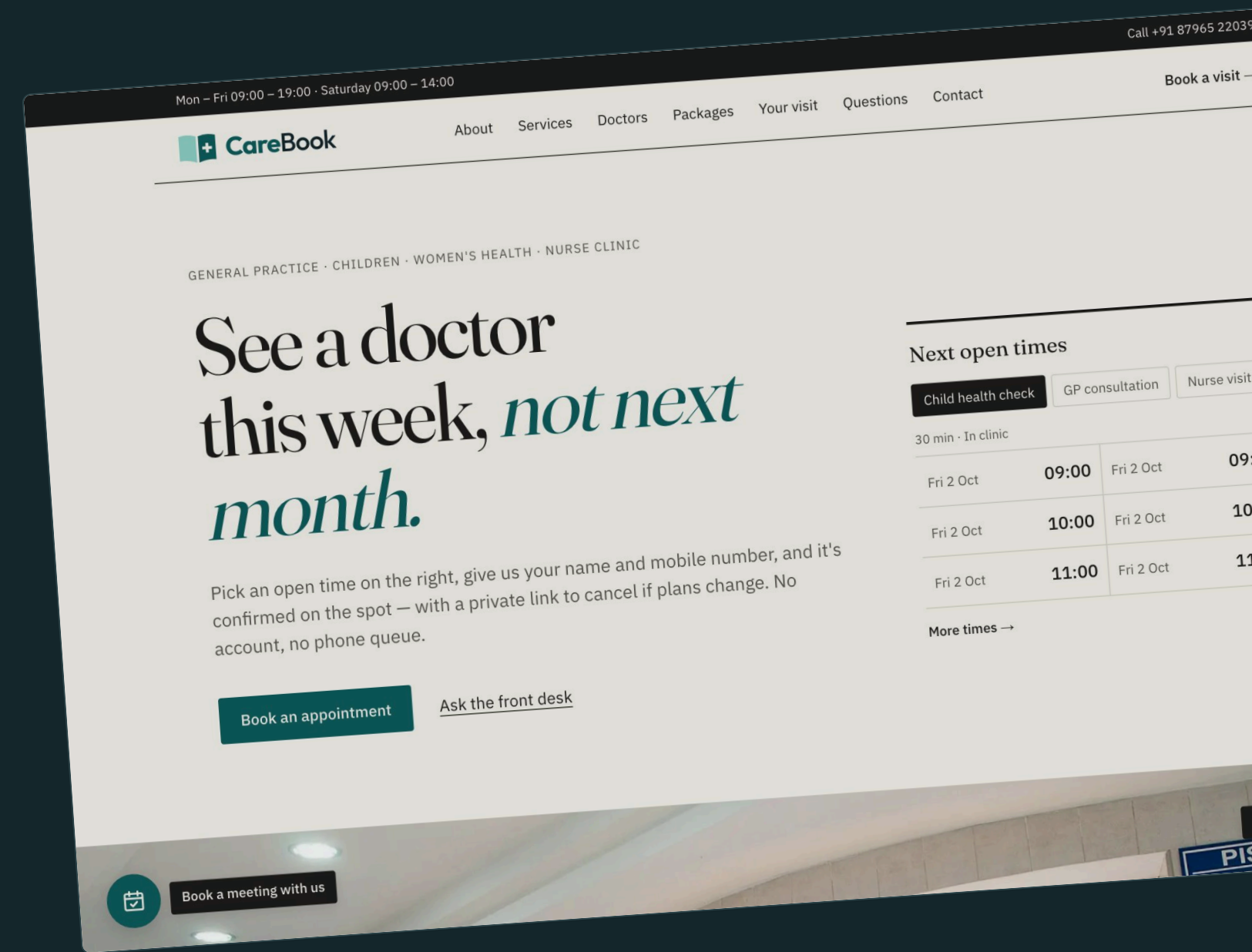


How CareBook works.

A walkthrough of the clinic website, online booking and the staff CRM. Every screen shown is the real product, captured from the working build.



OVERVIEW

One system, three parts that *talk to each other*.

Patients use the website and booking pages. Your team works in the CRM. Every booking and enquiry a patient sends lands in the CRM automatically. Nobody copies anything by hand.

FOR PATIENTS

Clinic website

Doctors, services, packages, fees, visit info and FAQs, plus a chat assistant and WhatsApp.

Next open times on the homepage

"Ask the front desk" form

Works on phones

FOR PATIENTS

Online booking

Pick a service, a day and a time, enter a name and mobile number, and the booking is confirmed on the spot.

No account or password

Add to calendar and cancel online

Double-booking is blocked

FOR THE CLINIC TEAM

Staff CRM

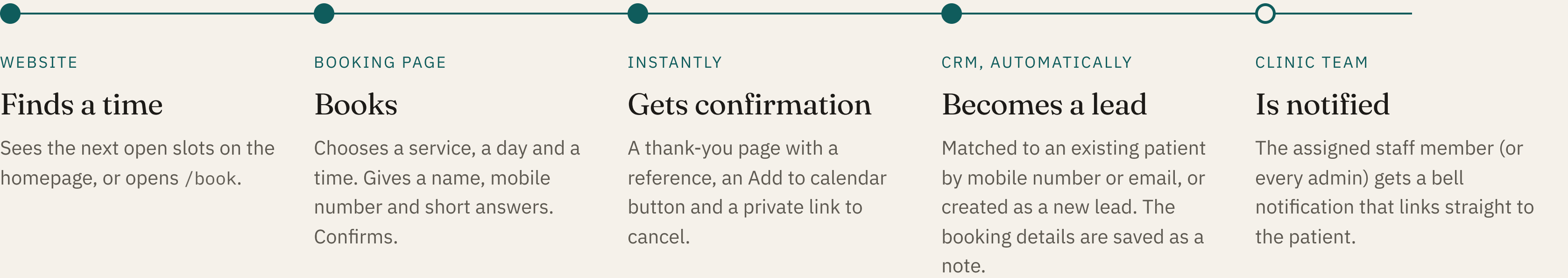
Every patient enquiry, appointment, deal and follow-up in one place, with dashboards.

Leads, Sales, Bookings

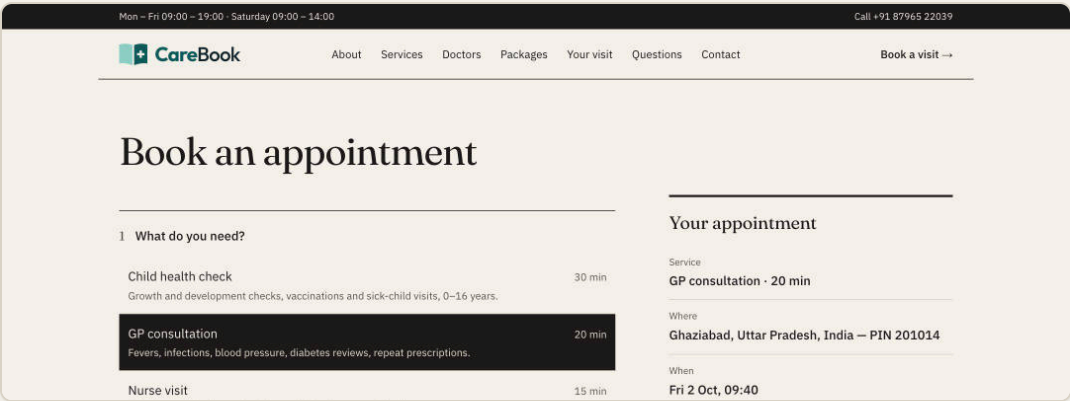
Notifications and activity log

Team roles and permissions

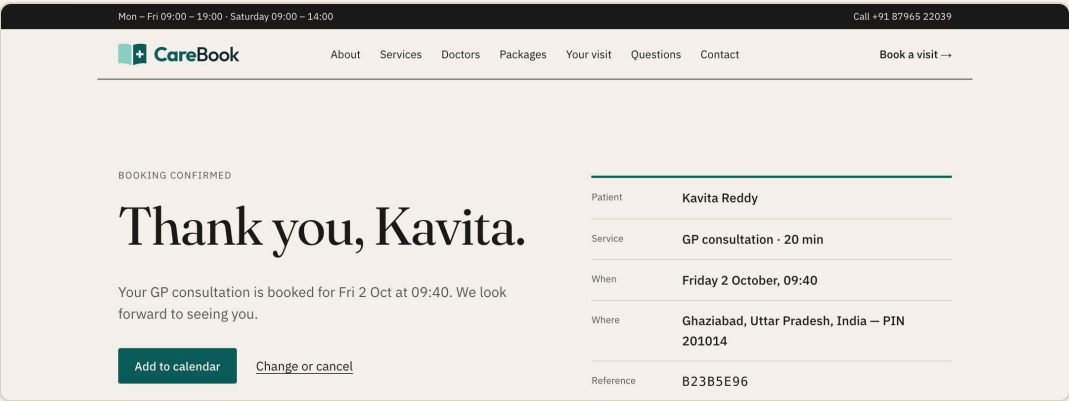
What happens when a patient *books*.



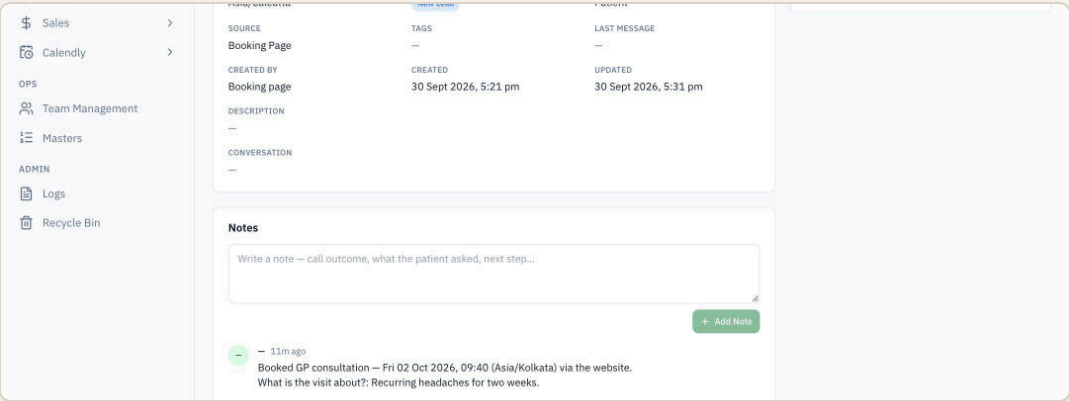
The same automatic steps run for the "Ask the front desk" form. A cancellation from the patient's link adds a note to their record and notifies the team.



Patient picks a time on the website



Confirmed instantly with a reference



Staff see it in the CRM with a note

The clinic website

What patients see first: who the clinic is, what it offers, what it costs, and how to get an appointment.

Open times, *front and centre.*

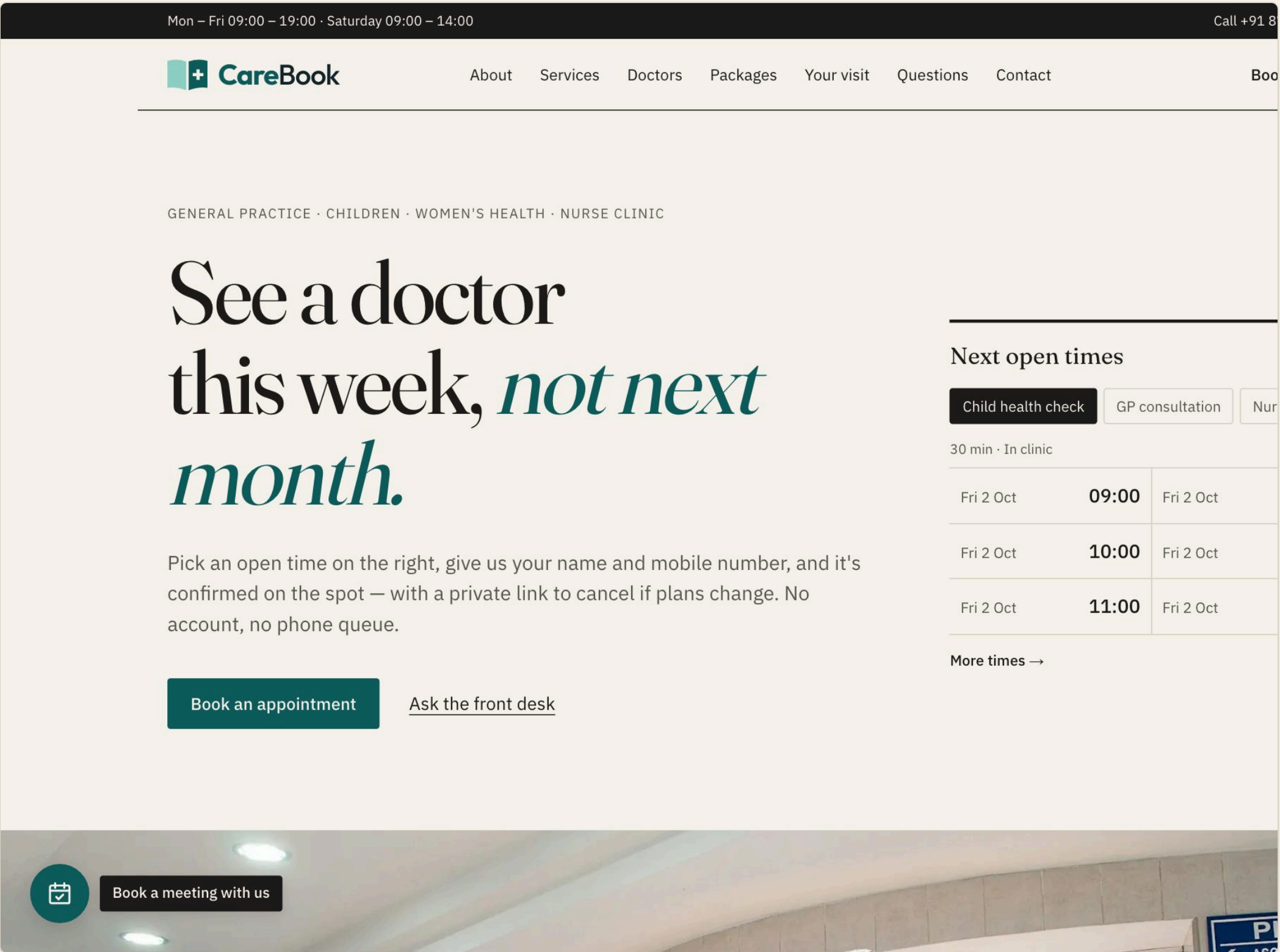
The first screen answers the patient's main question: when can I see a doctor?

- 1

Opening hours and phone number sit in the top bar on every page.
- 2

"Next open times" shows live free slots per service. One tap opens booking with that time already selected.
- 3

Floating buttons for WhatsApp, the chat assistant and "Book a meeting with us" follow the patient down the page.



Homepage. The slots on the right come from the booking system itself, so they are always current.

Who you are, and *what can be booked.*

The About section covers the clinic's story, key facts and promises. Services lists everything bookable online, with its length and whether it happens in the clinic.



ABOUT US · SINCE 2012

A family practice in Ghaziabad open six days a week.

We started as one doctor and one nurse. Today we are three doctors, a nurse clinic, and a front desk that answers the phone.

We are a family practice. The same doctor sees you each time where we can, your notes stay with us, and appointments are long enough to actually explain things.

20 min

standard GP appointment

Same day

reports explained

6 days

open a week

What we promise

Your booked time is your time — if we run more than 20 minutes late, the front desk tells you.

Test reports are explained by a doctor, not just handed over.

Children are seen the same day if they are unwell.



Book a meeting with us

Ask

About. Standard appointment length, same-day reports, open six days.

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Book a vi

What you can book

Not sure which one? Book a general consultation — the doctor will extend it if needed.

01

Child health check

Growth and development checks, vaccinations and sick-child visits, 0–16 years.

IN CLINIC

30 min

02

GP consultation

Fevers, infections, blood pressure, diabetes reviews, repeat prescriptions.

IN CLINIC

20 min

03

Nurse visit

Blood tests, injections, dressings and blood pressure checks.

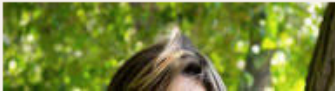
IN CLINIC

15 min

Our doctors

Three doctors and a practice nurse. Where we can, you see the same person every time.







Book a meeting with us

Ask

Services. These come from the CRM's Event Types, so adding a service there adds it here.

DOCTORS

Faces patients *will recognise.*

Each doctor and nurse has a photo, role, short bio, special interest, clinic days and languages spoken.

- 1 "Book with ..." links go straight to that doctor's service.
- 2 The chat assistant uses the same details, e.g. "my child has a fever" suggests the paediatrician.

CareBook

About

Services

Doctors

Packages

Your visit

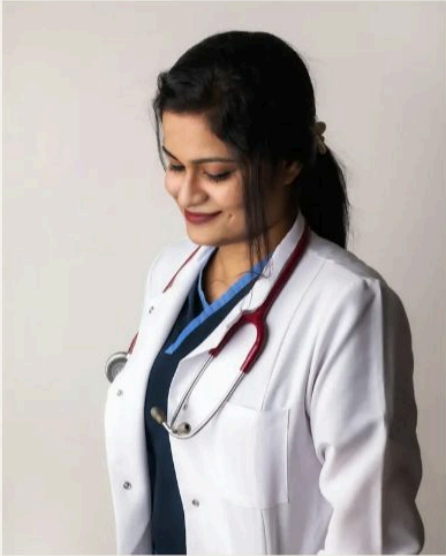
Questions

Contact

Book a visit →

Our doctors

Three doctors and a practice nurse. Where we can, you see the same person every time.



Dr. Meera Rao

GP, clinic lead

Runs the diabetes and blood-pressure clinic. Sees most long-term patients and reviews every lab report that comes back.

Special interest

Diabetes and blood pressure

Mon, Tue, Thu

Speaks

English, Hindi, Kannada

Book a meeting with us



Dr. Daniel Okafor

GP

Knees, backs and shoulders — from weekend cricket strains to long-standing joint pain. Saturday mornings are his.

Special interest

Sports injuries, joint pain



Dr. Anna Lindqvist

Paediatrician

Newborn checks, growth and development, vaccinations and the fevers that always seem to start at night.

Special interest

Children 0–16

Tue, Wed, Fri

Speaks

English

Book with Anna



Sara Khan

Practice nurse

Takes blood from 8:30, gives injections and vaccines, changes dressings, and checks blood pressure without a queue.

Special interest

Bloods, vaccinations, dressings

Chat with Sara

Our doctors. A staggered editorial layout rather than a uniform card grid.

CareBook · Website

07

PACKAGES & FEES

Prices, *stated plainly.*

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Book a vi

Health check packages

Fixed price, one visit, results explained by a doctor. Book by phone so we can send fasting instructions.

Call +91 87965 22039

Basic health check

Blood count, blood sugar, cholesterol, kidney and liver tests, BP, BMI, GP review of the results

₹1,4

Diabetes review

HbA1c, fasting sugar, kidney function, foot check, diet advice, medicine review with Dr. Rao

₹9

Heart check

ECG, lipid profile, blood sugar, BP, weight and waist, GP review and a written plan

₹1,9

Child growth check

Height, weight and head size on the growth chart, development check, vaccination record review

₹7

Book a meeting with us

the clinic

Step-free access. One waiting room, four consulting rooms, treatment room, and a pharmacy on site.

