



# HOSPITAL MANAGEMENT SYSTEM

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# **Purpose of the Document**

The purpose of this document is to identify the business requirements for the project Hospital Management Application. This document also provides the proposed solution for the same.

## **Project Requirement**

- 1.1 Finding Doctors
- 1.2 Booking Appointment
- 1.3 Patient registration
- 1.4 Department and Specialties
- 1.5 Medical test and reports
- 1.6 patient testimonials

## **PROJECT FUNCTIONAL AND TECHNICAL DETAILS**

**Scenario 1 :**create below custom objects and fields with various data types and relationship.

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# List of Custom Objects

## Doctor

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	First Name	text		
2	Last Name	text		
3	Department	picklist	Neurology , Cardiology , Dermatology , Radiology, Surgery, Orthopedics	
4	Specialty	picklist	Allergy and Immunology , Emergency Medicine , Geriatrics , Infectious Disease, Obstetrics and Gynecology	
5	Email	email		
6	Phone	phone		
7	Doctor id	Auto number		

## Patient

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	First Name	Text		
2	Last Name	Text		
3	Email	Email		
4	Phone	Phone		
5	Address	Text area		
6	Date of Birth	Date		
7	Gender	picklist	Male,female,others	
8	Patient id	Auto number		

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## Appointment

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	Patient			lookup to Patient
2	Doctor			lookup to doctor
3	Date/Time	datetime		
4	Duration	number		
5	Reason	Text area		
6	Appointment id	Auto number		
7	Appointment status	picklist	Approved ,declined ,pending	

## Department

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	Department Name	text		
2	Doctor name	text		Lookup to doctor

## Medical Test Report

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	name	Auto number		

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<b>2</b>	<b>Report cost</b>	<b>currency</b>		
<b>3</b>	<b>Test type</b>	<b>picklist</b>	<b>Blood,sugar,BP,eyes</b>	
<b>4</b>	<b>Test date</b>	<b>date</b>		
<b>5</b>	<b>result</b>	<b>Text area</b>		
<b>6</b>	<b>Doctor</b>			<b>Lookup to doctor</b>
<b>7</b>	<b>Patient</b>			<b>Lookup to patient</b>
<b>8</b>	<b>status</b>	<b>picklist</b>	<b>Test Done, Analyzing Test, Report ready</b>	
<b>9</b>	<b>Report id</b>	<b>Auto number</b>		

## Medical Encounter

SNo	Field Name	Field Types	Default Values / Required	Relationship
<b>1</b>	<b>Patient</b>			<b>lookup to Patient</b>
<b>2</b>	<b>Doctor</b>			<b>lookup to doctor</b>
<b>3</b>	<b>Date</b>	<b>date</b>		
<b>4</b>	<b>Medical test</b>	<b>picklist</b>		
<b>5</b>	<b>Treatment</b>	<b>Text area</b>		
<b>6</b>	<b>prescription</b>	<b>Text area</b>		
<b>7</b>	<b>Medical encounter id</b>	<b>Auto number</b>		

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## Specialty

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	Specialty Name	Text		
2	Doctor name	Text		Lookup to doctor

## BILL

SNo	Field Name	Field Types	Default Values / Required	Relationship
1	Patient Name			Lookup to Patient object
2	Doctor Name			Lookup to Doctor object
3	Treatment Cost	currency		
4	Test Report Cost	currency		Lookup to Medical Test object
5	Doctor Fees	currency		
6	Total Bill Amount	formula		calculates the sum of Treatment

[Type here]

				Cost, Test Report Cost, and Doctors Fees Cost
7	Bill Number	Auto number		
8	Bill Date	Date		
9	Payment Status	picklist	Paid,unpaid	
10	Payment Date	Date		
12	Notes	Long Text Area		
13	Bill id	Auto number		

**Scenario 2:** create below profiles.

Doctor

Patient

Bill manager

Lab staff

**Scenario 3 :**create 4 users.

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## VALIDATION RULE

### Scenario 3: -

Create a Validation Rule to Validate that the Email Address is in right format.

1. First Go to Patient Object.
2. Go To Validation Rule
3. Click On New
4. Rule Name – Email Address Validation
5. Tick the active Checkbox
6. NOT (REGEX( Email\_ID\_c , "[a-zA-Z0-9.\_%+-] +@[a-zA-Z0-9.-] +. [a-zA-Z] {2,}") ) W

Write This Code in the Error Condition Formula Section (Match the Field name according to your field names)

7. Error Message – Email ID Should Be in Correct Format

### Scenario 4: -

Create a Validation rule to Ensure that the Date OF Birth of the patient Is not a future Date

1. First Go to Patient Object.
2. Go To Validation Rule

3. Click On New
4. Rule Name – DOB Validation

5. Tick the active Checkbox
6. AND(  
    NOT(ISBLANK(Date\_of\_Birth\_\_c)),  
    Date\_of\_Birth\_\_c > TODAY ()  
)

Write This Code in the Error Condition Formula Section  
(Match the Field name according to your field names)

7. Error Message – Give Correct Date of Birth

## Scenario 5: -

C. Create a Validation rule to Ensure that the Date OF Appointment is a Future Date.

1. First Go to Patient Object.
2. Go To Validation Rule
3. Click On New
4. Rule Name – Date of Appointment Validation
5. Tick the active Checkbox
6. Date\_Time\_\_c < NOW ()

Write This Code in the Error Condition Formula Section (Match the Field name according to your field names)

7. Error Message – Select Correct date of Appointment.

## Scenario 6: -

### OWD SETTINGS

1. Go to Setup
2. In the Quick Find box type Sharing setting
3. Click on Edit
4. Change Default Internal Settings to Public Read Only  
for All the Objects Needed in our Project (**Doctor, Patient, Appointment, Department, Specialty, Medical Test Report, Medical Encounter, Bill**)

### PERMISSION SETS

## Scenario 7: -

### DOCTOR PROFILE PERMISSIONS: -

1. Go to Setup
2. In the Quick Find box type Permission Sets
3. Click on New

4. Label – Doctors Permission

License – Salesforce

5. From The apps section click on Assigned Apps
6. Select Our Hospital App Then Click add then Save
7. Click on the Down arrow beside Assigned apps and from the drop-down list select object permission.
8. Click on objects, click edit and give them permission mentioned below.

## Appointment Object

9. Tab Setting: - Click on Both Available and Visible
10. Object Permission: – Read, View All
11. Field Permission: -
  - Read Access – All the Fields
  - Edit Access – Appointment Status
12. Save

Special Note – A Doctor can Read the Appointment details and can edit the appointment status only.

## Bills Object

Doctor has No Access to this Object

## Doctor Object

The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab selected.
- Object Manager** dropdown.
- Search bar**: user
- Left sidebar (Users)**:
  - Permission Set Groups
  - Permission Sets** (selected)
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
  - Users
- Right pane (Permission Sets for user)**:
  - Tab Settings**: Available (checkbox checked), Visible (checkbox checked).
  - Object Permissions**:

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
  - Field Permissions**:

Field Name	Read Access	Edit Access
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Doctor ID	<input type="checkbox"/>	<input type="checkbox"/>
Doctor Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Specialty	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Special Note – A Doctor can Read his record but cannot edit it or create it. Doctor records are only created by the Administrator.

## **Department Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

Read Access – All the Fields

## **Specialty Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

Read Access – All the Fields

## **Medical Encounter**

**SETUP**

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

**ADMINISTRATION**

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Medical Encounters

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Doctor Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>
Medical Encounter ID	<input type="checkbox"/>	<input type="checkbox"/>
Medical Test Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prescription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Special Note – A Doctor can Read the medical Encounter.  
And can edit the Prescription and Date.

## Medical Test Report

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets. The Permission Sets link is highlighted. The main content area is titled "Permission Sets" and contains sections for Available (checkbox checked), Visible (checkbox checked), Object Permissions (listing Read, Create, Edit, Delete, View All, Modify All with checkboxes), and Field Permissions (listing fields like Created By, Doctor\_Name, Last Modified By, Medical Test Number, Owner, Patient Name, Status, Test Date, Test Result with checkboxes for Read Access and Edit Access).

**Special Note - Doctor Can See Medical Test Report. But He Can't Edit Anything.**

## Patient Object

The screenshot shows the Salesforce Setup interface with the following navigation bar:

- Setup
- Home
- Object Manager

The main content area is titled "Permission Sets". It includes the following sections:

- Tab Settings**: A table with columns "Available" and "Visible". Under "Available", there is a checked checkbox. Under "Visible", there is a checked checkbox with a "Edit" icon.
- Object Permissions**: A table with columns "Permission Name" and "Enabled". The rows are:
  - Read: Enabled (checked)
  - Create: Not Enabled (unchecked)
  - Edit: Not Enabled (unchecked)
  - Delete: Not Enabled (unchecked)
  - View All: Not Enabled (unchecked)
  - Modify All: Not Enabled (unchecked)
- Field Permissions**: A table with columns "Field Name", "Read Access", and "Edit Access". The rows are:
  - Address: Read Access (checked), Edit Access (unchecked)
  - Created By: Read Access (unchecked), Edit Access (unchecked)
  - Date of Birth: Read Access (checked), Edit Access (unchecked)
  - Email ID: Read Access (checked), Edit Access (unchecked)
  - First Name: Read Access (unchecked), Edit Access (checked)
  - Gender: Read Access (checked), Edit Access (unchecked)
  - Last Modified By: Read Access (unchecked), Edit Access (unchecked)
  - Last Name: Read Access (checked), Edit Access (unchecked)
  - Owner: Read Access (unchecked), Edit Access (checked)
  - Patient ID: Read Access (checked), Edit Access (unchecked)
  - Phone: Read Access (checked), Edit Access (unchecked)

**Special Note - Doctor Can See Patient Record but He Can't edit anything.**

## Scenario 8: -

## PATIENT PROFILE PERMISSION: -

Go to Setup

In the Quick Find box type Permission

Sets Click on New

Label – Patient Permission

License – Salesforce

From The apps section click on Assigned Apps

Select Our Hospital App Then Click add then Save

Click on the Down arrow beside Assigned apps and from the drop-down list select object permission.

Click on objects, click edit and give them permission mentioned below.

## **Appointment Object Permission**

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Trackback Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets. The 'Permission Sets' link is currently selected. The main content area is titled 'Permission Sets' and shows the configuration for the 'Appointments' object. It includes sections for 'Tab Settings', 'Object Permissions', and 'Field Permissions'. In the 'Object Permissions' section, 'Read' is checked under 'Enabled'. In the 'Field Permissions' section, 'Read Access' and 'Edit Access' are checked for fields like 'Appointment Status', 'Appointment ID', 'Created By', 'Date & Time', 'Doctor Name', 'Last Modified By', 'Owner', 'Patient Name', and 'Reason'.

**Special Note – Patient can Create, Del and read records in the appointment object.**

# Bills Object

The screenshot shows the Salesforce Setup Home page with the 'Object Manager' tab selected. On the left sidebar, under 'Permission Set Groups', 'Permissions Sets' is highlighted. The main content area displays the 'Permission Sets' page for the 'Bills' object. The page includes sections for 'Tab Settings', 'Object Permissions', and 'Field Permissions'. In the 'Tab Settings' section, the 'Available' tab is selected. Under 'Object Permissions', the 'Enabled' column shows checkboxes for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. In the 'Field Permissions' section, a table lists fields like 'Bill Date', 'Bill Number', 'Created By', 'Doctor Name', 'Email ID', 'Last Modified By', 'Medical Test Report', 'Owner', 'Patient Name', 'Payment Date', 'Paid/Not Paid', 'Repon Cost', 'Total Bill', and 'Treatment Cost', each with checkboxes for 'Read Access' and 'Edit Access'.

Special Note – Patient only have read access to the bills.

