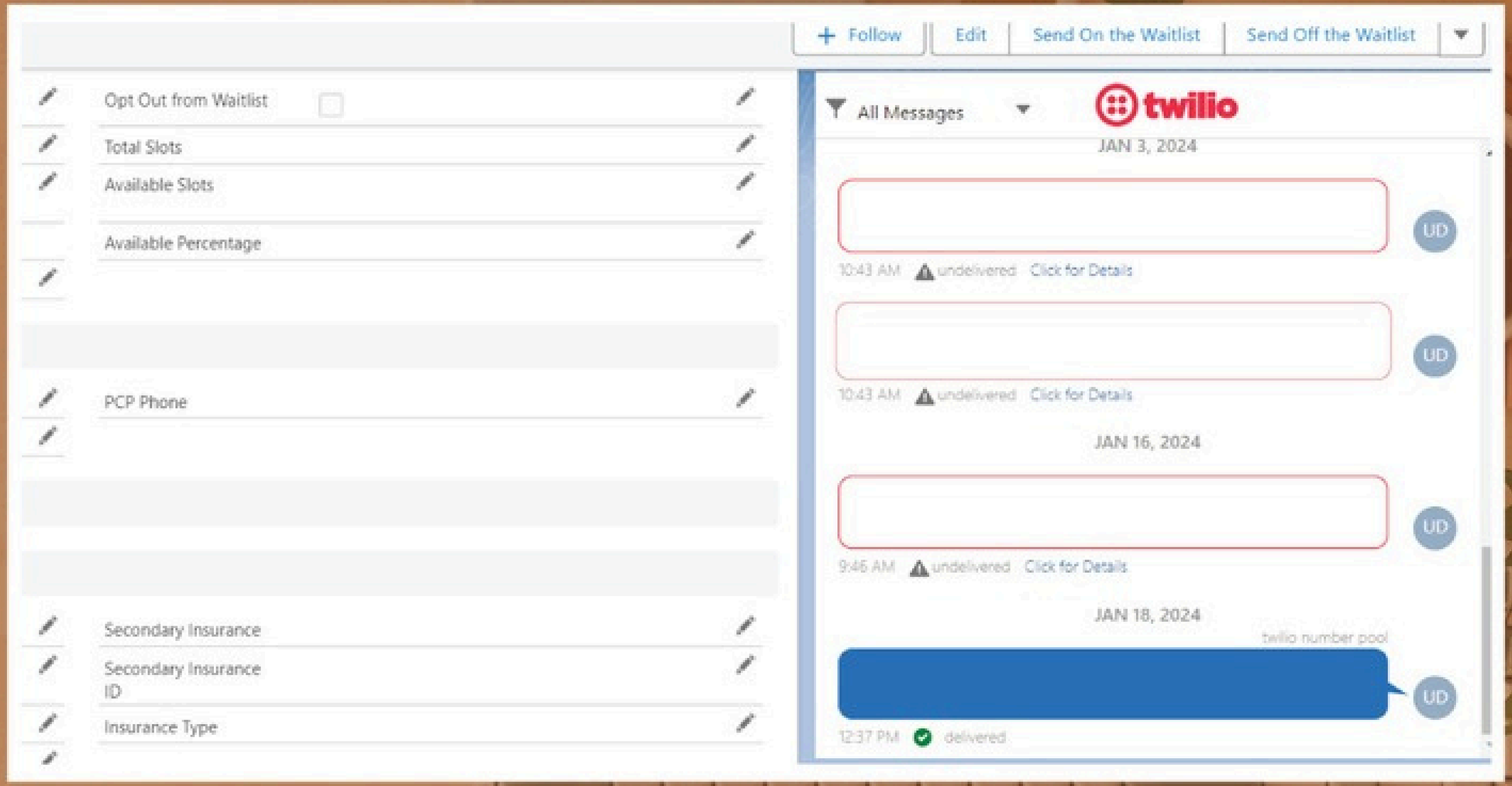


Waitlist client, Dieitian Appointment

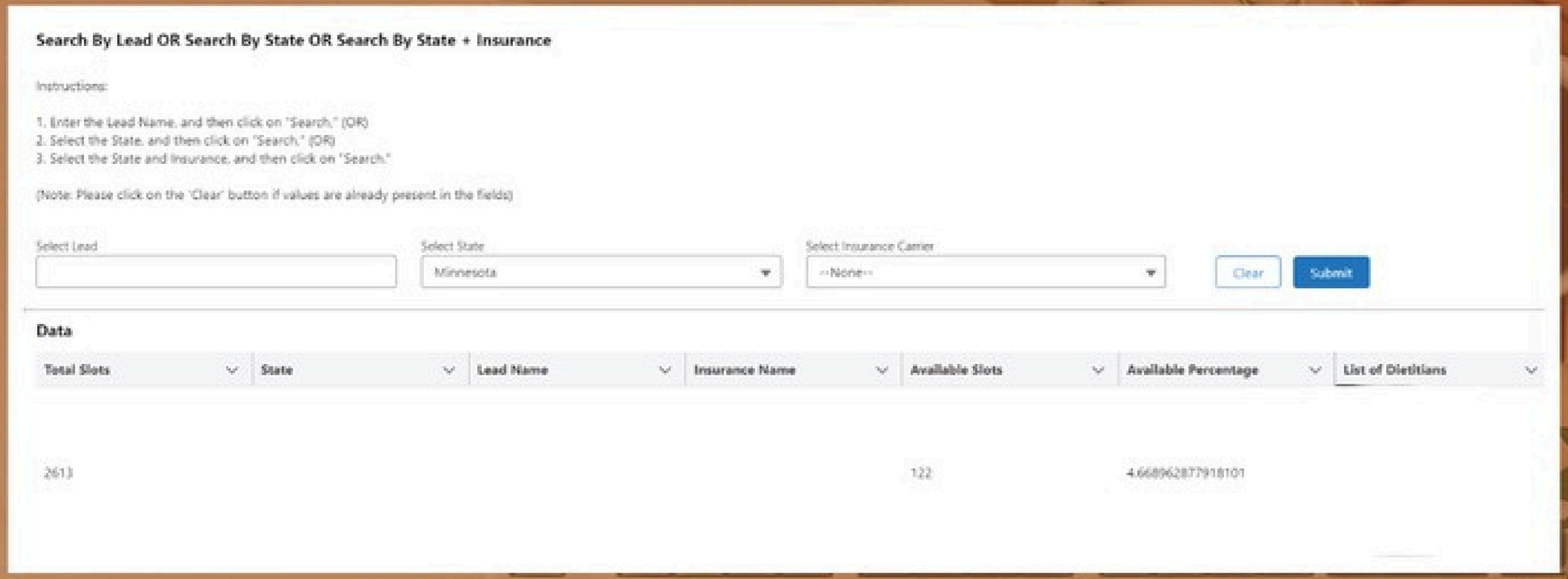


	Name	Lead Status	Email	Position on the waitlist	Available Slots	Available Percentage	Insurance Carrier	State/Province
1		Wait List		123	0.00	0.00		
2		Wait List		122	0.00	0.00		
3		Wait List		121	0.00	0.00		
4		Wait List		120	0.00	0.00		
5		Wait List		119	0.00	0.00		
6		Wait List		118	0.00	0.00		
7		Wait List		117	0.00	0.00		
8		Wait List		116	0.00	0.00		
9		Wait List		115	0.00	0.00		

