

Phase 3: Data Modeling & Relationships

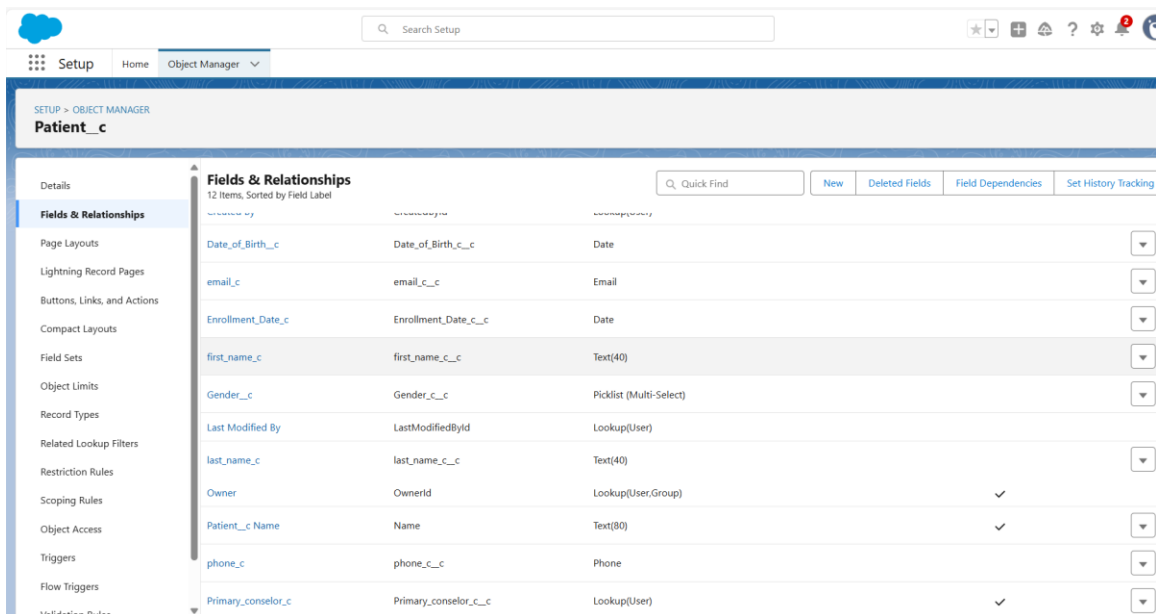
Objective

In this phase, we design the data model for NeuroWell CRM to capture all important entities such as Patients, Counselors, Sessions, and Mental Wellness Records. Salesforce objects, fields, and relationships ensure the system can store and connect information properly.

3.1 Custom Objects

We created the following custom objects to represent the NeuroWell domain:

1. Patient - Stores patient details. Key fields: Name, Age, Gender, Contact Info, Enrollment Date.
2. Counselor - Stores counselor details. Key fields: Name, Specialization, Experience, Contact Info.
3. Wellness Record - Tracks patient's mental health check-ins. Key fields: Stress Score, Mood Level, Risk Level, Date.
4. Counselor Session - Represents counseling appointments. Key fields: Session Date, Notes, Follow-up Date, Status.
5. Progress Tracker - Records long-term improvement in patient's wellness. Key fields: Week Number, Improvement Score, Comments.
6. Mental Health Program - Represents available wellness programs. Key fields: Program Name, Type, Duration.
7. Program Enrollment - Junction object to link Patients and Programs.



The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for the custom object 'Patient_c'. The left sidebar shows a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The 'Fields & Relationships' section is active, showing a list of 12 fields sorted by label. The fields are: Date_of_Birth_c (Date), email_c (Email), Enrollment_Date_c (Date), first_name_c (Text(40)), Gender_c (Picklist (Multi-Select)), Last Modified By (Lookup(User)), last_name_c (Text(40)), Owner (Lookup(User,Group)), Patient_c Name (Text(80)), phone_c (Phone), and Primary_counselor_c (Lookup(User)). The 'Owner' and 'Patient_c Name' fields have checkmarks in the 'Required' column. The 'Primary_counselor_c' field also has a checkmark. The 'Last Modified By' field is highlighted in blue.

Field Label	Field Name	Field Type	Required
Date_of_Birth_c	Date_of_Birth_c_c	Date	
email_c	email_c_c	Email	
Enrollment_Date_c	Enrollment_Date_c_c	Date	
first_name_c	first_name_c_c	Text(40)	
Gender_c	Gender_c_c	Picklist (Multi-Select)	
Last Modified By	LastModifiedById	Lookup(User)	
last_name_c	last_name_c_c	Text(40)	
Owner	OwnerId	Lookup(User,Group)	✓
Patient_c Name	Name	Text(80)	✓
phone_c	phone_c_c	Phone	
Primary_counselor_c	Primary_counselor_c_c	Lookup(User)	✓

3.2 Relationships

We used lookup and master-detail relationships to link objects:

- Patient ↔ Wellness Record (Master-Detail): One Patient can have multiple Wellness Records.
- Patient ↔ Counselor Session (Lookup): Each Session is linked to a Patient.
- Counselor ↔ Counselor Session (Lookup): Each Session is linked to a Counselor.
- Patient ↔ Progress Tracker (Master-Detail): One Patient can have multiple Progress Trackers.
- Patient ↔ Program Enrollment ↔ Mental Health Program (Junction Object): Many-to-many relationship between Patients and Programs.

