

Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

Standard Objects Used:

- **User** → Stores doctor, receptionist, and admin login details.
- **Account / Contact** → Optional, for hospital/patient organizational data.

Custom Objects Created:

1. **Patient** → Stores patient details.
2. **Doctor** → Stores doctor details and specialty.
3. **Appointment** → Stores appointment details (date, time, mode, status).
4. **Prescription** → Stores prescriptions linked to appointments.

2. Fields

Key Custom Fields for Objects:

Patient:

- Name (Standard)
- Email
- Phone
- Age
- Gender
- Primary Doctor (Lookup to Doctor)

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Patient

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

15 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(1000)		<input type="checkbox"/>
Age	Age__c	Number(3, 0)		<input type="checkbox"/>
Contact Number	Contact_Number__c	Phone		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Date of Birth	DOB__c	Date		<input type="checkbox"/>
Doctor	Doctor__c	Lookup(Doctor)		<input checked="" type="checkbox"/>
Email	Email__c	Email (Unique)		<input checked="" type="checkbox"/>
Full Name	Full_Name__c	Text(80)		<input type="checkbox"/>
Gender	Gender__c	Picklist		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Medical History	Medical_History__c	Picklist (Multi-Select)		<input type="checkbox"/>

Doctor:

- Name (Standard)
- Email
- Phone
- Specialty

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Doctor

Details

Fields & Relationships

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Fields & Relationships

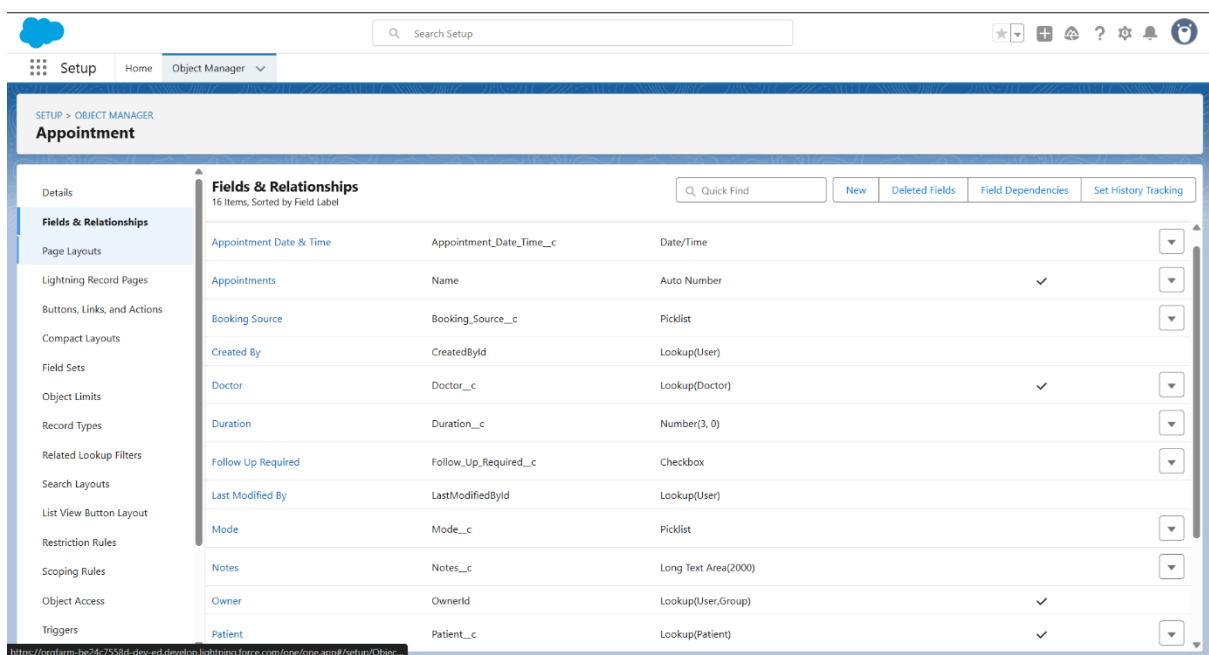
11 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Consultation Fee	Consultation_Fee__c	Currency(16, 2)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Doctor Name	Name	Text(80)		<input checked="" type="checkbox"/>
Email	Email__c	Email (External ID) (Unique)		<input checked="" type="checkbox"/>
Is Default	Is_Default__c	Checkbox		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Phone	Phone__c	Phone		<input type="checkbox"/>
Record Type	RecordTypeId	Record Type		<input checked="" type="checkbox"/>
Specialization	Specialization__c	Picklist		<input type="checkbox"/>
User	User__c	Lookup(User)		<input checked="" type="checkbox"/>