## Doctor Object

The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes: Setup, Home, Object Manager, Quick Find, and sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets (which is currently selected). The main content area is titled "Permission Sets" under "SETUP". It displays the "Patient Permission" settings for the "Doctors" object. The "Doctors" tab is selected. Under "Tab Settings", the "Available" and "Visible" checkboxes are checked. The "Object Permissions" section lists permissions: Read (Enabled), Create (Disabled), Edit (Disabled), Delete (Disabled), View All (Disabled), and Modify All (Disabled). The "Field Permissions" section lists fields and their access levels: Created By (Read Access Enabled, Edit Access Disabled), Department (Read Access Enabled, Edit Access Disabled), Doctor ID (Read Access Enabled, Edit Access Enabled), Doctor Name (Read Access Enabled, Edit Access Enabled), Email ID (Read Access Enabled, Edit Access Disabled), Last Modified By (Read Access Enabled, Edit Access Enabled), Owner (Read Access Enabled, Edit Access Enabled), Phone (Read Access Enabled, Edit Access Enabled), and Speciality (Read Access Enabled, Edit Access Enabled).

Special Note: - Patient can only see Doctor Details

## **Department Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

Read Access – All the Fields

## **Specialty Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

Read Access – All the Fields

## **Medical Encounter Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

    Read Access – All the Fields

## **Medical Test Report Object**

Tab Setting: - Click on Both Available and Visible

Object Permission: – Read, View All

Field Permission: -

    Read Access – All the Fields

**(Same as Bills Object)**

## Patient Object

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, and Permission Sets), Data (with sub-links for Queues, Roles, User Management Settings, and Users), PLATFORM TOOLS (with sub-links for Data and Email), and Apps. The "Permission Sets" link under ADMINISTRATION is currently selected, indicated by a blue background.

The main content area is titled "Permission Sets" and shows the "Patients" object settings. It includes sections for "Tab Settings" (with "Available" and "Visible" columns) and "Object Permissions" (listing Read, Create, Edit, Delete, View All, and Modify All with checkboxes for Enabled). Below these are "Field Permissions" for fields like Address, Created By, Date of Birth, Email ID, First Name, Gender, Last Modified By, Last Name, Owner, Patient ID, and Phone, with checkboxes for Read Access and Edit Access.

**Special Note – Patient can do everything in the patient object.**

## **Scenario 9: -**

### **LAB STAFF PROFILE PERMISSION**

Go to Setup

In the Quick Find box type Permission

Sets Click on New

Label – Patient Permission

License – Salesforce

From The apps section click on Assigned Apps

Select Our Hospital App Then Click add then Save

Click on the Down arrow beside Assigned apps and from the drop-down list select object permission.

Click on objects, click edit and give them permission mentioned below.

### **Appointment Object**

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

SETUP

Home Object Manager

Quick Find

Search Setup

Permission Sets

Lab Staff Permission Set

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings Appointments

Appointments

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <small>i</small>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Appointment Status	<input type="checkbox"/>	<input type="checkbox"/>
Appointment ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date & Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Doctor Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reason	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Special Note: - Staff Can Only See the appointment.**

## Department Object

**NO ACCESS**

## Specialty Object

NO ACCESS

## Doctor Object

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like Setup Home, Service Setup Assistant, and Administration. Under Administration, the 'Permission Sets' option is selected, indicated by a blue bar at the top of the list. The main content area is titled 'Permission Sets' and shows a specific permission set named 'Lab Staff Permission Set'. The 'Doctors' tab is selected under 'Object Settings'. The 'Tab Settings' section shows 'Available' checked and 'Visible' checked. The 'Object Permissions' section lists permissions for the Doctor object, with 'Read', 'View All', and 'Modify All' checked as 'Enabled'. The 'Field Permissions' section lists permissions for fields like Created By, Department, Doctor ID, Doctor Name, Email ID, Last Modified By, Owner, Phone, and Speciality, with 'Read Access' checked for most and 'Edit Access' checked for some.

Special Note: - Staff can only see the Doctors details.

**Bill Object**

**NO ACCESS**

**Medical Encounter**

**NO ACCESS**

**Patient Object**

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Quick Find, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, "Permission Sets" is selected. The main content area is titled "Permission Sets" and shows the "Patients" object settings. It includes sections for Tab Settings (Available: checked, Visible: checked), Object Permissions (Read: checked, Create: unchecked, Edit: unchecked, Delete: unchecked, View All: checked, Modify All: unchecked), and Field Permissions (Address: Read Access checked, Edit Access unchecked; Created By: Read Access checked, Edit Access unchecked; Date of Birth: Read Access checked, Edit Access unchecked; Email ID: Read Access checked, Edit Access unchecked; First Name: Read Access checked, Edit Access checked; Gender: Read Access checked, Edit Access unchecked; Last Modified By: Read Access checked, Edit Access unchecked; Last Name: Read Access checked, Edit Access unchecked; Owner: Read Access checked, Edit Access checked; Patient ID: Read Access checked, Edit Access unchecked; Phone: Read Access unchecked, Edit Access unchecked). Buttons for Save and Cancel are at the top right.

**Special Note: - Staff only have read access for patient profile.**

## Medical Test Report

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-sections like Users, Permission Set Groups, and Permission Sets), Data, Platform Tools, and Apps. The 'Permission Sets' section is currently selected. The main content area is titled 'Permission Sets' and shows the 'Medical Test Reports' object settings. It includes tabs for 'Tab Settings' (with 'Available' checked) and 'Object Permissions' (listing Read, Create, Edit, Delete, View All, and Modify All with checkboxes checked). Below that is a 'Field Permissions' table:

Field Name	Read Access	Edit Access
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dcotor_Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Test Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test Result	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Special Note – Staff can do everything in medical test report object.

## Scenario 9: -

## Bill Manager Profile Permission Set

Go to Setup

In the Quick Find box type Permission Sets

Click on New

Label – Patient Permission

License – Salesforce

From The apps section click on Assigned Apps

Select Our Hospital App Then Click add then Save

Click on the Down arrow beside Assigned apps and from the drop-down list select object permission.

Click on objects, click edit and give them permission mentioned below.

### **Department Object**

**NO ACCESS**

**Specialty Object**

**NO ACCESS**

**Doctor Object**

**NO ACCESS**

**Medical Test Report Object**

**NO ACCESS**

**Appointment Object**

**NO ACCESS**

## Patient Object

The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes: Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), > Data (with sub-options: Email, Data, Platform Tools, Subscription Management, Apps). The main content area is titled "Permission Sets" under "SETUP". It shows the "Patients" object settings. The "Tab Settings" section has "Available" checked under "Visible". The "Object Permissions" section lists permissions: Read (checked), Create (unchecked), Edit (unchecked), Delete (unchecked), View All (checked), Modify All (unchecked). The "Field Permissions" section lists fields with their Read Access and Edit Access status: Address (Read checked, Edit unchecked), Created By (Read checked, Edit unchecked), Date of Birth (Read checked, Edit unchecked), Email ID (Read checked, Edit unchecked), First Name (Read checked, Edit checked), Gender (Read checked, Edit unchecked), Last Modified By (Read checked, Edit unchecked), Last Name (Read checked, Edit unchecked), Owner (Read checked, Edit checked), Patient ID (Read checked, Edit unchecked), Phone (Read unchecked, Edit unchecked).

Special Note – Bill Manager can read patient records.

# Medical Encounter

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, Quick Find, and various administrative tools like Service Setup Assistant and Multi-Factor Authentication Assistant. The main content area is titled "Permission Sets" under the "SETUP" tab. It displays the "Bill Manager Permission" set. The page includes tabs for "Permission Set Overview", "Object Settings" (set to "Medical Encounters"), and "Edit". Under "Object Permissions", there are tables for "Medical Encounters" and "Field Permissions".

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

**Field Permissions**

Field Name	Read Access	Edit Access
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Doctor Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Encounter ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Test Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prescription	<input type="checkbox"/>	<input type="checkbox"/>

# Bill Object

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Home:** Quick Find, Home, Object Manager.
- Permission Sets:** Bills tab selected.
- Tab Settings:** Available (checkbox) is checked, Visible (checkbox) is checked.
- Object Permissions:**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>
- Field Permissions:**

Field Name	Read Access	Edit Access
Bill Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bill Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Doctor Fees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Test Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Report Cost	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Treatment Cost	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Scenario 10-** create an App in classic ,

Add a logo in a tab called Documents

Logo size should not be more than 20 kb

Step 1: Click on avatar and select Switch to Salesforce Classic first.

Step 2: Click on Setup.

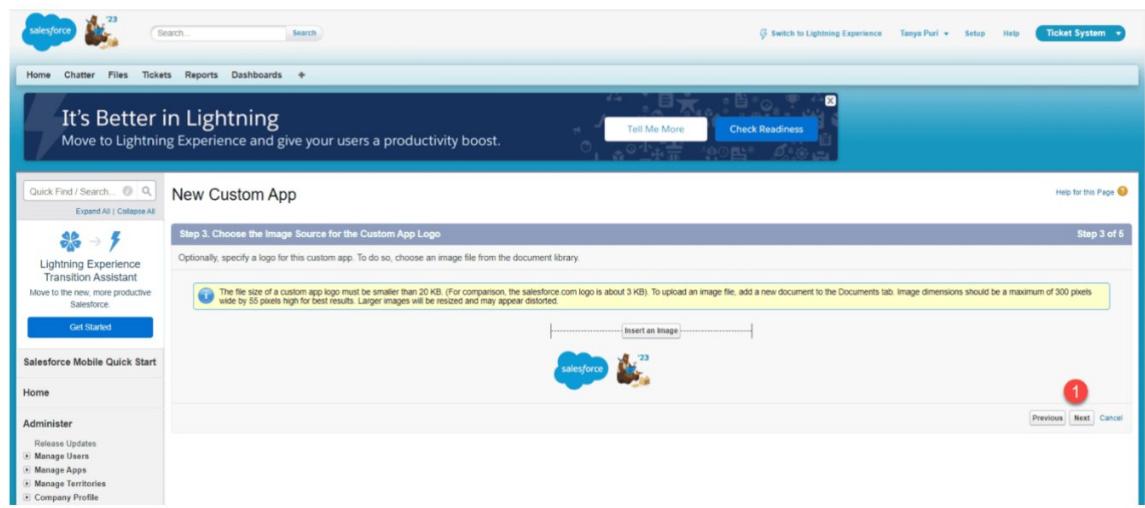
Step 3: , enter the keyword apps in the Quick Find / Search Box.

Step 4: Click on Apps located under Create < Build.

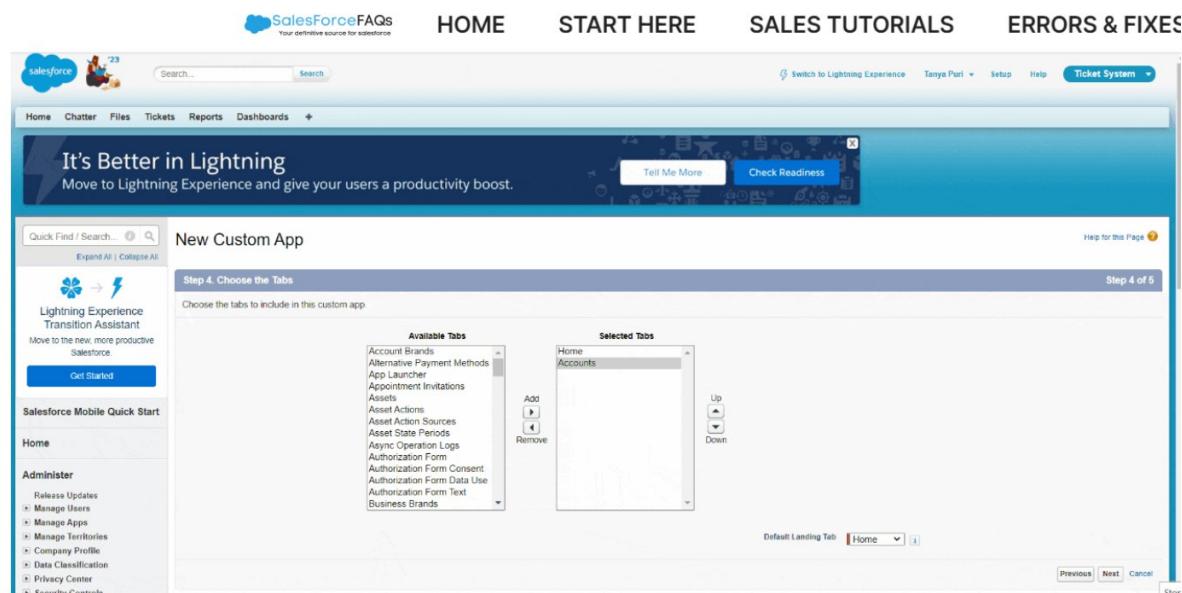
Step 5: Select the type of app you want to create. Here, I select the custom app radio button. Then, click on Next.