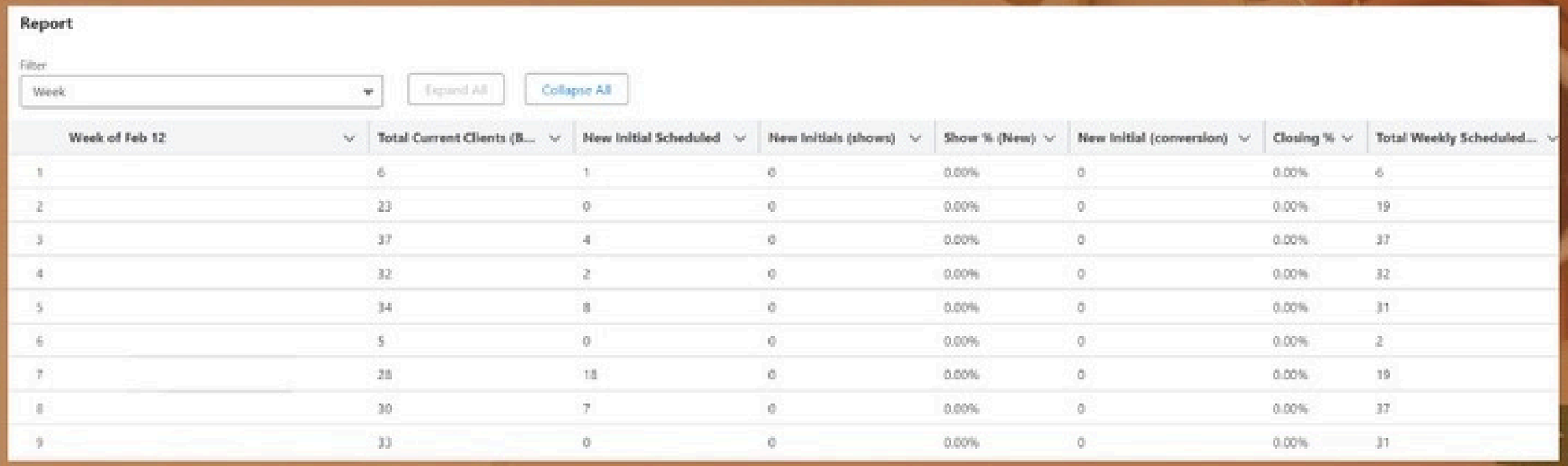
Salesforce Integration with Twilio



Check Dietitian Slots Against State and Insurance



Custom LWC report to track Dietitians Progress



Report

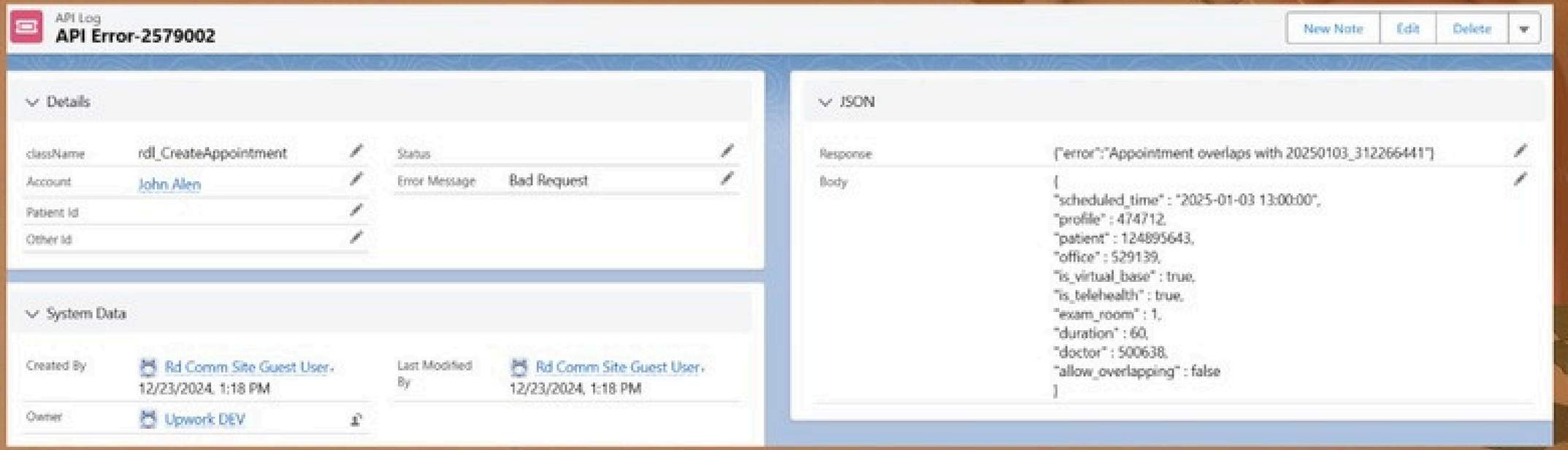
Filter

Week

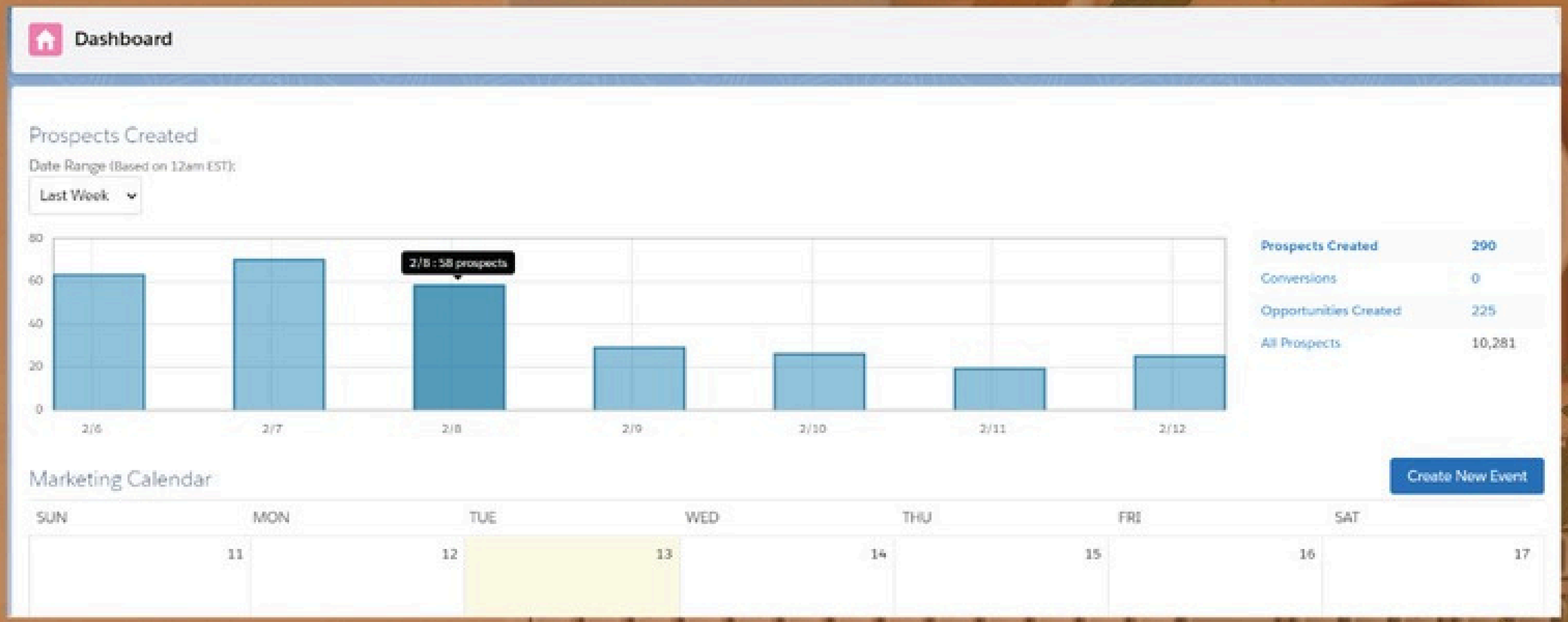
Expand All | Collapse All

Week of Feb 12	Total Current Clients (B...	New Initial Scheduled	New Initials (shows)	Show % (New)	New Initial (conversion)	Closing %	Total Weekly Scheduled...
1	6	1	0	0.00%	0	0.00%	6
2	23	0	0	0.00%	0	0.00%	19
3	37	4	0	0.00%	0	0.00%	37
4	32	2	0	0.00%	0	0.00%	32
5	34	8	0	0.00%	0	0.00%	31
6	5	0	0	0.00%	0	0.00%	2
7	28	18	0	0.00%	0	0.00%	19
8	30	7	0	0.00%	0	0.00%	37
9	33	0	0	0.00%	0	0.00%	31