Appointment:

- Appointment Date Time
- Mode (Picklist: Online, In-Person)
- Status (Picklist: Scheduled, Completed, Cancelled)
- Patient (Lookup to Patient)
- Doctor (Lookup to Doctor)



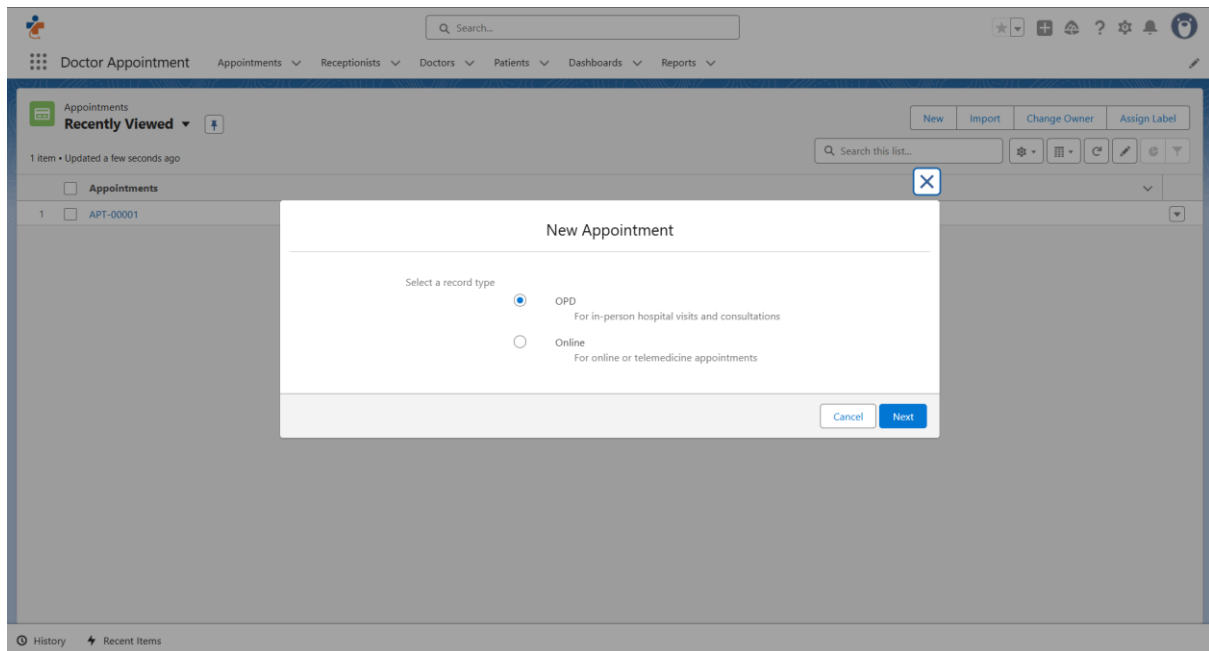
The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Appointment' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, and Triggers. The 'Fields & Relationships' section is selected, showing a list of 16 items sorted by field label. The table lists fields such as Appointment Date & Time, Appointments, Booking Source, Created By, Doctor, Duration, Follow Up Required, Last Modified By, Mode, Notes, Owner, and Patient, along with their data types and lookup relationships.

Field Label	Field Name	Data Type	Lookup Relationship
Appointment Date & Time	Appointment_Date_Time__c	Date/Time	
Appointments	Name	Auto Number	✓
Booking Source	Booking_Source__c	Picklist	
Created By	CreatedById	Lookup(User)	
Doctor	Doctor__c	Lookup(Doctor)	✓
Duration	Duration__c	Number(3, 0)	
Follow Up Required	Follow_Up_Required__c	Checkbox	
Last Modified By	LastModifiedById	Lookup(User)	
Mode	Mode__c	Picklist	
Notes	Notes__c	Long Text Area(2000)	
Owner	OwnerId	Lookup(User/Group)	✓
Patient	Patient__c	Lookup(Patient)	✓

3. Record Types

Appointment Record Types:

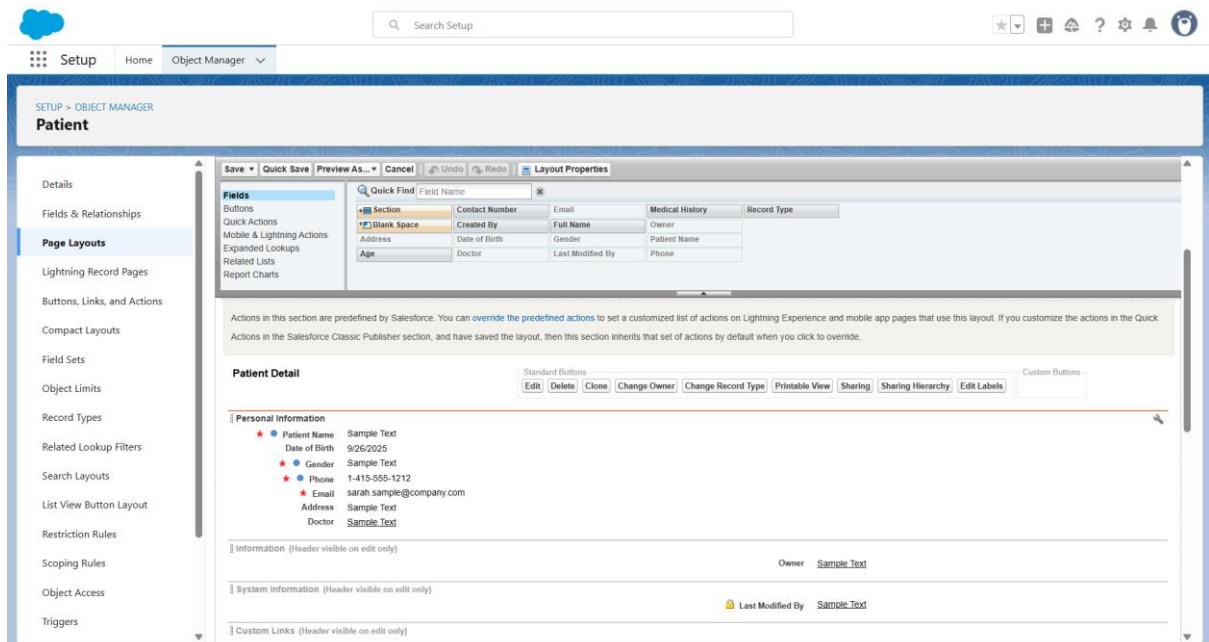
- **In-Person Appointment** → Fields: Room Number, Visit Type
- **Online Appointment** → Fields: Video Call Link, Platform



4. Page Layouts

Patient Page Layout:

- Personal Info (Name, Age, Gender, Contact)
- Primary Doctor
- Recent Appointments (Related List)



Doctor Page Layout:

- Personal Info, Specialty
- Assigned Patients
- Upcoming Appointments (Related List)

The screenshot shows the Salesforce Setup interface for the 'Doctor' 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', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', 'Object Access', and 'Triggers'. The 'Page Layouts' option is selected. The main content area displays the 'Doctor Detail' page layout. At the top, there is a 'Fields' section with a 'Quick Find' bar and a list of fields including 'Section', 'Blank Space', 'Consultation Fee', 'Created By', 'Doctor Name', 'Email', 'Is Default', 'Last Modified By', 'Owner', 'Phone', 'Record Type', and 'Specialization'. Below this, the 'Doctor Detail' section includes standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels) and custom buttons. The layout is divided into sections: 'Information (Header visible on edit only)' with fields for Doctor Name, Specialization, Phone, Email, and Consultation Fee; 'System Information (Header visible on edit only)' with Created By and Last Modified By; and 'Custom Links (Header visible on edit only)'. There is also a 'Mobile Cards (Salesforce mobile only)' section with a placeholder for expanded lookups and mobile-enabled Visualforce pages. At the bottom, there is a 'Related Lists' section.