Ask

Health check packages. Booked by phone so the desk can explain fasting instructions.

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Book a vi

Fees, payment and insurance

Booking online is free. You pay at the desk after your visit.

Fees

GP consultation₹500

Child health check₹600

Nurse visitfrom ₹200

Follow-up within 7 daysNo charge

Payment

UPI, cards and cash at the desk

Pay after your visit — nothing is charged v
you book online

Insurance

We give an itemised bill and prescription
your insurance claim.

Cashless cover depends on your insurer -
the front desk before your visit.

Questions patients ask

Anything else? Ask the front desk.

Do I need an account to book?

How do I cancel or change my appointment?

Can I book for my child or a family member?

What if no times suit me?

Book a meeting with us

Ask

Fees, payment and insurance. Booking online is free; patients pay at the desk.

What to expect *before arriving.*

Photos of the rooms, then four steps from booking to follow-up. Patients arrive knowing what to bring and how long it takes.

CareBook

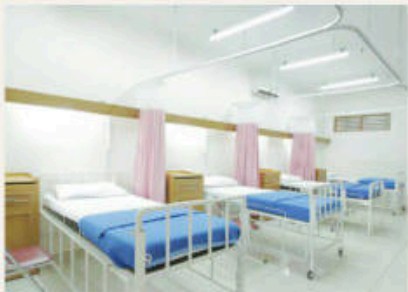
[About](#)[Services](#)[Doctors](#)[Packages](#)[Your visit](#)[Questions](#)[Contact](#)[Book a visit](#)

Inside the clinic

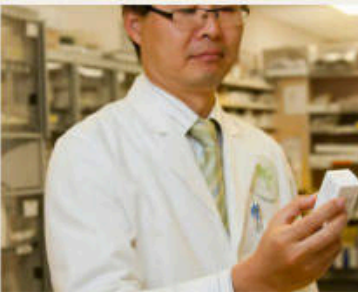
Step-free access. One waiting room, four consulting rooms, a treatment room, and a pharmacy on site.



Reception and waiting area



Treatment room — dressings, drips and observation



Pharmacy — collect your prescription on the way out



Reports and scans reviewed on screen with you

[Book a meeting with us](#)

[Ask a question](#)

Inside the clinic. Reception, treatment room, pharmacy and consulting rooms.

CareBook

[About](#)[Services](#)[Doctors](#)[Packages](#)[Your visit](#)[Questions](#)[Contact](#)[Book a visit](#)

How a visit works

1

Book

Choose a time online or call us. You get a confirmation screen with a private link to cancel.

2

Arrive

Come 5 minutes early and give your name at the front desk. Bring any medicines you take.

3

See the doctor

In person or on a video or phone call, depending on what you booked.

4

Afterwards

Prescriptions and follow-up bookings are handled at the desk before you leave.

What patients say

“Dr. Lindqvist saw my son the same afternoon I called. She explained everything twice, slowly, without making me feel silly for asking.”

[Book a meeting with us](#)

[Ask a question](#)

“Booked at 11pm on my phone, got a 9:20 slot. I was in and out with my blood test by 9:35.”

— Patient, nurse clinic

“I have been coming for my diabetes for 10 years. Same doctor, same notes, and she

[Book a meeting with us](#)

[Ask a question](#)

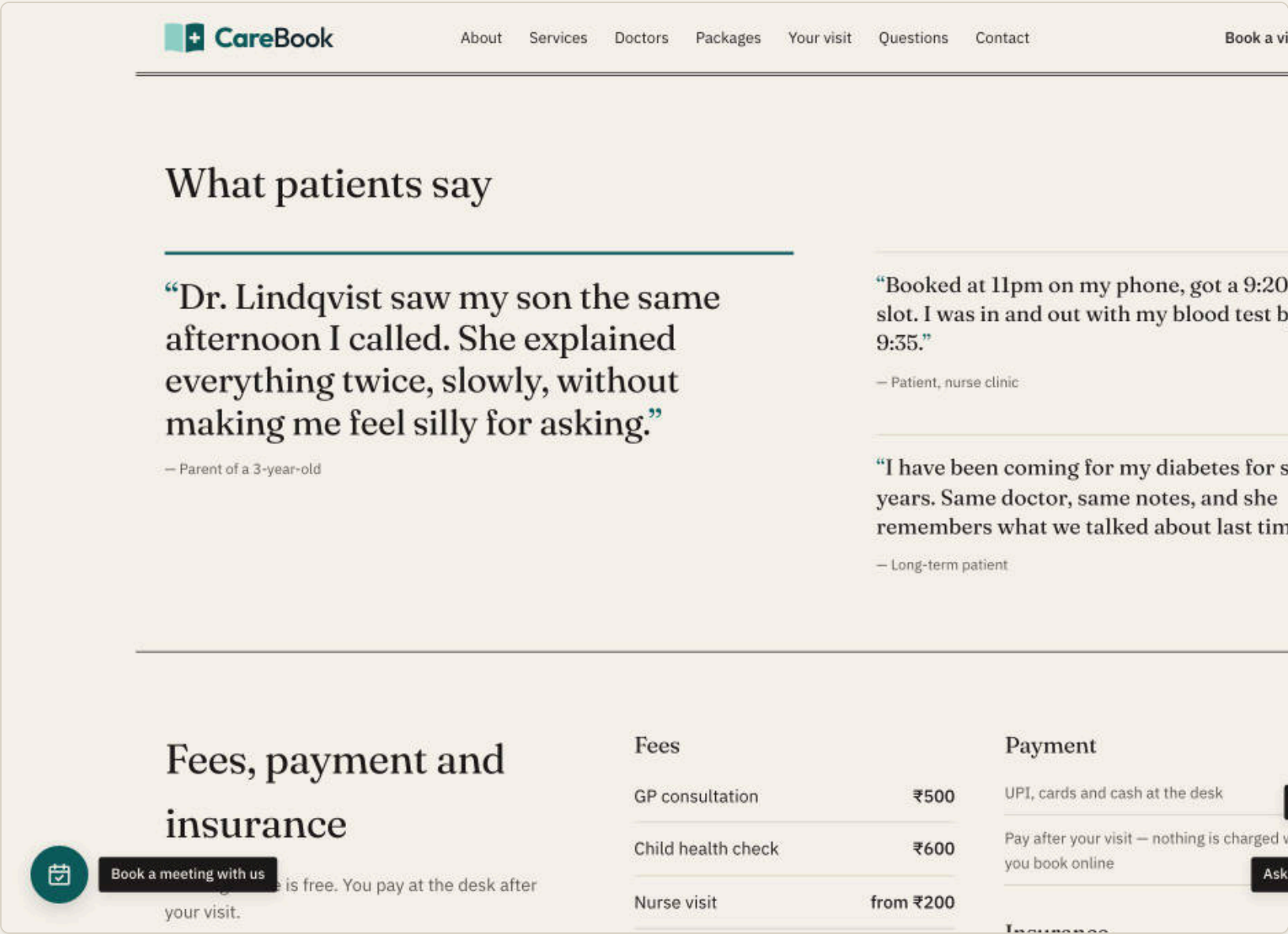
How a visit works. Book, arrive, see the doctor, afterwards.

CareBook · Website

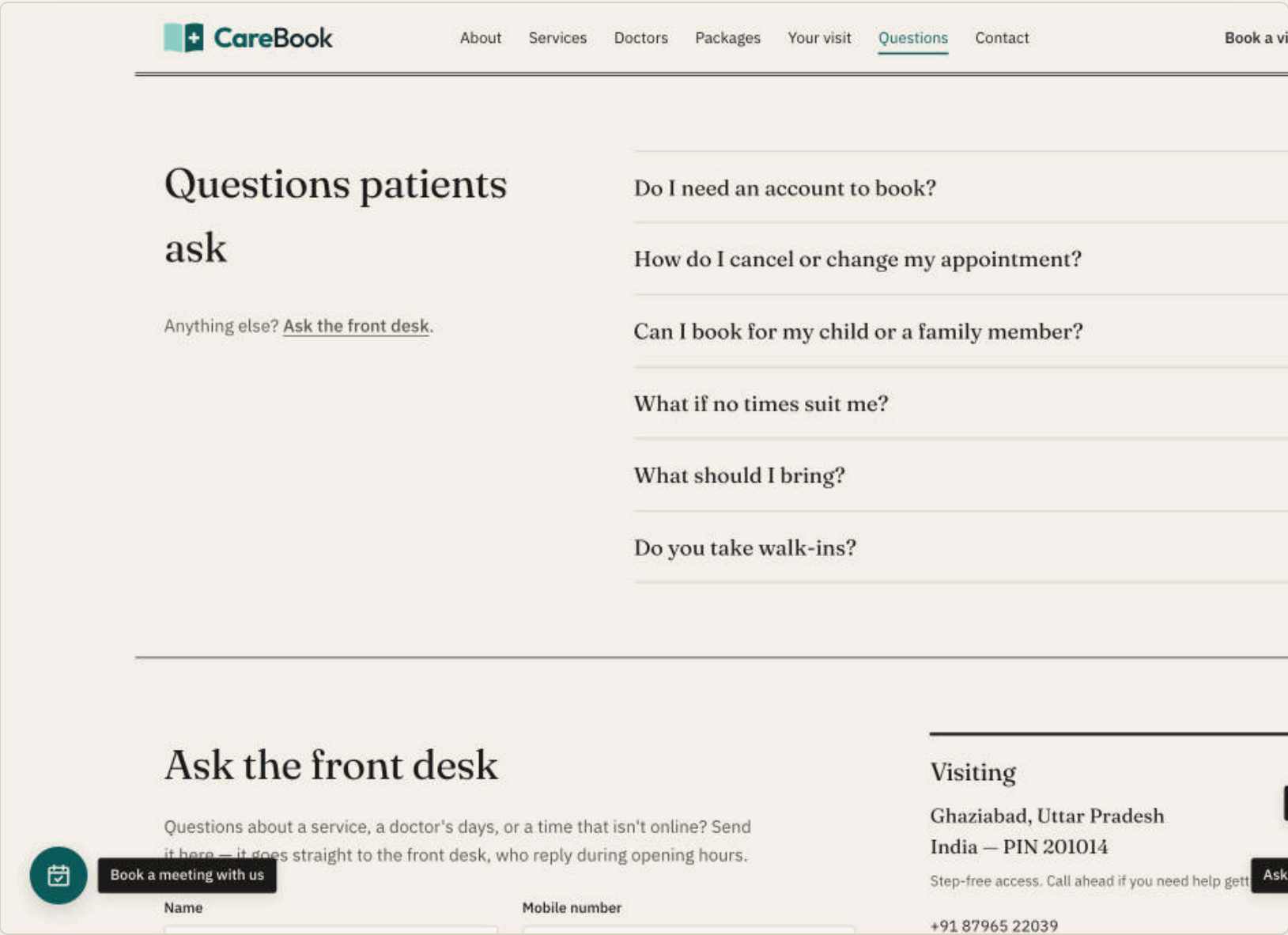
09

Answers before *the phone rings.*

Patient quotes build trust. The FAQ handles the common questions: do I need an account, how do I cancel, can I book for my child, do you take walk-ins.



What patients say. Needs genuine reviews from the clinic before launch.



Questions patients ask. Each answer expands on tap.

ASK THE FRONT DESK

An enquiry becomes *a CRM lead*.

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Book a visit

Ask the front desk

Questions about a service, a doctor's days, or a time that isn't online? Send it here — it goes straight to the front desk, who reply during opening hours.

Name

Arjun Mehta

Mobile number

+91 90000 00011

Email

arjun.mehta@example.com

How can we help?

Is Dr Rao in on Saturday? I need a BP review.

☒ Please call me back

Send to the front desk

Visiting

Ghaziabad, Uttar Pradesh

India — PIN 201014

Step-free access. Call ahead if you need help getting in.

+91 87965 22039

+91 85880 99741

+91 97736 03818

info@hvtechnologies.app

Mon – Fri

09:00 – 1

Saturday

09:00 – 1

Sunday

Cl

Call +91 87965 22039

WhatsApp

Get directions

Before sending. Contact details, hours, WhatsApp and directions sit alongside.

For questions that aren't a booking. The patient leaves a name, mobile number and message, and can tick "Please call me back". Spam bots are filtered out silently.

CareBook Clinic

Super Admin

CORE

Dashboard

Notifications

SALES

Leads

All Leads

Dashboard

Sales

Calendly

OPS

Team Management

Masters

ADMIN

Logs

Recycle Bin

CRM v0.1.0

CareBook

Back to Leads

Book via Booking

Arjun Mehta

Details

NAME

Arjun Mehta

FIRST NAME

—

LAST NAME

—

COMPANY

—

EMAIL

arjun.mehta@example.com

PHONE

+91 90000 00011

TAX ID / GSTIN

—

ADDRESS

—

COUNTRY

—

TIMEZONE

—

STATUS

New Lead

CATEGORY

Patient

SOURCE

Website

TAGS

Needs Callback

LAST MESSAGE

—

CREATED BY

Booking page

CREATED

30 Sept 2026, 5:21 pm

UPDATED

30 Sept 2026, 5:26 pm

DESCRIPTION

Callback requested.

Is Dr Rao in on Saturday? I need a BP review.

CONVERSATION

—

Sales

Opportunities linked to this lead

No sales linked yet.

Bookings

No bookings yet.

Notes

Write a note — call outcome, what the patient asked, next step...

Seconds later, in the CRM. A new lead tagged "Needs Callback" with the message saved, and the team notified.

Quick answers, *any hour.*

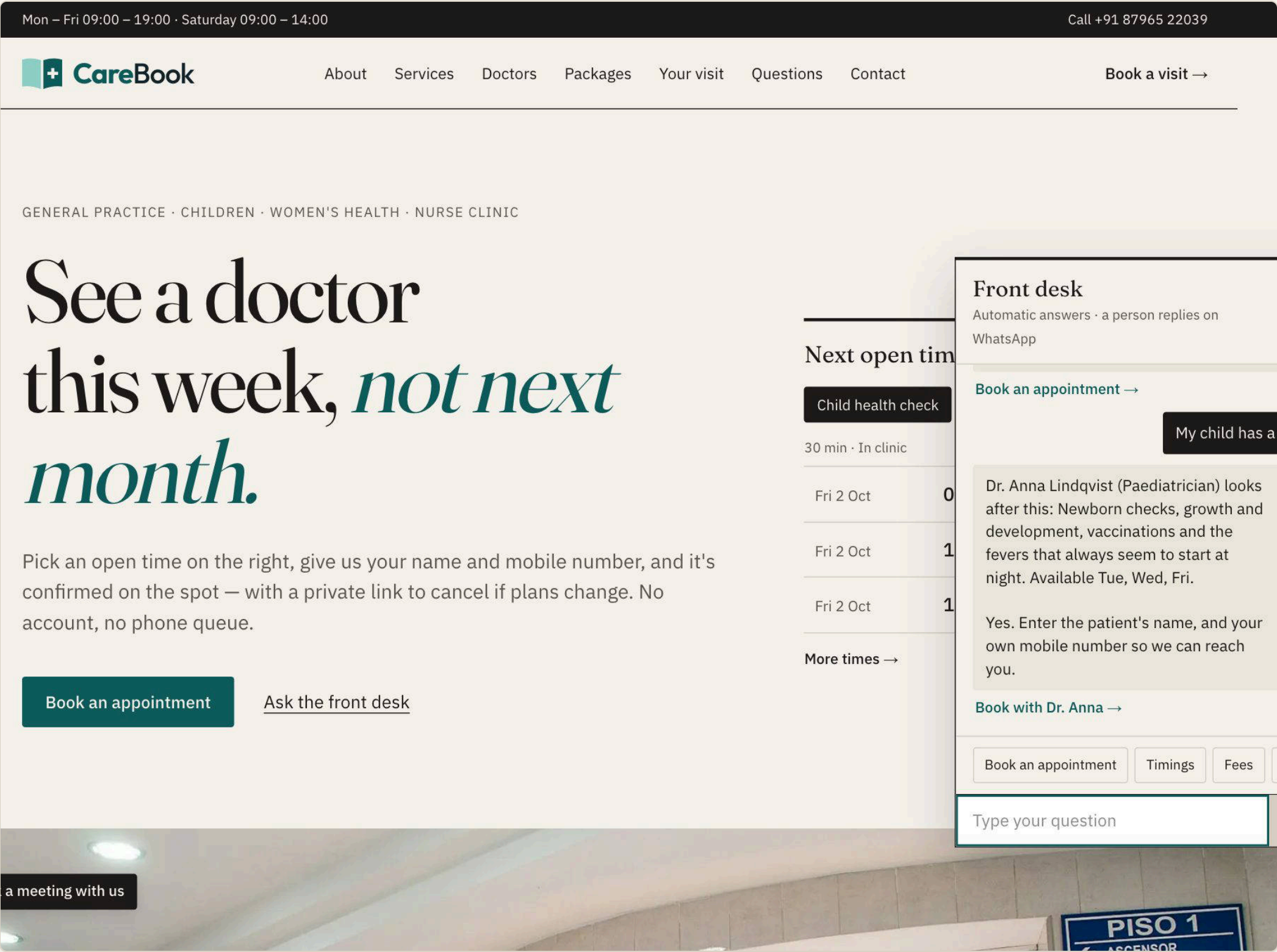
The chat button answers common questions using the clinic's own information: fees, timings, doctors, packages, location and cancellations.

- 1

Emergency words always get "call 112" first.
- 2

Answers link onward to "Book with Dr ...", Google Maps, WhatsApp or a phone call.
- 3

Private by design : runs in the browser, so nothing typed is stored or sent anywhere.



"My child has a fever" brings up the paediatrician, her clinic days and a direct booking link.

ON PHONES

Built for the *phone* first.

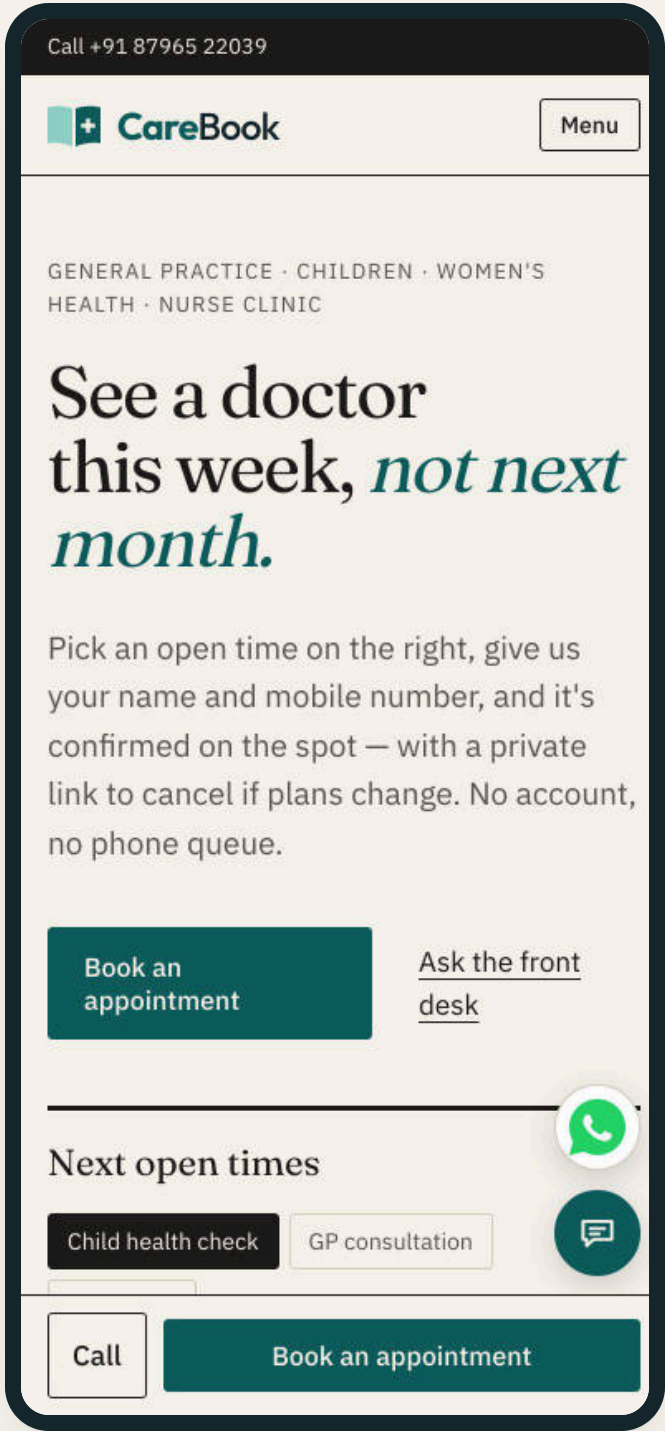
Most patients will book from a mobile.
The layout adapts rather than shrinking.

