
☐ **HealthCare360 – Phase 3 Documentation**

Module: Data Modeling & Relationships in Salesforce

☐ **1. Standard & Custom Objects**

☒ **Implemented:**

- **Standard Objects Used:** Contact, User
- **Custom Objects Created:**
 - Patient
 - Appointment
 - Medical Note
 - Doctor
 - Prescription

☐ **Notes:**

- All custom objects configured with reports, activities, and field history tracking.
 - Record Name field customized where applicable (e.g., Patient ID).
-

☐ **2. Fields**

☒ **Implemented:**

- **Patient Object Fields:**
 - Patient Name (Text)
 - Date of Birth (Date)
 - Gender (Picklist)
 - Contact Number (Phone)
 - Medical History (Long Text Area)
- **Doctor Object Fields:**
 - Doctor Name (Text)
 - Specialty (Text)

- Phone (Phone)
- **Appointment Object Fields:**
 - Appointment Name (Text)
 - Date (Date)
 - Time (Time)
 - Patient (Lookup to Patient)
 - Doctor (Lookup to Doctor)

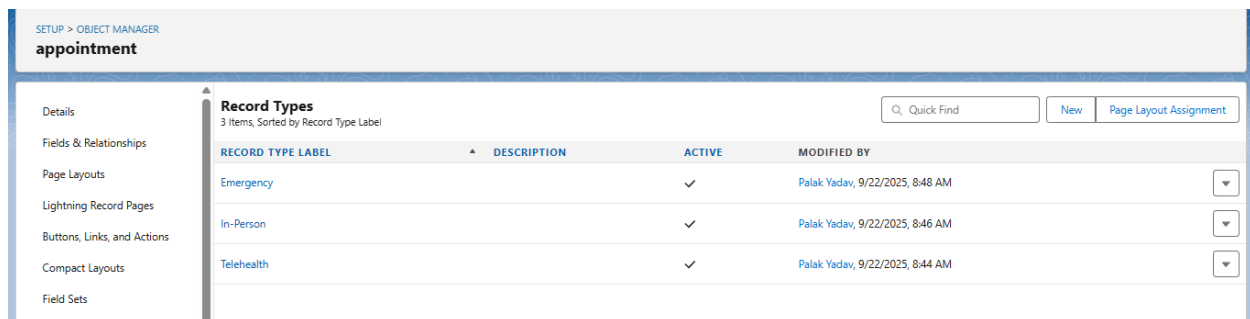
□ 3. Record Types

✓ Implemented:

- **Appointment Record Types:**
 - Telehealth
 - In-Person
 - Emergency

□ Notes:

- Record types assigned to Doctor and Nurse profiles with custom page layouts.



The screenshot shows the Salesforce Setup > Object Manager > appointment page. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Record Types' and shows 3 items, sorted by Record Type Label. The table lists three record types: Emergency, In-Person, and Telehealth, all of which are active and were modified by Palak Yadav on 9/22/2025. Each row has a dropdown arrow in the rightmost column.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Emergency		✓	Palak Yadav, 9/22/2025, 8:48 AM
In-Person		✓	Palak Yadav, 9/22/2025, 8:46 AM
Telehealth		✓	Palak Yadav, 9/22/2025, 8:44 AM

4. Page Layouts

✓ Implemented:

- Separate layouts for Doctor, Nurse, and Receptionist profiles.
- Fields grouped into logical sections (e.g., Medical Info, Contact Info).
- Related lists added: Appointments, Medical Notes, Prescriptions.