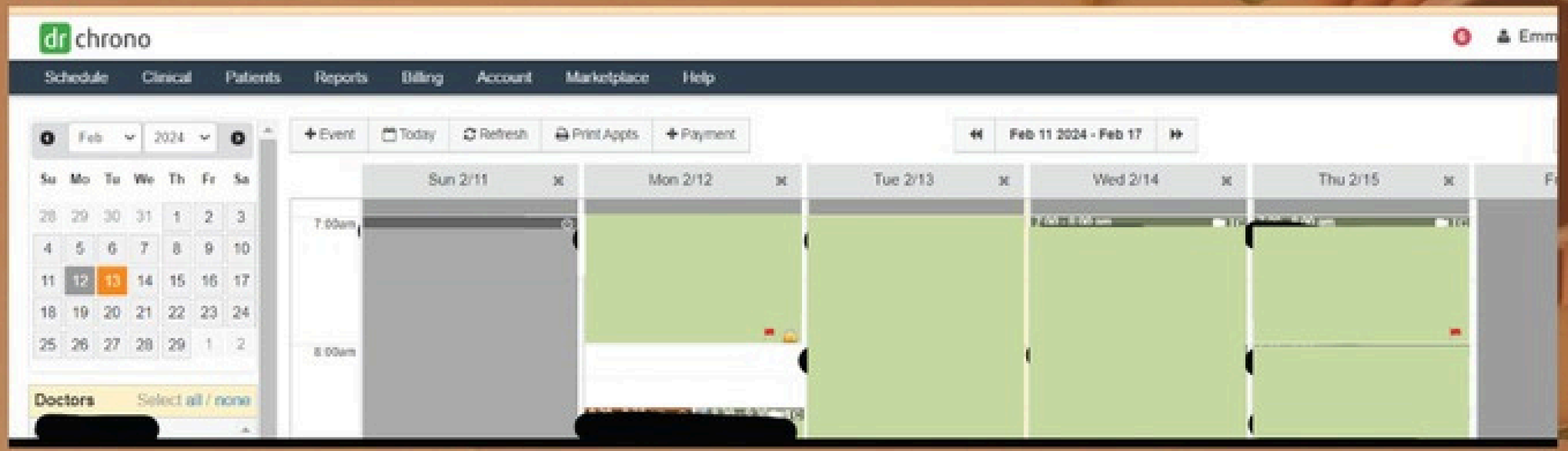
Dr Chrono API Logs Errors



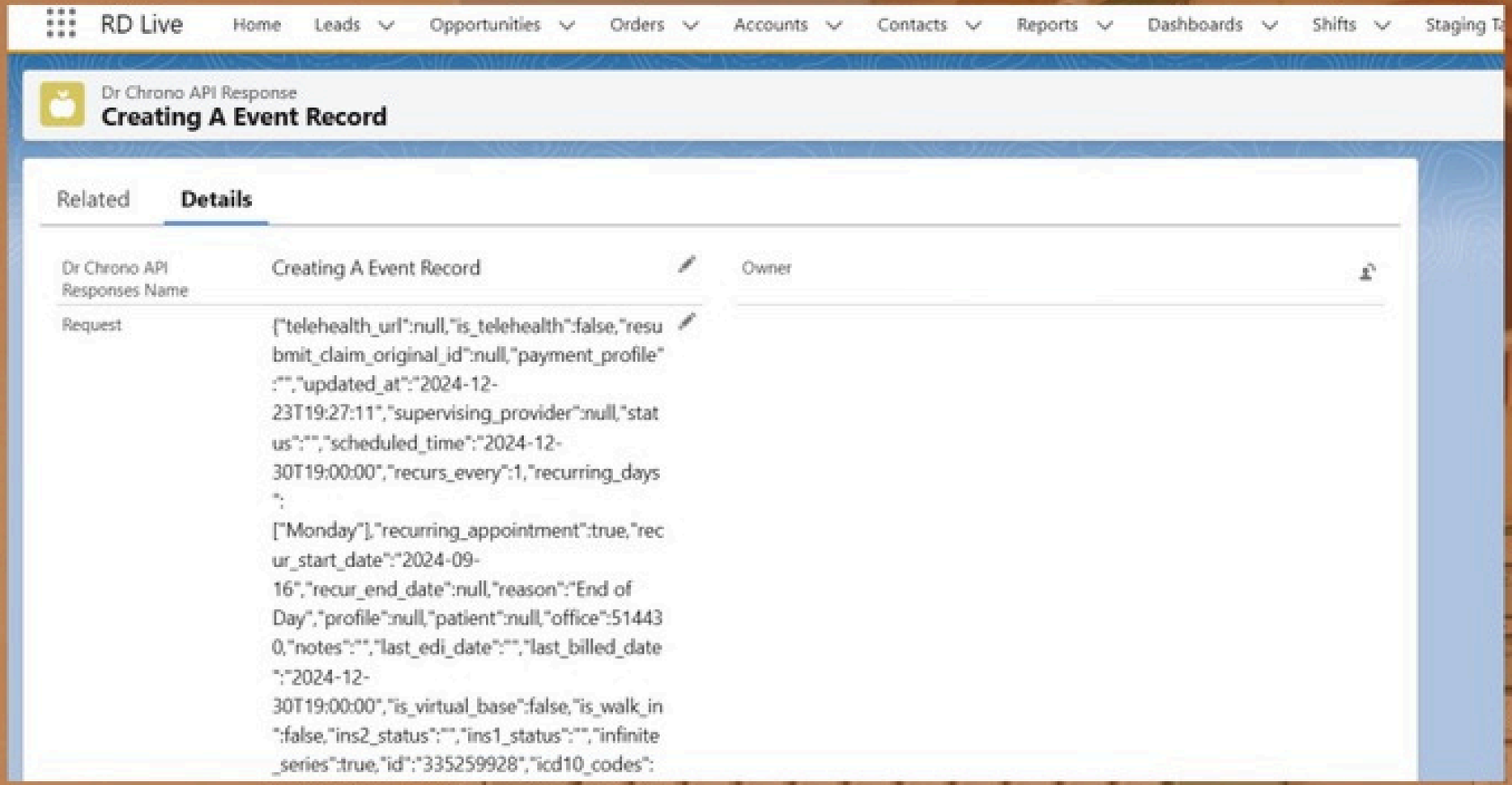
Pardot Setup



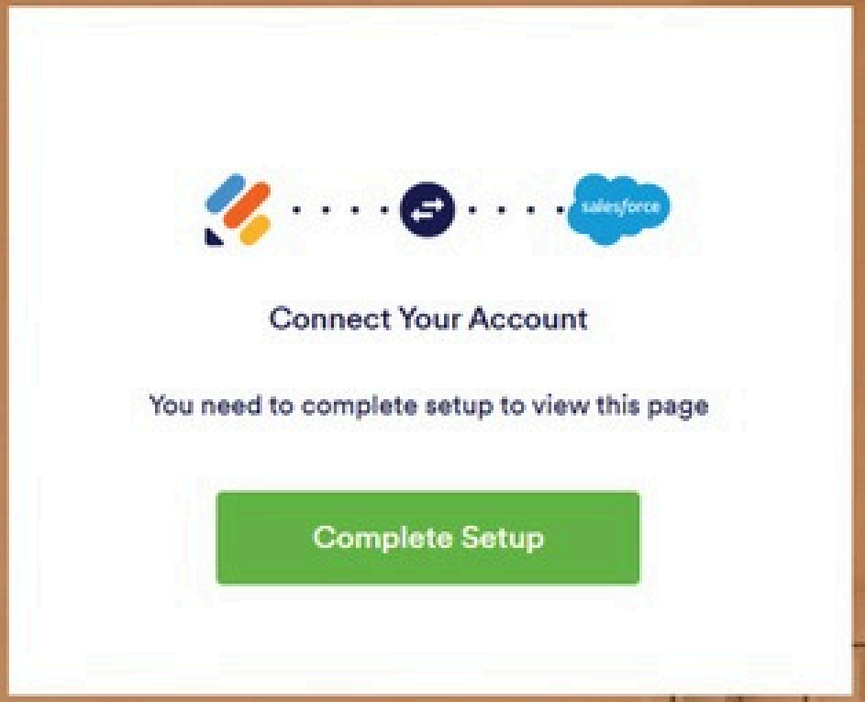
Dr Chrono Integration

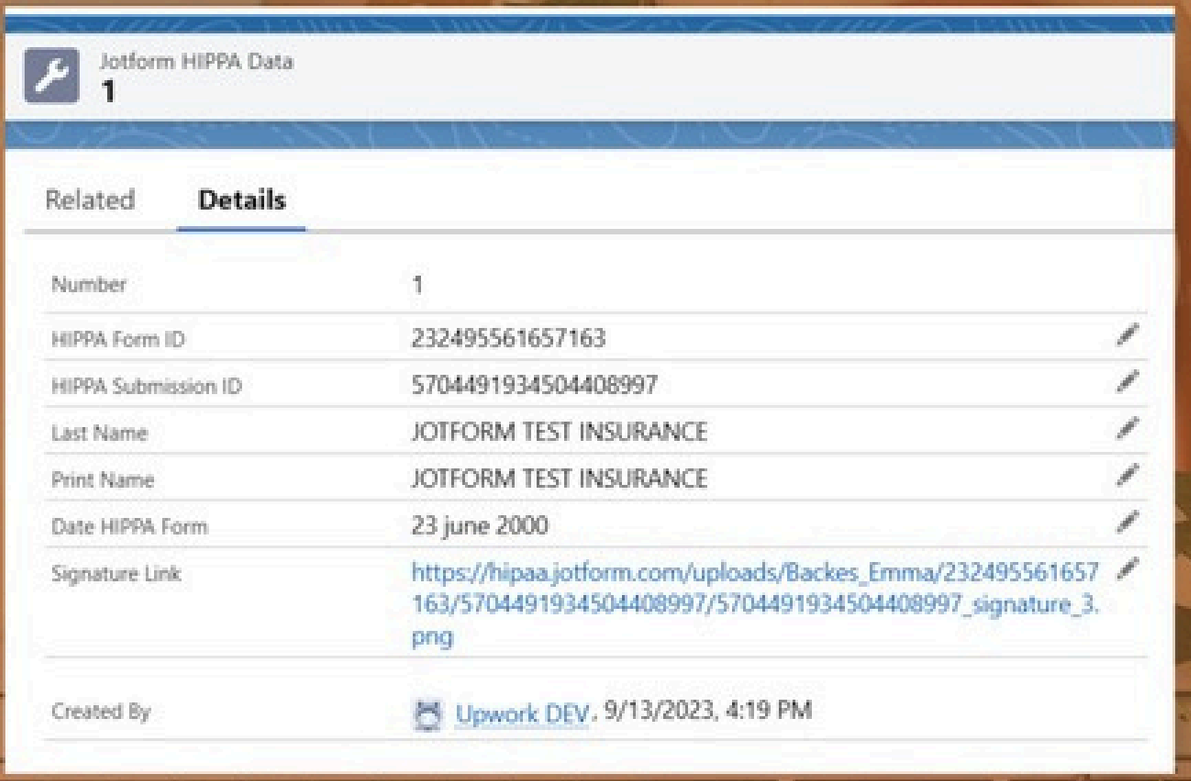


Dr Chorono API responses

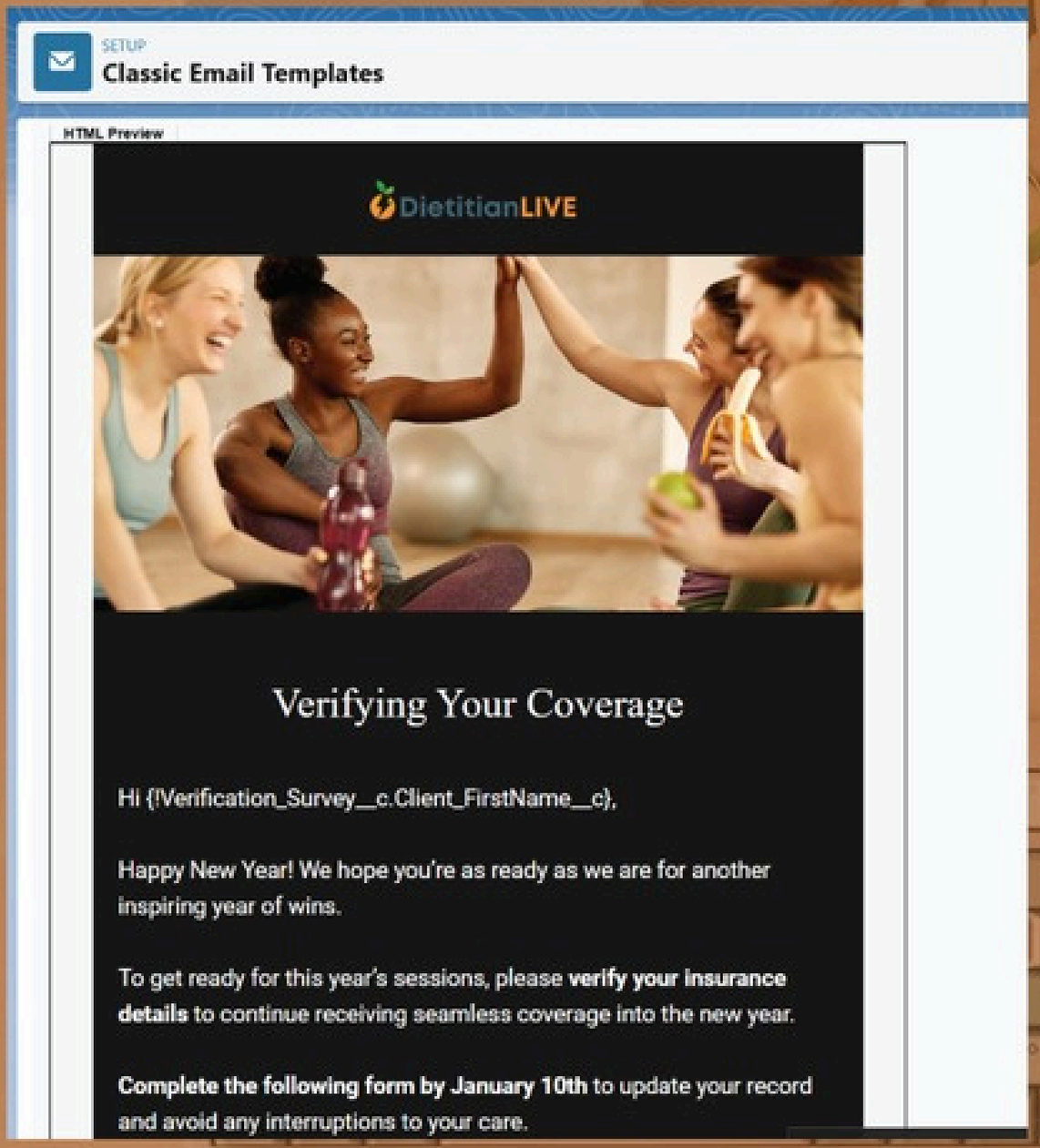


Integration with Jotform