- 1

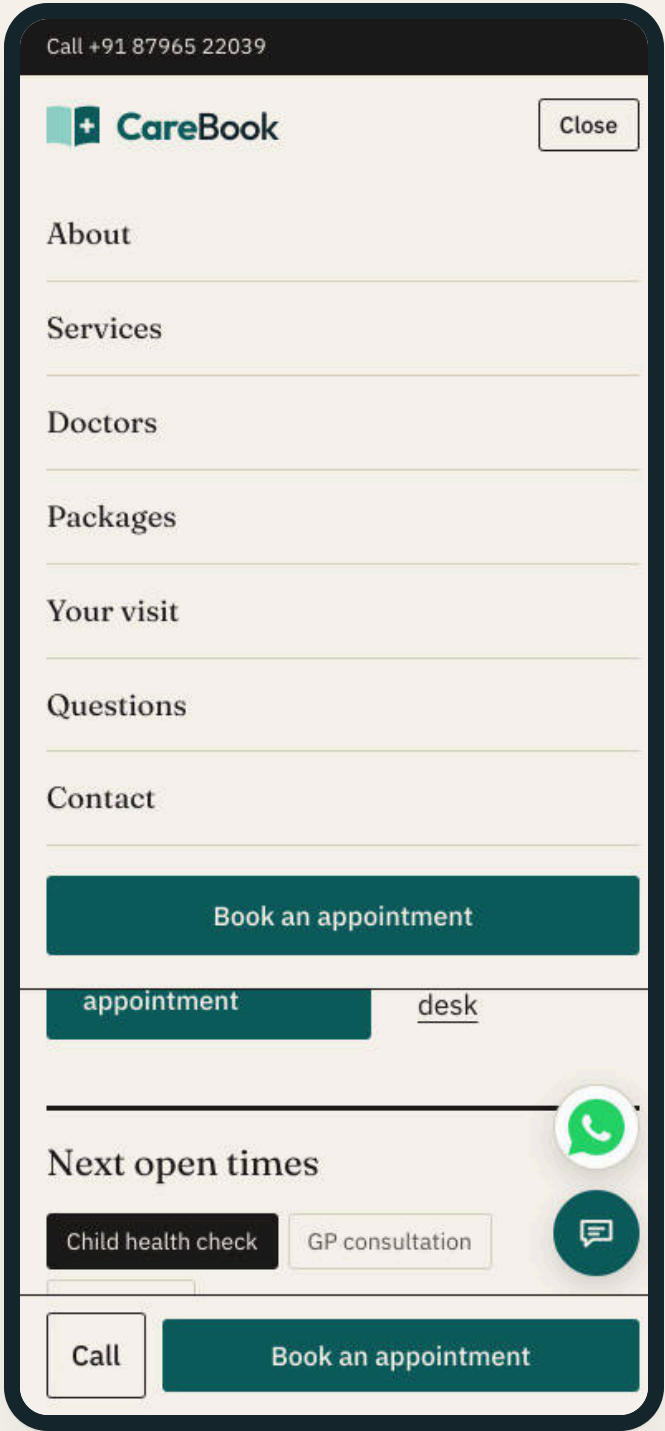
A fixed bottom bar with Call and Book an appointment is always within thumb reach.
- 2

A full-screen menu with large tap targets.
- 3

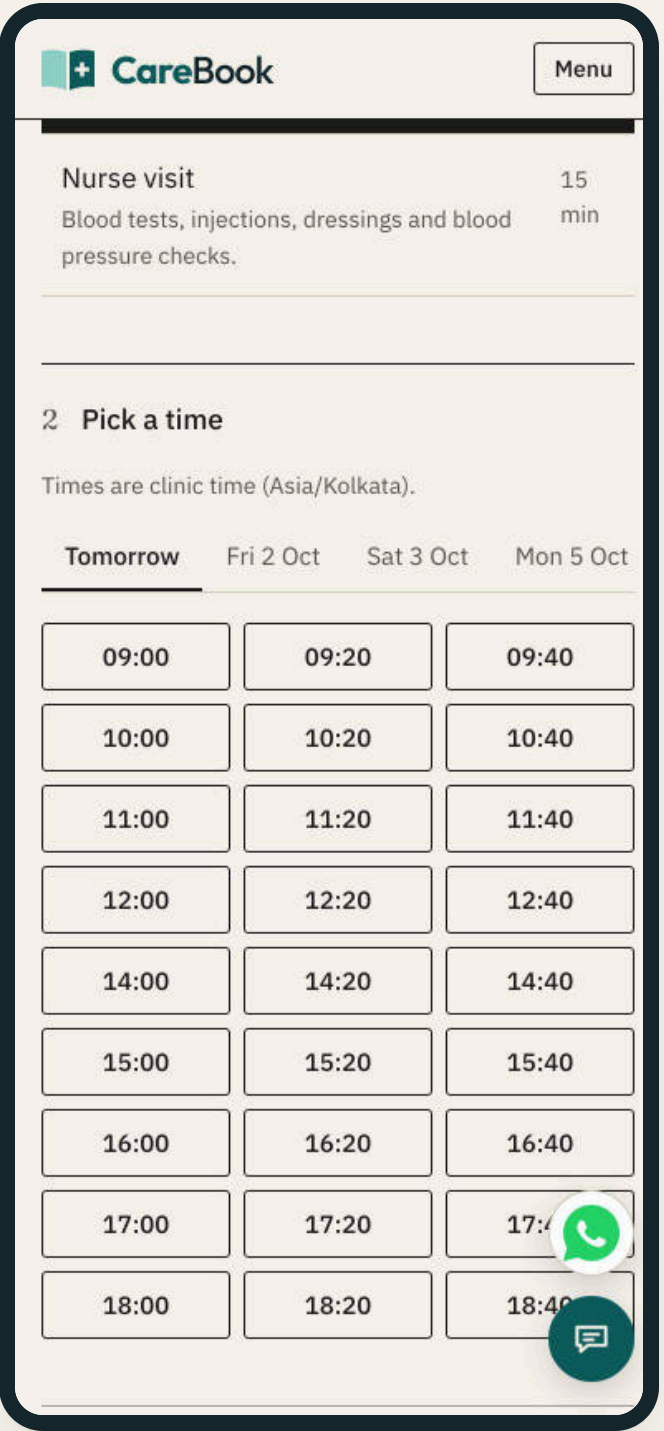
Time slots laid out as a large grid for easy tapping.



Homepage



Menu



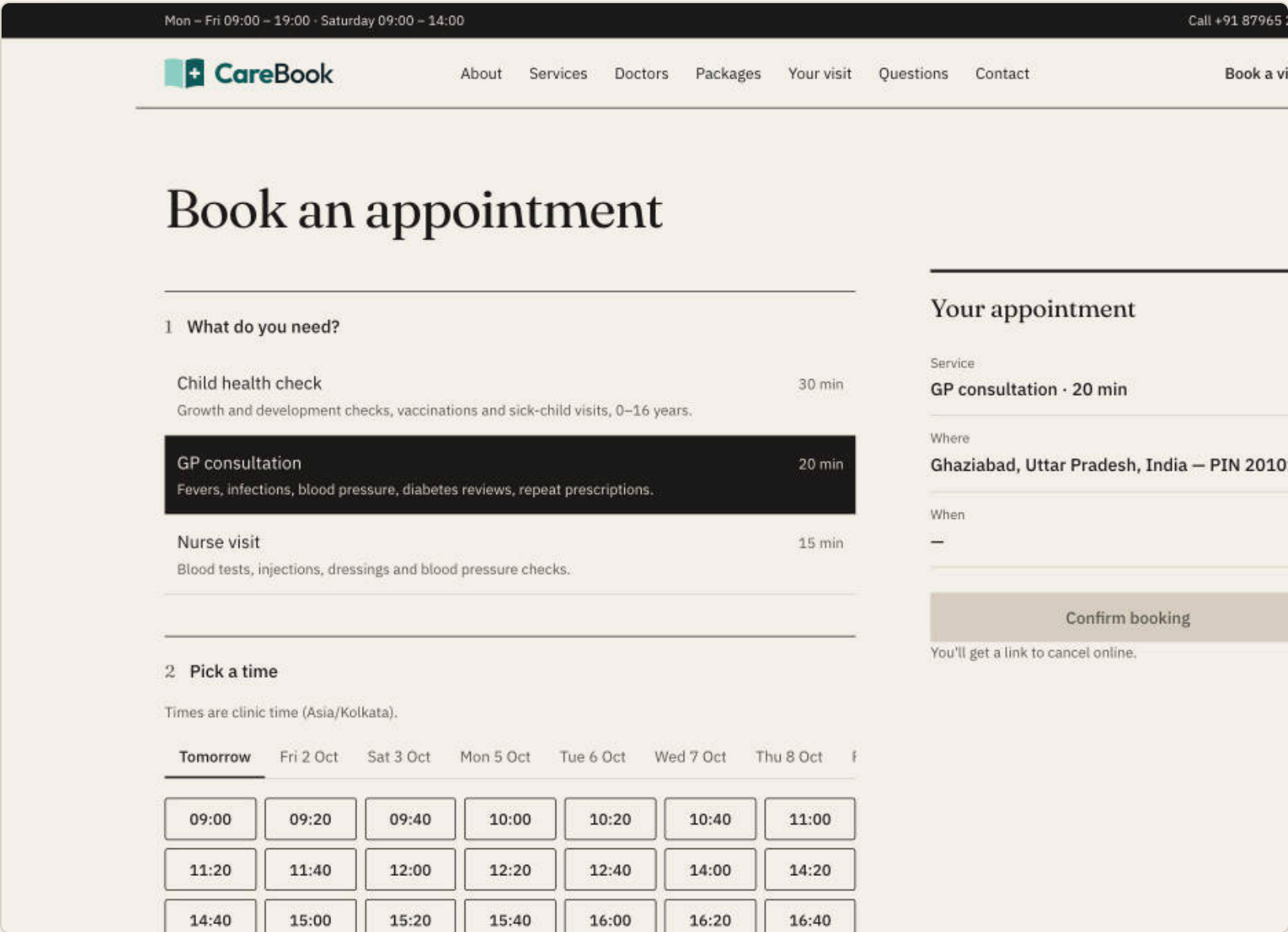
Picking a time

Online booking

Three steps on one page. No account, no password, no phone queue, and a slot can never be booked twice.

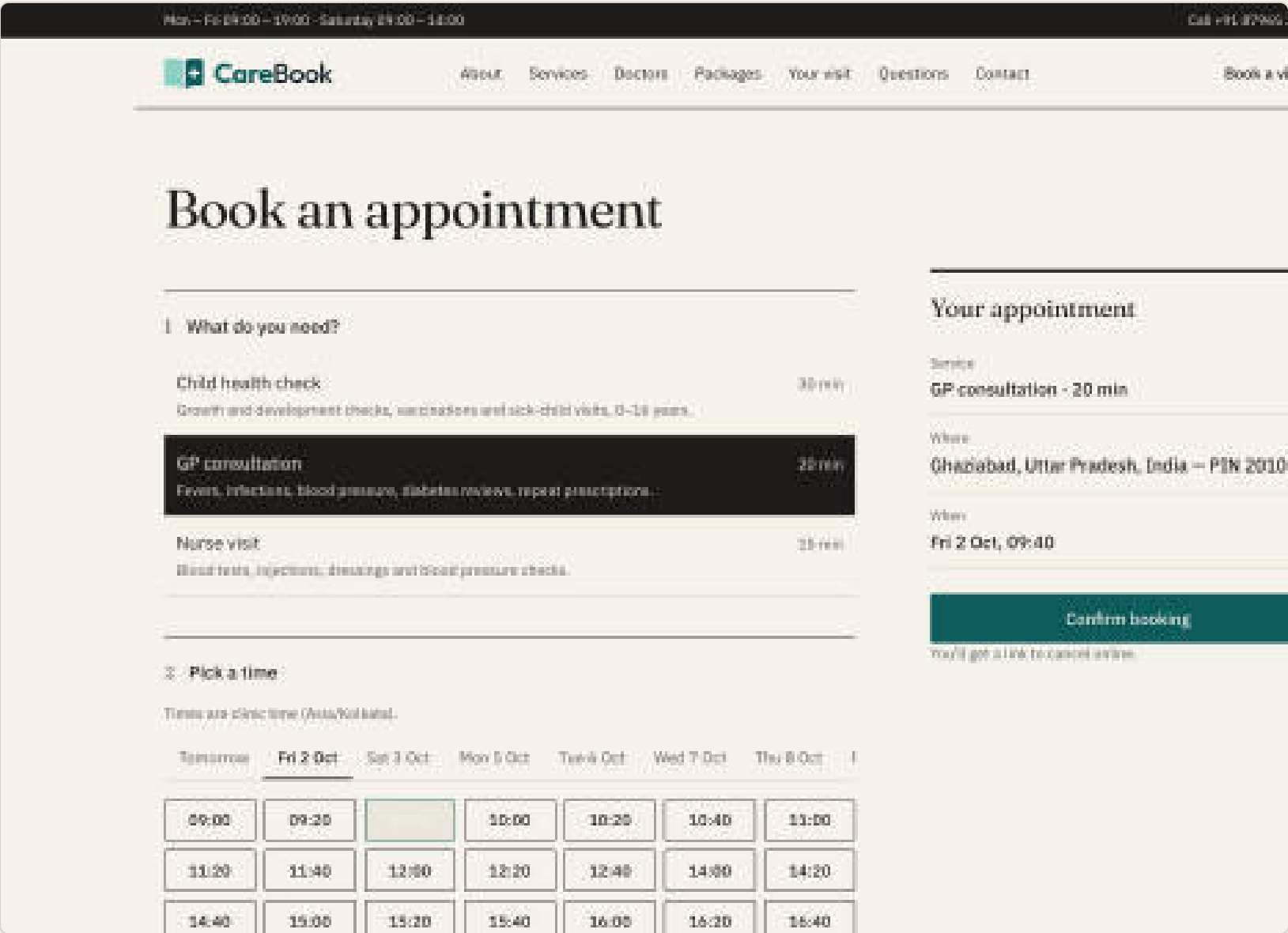
STEPS 1 & 2

Choose a service, *then a time.*



Step 1: What do you need? Each service shows its length and a plain description.

Choosing a service loads its real free times, day by day. A time disappears as soon as it's taken, including buffer time and other bookings with the same doctor.



Step 2: Pick a time. The summary on the right fills in as the patient chooses.

STEP 3

A few details, *then confirm.*

Name and mobile number are required; email is optional.

- 1

Service-specific questions , e.g. "Child's age" for a child health check. Set per service in the CRM.
- 2

Consent tick box for WhatsApp and email confirmations.
- 3

On confirm , the system re-checks that the slot is still free before saving, so two people can't grab the same time.

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Book an appointment

3 Your details

Full name

Rohan Das

Mobile number

+91 90000 00013

Email

(optional)

rohan.das@example.com

Child's age

What is the visit about?

(optional)

Vaccination due for my 4-year-old.

☒ I agree to receive appointment confirmations on WhatsApp and email.

CareBook

FAMILY PRACTICE • GHAZIABAD • SINCE 2012

Ghaziabad, Uttar Pradesh, India — PIN 201014

+91 87965 22039

info@hvtechnologies.app

Book an appointment

In an emergency, call 112.

InstagramFacebookLinkedInX

Staff login

Your details. The Child health check asks the child's age and the reason for the visit.

CareBook · Booking

16

CONFIRMATION

Booked, *and clear about next steps.*

The patient lands on a personal confirmation page.

- 1

Summary and reference : patient, service, date, place, booking reference.
- 2

Add to calendar works with Google, Apple and Outlook, and includes a reminder 2 hours before.
- 3

What happens next : arrive 10 minutes early, what to bring, how to cancel.

Mon – Fri 09:00 – 19:00 · Saturday 09:00 – 14:00

Call +91 8

CareBook

AboutServicesDoctorsPackagesYour visitQuestionsContact

Boo

BOOKING CONFIRMED

Thank you, Kavita.

Your GP consultation is booked for Fri 2 Oct at 09:40. We look forward to seeing you.

Add to calendar

[Change or cancel](#)

What happens next

1

Your booking is with our front desk now. If anything changes on our side, we call you.

2

Please arrive 10 minutes early. Bring any medicines you take, recent test reports and a photo ID.

3

Can't make it? Cancel with the link above so someone else can have the slot.