SETUP > OBJECT MANAGER

appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Page Layouts

4 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
appointment Layout	Palak Yadav, 9/17/2025, 6:10 AM	Palak Yadav, 9/17/2025, 6:18 AM	▼
Emergency	Palak Yadav, 9/22/2025, 8:48 AM	Palak Yadav, 9/22/2025, 8:48 AM	▼
In-Person	Palak Yadav, 9/22/2025, 8:46 AM	Palak Yadav, 9/22/2025, 8:46 AM	▼
Telehealth	Palak Yadav, 9/22/2025, 8:49 AM	Palak Yadav, 9/22/2025, 8:49 AM	▼

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

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Quick Find

Field Name

Section

Blank Space

Date of Birth

Gender

Contact Number

Created By

Owner

patient object Name

Last Modified By

Medical History

Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

patient Detail

Standard Buttons

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Custom Buttons

Information (Header visible on edit only)

patient object

Name

Sample Text

Owner

Sample Text

Gender

Sample Text

Date of Birth

Sample Text

Contact Number

1-415-555-1212

Medical History

Sample Text

System Information (Header visible on edit only)

Created By

Sample Text

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

❑ 5. Compact Layouts

✔ Implemented:

- **Patient Compact Layout:**
 - Patient Name
 - Age
 - Contact Number

❑ Notes:

- Assigned as primary layout for mobile and highlights panel.

The screenshot shows the Salesforce 'Compact Layout' configuration page for the 'patient' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, **Compact Layouts** (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'patient Compact Layout Patient Summary' with a 'Back to patient' link. Below this is a 'Compact Layout Detail' section with two identical layout cards. Each card has buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The first card shows the following details: Label: Patient Summary, API Name: Patient_Summary, Object Name: patient, Included Fields: Contact Number, patient object Name, Gender, Date of Birth, Created By: Palak Yadav, 9/22/2025, 9:39 AM, and Modified By: Palak Yadav, 9/22/2025, 9:39 AM.

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

patient Compact Layout

Patient Summary

[Back to patient](#)

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

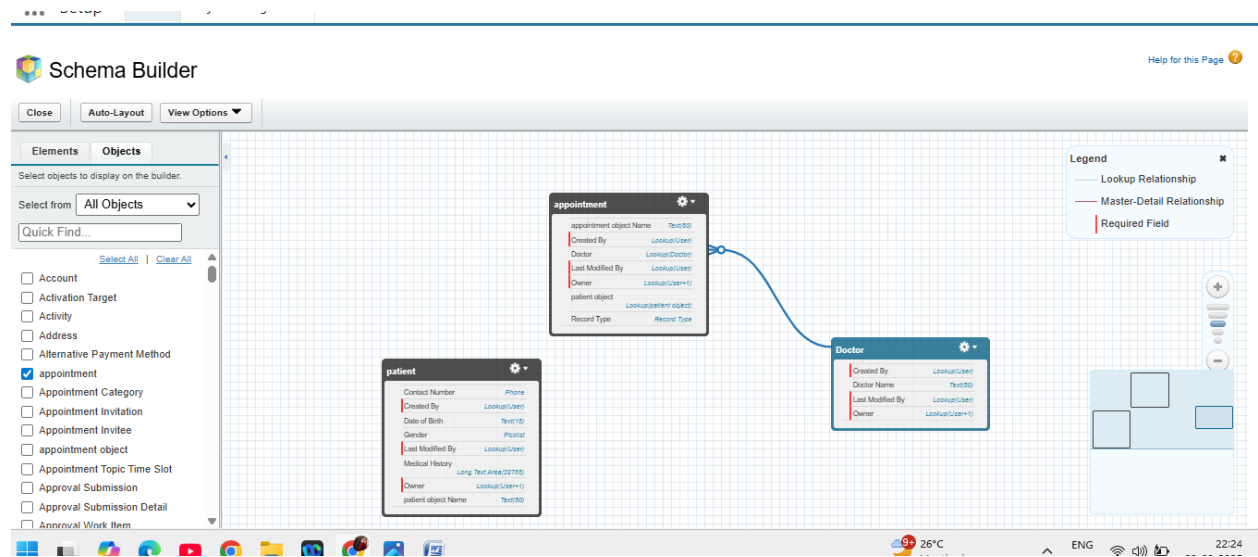
Label	Patient Summary	Object Name	patient
API Name	Patient_Summary		
Included Fields	Contact Number patient object Name Gender Date of Birth		
Created By	Palak Yadav, 9/22/2025, 9:39 AM	Modified By	Palak Yadav, 9/22/2025, 9:39 AM

Edit Clone Delete Compact Layout Assignment

❑ 6. Schema Builder

✔Used:

- Visualized relationships between Patient, Appointment, and Doctor.
- Validated field types and object connections.
- Created relationships directly from canvas.