Step 6: Provide the label of the app and the app name is automatically populated. If you want to give more description about the application, add to the Description. Then, click on Next.

Step 7: add the log to the application and do the branding, Insert an Image. But make sure, the file size of the custom app logo must be smaller than 20 KB. Then, click on Next.



**Step 8:** Now, choose the tabs that you want to include in your custom app. Select the specific tabs from the Available Tabs and move them to the Selected Tabs. Then, click on Next.



**Step 9:** Click on the visible checkbox of the profile, in which you want to visible your new custom app. Then, click save.

## **Scenario 11:** upgrade your app in lightning

From the Home tab in Setup, enter App in the Quick Find box, then select App Manager. Find the Classic app that you want to upgrade in the apps list. Click. , and select Upgrade.

## **FLOWs**

### **Scenario 12:** APPOINTMENT BOOKING FLOW

When an appointment will be booked both doctor and patient will receive an email with appointment id

- 1.create a new flow
- 2.Click record trigger flow
  - 3.1) Object - Appointment
  - 2) Trigger - A record is created
  - 3) optimize for - Actions and Related Records
4. click the plus icon
5. Add action
6. In search all actions search for send email and choose it
7. Label – Patient Appointment Booking.

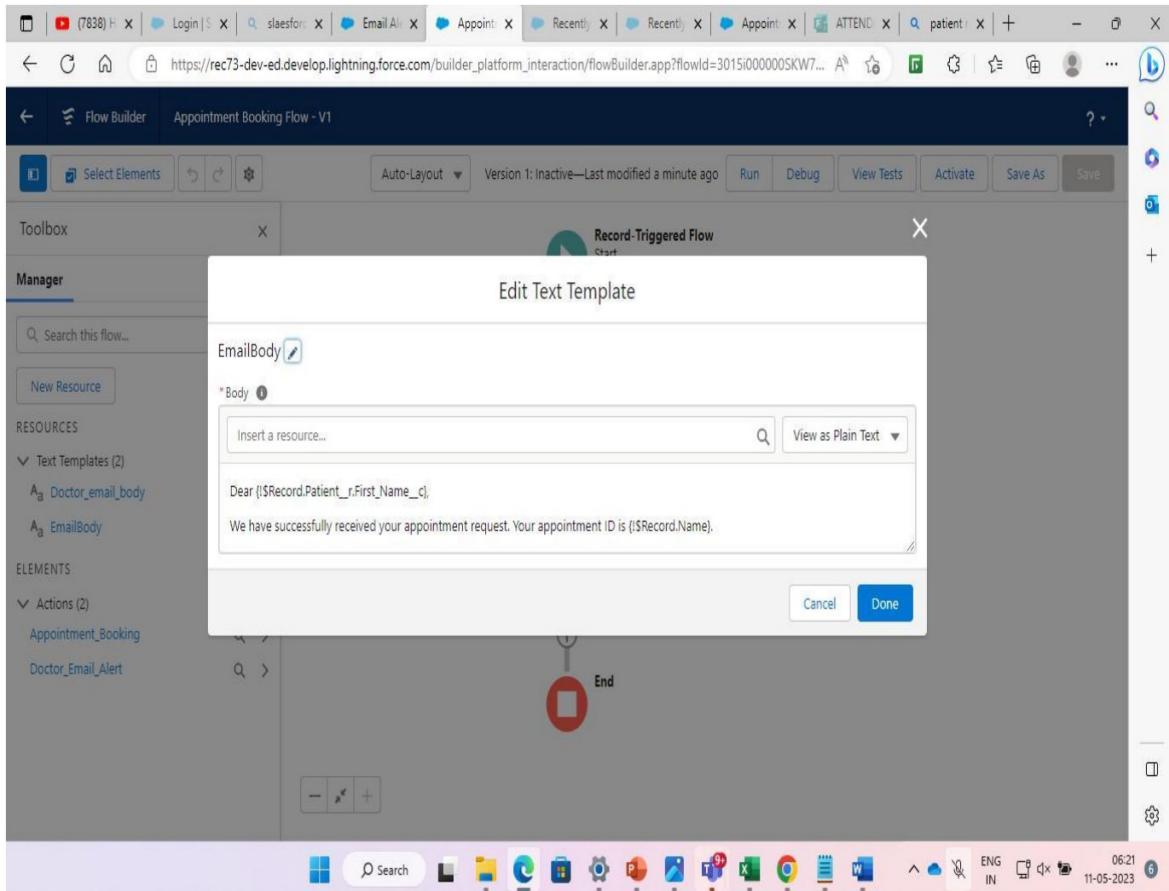
## 8.Body-New resource-Text Template-Email Body(api name).

In Body:

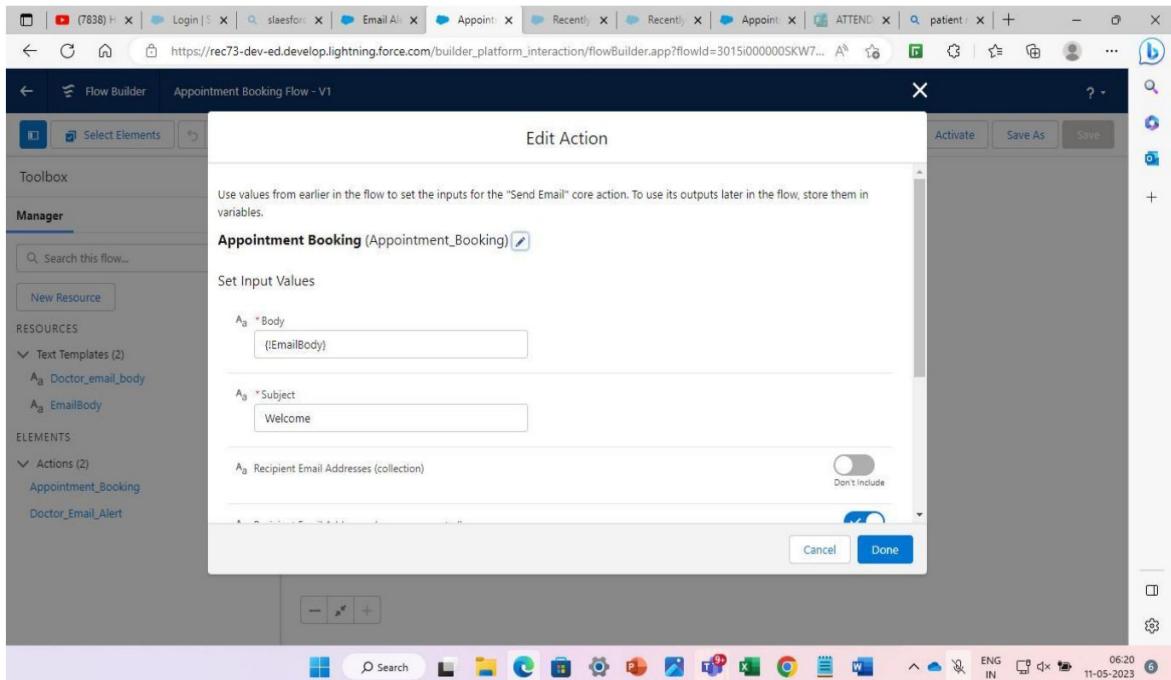
Dear {!\$Record.Patient\_\_r.First\_Name\_\_c},

We have successfully received your appointment request.

Your appointment ID is {!\$Record.Name}



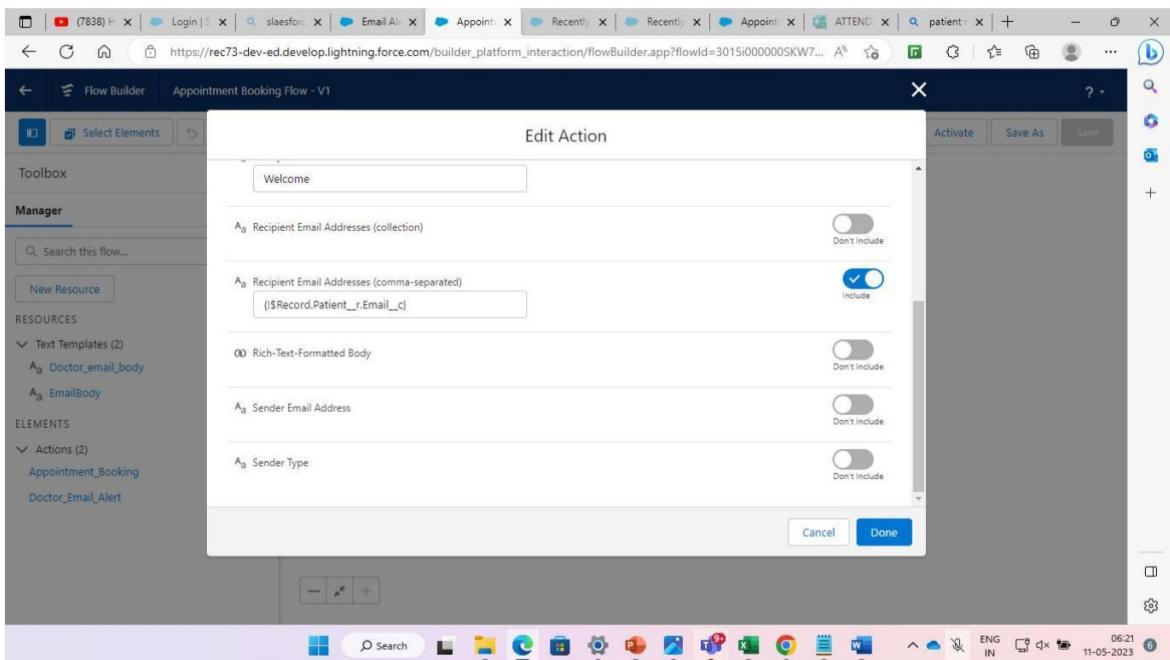
9. In subject type "Welcome".



10.In recipient mail address click include.