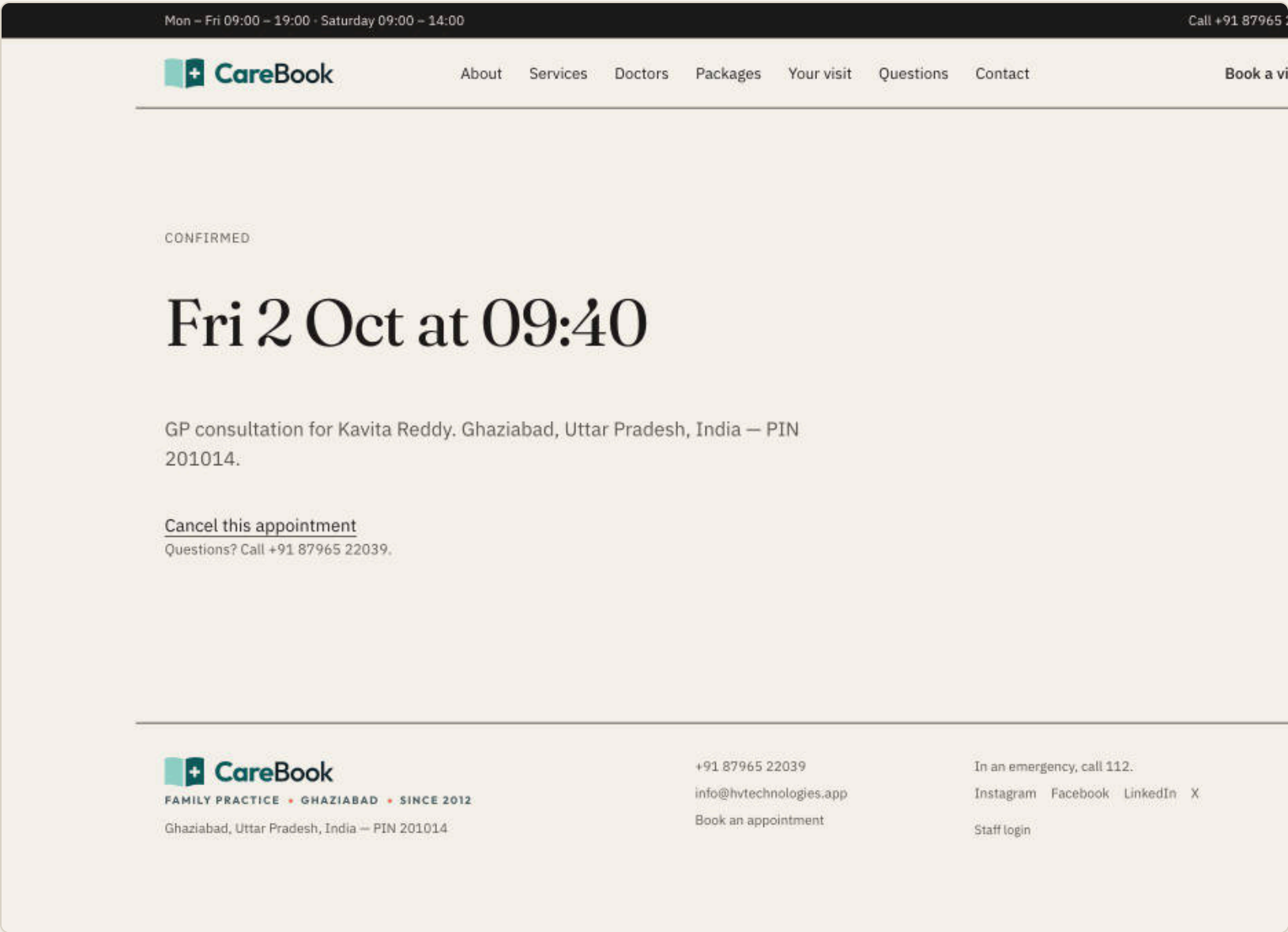
Keep this page's link — it's how you manage the booking online. Questions? Call +91

Patient	Kavita Reddy
Service	GP consultation · 20 min
When	Friday 2 October, 09:40
Where	Ghaziabad, Uttar Pradesh, India — PIN 201014
Reference	B23B5E96

Thank-you page. Its link is private to the patient and is how they manage the booking later.

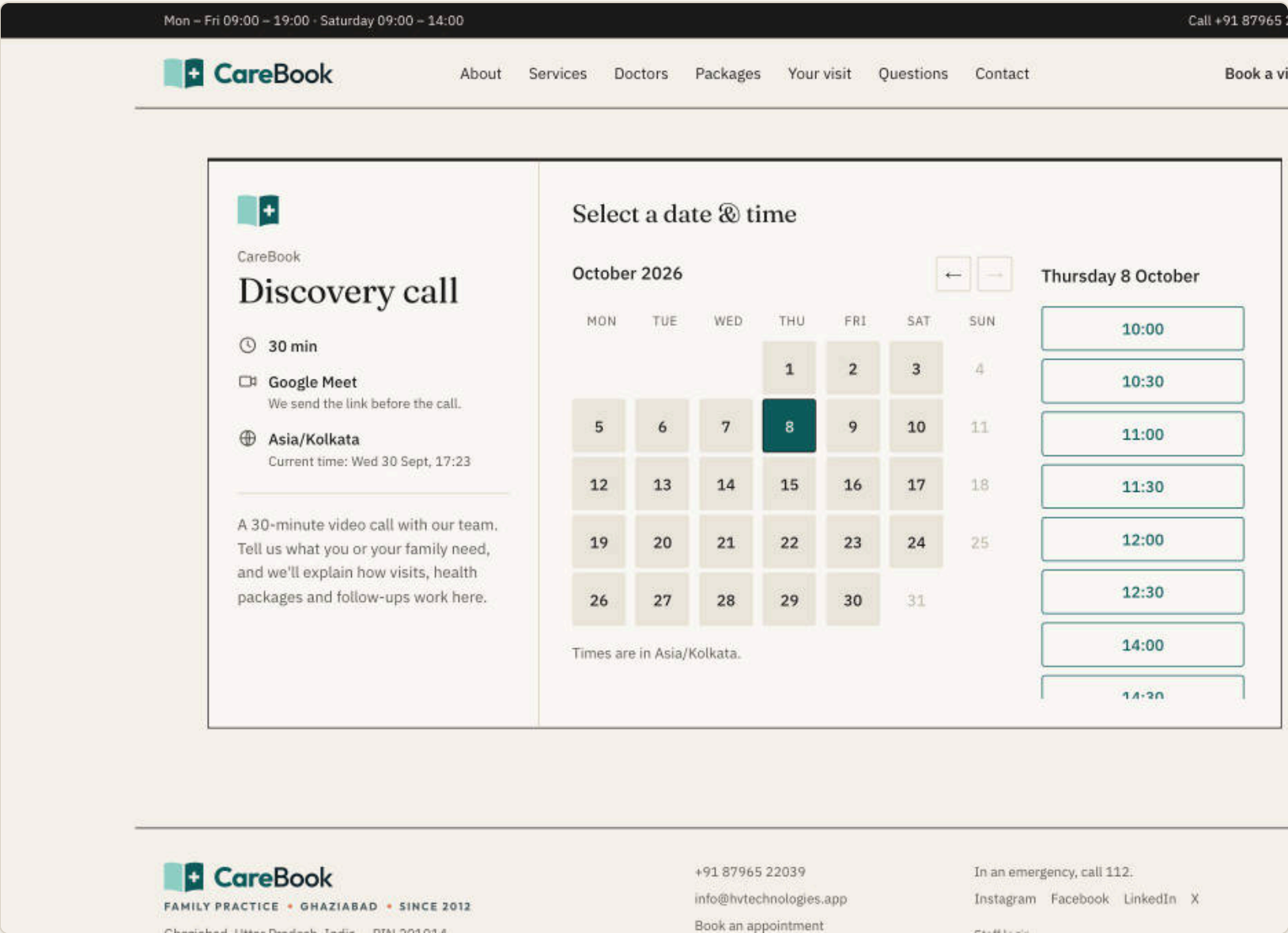
CANCEL & MEETING PAGE

Easy to cancel. *A page per service.*



Manage booking. One click to cancel, with an optional reason saved to the patient's record.

"Change or cancel" frees the slot for someone else and tells the team. Each service also has its own calendar-style booking page you can share on WhatsApp or social media.



/book/discovery-call. A month calendar; only days with free times can be clicked. This is where "Book a meeting with us" leads.

The staff CRM

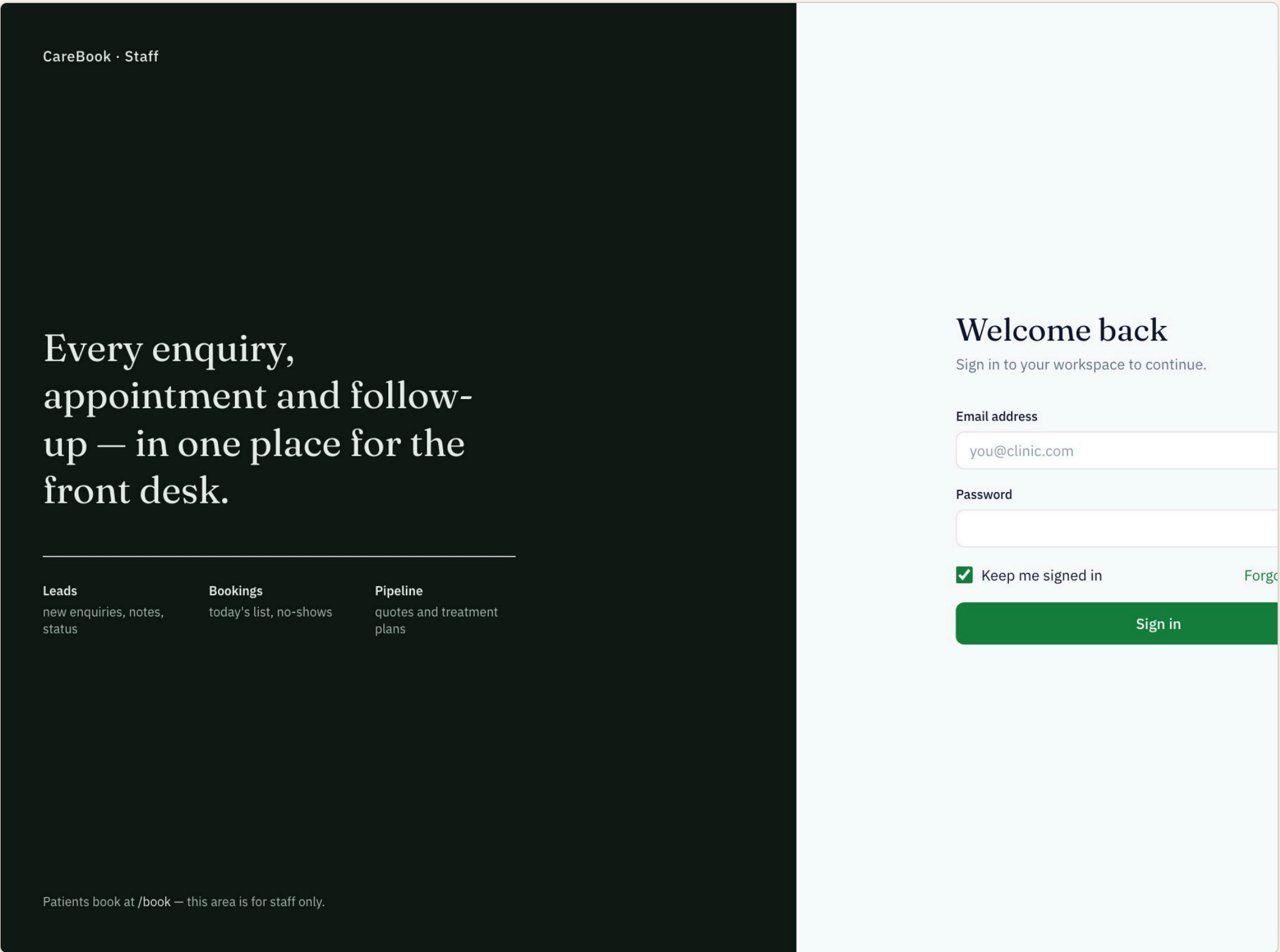
Where the clinic team works: every enquiry, appointment and follow-up, with dashboards, roles and a full audit trail. Staff-only, behind a login.

SIGN IN

Staff only, *by invitation.*

The CRM lives at /crm and is reached from "Staff login" in the website footer.

- 1 Only invited team members get access. A public sign-up sees nothing.
- 2 Forgot password sends a secure reset email.
- 3 Every sign-in is recorded in the activity log.



CRM login.

DASHBOARD

The day *at a glance*.

The first screen after signing in.

- 1

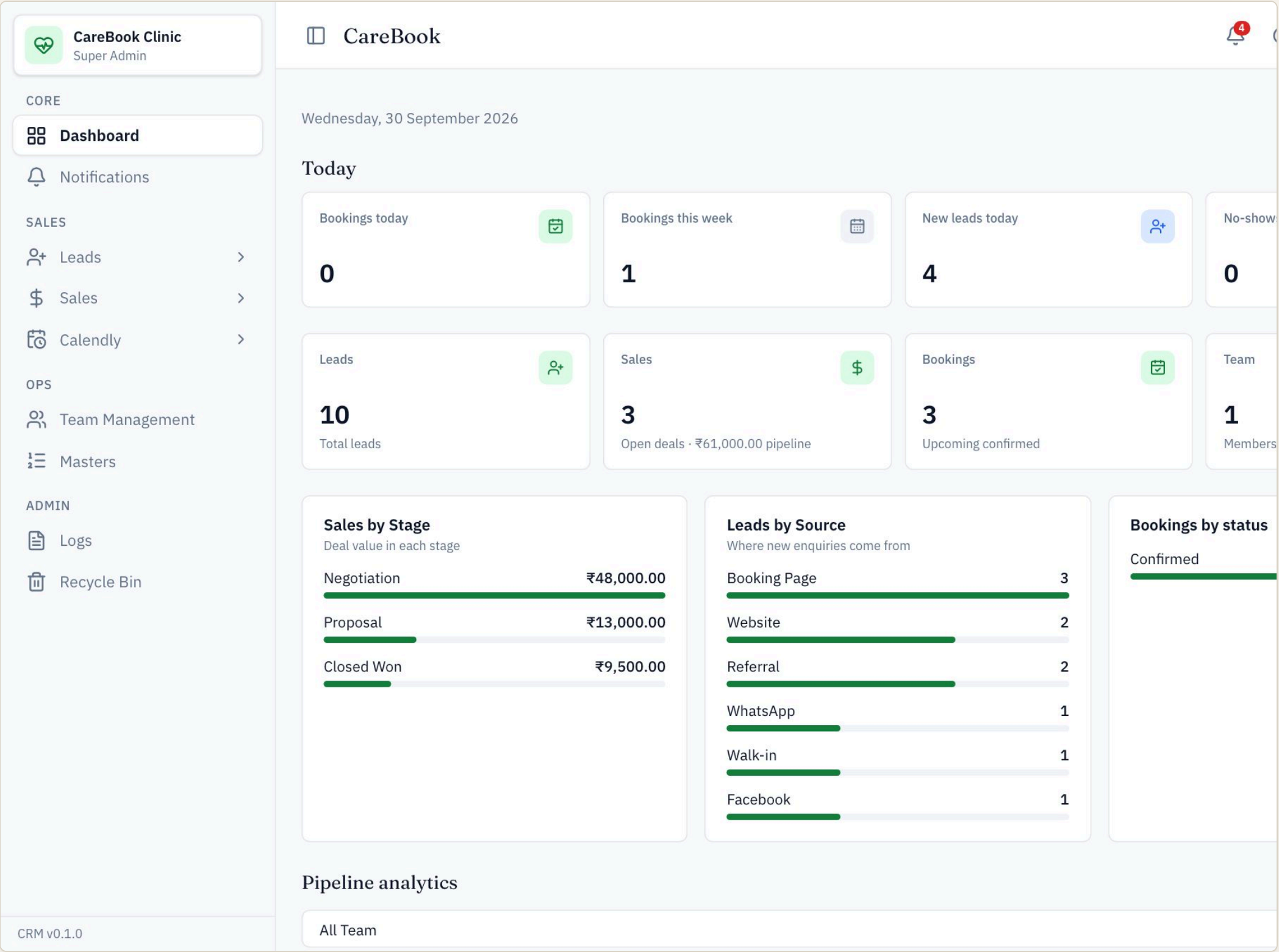
Today : bookings today and this week, new leads, no-shows.
- 2

Totals : leads, open deals with pipeline value in ₹, upcoming bookings, team size.
- 3

Breakdowns : deals by stage, where leads come from, bookings by status.
- 4

Customize changes which widgets appear.

Screens in this section show sample patients created for this walkthrough.



Main dashboard. "Leads by Source" shows the Booking Page is already the top source.

LEADS

Every patient enquiry, *in one list.*

Filter by status, source, category, country, tag or date. Search by name, phone or email. Switch between table, list, grid and Kanban. Import from CSV and export anytime.

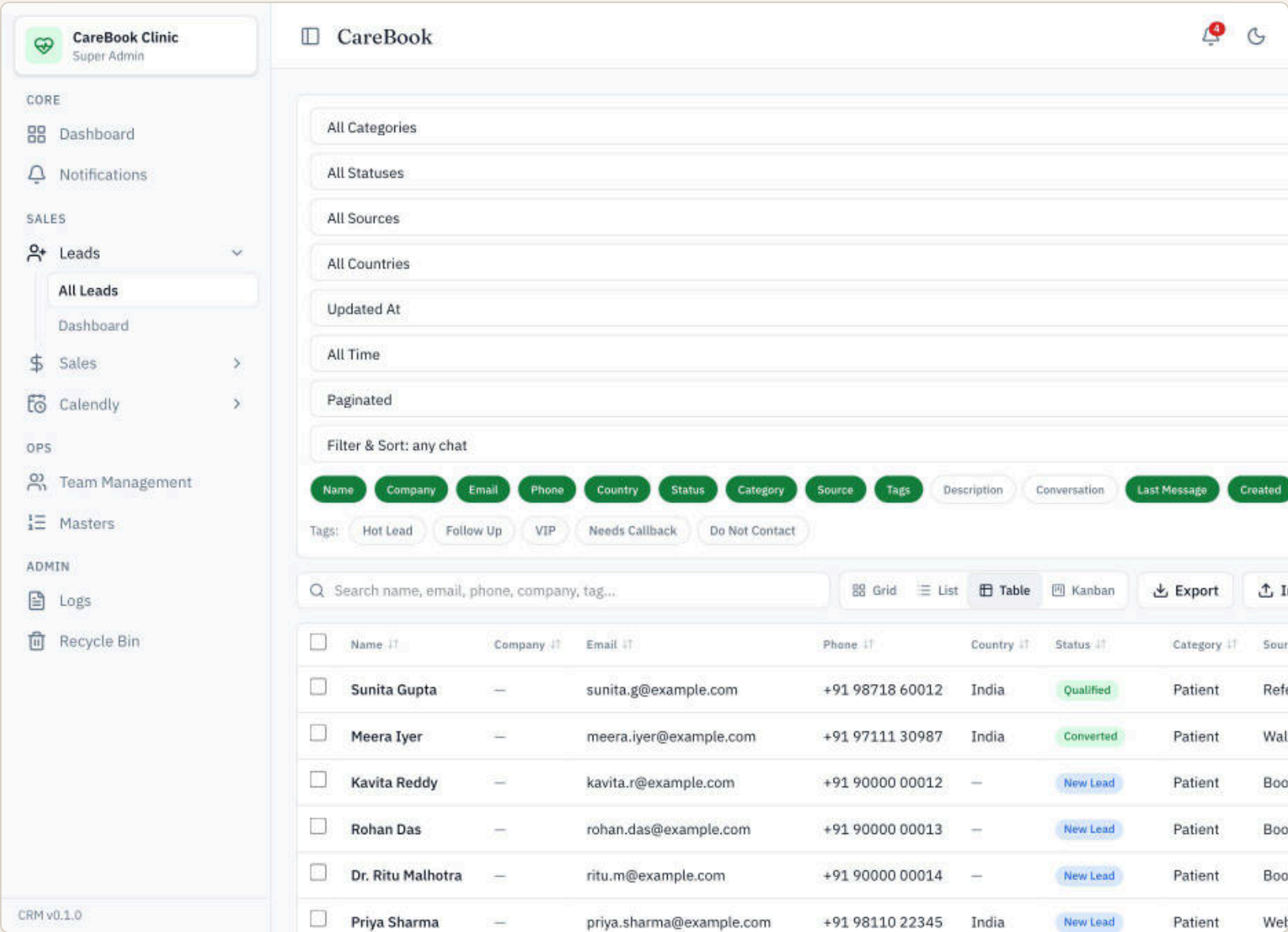
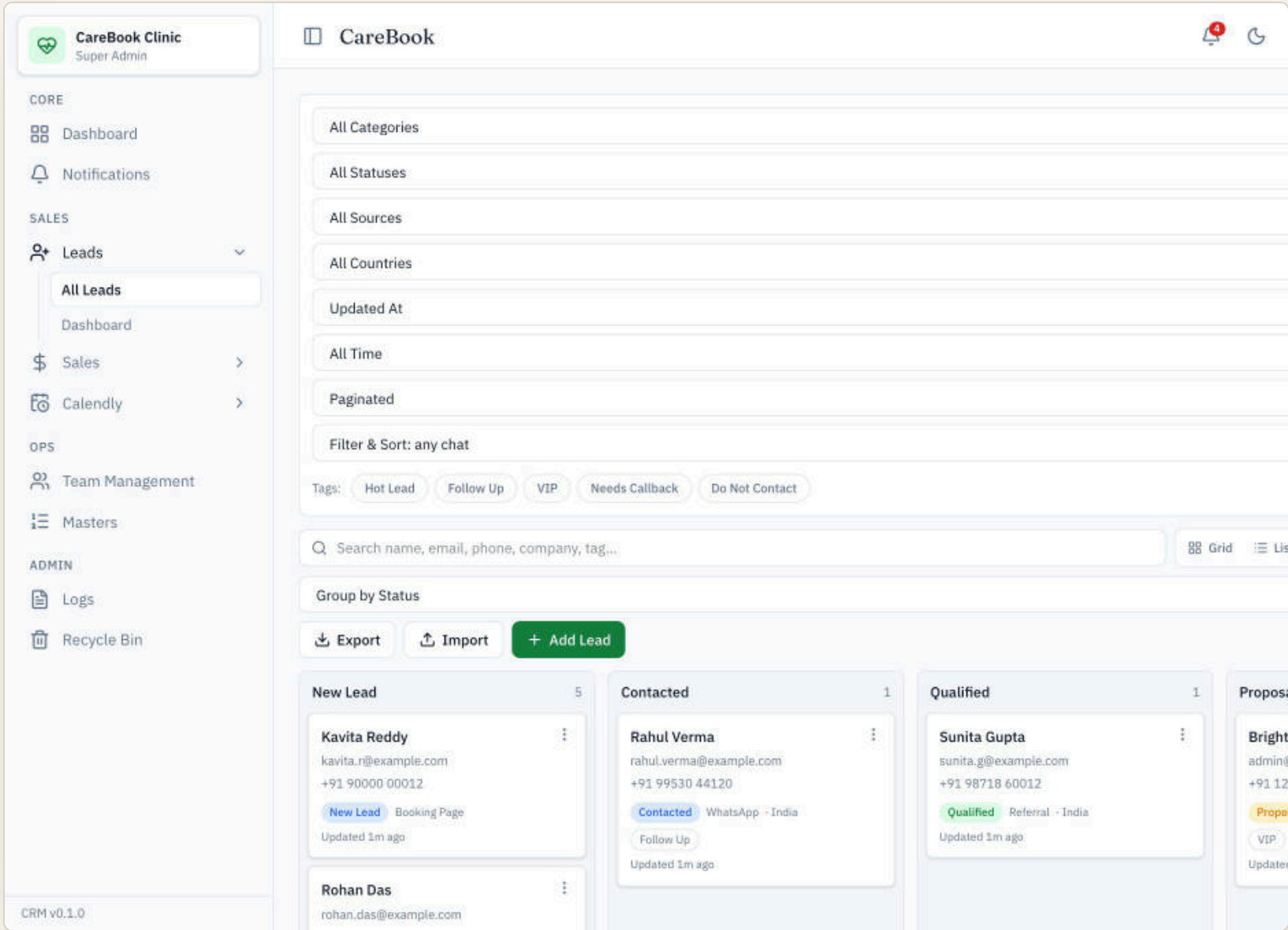