SETUP > OBJECT MANAGER
Wellness_Record__c

Details
Fields & Relationships
6 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assessment_Date__c	Assessment_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Patient__c	Patient__c	Master-Detail(Patient__c)		✓
Stress_Score__c	Stress_Score__c	Number(15, 3)		
Wellness_Record__c Name	Name	Auto Number		✓

3.3 Custom Fields

Some important fields created on objects:

- Patient → Enrollment Date, Mental Health ID (Auto Number).
- Wellness Record → Stress Score (Number), Mood (Picklist), Risk Level (Picklist).
- Counselor Session → Session Notes (Long Text), Status (Picklist).
- Progress Tracker → Improvement Score (Number), Week Number (Auto Number).
- Mental Health Program → Program Type (Picklist), Duration (Number).
- Program Enrollment → Enrollment Date (Date), Status (Picklist).

The screenshot shows the Salesforce Setup interface for the 'Progress_tracker_c' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Improvement_score_c, Last Modified By, Owner, Progress_tracker_c Name, and Week_number_c.

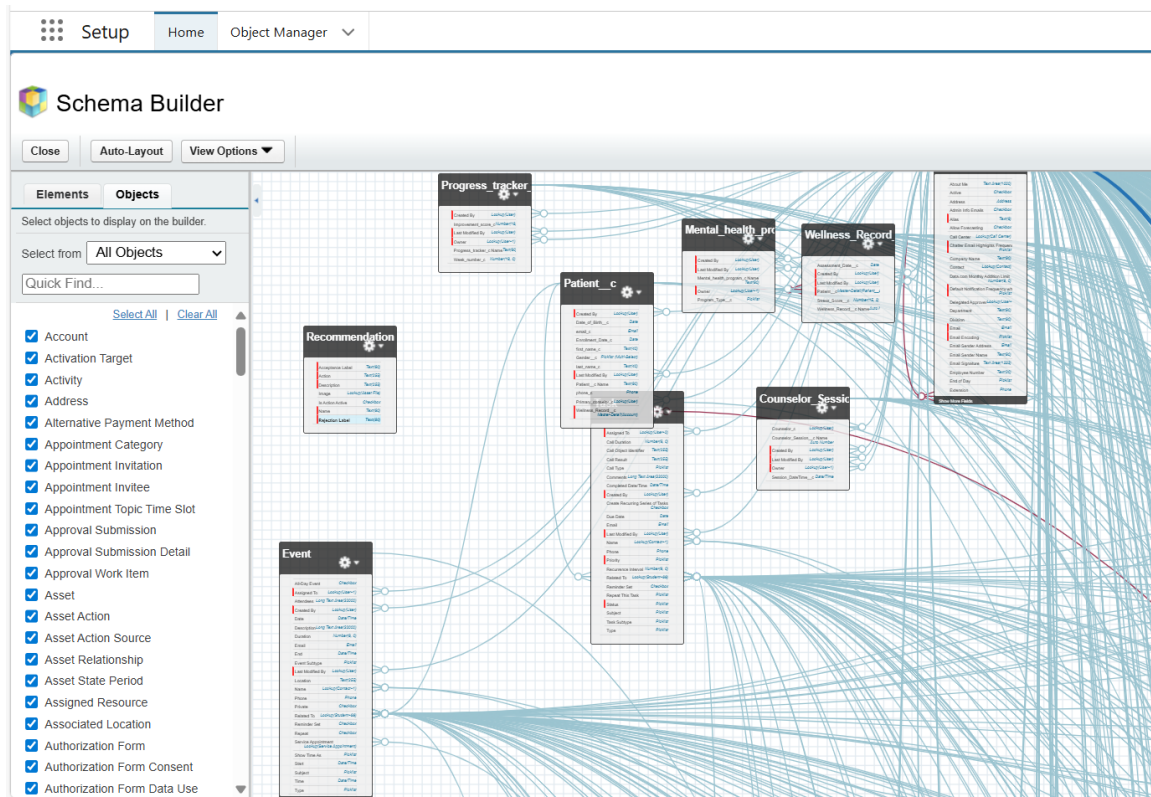
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Improvement_score_c	Improvement_score_c_c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Progress_tracker_c Name	Name	Text(80)		✓
Week_number_c	Week_number_c_c	Number(18, 0)		

3.4 Record Types & Page Layouts

Record Types were created for Counselor Session (Initial Assessment, Follow-up). Different layouts ensure that required fields for each type of session are displayed. Page layouts for Patients show related lists: Wellness Records, Counselor Sessions, Program Enrollments, and Progress Trackers.

3.5 Schema Builder

We used Schema Builder in Salesforce to visualize the complete data model. It shows how Patients, Counselors, Wellness Records, Sessions, Progress Trackers, and Programs are connected.



Outcome

A complete data model has been set up in Salesforce for NeuroWell CRM. All custom objects, fields, and relationships are ready for use in later phases like automation, Apex coding, and reporting.