11. In recipient email addressses click Record- Appointment-patient-email.

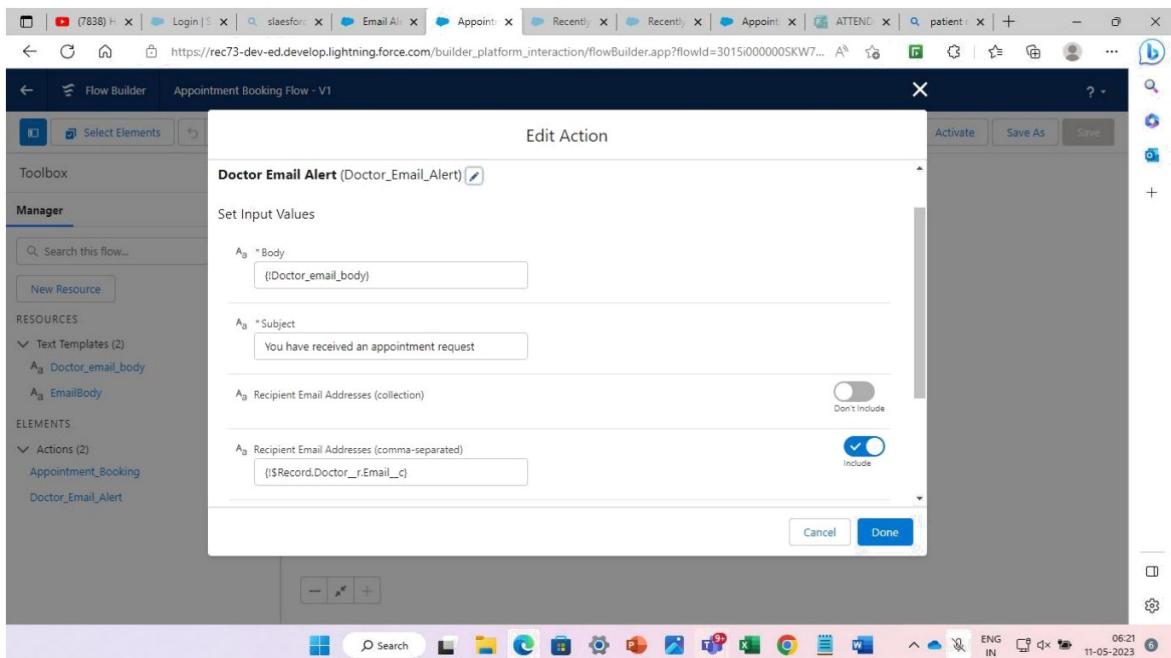
({\$Record.Patient\_\_r.Email\_\_c}).



12. click the plus icon and add action again

13. In search all actions search for send email and choose it.

14. Label – Doctor Email Alert



## 15.Body-New resource-Text Template- Doctor Email Body(api name).

In Body:

Hello

Dr. {!\$Record.Doctor\_\_r.Name}  
e}, You have received an  
appointment from  
{!\$Record.Patient\_\_r.Name} on  
{!\$Record.Date\_Time\_\_c}.

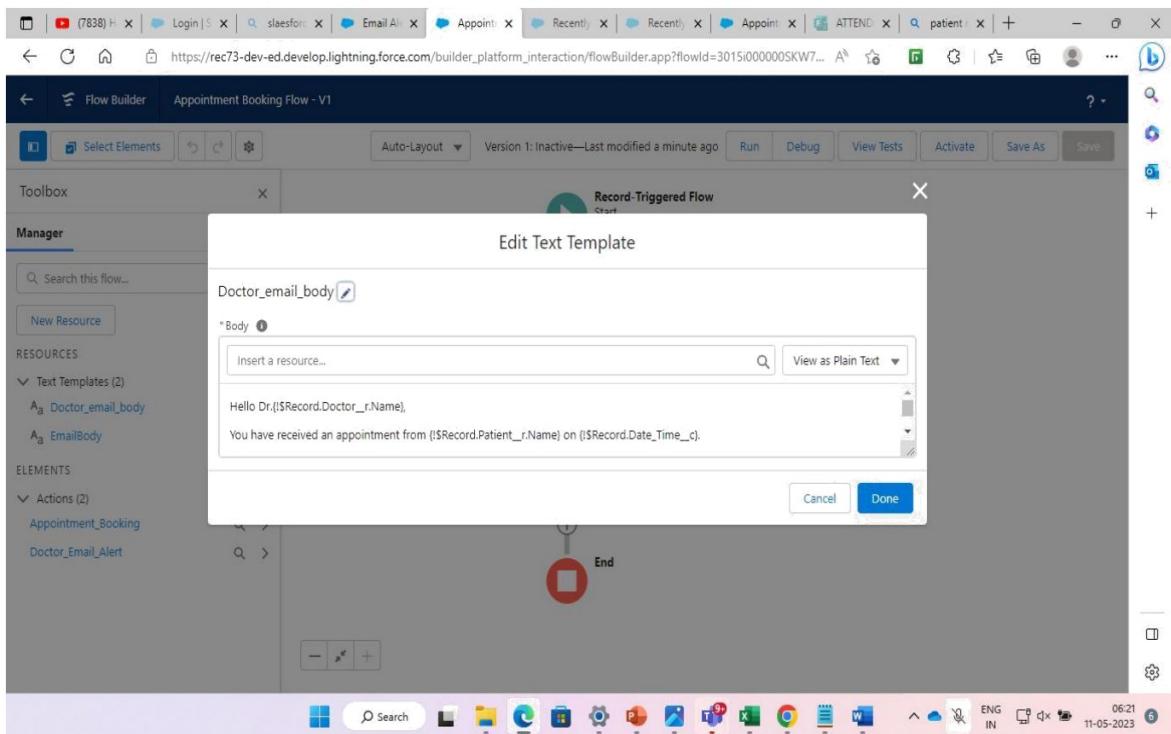
Appointment Details:

Appointment ID: {!\$Record.Name}

Reason : {!\$Record.Reason\_\_c}

Thanks and Regards

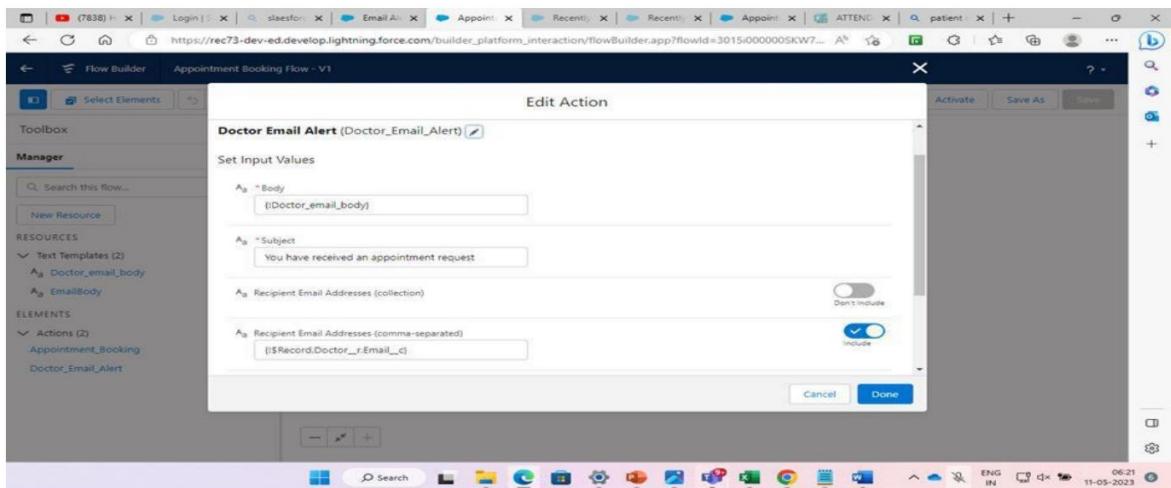
ABC Hospital



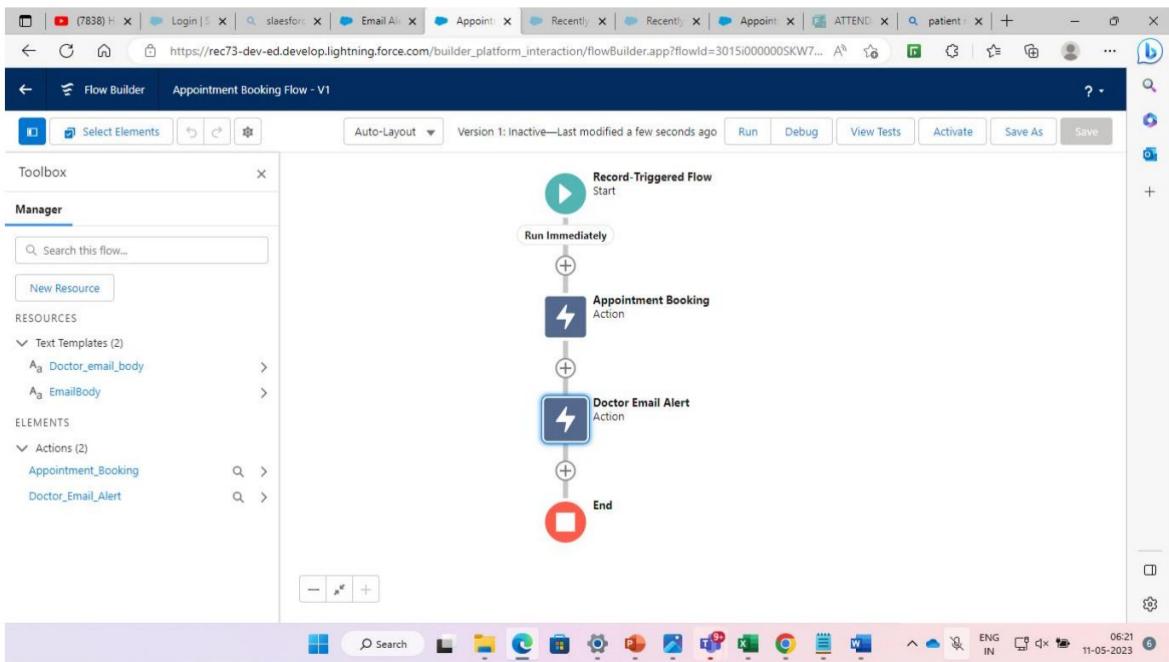
16. In subject type – You have received an appointment request.

17. In recipient email addressses click Record- Appointment-patient-email.

`({$Record.Patient__r.Email__c}).`



## Screenshot of Final Flow:



## **Scenario 13: TOTAL BILL AMOUNT FLOW**

When the total bill amount is generated that trigger mail to patient will flowing details

### 1.Create Trigger Flow

Select Object  
Select the object whose records trigger the flow when they're created, updated, or deleted.

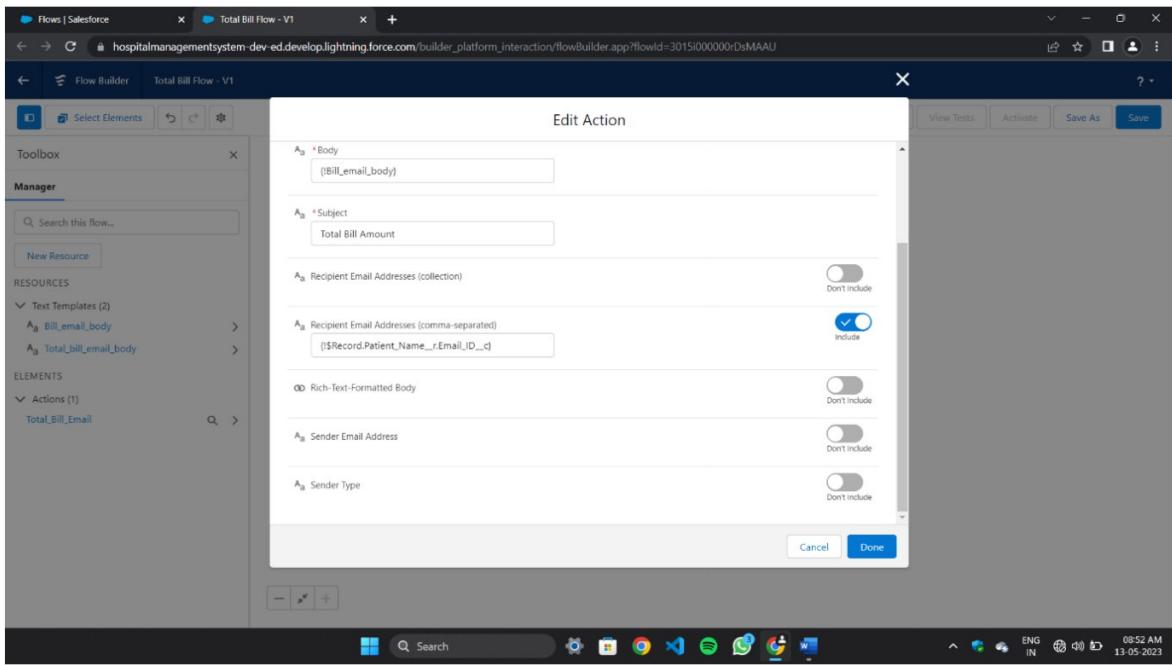
\*Object: Bill

Configure Trigger  
\*Trigger the Flow When:  
 A record is created  
 A record is updated  
 A record is created or updated  
 A record is deleted