Appointment Page Layout:

- Appointment Date/Time, Mode, Status
- Linked Patient & Doctor
- Related Prescriptions

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. The left sidebar is the same as the previous screenshot, with 'Page Layouts' selected. The main content area displays the 'Appointment Detail' page layout. At the top, there is a 'Fields' section with a 'Quick Find' bar and a list of fields including 'Section', 'Blank Space', 'Appointment Date...', 'Appointments', 'Booking Source', 'Created By', 'Duration', 'Follow Up Required', 'Last Modified By', 'Mode', 'Notes', 'Owner', 'Patient', 'Receptionist', 'Reminder Sent', 'Status', and 'Record Type'. Below this, the 'Appointment Detail' section includes standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels) and custom buttons. The layout is divided into sections: 'Information (Header visible on edit only)' with fields for Appointments, Appointment Date & Time, Duration, Status, Doctor, Booking Source, Patient, Receptionist, Reminder Sent, Follow Up Required, and Notes; 'System Information (Header visible on edit only)' with Created By and Last Modified By; and 'Custom Links (Header visible on edit only)'.

5. Compact Layouts

Purpose: Show critical info in **Lightning record highlights** and mobile views.

- **Patient Compact Layout:** Name, Age, Gender, Phone, Email

Patient Compact Layout

Patient Compact Layout

[Back to Patient](#)

Help for this Page

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label

Patient Compact Layout

Object Name

Patient

API Name

Patient_Compact_Layout

Included Fields

Patient Name
Age
Gender
Phone
Email

Created By

Atharva Gulhane, 9/16/2025, 2:03 PM

Modified By

Atharva Gulhane, 9/16/2025, 2:03 PM

EditCloneDeleteCompact Layout Assignment

- **Doctor Compact Layout:** Name, Specialty, Phone, Email

Doctor Compact Layout

Doctor Compact Layout

[Back to Doctor](#)

Help for this Page

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label

Doctor Compact Layout

Object Name

Doctor

API Name

Doctor_Compact_Layout

Included Fields

Doctor Name
Specialization
Phone
Email

Created By

Atharva Gulhane, 9/16/2025, 2:07 PM

Modified By

Atharva Gulhane, 9/16/2025, 2:07 PM

EditCloneDeleteCompact Layout Assignment

- **Appointment Compact Layout:** Date/Time, Status, Patient Name

Appointment Compact Layout

Appointment Compact Layout

[Back to Appointment](#)

