Hospital Management System - Step by Step Clickable Guide

MVP Features

- Patient registration (Patient object + basic fields)
- Appointment scheduling (Appointment object + calendar/flow)
- Doctor & Department master data (Doctor, Department objects)
- Admissions/Ward assignment (Admission, Bed/Ward objects)
- Billing invoice (Billing object, basic calculations)
- Basic Lab Test orders & results (LabTest object)
- Reports & Dashboard (appointments, admissions, billing summary)

Key Principles for Minimum Time Delivery

- Parallelize admin + developer tasks.
- Use declarative tools (Flow, Page Layouts, Record Types).
- Reuse standard objects where possible.
- Import test data early for validation.
- Leverage AppExchange / templates for speed.
- Build MVP first and enhance later.

Phase 2 — Org setup & basic security

- Go to Setup → Company Information → Edit details → Save.
- Setup → Business Hours → New → Save.
- Setup → Holidays → New → Save.
- Setup → Users → New User (Admin, Doctor, Receptionist).
- Setup → Profiles → Clone and Save.
- Setup → Permission Sets → New (HMS Power User).
- Setup → Sharing Settings → Set internal access Private → Save.
- Setup → Roles → Add Role (Admin, Doctor, Reception).
- Setup → Login Access Policies as required.

Phase 3 — Data modeling

- Setup → Object Manager → Create custom objects: Patient, Doctor, Department, Appointment, Admission, Ward/Bed, Billing, LabTest, Prescription.
- Create fields (Text, Date, Phone, Picklist).
- Add Lookup/Master-Detail relationships.
- Configure Page Layouts and Record Types.

Phase 4 — Process automation

- Create Record-Triggered Flows for appointment assignment.
- Validation Rule to prevent double-booking.
- Email Alerts for appointment confirmation.

Phase 5 — Developer (Apex)

- Use Developer Console → New → Apex Trigger or Class.
- Add unit tests, bulkify code.

Phase 6 — UI (Lightning App)

- Setup → App Manager → New Lightning App (Hospital).
- Customize Record Pages in Lightning App Builder.
- Add Utility Bar components for quick actions.

Phase 7 — Integrations

- Setup → Remote Site Settings → Add site.
- Setup → Named Credentials → Add lab system.
- Create Platform Event for lab results.

Phase 8 — Data Management

- Use Data Import Wizard for Patients.
- Use Data Loader for bulk operations.
- Setup Outbound Change Sets for deployment.

Phase 9 — Reports & Dashboards

- App Launcher → Reports → New Report (Appointments, Patients).
- App Launcher → Dashboards → New Dashboard.
- Configure charts and save.

Phase 10 — Final Demo & Handoff

- Prepare demo script (Patient → Appointment → Admit → Bill → Dashboard).
- Document objects, flows, permissions.
- Deploy and handoff.

Quick MVP Checklist

- Admin: Setup org, users, objects, flows, reports, dashboards, data import.
- Developer: Apex triggers, classes, LWC if needed, integrations.
- Lead: Prioritize MVP, run UAT, feedback.