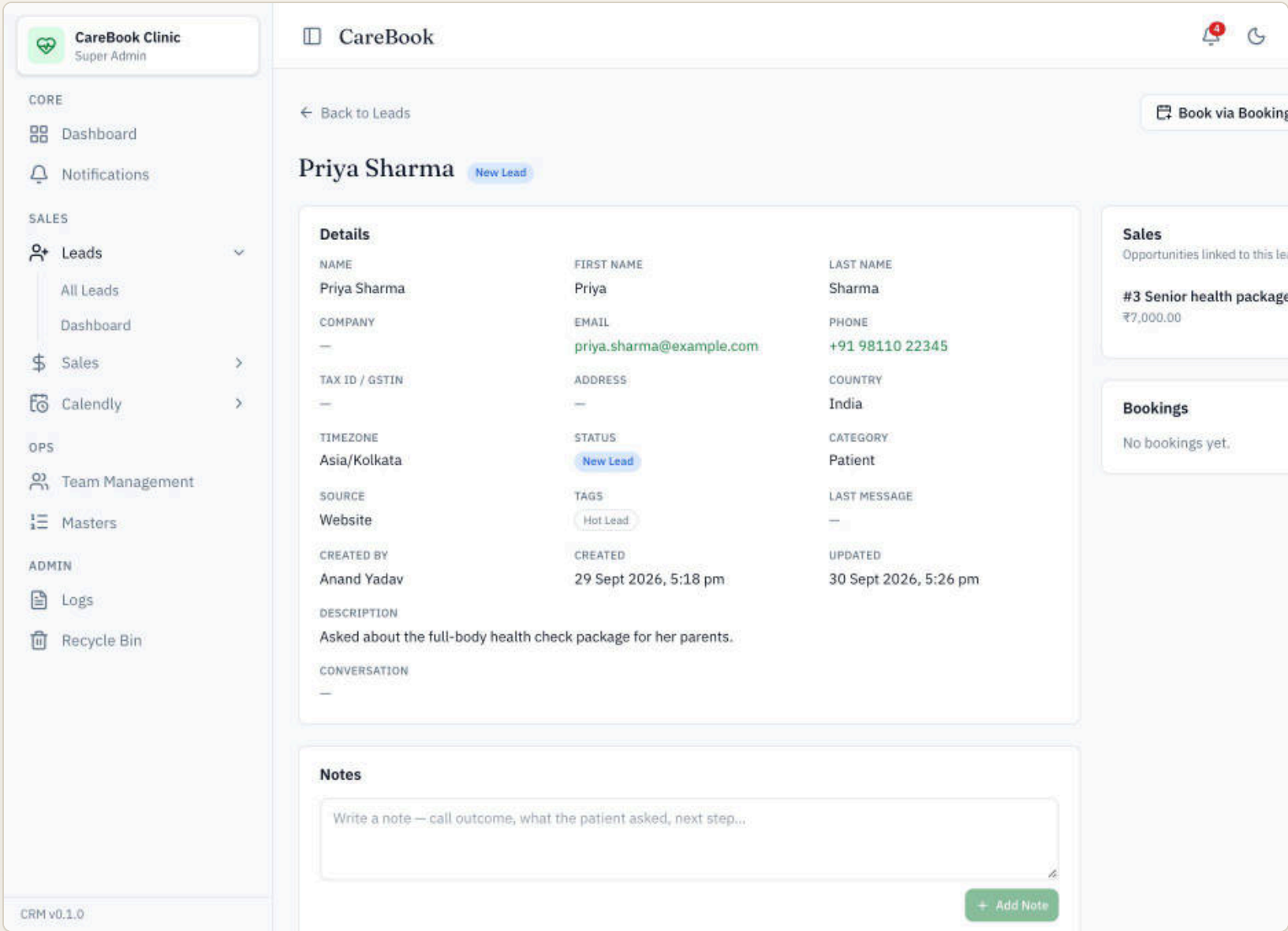
Table view. Choose which columns to show with the green toggles.



Kanban view. Drag a card from "New Lead" to "Contacted" to "Qualified" to update its status.

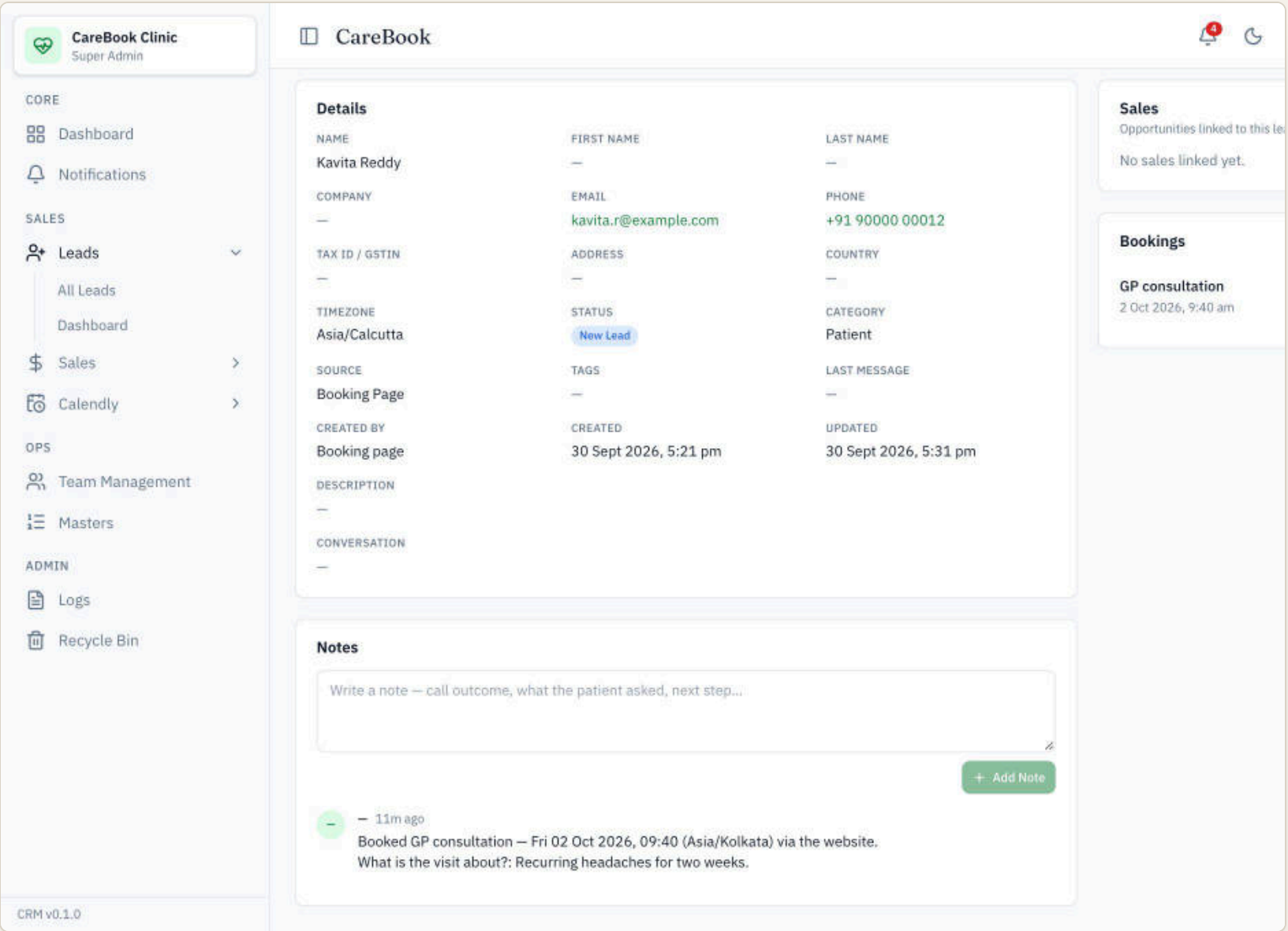
LEAD RECORD

The full story *of one patient.*



Manually added lead. A deal (Senior health package) is linked on the right.

Contact details, status and tags, linked deals and bookings, and a running notes timeline. "Book via Booking Page" opens the booking form pre-linked to this patient.

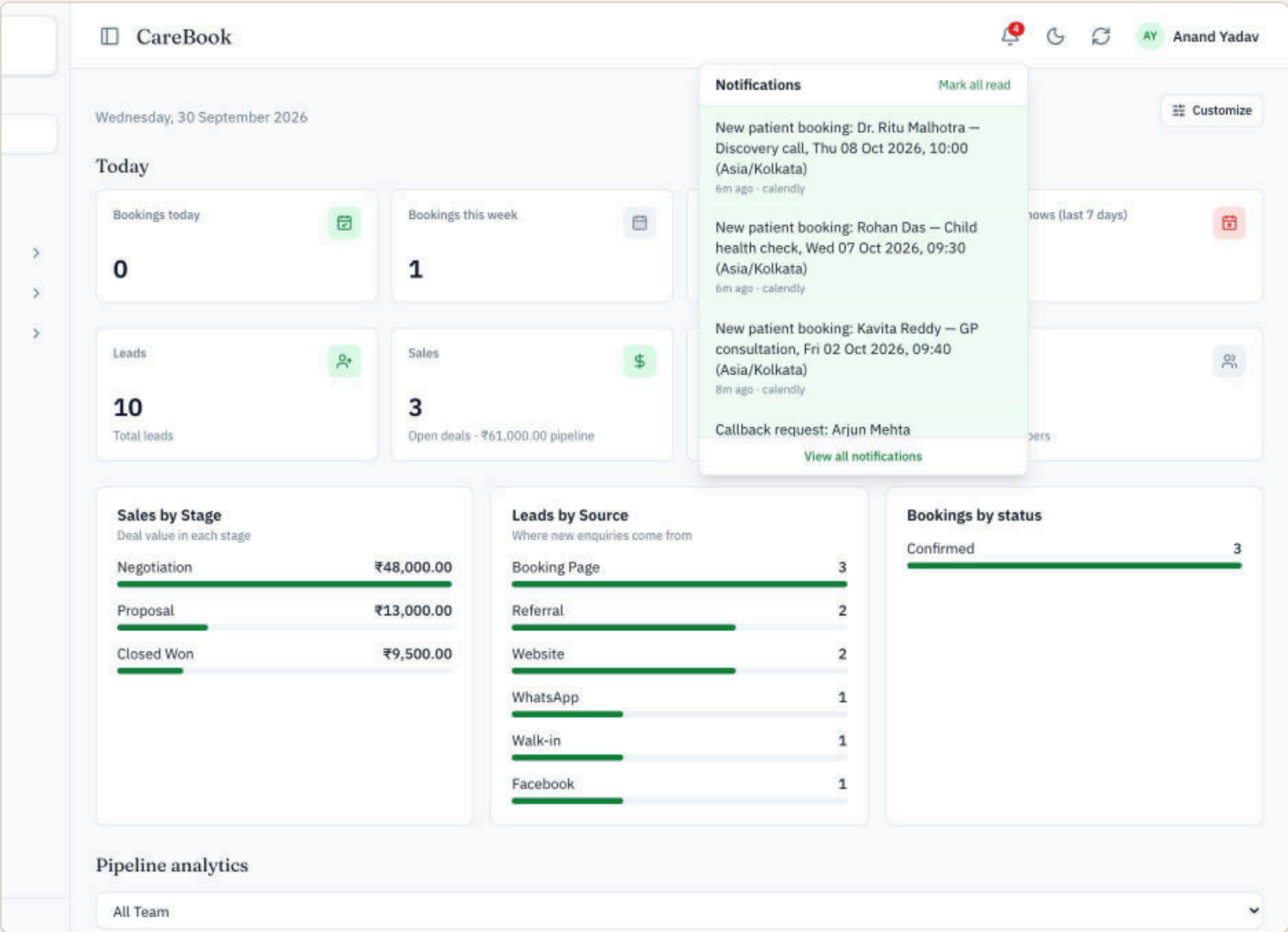


Created by a website booking. Source "Booking Page", booking linked, and an automatic note: service, time and the patient's answers.

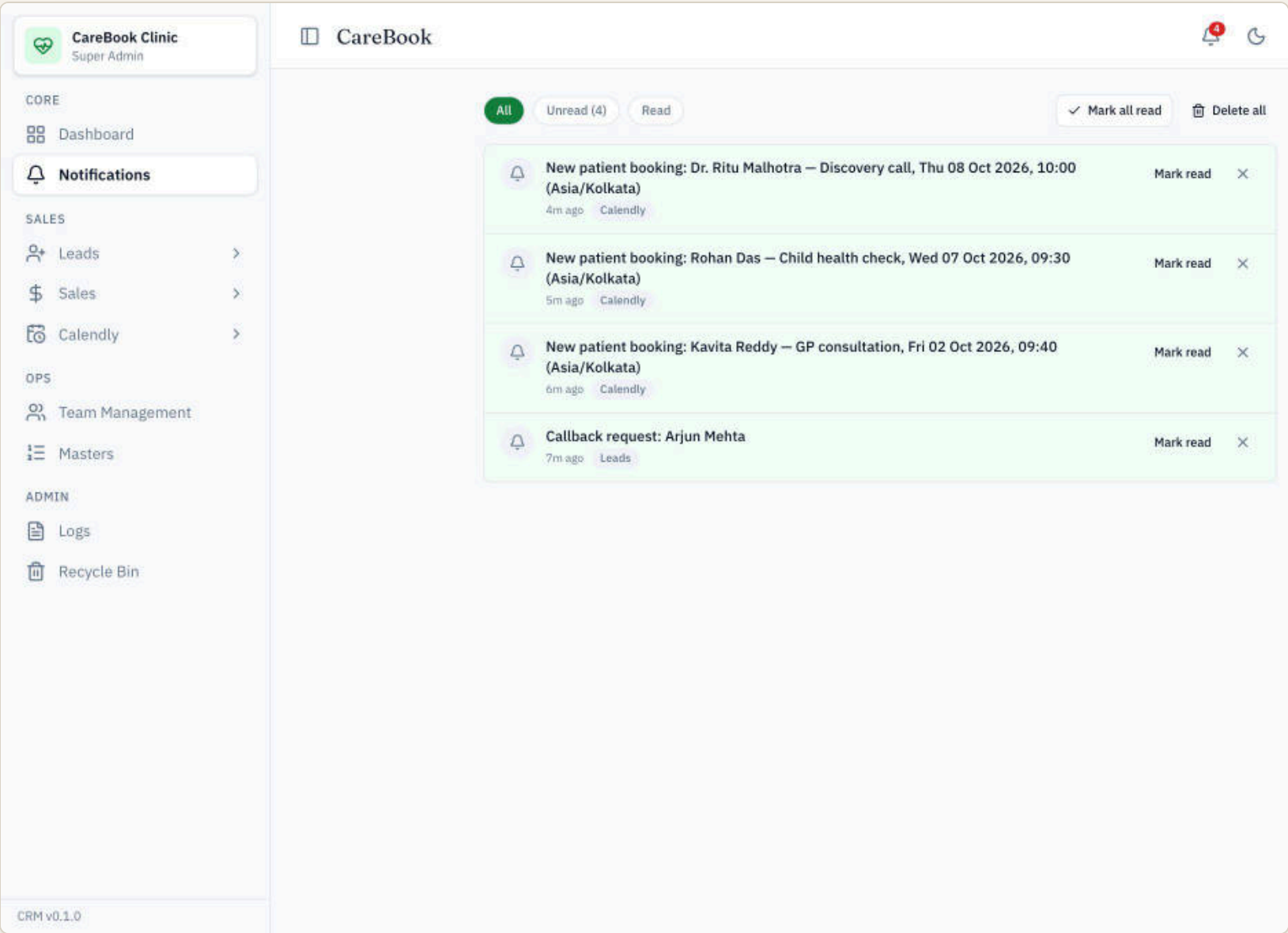
NOTIFICATIONS

The team hears about it *straight away.*

The bell shows new bookings, cancellations, callback requests and deals assigned to you. Each one links straight to the patient. Mark as read or clear.