Help for this Page

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label

Appointment Compact Layout

Object Name

Appointment

API Name

Appointment_Compact_Layout

Included Fields

Appointment Date & Time
Doctor
Patient
Status
Duration

Created By

Atharva Gulhane, 9/16/2025, 1:04 PM

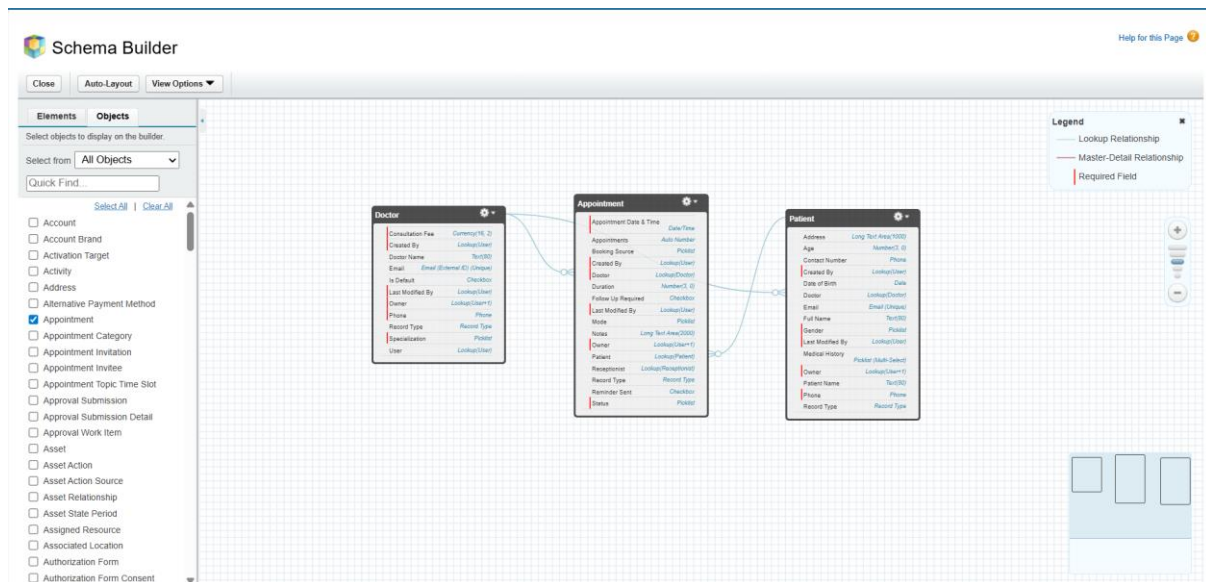
Modified By

Atharva Gulhane, 9/16/2025, 1:04 PM

EditCloneDeleteCompact Layout Assignment

6. Schema Builder

- Used to **visualize objects and relationships**.
- Shows how **Patients, Doctors, Appointments, and Prescriptions** are connected.
- Helpful for admins & developers to quickly understand the data model.



7. Lookup vs Master-Detail vs Hierarchical Relationships

Lookup Relationship:

- **Patient → Doctor** → Optional; patient can exist without doctor assigned.

Master-Detail Relationship:

- **Prescription → Appointment** → Prescription cannot exist without an appointment.

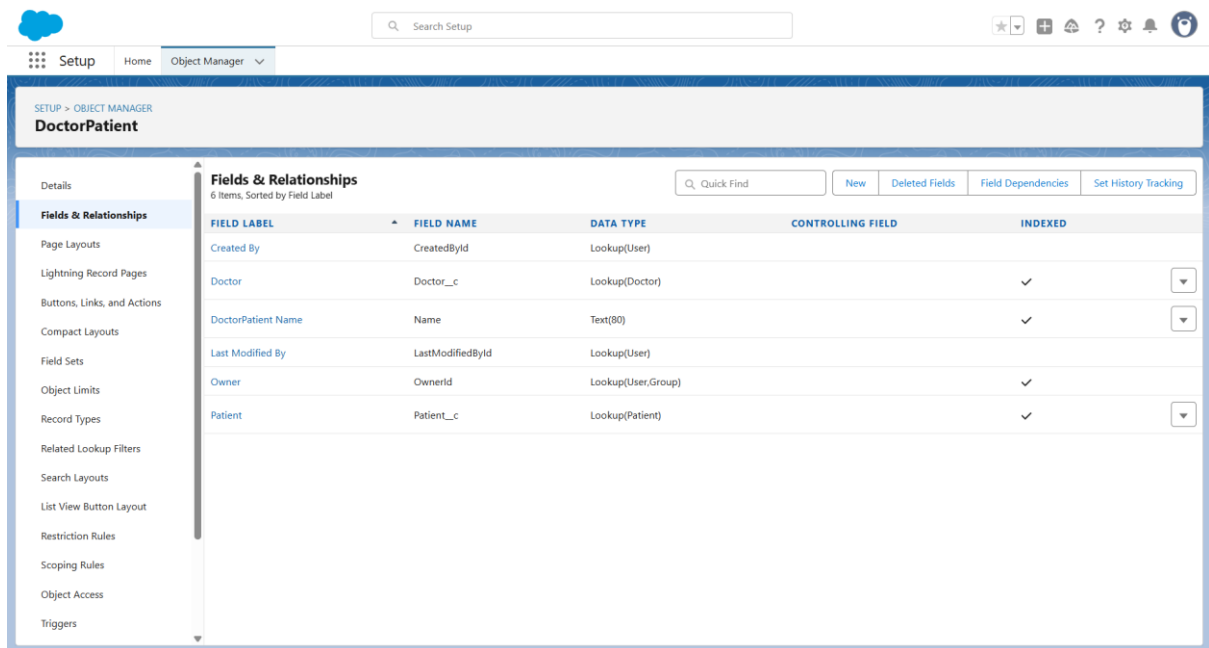
Hierarchical Relationship:

- Not needed in this project (used mainly for User-to-User relationships).

8. Junction Objects

Use Case:

- If a patient can have multiple doctors and a doctor can have multiple patients (many-to-many), we can create a **Patient Doctor junction object**.
- Fields:
 - Patient (Lookup)
 - Doctor (Lookup)
- Tracks multiple doctor assignments per patient.



The screenshot displays the Salesforce Setup interface for the 'DoctorPatient' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields for the 'DoctorPatient' object, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Created By, Doctor, DoctorPatient Name, Last Modified By, Owner, and Patient.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Doctor	Doctor__c	Lookup(Doctor)		✓
DoctorPatient Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient	Patient__c	Lookup(Patient)		✓