Set Entry Conditions  
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements



## Email Body :

Dear {!\$Record.Patient\_Name\_\_r.Name},

We hope this email finds you in good health. As per your recent appointment at ABC Hospital, we would like to provide you bill details

Patient Name : {!\$Record.Patient\_Name\_\_r.Name}

Appointment Id : {!\$Record.Appointment\_\_r.Name}

Doctor fee :

{!\$Record.Appointment\_\_r.Doctor\_Fees\_\_c}

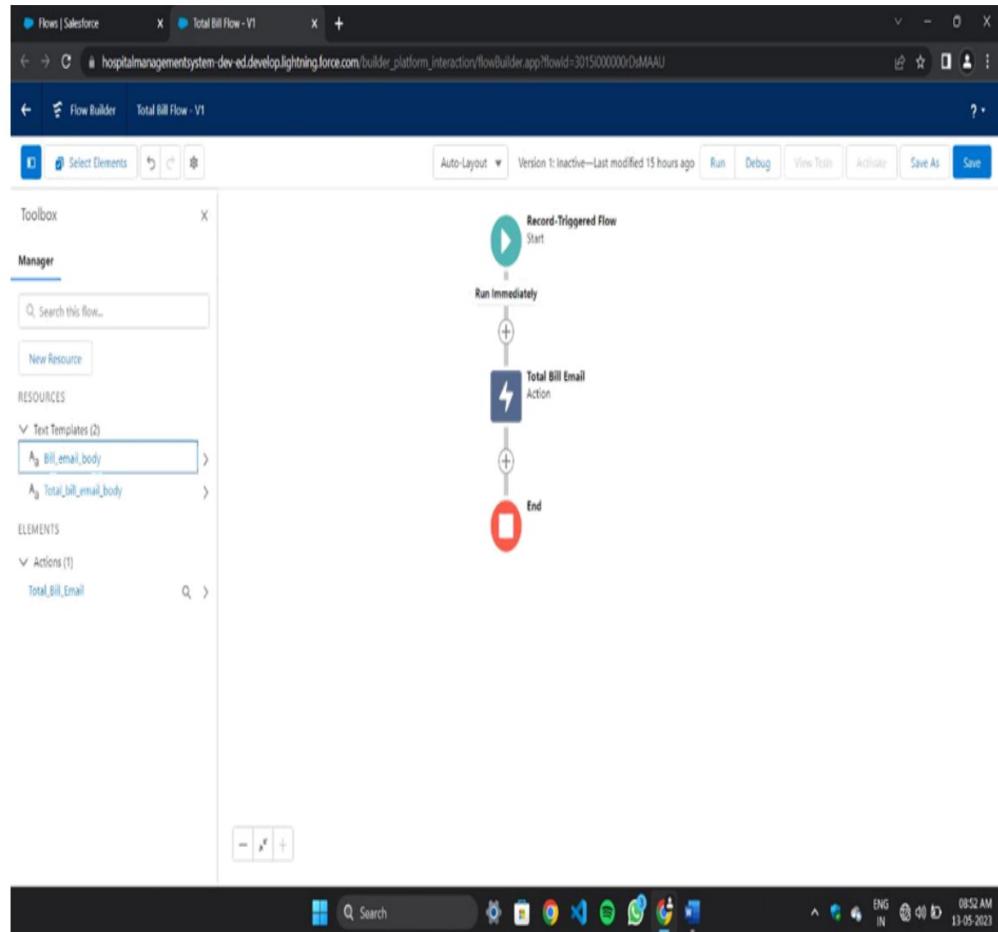
Report Cost :

{!\$Record.Medical\_Test\_Report\_\_r.Report\_Cost\_\_c}

Total Bill Amount : {!\$Record.Total\_Bill\_Amount\_\_c}

Thanks and Regards

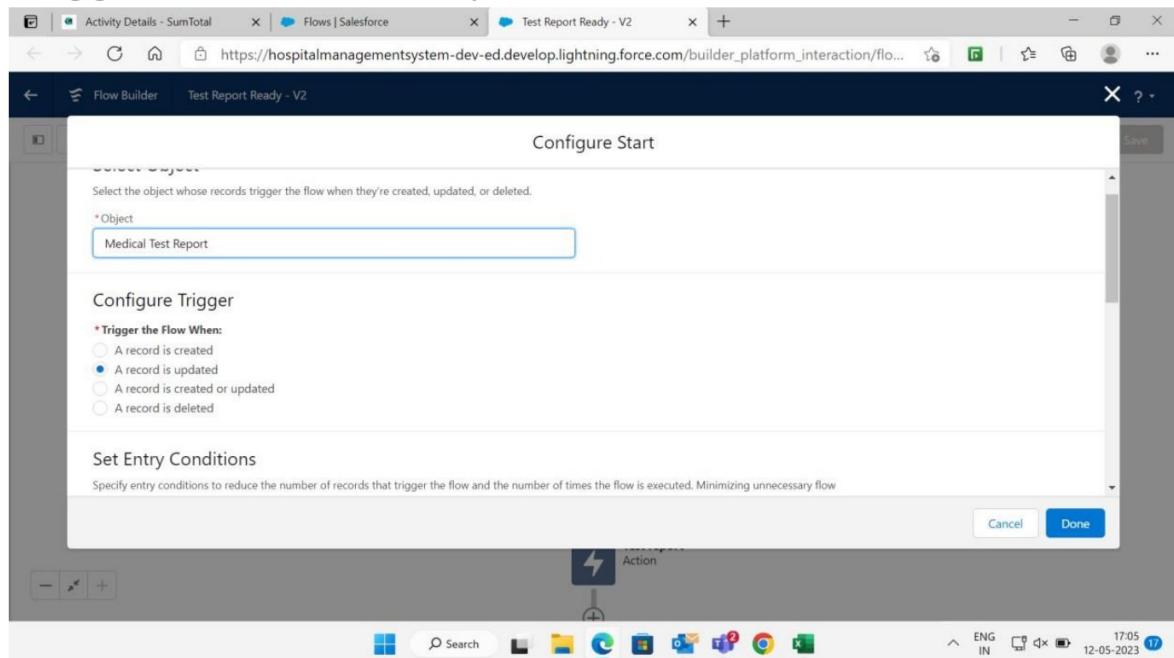
# ABC hospital

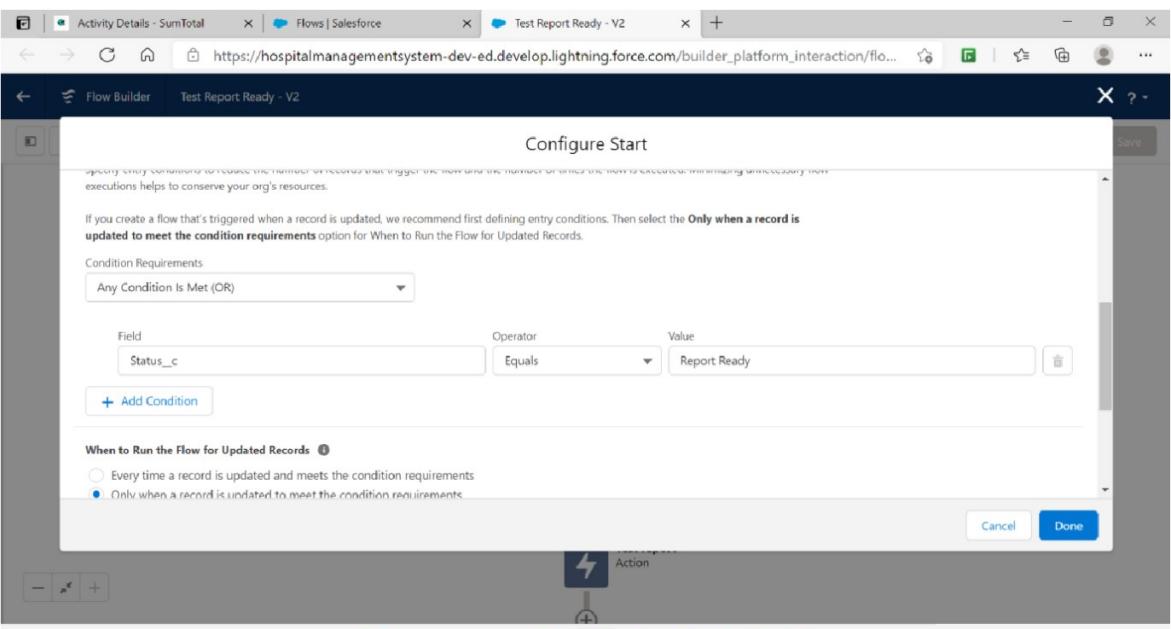


## Scenario 14: TEST REPORT READY FLOW

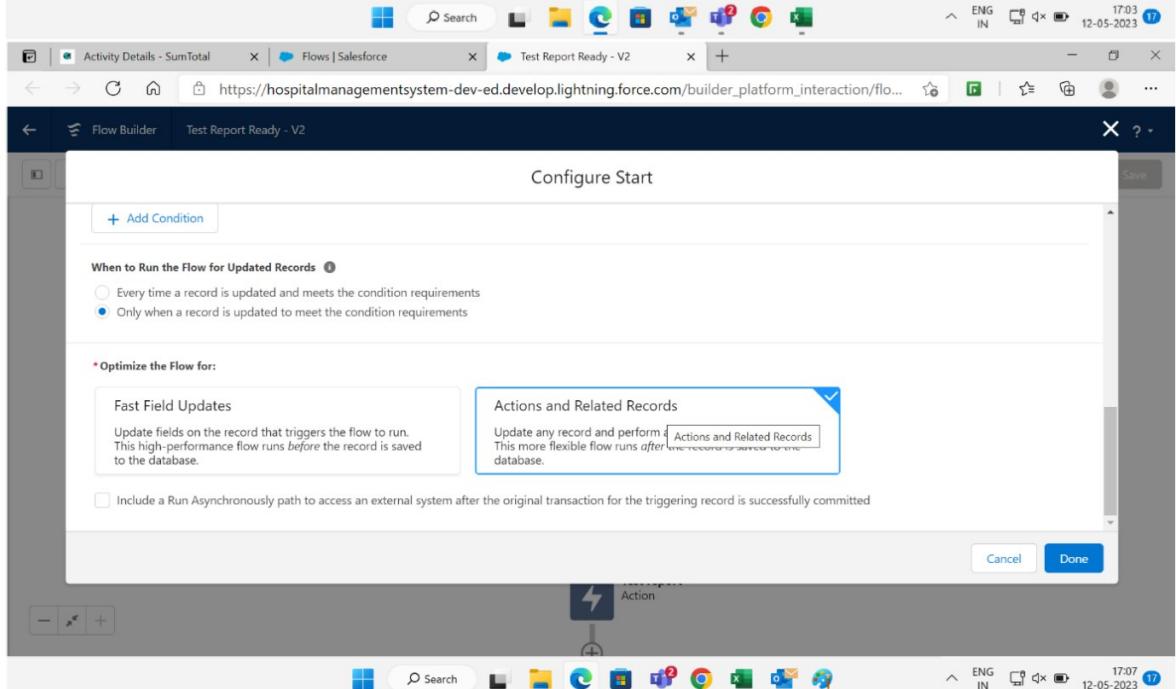
When the Lab staff upload the report file and update the status field in the medical test report object that trigger the email to patient