Bell drop-down. Three website bookings and a callback request.



Notifications page. Filter by all, unread or read.

LEADS DASHBOARD

Where patients
come from.

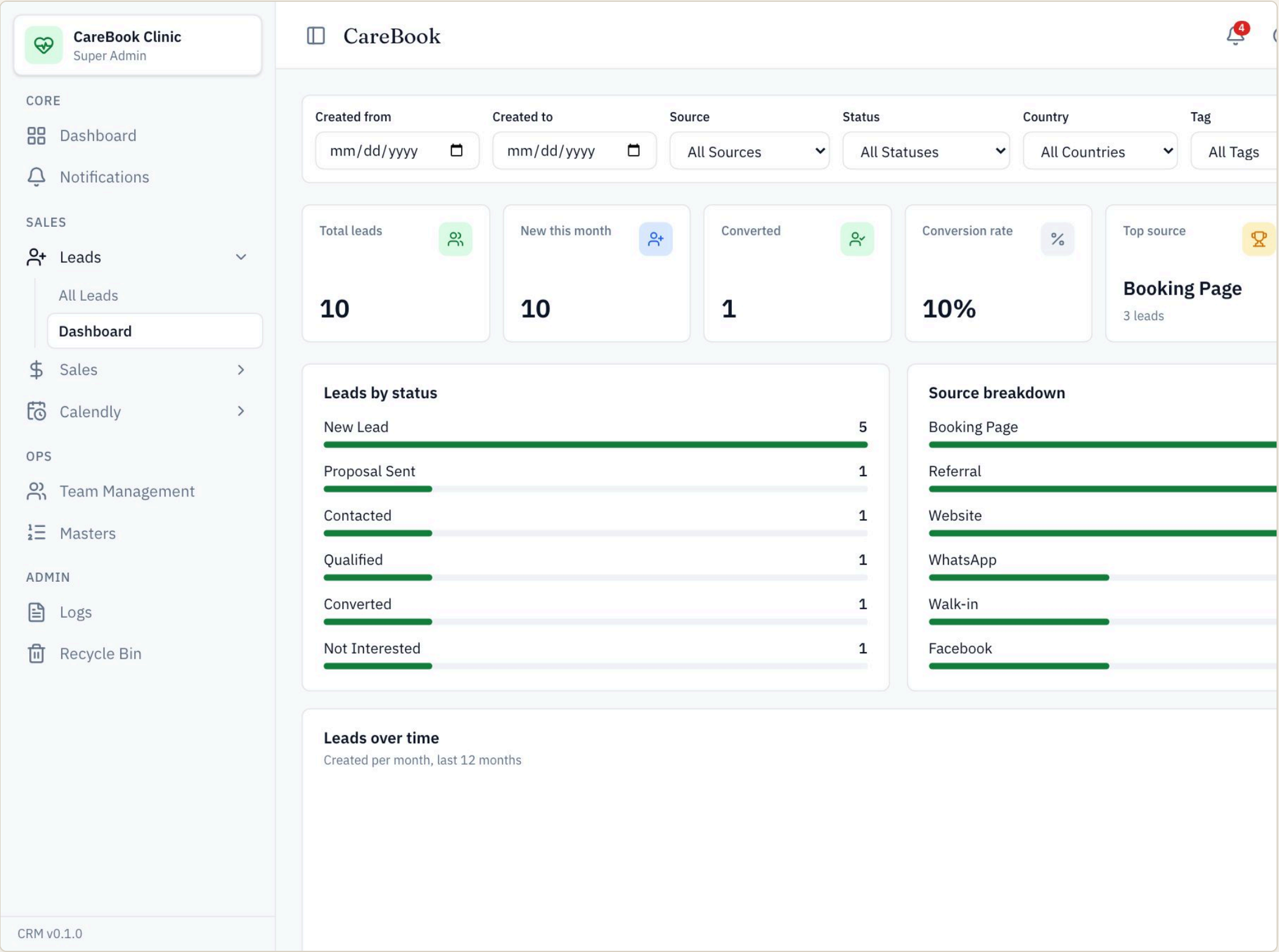
A focused report on enquiries.

- 1

Totals : all leads, new this month, converted, conversion rate, top source.
- 2

Leads by status and by source , so you can see which channel works.
- 3

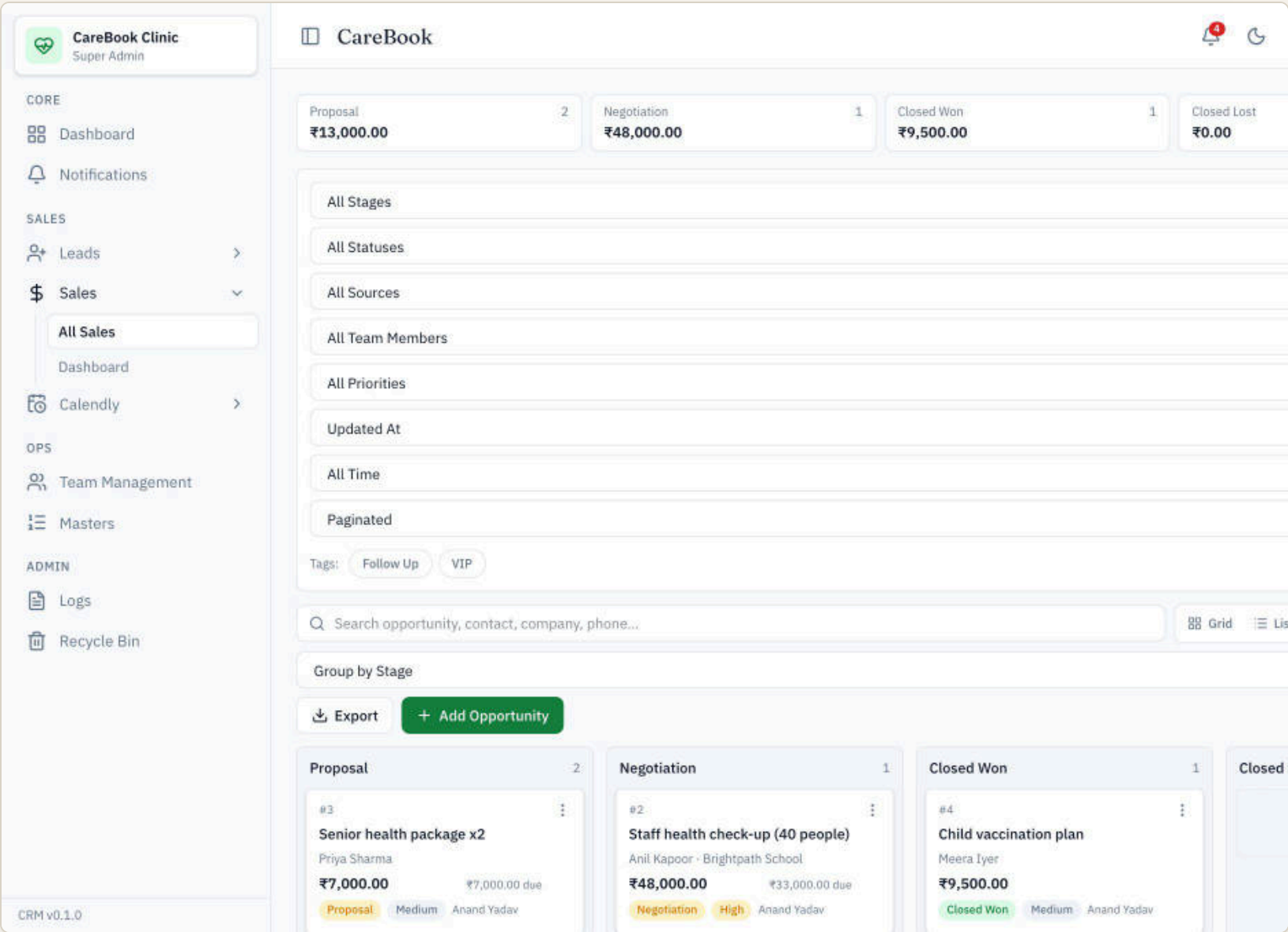
Leads over time by month, filterable by date, source, status, country and tag.



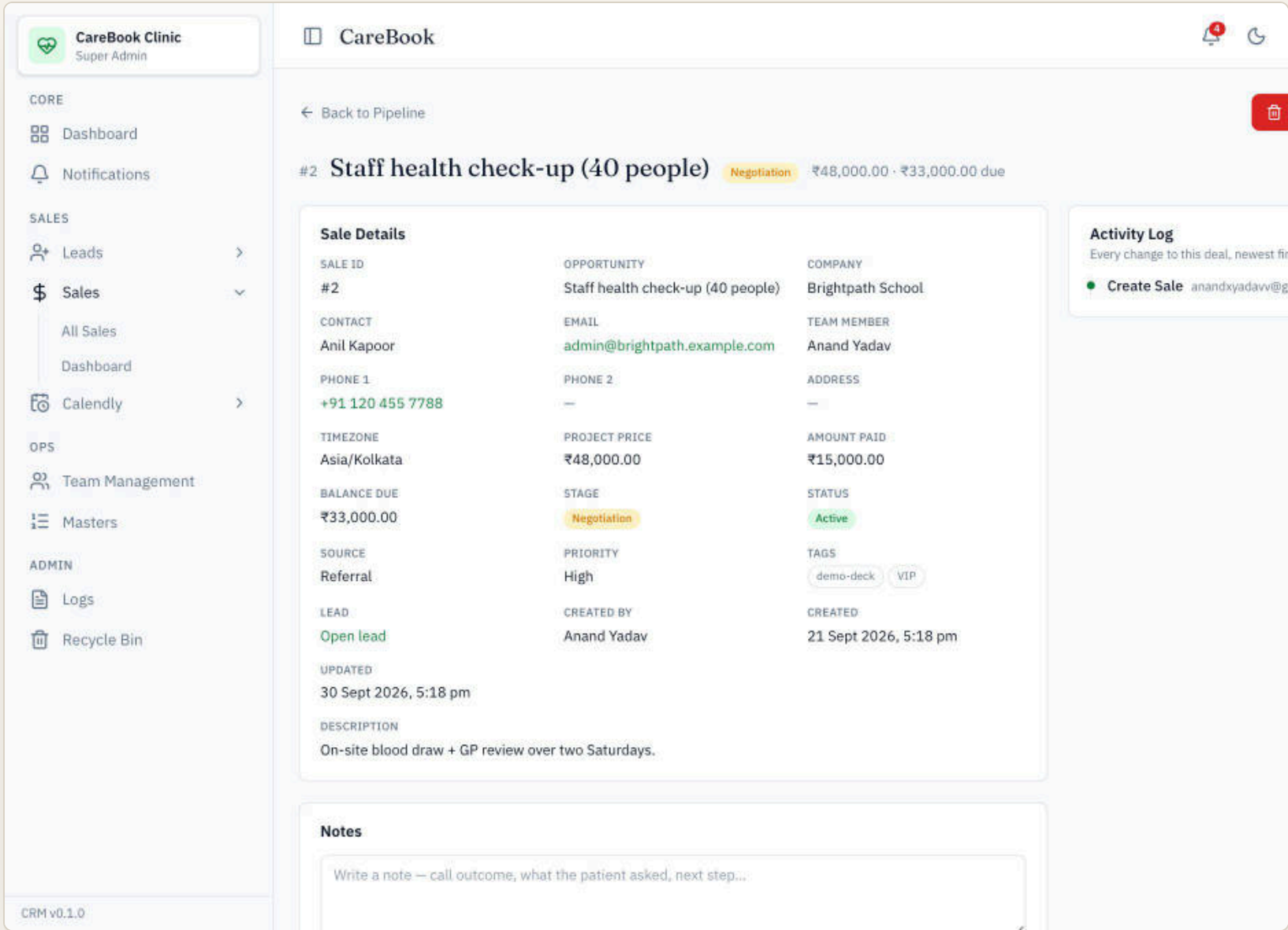
Leads dashboard.

Packages and contracts, *tracked to payment.*

A "sale" is any paid opportunity: a family health package, a corporate check-up, a care plan. Each deal has a price, amount paid, balance due, stage, priority and owner.



Pipeline (Kanban). Proposal → Negotiation → Closed Won / Lost, with ₹ totals per stage.



Deal record. A corporate staff check-up: ₹48,000 value, ₹15,000 paid, ₹33,000 due, with its own activity log.

Revenue, *without a spreadsheet.*

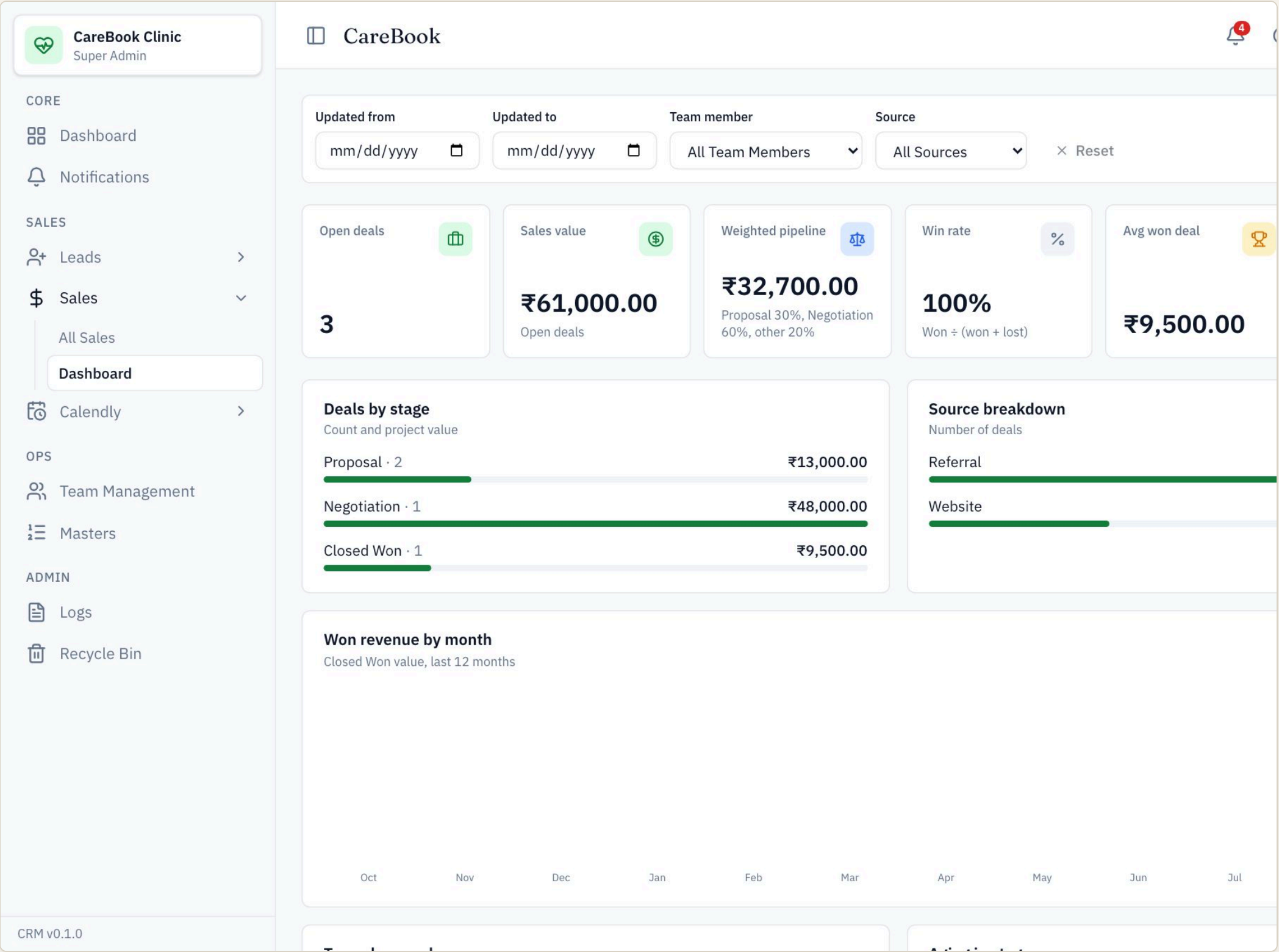
Open deals, pipeline value, weighted pipeline (value × chance of closing), win rate, average deal size and deals closed this month.

- 1

Deals by stage in ₹.
- 2

Won revenue by month over the last 12 months.
- 3

Filter by team member to see each person's pipeline.



Sales dashboard.

BOOKINGS

Every appointment, *every status.*

All appointments from the website and the CRM. Filter by status (Confirmed, Attended, Pending payment, Cancelled, No-show), tag or date. Mark attended or no-show from the row menu.