7. Relationships

✓ Implemented:

Relationship Type	Used In Object	Related To	Purpose
Lookup	Appointment	Doctor, Patient	Flexible linking
Master-Detail	Medical Note	Patient	Strong dependency, roll-up
Hierarchical	User (Nurse Profile)	User (Doctor)	Reporting structure

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

FIELD LABEL	FIELD NAME	DATA TYPE
appointment object Name	Name	Text(80)
Created By	CreatedById	Lookup(User)
Doctor	Doctor__c	Lookup(Doctor)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
patient object	patient_object__c	Lookup(patient object)
Record Type	RecordTypeId	Record Type

[Setup](#)[Home](#)[Object Manager](#) [SETUP > OBJECT MANAGER](#)

Medical Note

[Details](#)**Fields & Relationships**[Page Layouts](#)[Lightning Record Pages](#)[Buttons, Links, and Actions](#)[Compact Layouts](#)[Field Sets](#)[Object Limits](#)[Record Types](#)[Setup](#)[Home](#)[Object Manager](#)

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Medical Note Name	Name	Text(80)		✓	
patient	patient__c	Master-Detail(patient)		✓	

[SETUP > OBJECT MANAGER](#)

Nurse

[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](#)

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

[New](#)[Deleted Fields](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Nurse Name	Name	Text(80)	
Owner	OwnerId	Lookup(User,Group)	
Reports to Doctor	Reports_to_Doctor__c	Lookup(User)	

❑ 8. Junction Object

✔ Implemented:

- **Object Name:** PatientDoctorAssignment
- **Relationships:**
 - Master-Detail to Patient
 - Master-Detail to Doctor
- **Additional Field:** Assignment Date (Date)

❑ Notes:

- Enables many-to-many mapping between patients and doctors.

SETUP > OBJECT MANAGER

PatientDoctorAssignment

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

Fields & Relationships

6 Items, Sorted by Field Label

[New](#)

[Delete](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Assignment Date	Assignment_Date__c	Date	
Created By	CreatedById	Lookup(User)	
Doctor	Doctor__c	Master-Detail(Doctor)	
Last Modified By	LastModifiedById	Lookup(User)	
patient	patient__c	Master-Detail(patient)	
PatientDoctorAssignment Name	Name	Text(80)	

9. External Objects

✔ Implemented (Practice):

- **External Data Source Name:** LabResults
- **Type:** Salesforce Connect: OData 4.0
- **Endpoint Used:** `https://services.odata.org/V4/Northwind/Northwind.svc/`
- **Authentication:** No Authentication
- **Status:** Validated and Synced

□ Notes:

- External objects appear in Object Manager for reference and testing.

The screenshot shows the Salesforce Setup interface for 'External Data Sources'. The page title is 'External Data Source: LabResults'. Below the title, it states 'Connected to another Salesforce org or a third-party database or content system.' and provides a link to 'Back to External Data Sources'.

At the top right, there is a 'Help for this Page' link. Below the title, there are three buttons: 'Edit', 'Validate and Sync', and 'Delete'.

The main configuration area is divided into two sections: 'Parameters' and 'Authentication'.

Parameters Section:

- URL: `https://services.odata.org/V4/Northwind/Northwind.svc/`
- Connection Timeout (Seconds): 120
- Writable External Objects: ☐
- High Data Volume: ☐
- Server Driven Pagination: ☐
- Request Row Counts: ☒
- Compress Requests: ☐
- Enable Search: ☒
- Custom Query Option for Salesforce Search: ☐
- Format: AtomPub
- Special Compatibility: None

Authentication Section:

- Certificate: ☐
- Identity Type: Anonymous
- Authentication Protocol: No Authentication

At the bottom of the 'Authentication' section, there are three buttons: 'Edit', 'Validate and Sync', and 'Delete'.