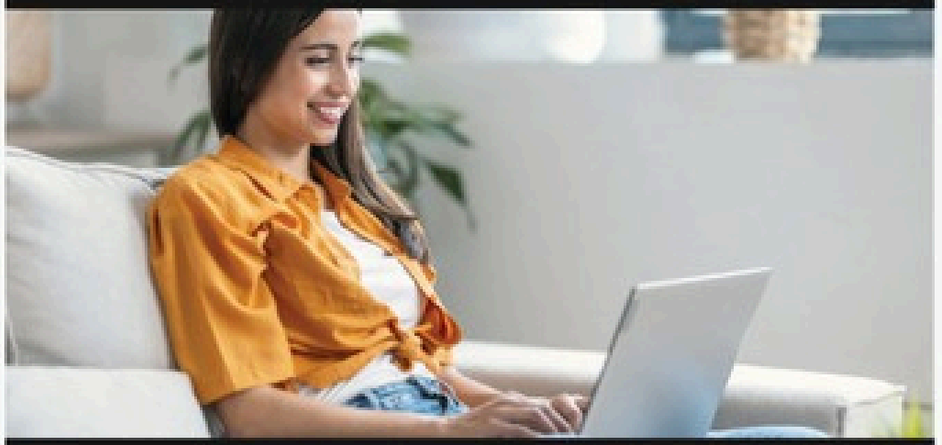


Insurance Verification Email



Update Insurance

DietitianLIVE



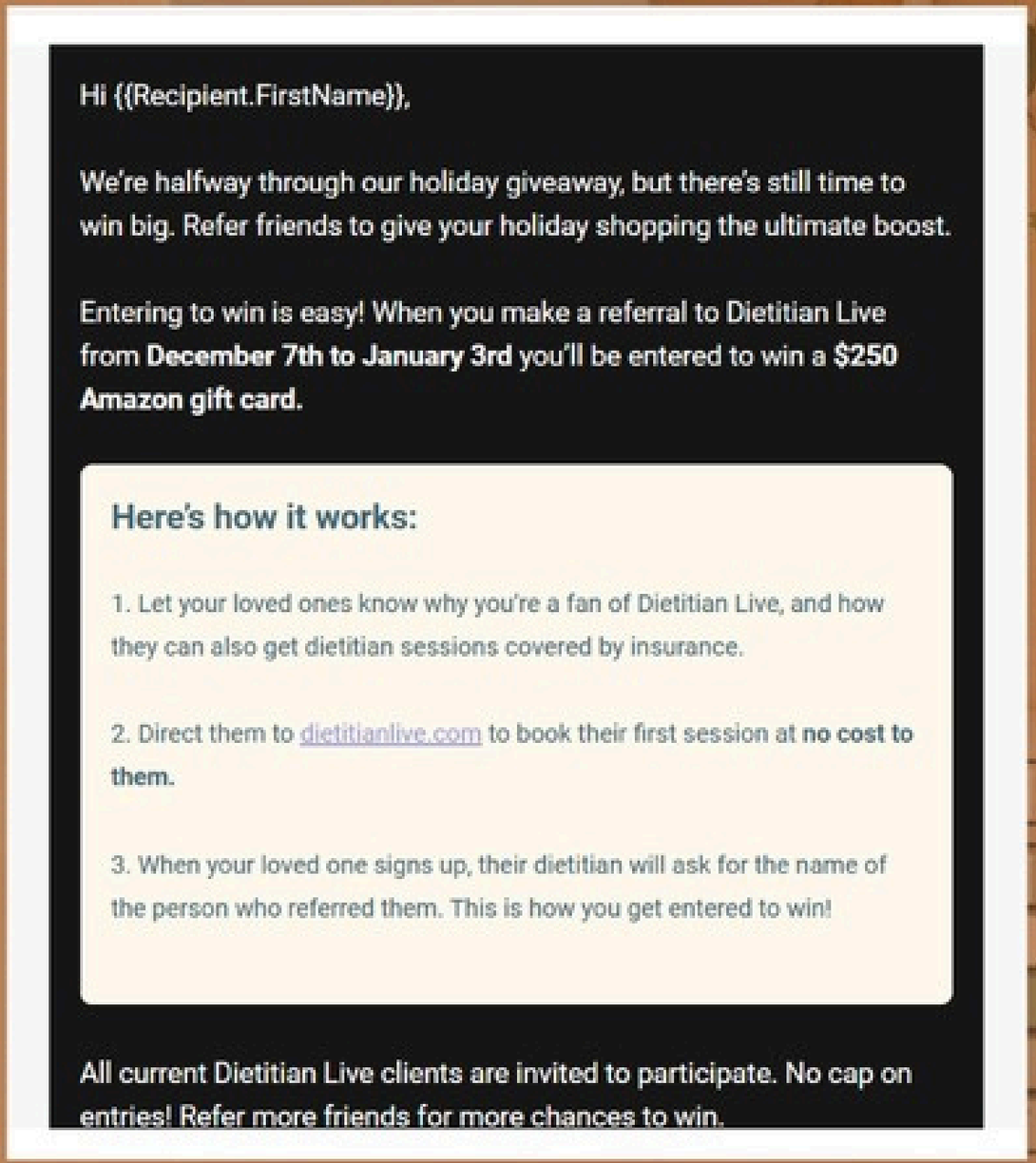
Updating Your Insurance

Hi {{Recipient.FirstName}},

As we kick off the new year, we're reaching out to remind you about updating your insurance information. Keeping your details up-to-date ensures smooth billing and uninterrupted care throughout the year.

Updating your information is quick and easy. Simply **complete the**

Holiday treat email templates



Hi {{Recipient.FirstName}},

We're halfway through our holiday giveaway, but there's still time to win big. Refer friends to give your holiday shopping the ultimate boost.

Entering to win is easy! When you make a referral to Dietitian Live from **December 7th to January 3rd** you'll be entered to win a **$250 Amazon gift card.**

Here's how it works:

1. Let your loved ones know why you're a fan of Dietitian Live, and how they can also get dietitian sessions covered by insurance.

2. Direct them to dietitianlive.com to book their first session at **no cost to them.**

3. When your loved one signs up, their dietitian will ask for the name of the person who referred them. This is how you get entered to win!

All current Dietitian Live clients are invited to participate. No cap on entries! Refer more friends for more chances to win.