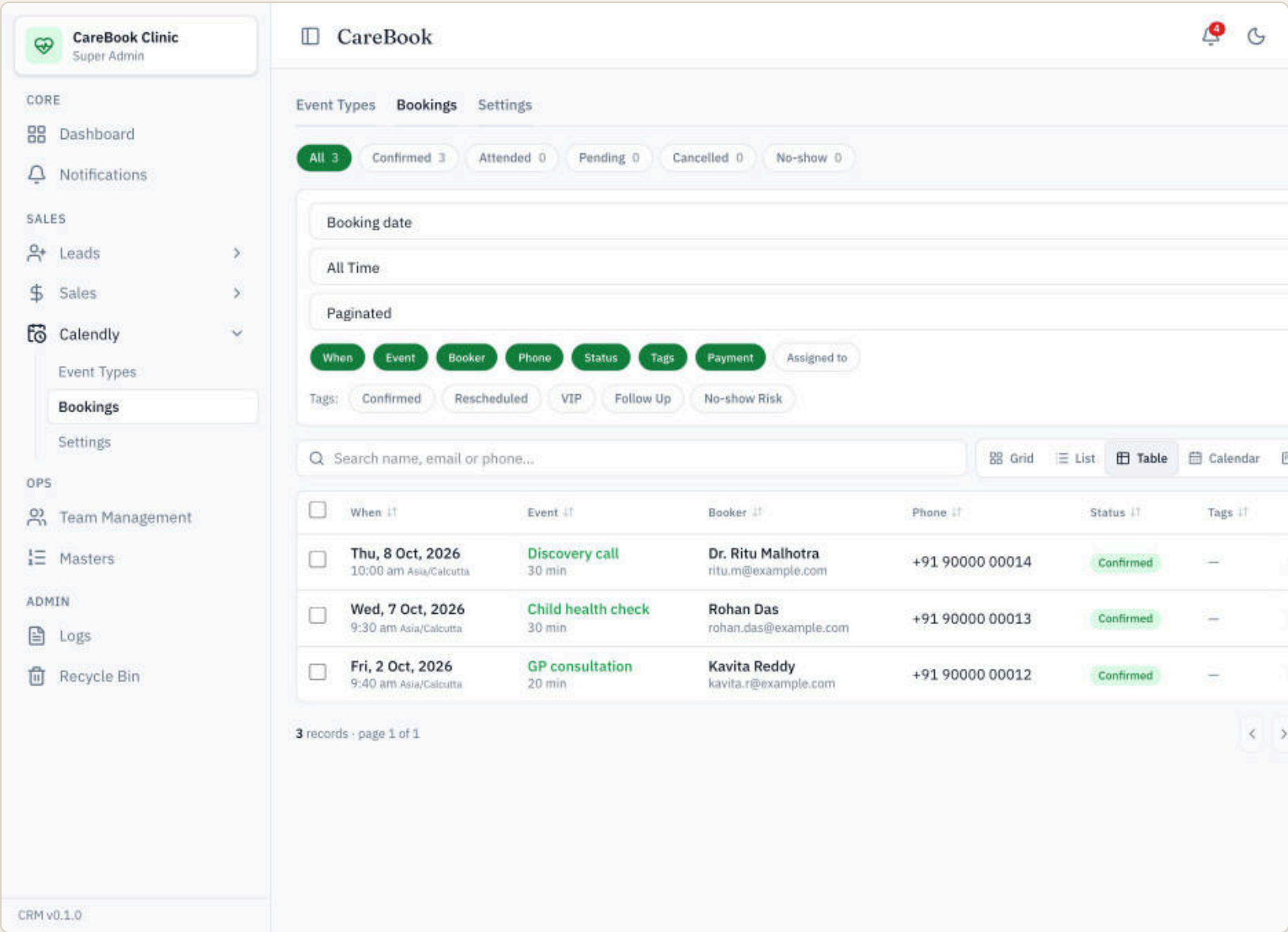
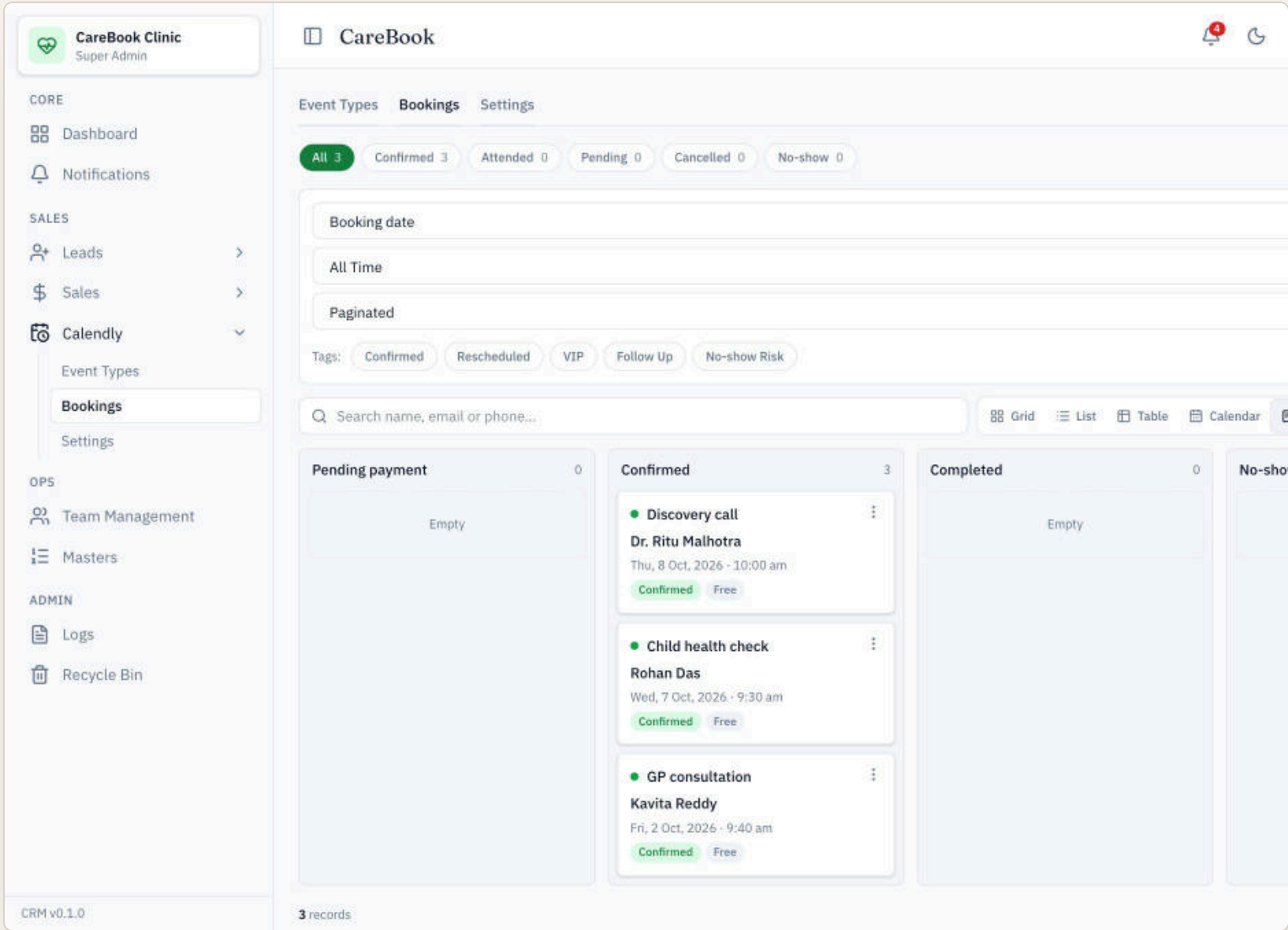


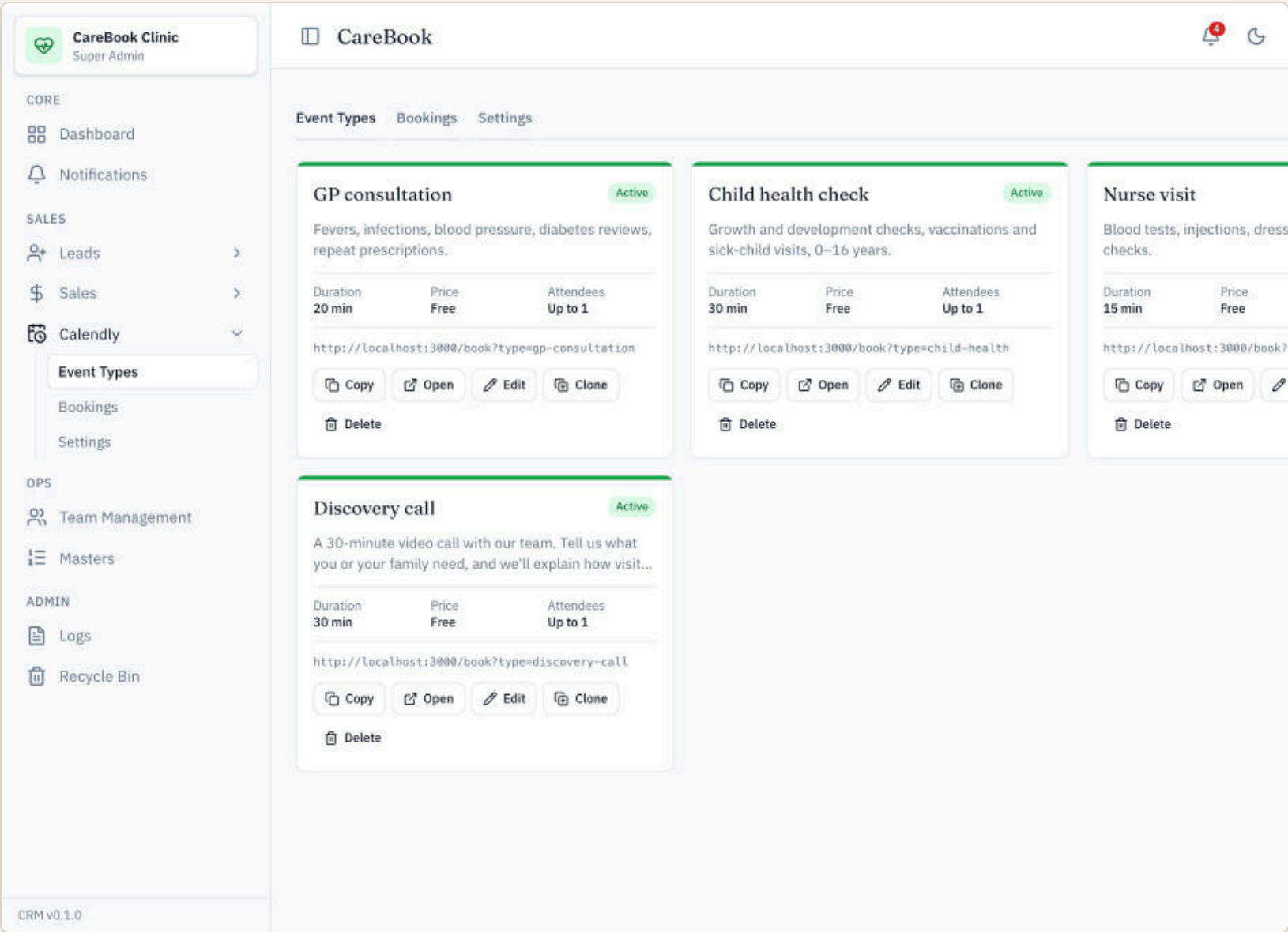
Table view. The three bookings made on the website earlier in this walkthrough.



Kanban view. Move an appointment from Confirmed to Completed or No-show.

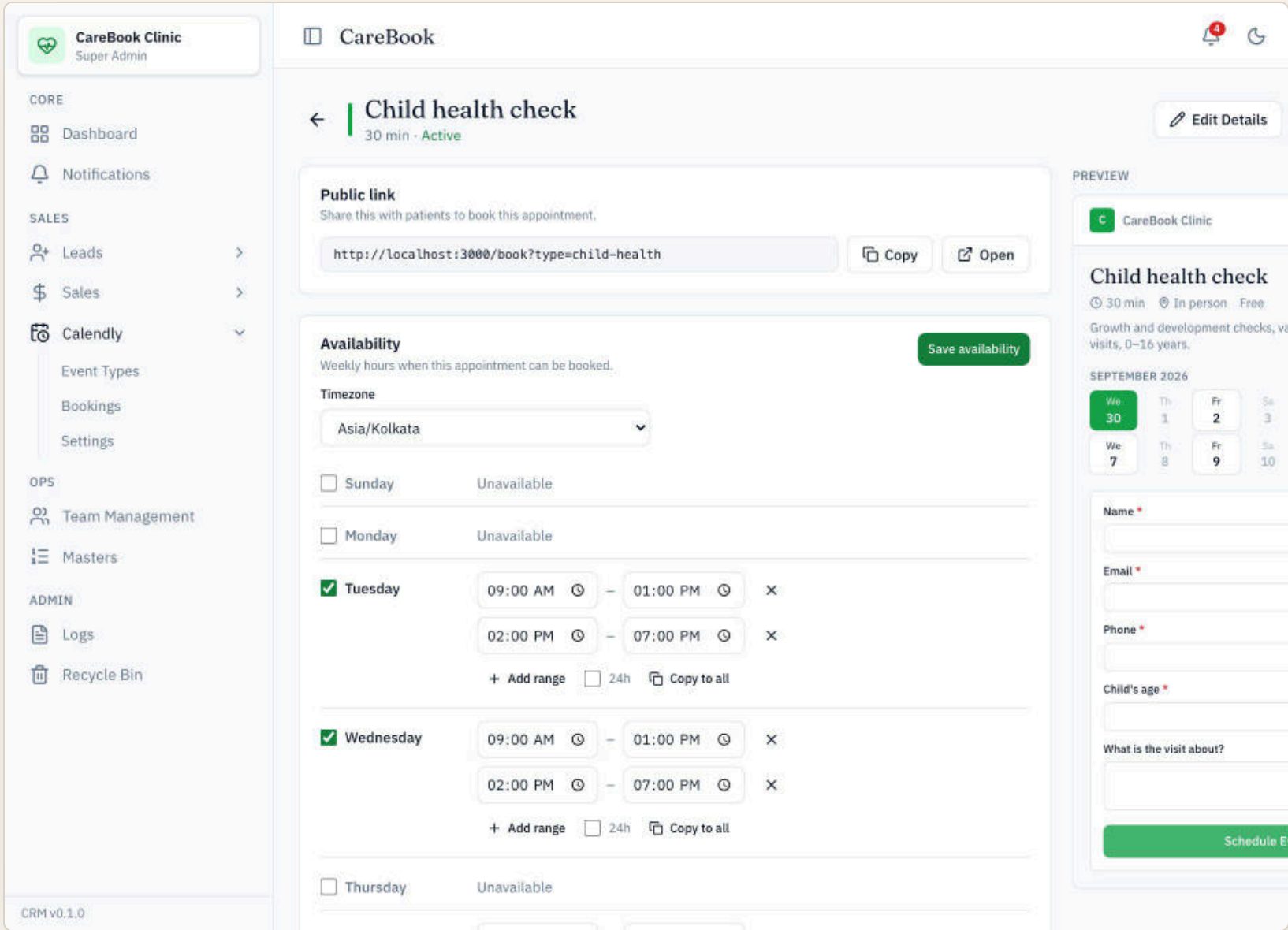
EVENT TYPES (SERVICES)

You control *what's bookable, and when.*



All services. Copy a service's public link, open, edit, clone or deactivate it.

Each service is an "event type": length, price, location (clinic, phone or video), weekly hours, buffers, minimum notice, daily limit and the questions patients answer. Changes go live on the website immediately.



Service editor. Weekly availability on the left, a live preview of the patient's booking form on the right.

BOOKING SETTINGS

Your name, *your booking page.*

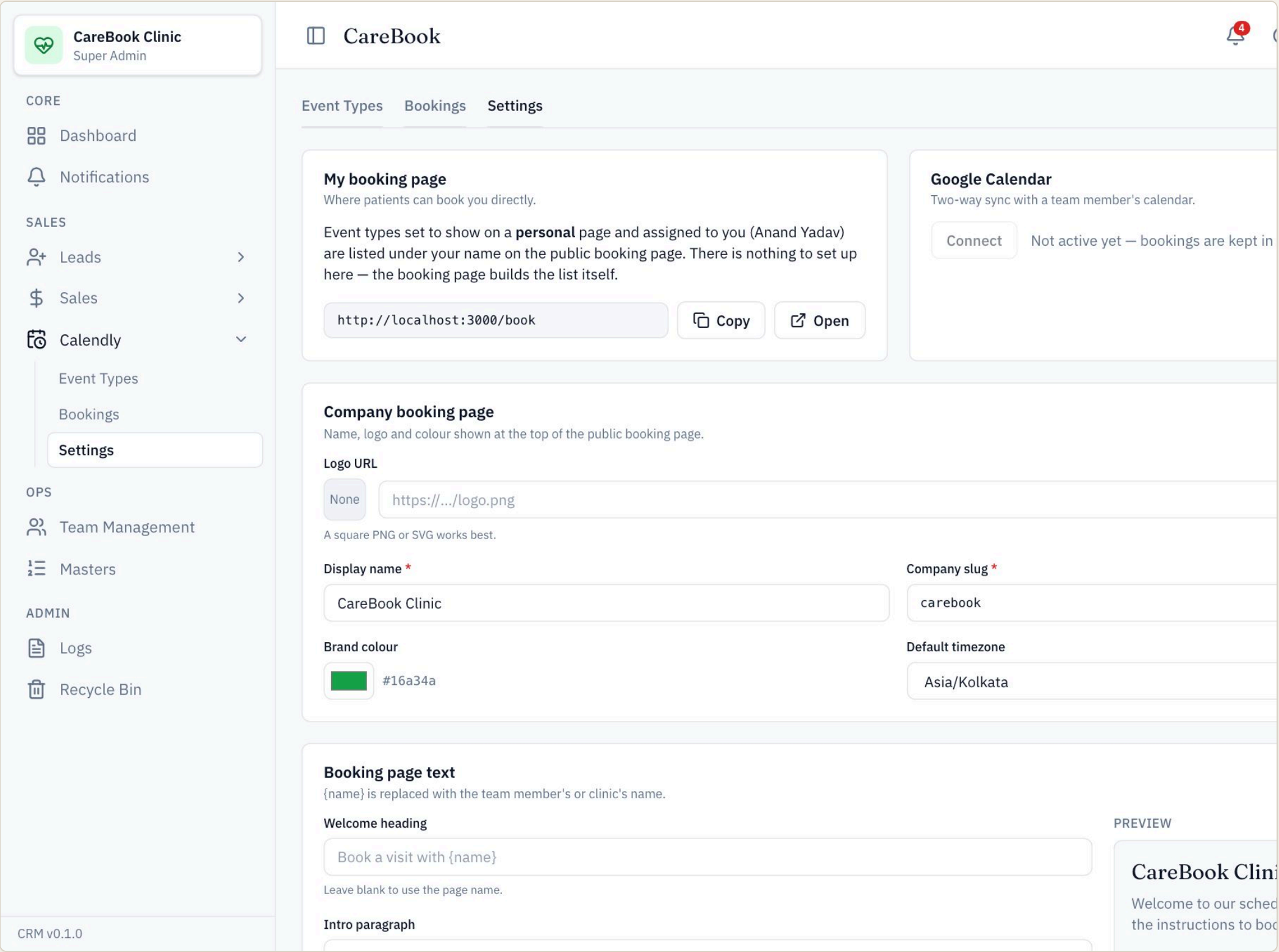
Clinic-wide settings for the booking pages.

- 1

Display name, logo, brand colour and default time zone (Asia/Kolkata).
- 2

Welcome heading and intro text , with a live preview.
- 3

Personal booking page for each staff member, and a Google Calendar connection slot for later.

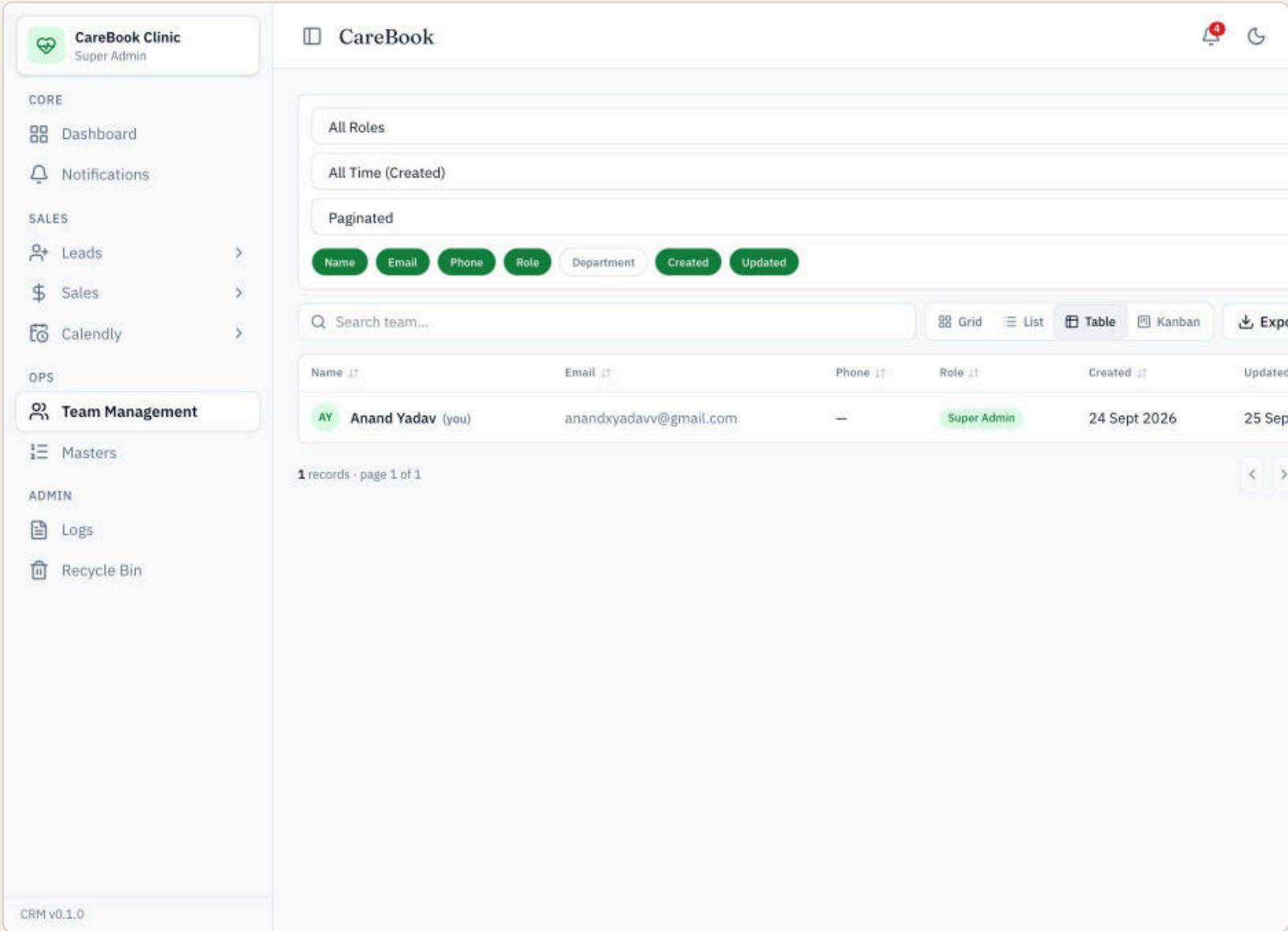


Calendly → Settings.