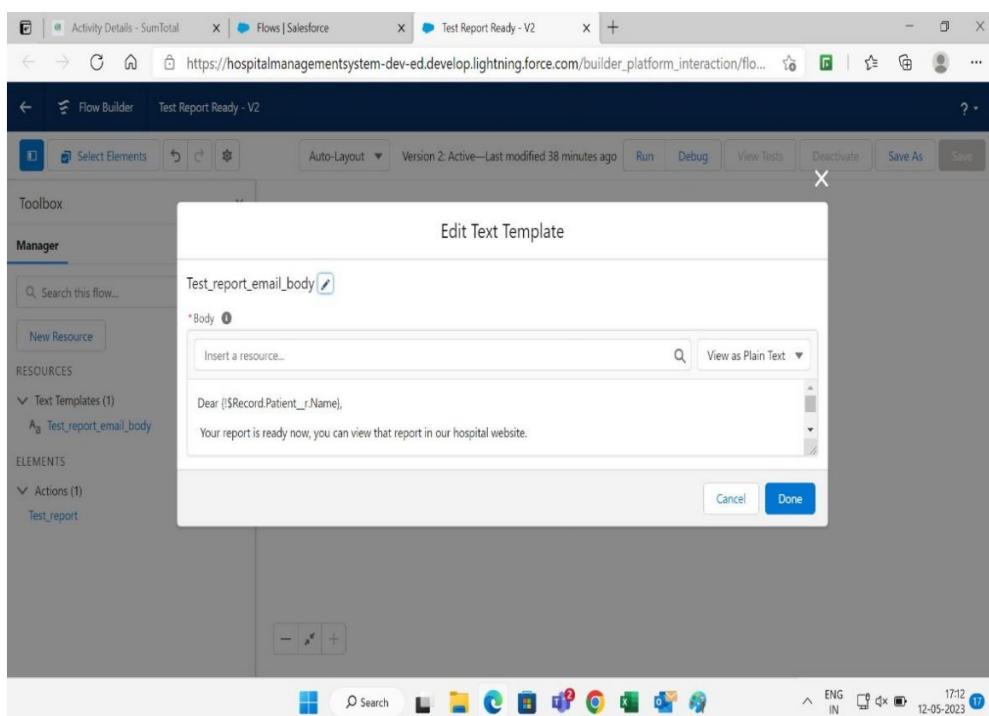
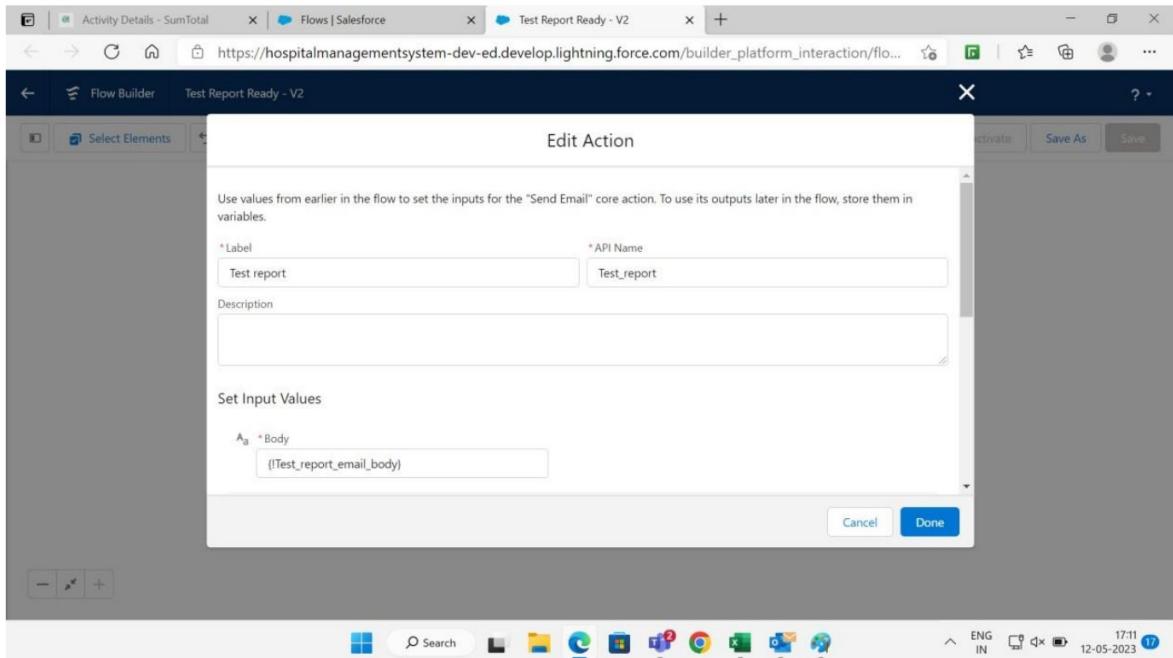
1. Create a new flow
2. Click record trigger flow
3. Object – Medical Test report
4. Trigger – A record is updated





5.





## Email body :

Dear {!\$Record.Patient\_r.Name},  
Your report is ready now, you can view  
that report in our hospital website.

Report id : {!\$Record.Name}

Thanks and Regards  
ABC Hospital

The screenshot shows the Salesforce Flow Builder interface with two main windows.

**Edit Action Window:**

- Action Type:** {!Test\_report\_email\_body}
- Subject:** Test report is ready
- Recipient Email Addresses:** (collection)  Don't include
- Recipient Email Addresses (comma-separated):** {!\$Record.Patient\_\_r.Email\_\_c}  Include
- Rich-Text-Formatted Body:**  Don't include

**Done** button is visible at the bottom right.

**Flow Diagram Window:**

```
graph TD; Start((Record-Triggered Flow Start)) --> Run[Run Immediately]; Run --> TestAction[Test report Action]; TestAction --> End((End))
```

The flow starts with a Record-Triggered Flow Start, followed by a Run Immediately step, then a Test report Action step, and finally an End step.

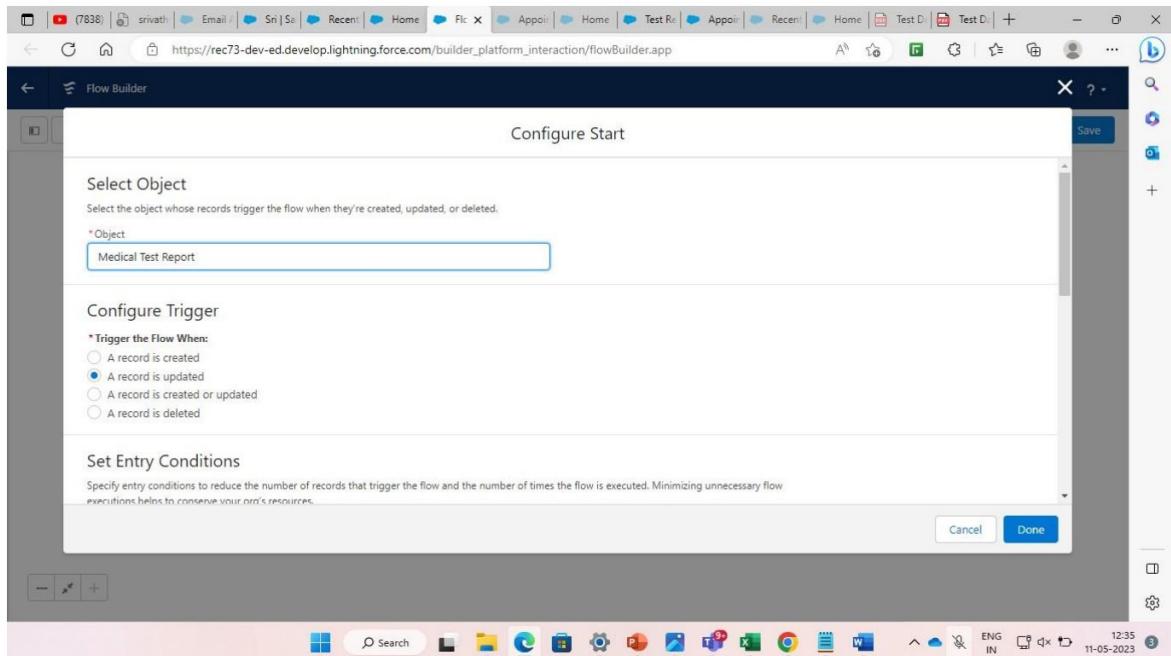
## Scenario 15- TEST DONE FLOW

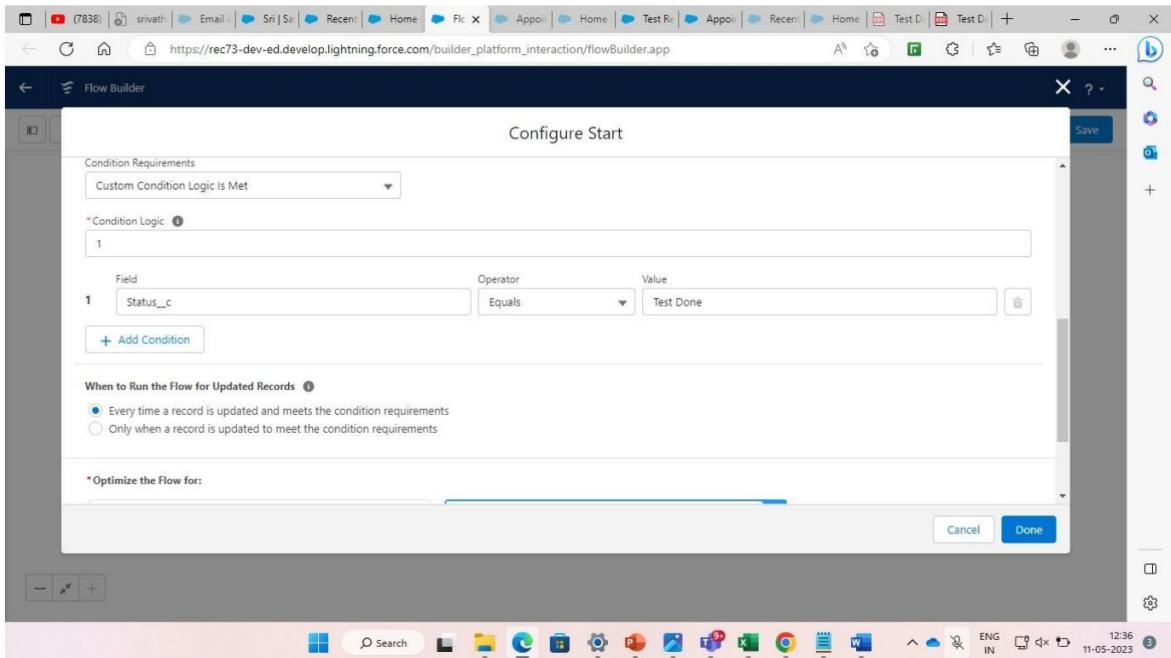
When medical test will be completed ,patient will receive a mail with test report

1. create a new flow

2. Click record trigger flow

- Object – Medical Test Report
- Trigger - A record is updated
- optimize for - Actions and Related Records