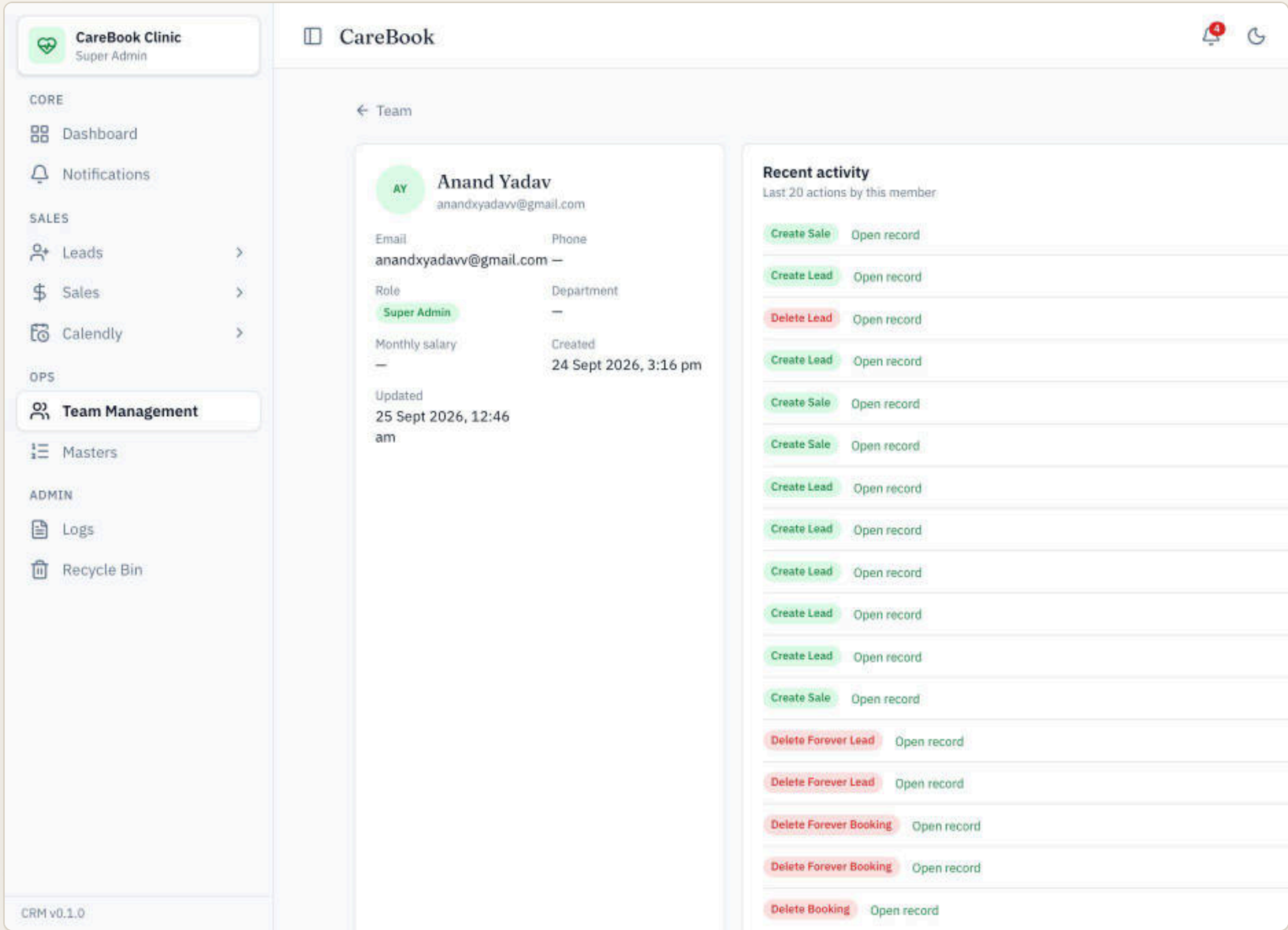
TEAM MANAGEMENT

Who can see *and do what*.

Add staff by email and give them a role: Super Admin, Admin or Member.
Only admins can delete records or change roles. Each person's page shows what they have recently done in the system.



Team list. "Add Member" gives a new person access.



Team member. Role, department and a feed of their recent activity.

MASTERS

Your own words *in every drop-down.*

All the pick-lists in the CRM are editable without a developer.

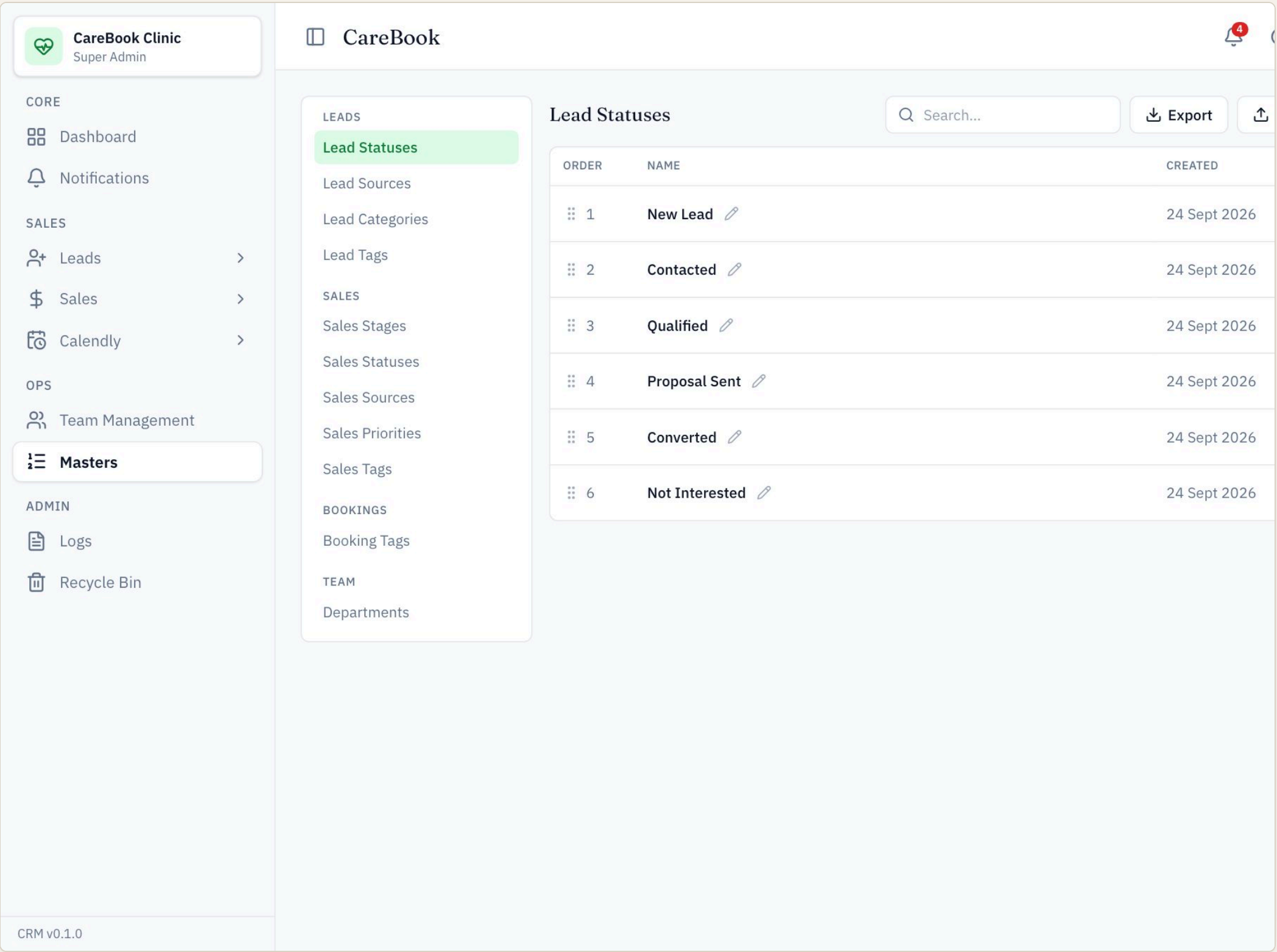
- 1

Leads : statuses, sources, categories, tags.
- 2

Sales : stages, statuses, sources, priorities, tags.
- 3

Bookings and team : booking tags, departments.
- 4

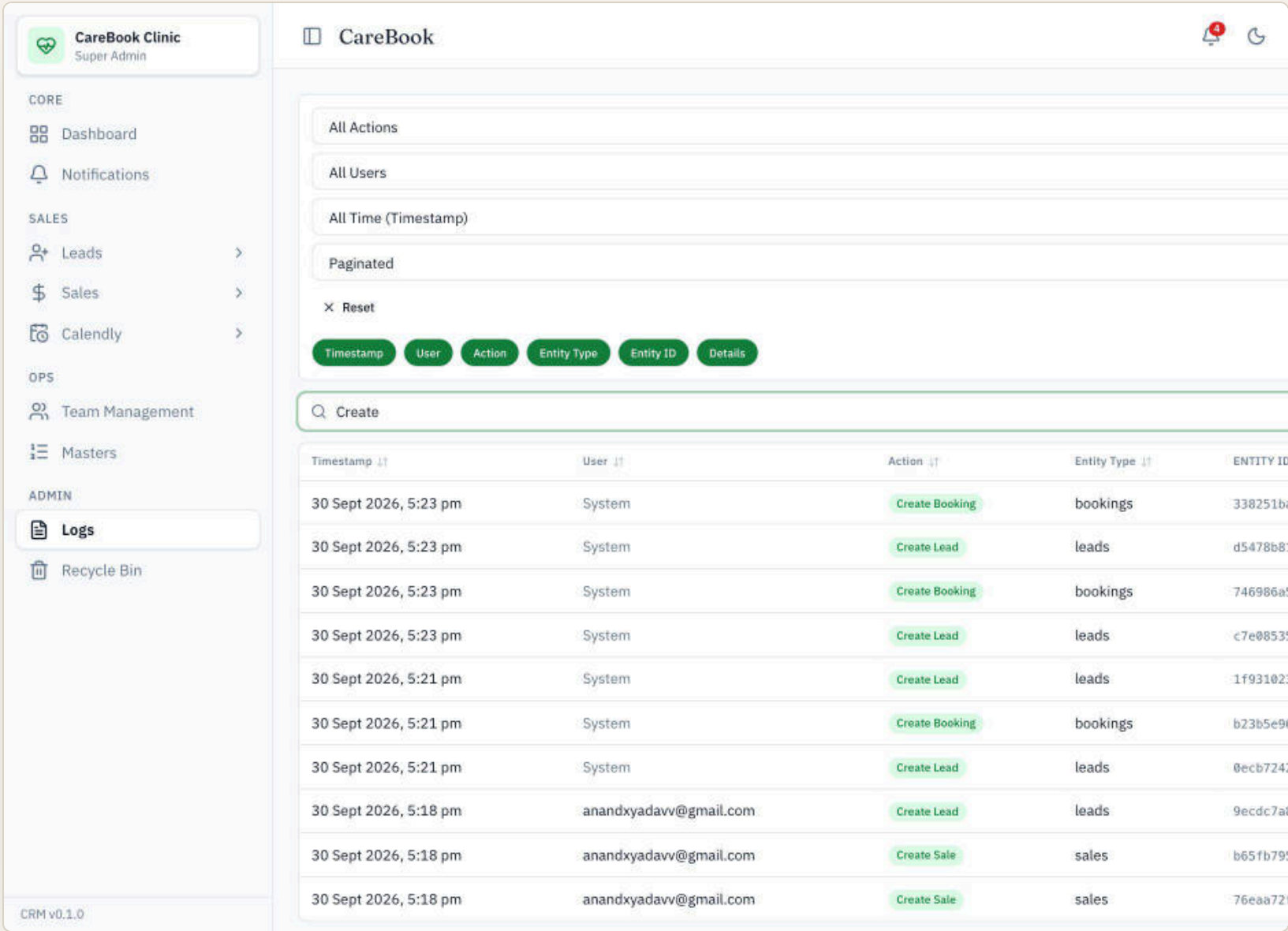
Rename, reorder, add or remove , or import a list from CSV.



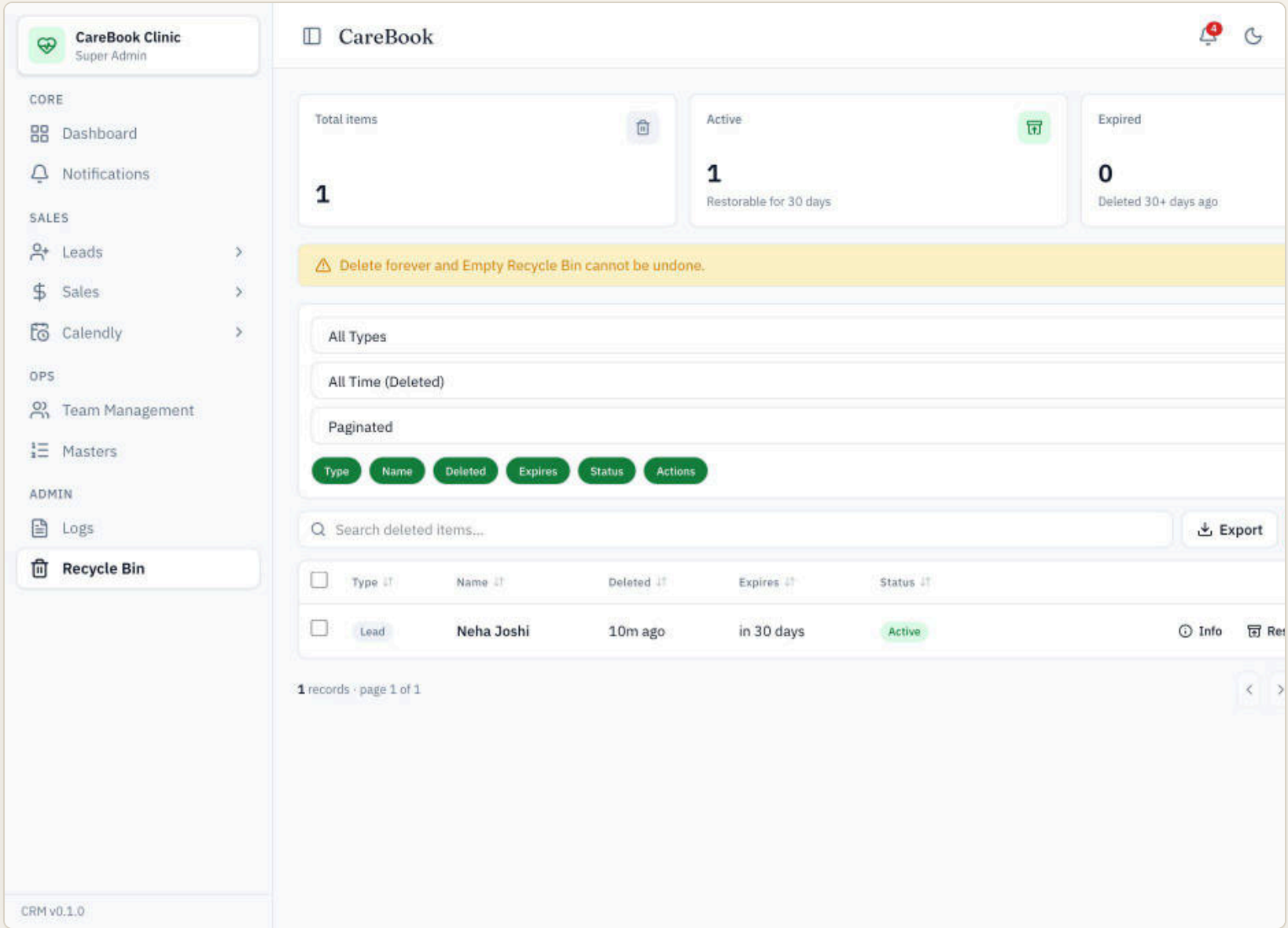
Masters → Lead Statuses.

Nothing is lost, *nothing is hidden.*

Every create, edit, delete and sign-in is logged with who, when and what changed. Deleted records go to a recycle bin for 30 days and can be restored. Only admins can delete.



Activity log. "System" entries are bookings and leads created automatically by the website.



Recycle bin. Restore or delete forever, with days until auto-expiry.

Rules the system *enforces for you.*

No double-booking	Each booking is re-checked and locked at the moment of saving, counting buffers and the doctor's other appointments.
One patient, one record	A new booking or enquiry is matched on the last 10 digits of the mobile number (so "+91 98110 22345" = "9811022345") or on email.
Private patient data	CRM data is readable only by signed-in staff. The website never exposes it, even to someone who has just booked.
Safe deletes	Only admins can delete. Deleted records sit in the recycle bin before removal. Every change is in the log.
Indian defaults	₹ INR, Asia/Kolkata time zone, +91 phone numbers, Indian date format.

BEFORE LAUNCH

What we need *from the clinic.*

The system works end to end. These items are placeholder content, or small steps we'll finish together.

Photos	CONTENT	Real photos of the doctors, reception and rooms, to replace the stock images.
Prices & packages	CONTENT	Confirm consultation fees, package prices and what each package includes.
Patient reviews	CONTENT	Genuine quotes (with permission) for "What patients say". The current ones are samples.
Address & hours	CONTENT	Full street address for the map and directions, and final opening hours.
Video-call links	NEXT STEP	Google Meet links for Discovery calls are sent by staff for now. Automatic sending via WhatsApp/email can be added.

Thank *you.*

Questions, changes or a live demo: we're happy to walk your team through it.

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