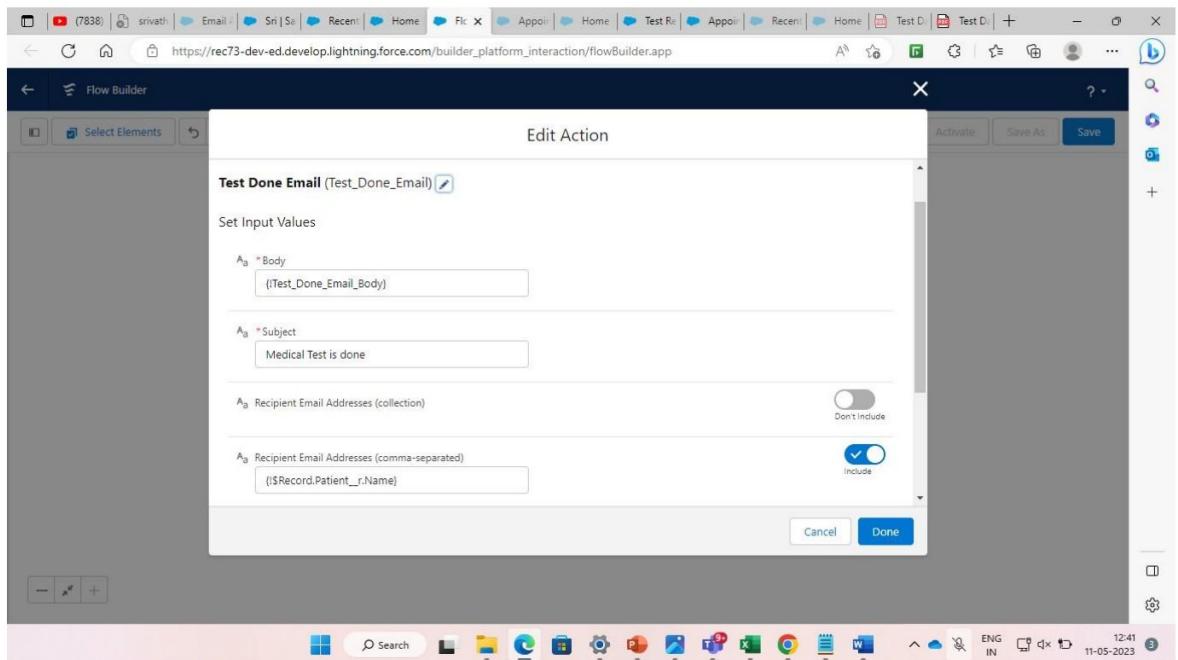


3. click the plus icon

4. Add action

5. In search all actions search for send email and choose it.

6. Label – Test Report Done.

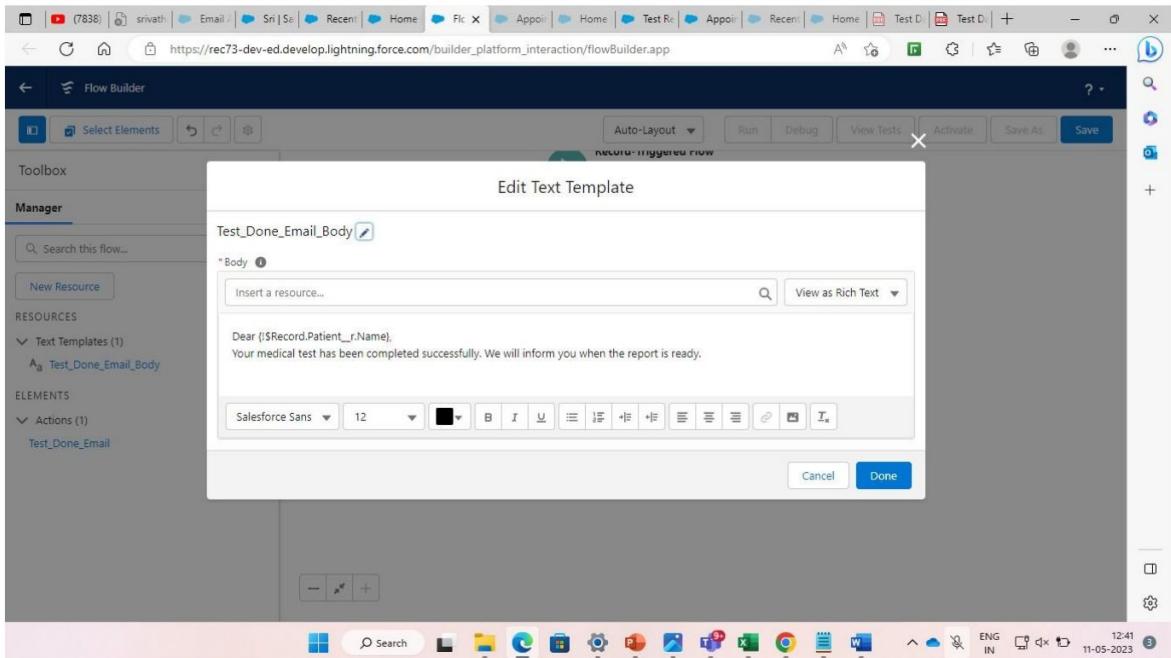


## 7. Body-New resource-Text Template- Test\_Done\_Email\_Body(api name).

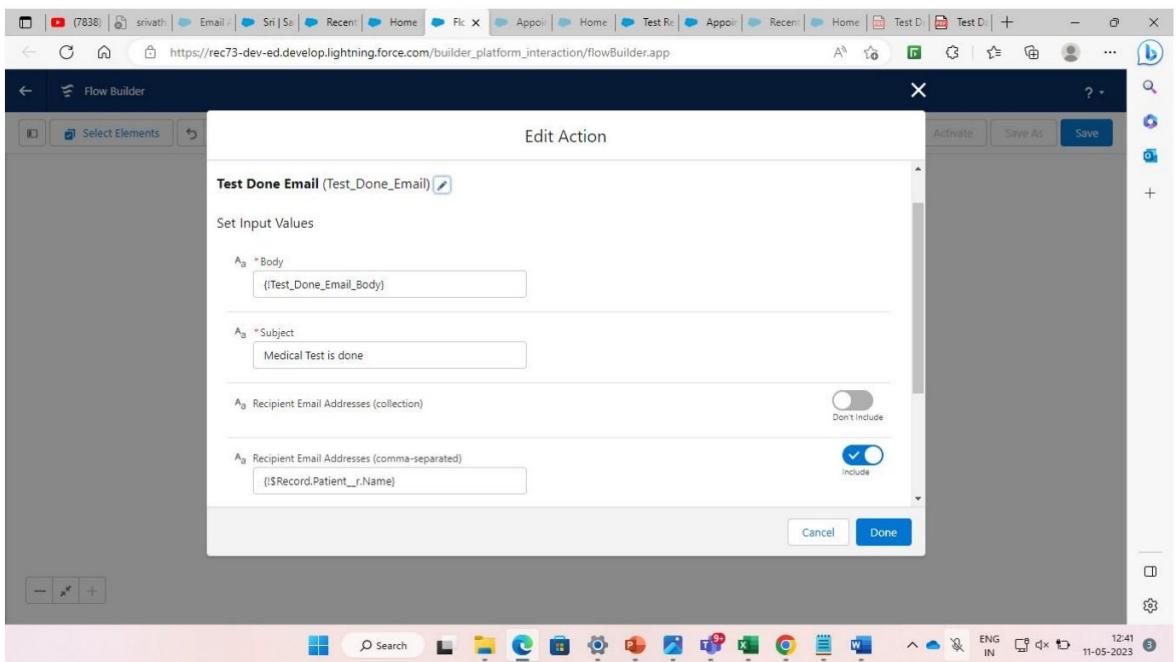
### Body:

Dear {!\$Record.Patient\_\_r.Name},

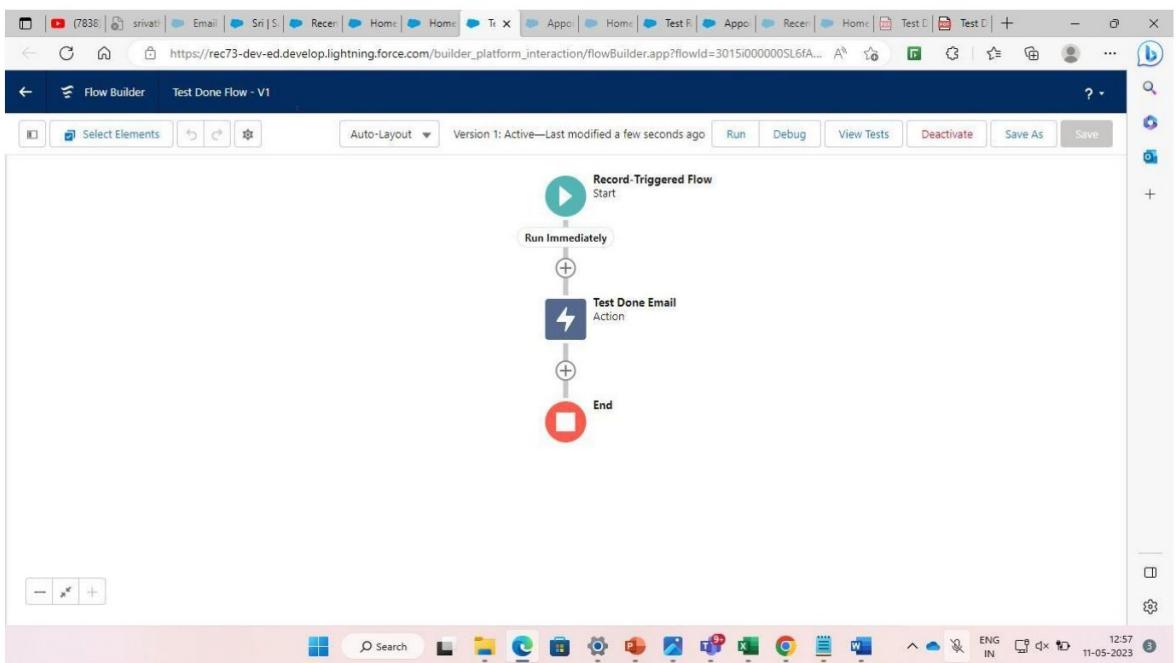
Your medical test has been completed successfully.  
We will inform you when the report is ready.



8. In subject type "Medical Test is done".
9. In recipient email address click include.
10. In recipient email addresses click Record-Medical Test Report-patient-email.  
 $\{!$Record.Patient\_\_\_r.Email\_\_c\}$ .



## Final Flow :



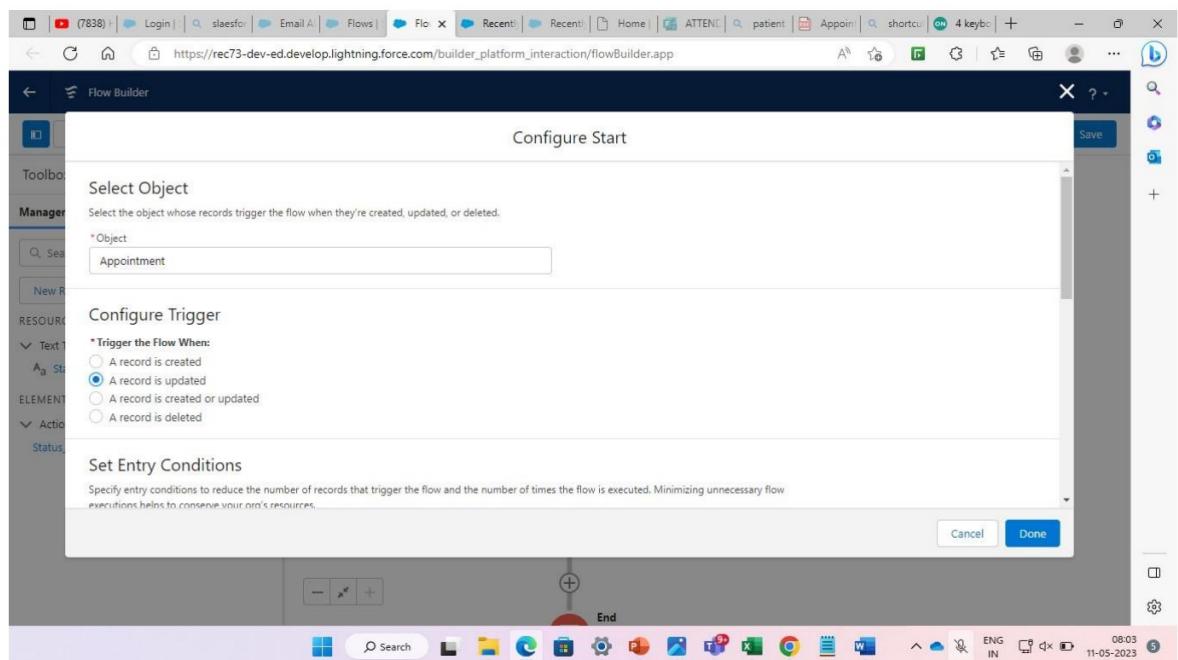
## Scenario 16: APPOINTMENT STATUS FLOW

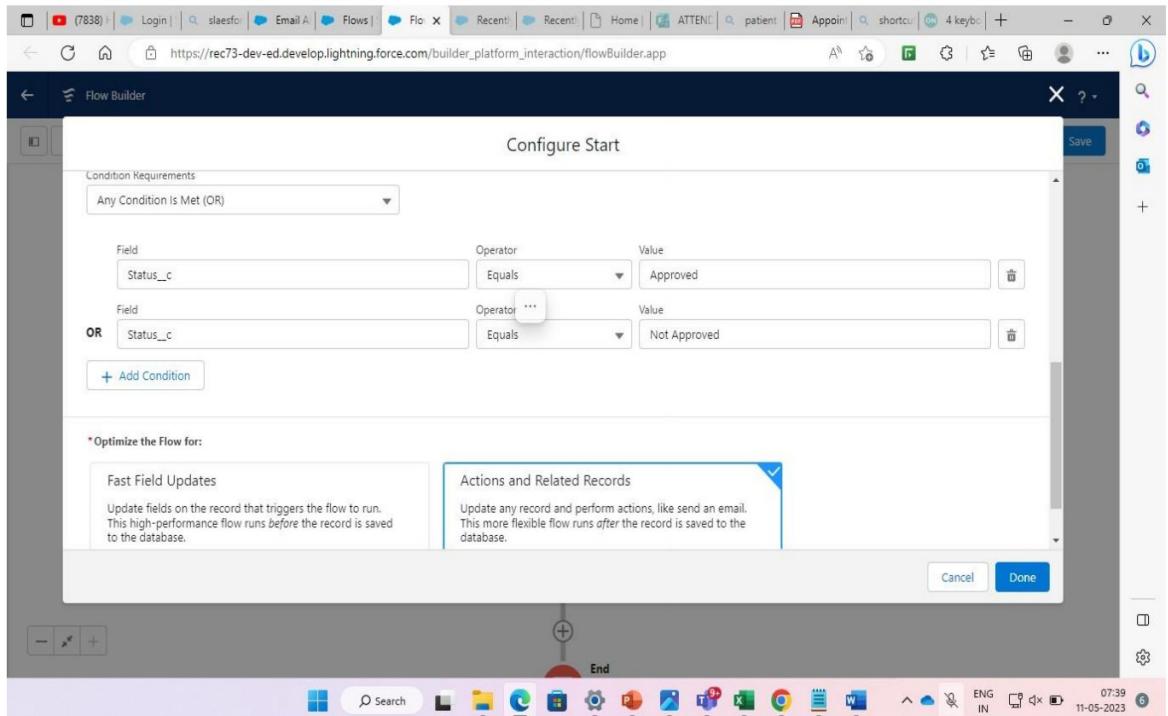
When doctor will approve or decline the appointment ,patient will get a mail accordingly.

1. create a new flow

2. Click record trigger flow

- Object – Appointment
- Trigger - A record is updated
- optimize for - Actions and Related Records



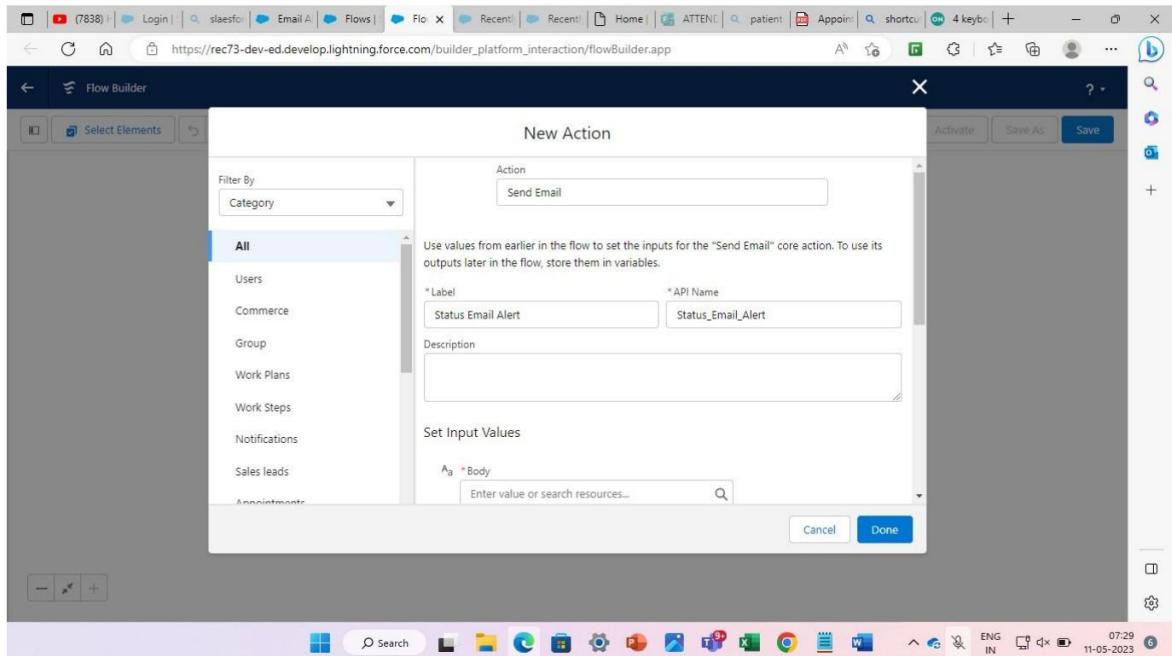


3. click the plus icon

4. Add action

5. In search all actions search for send email and choose it.

6 Label – Status Email Alert.



## 6. Body-New resource-Text Template-Status Email Body(api name).

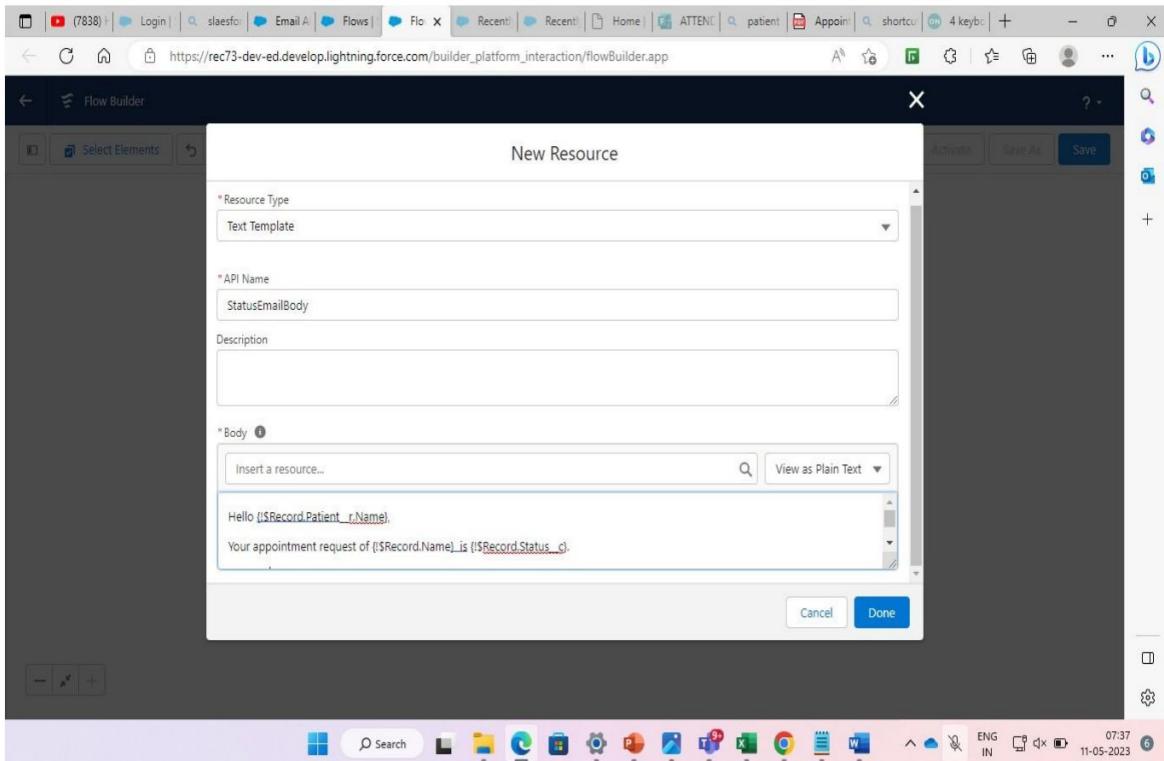
### Body:

Hello {!\$Record.Patient\_\_r.Name},  
Your appointment request of {!\$Record.Name} is  
{!\$Record.Status\_c}.

Regards,

ABC

Hospital

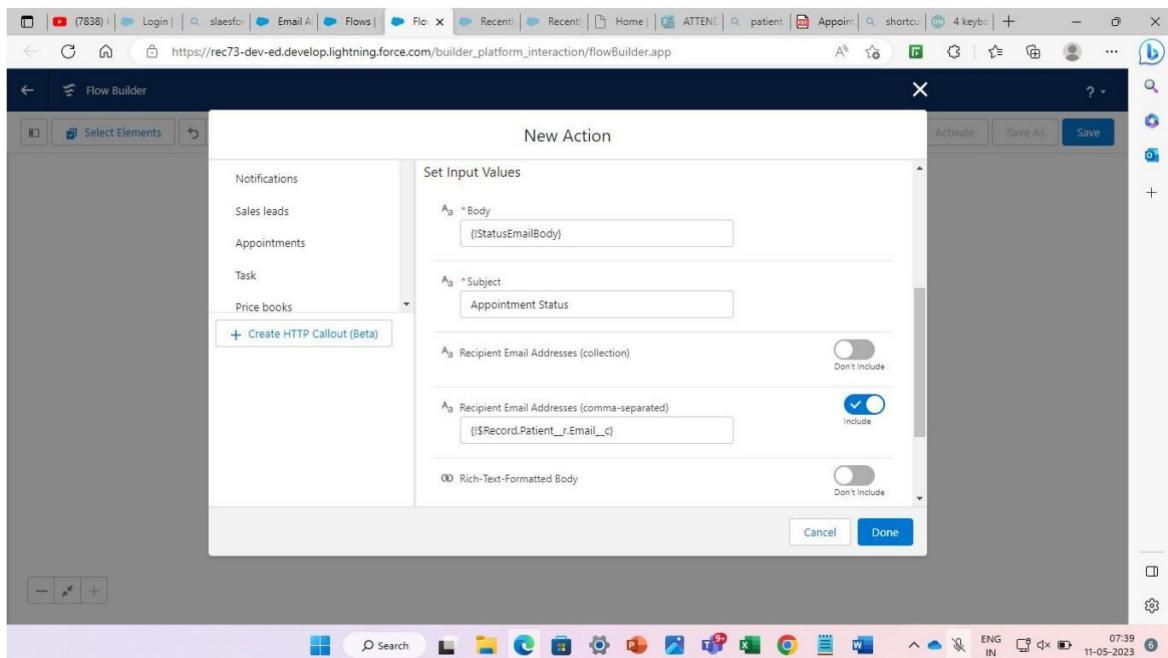


7. In subject type "Appointment Status".

8. In recipient email address click include.

9. In recipient email addresses click Record-Appointment-patient-email.

{!\$Record.Patient\_\_\_\_\_r.Email\_\_\_\_c}).



## Final Flow :

