

# Salesforce Project Implementation Phases with Concepts (Admin + Developer)

## Problem Statement:

Healthcare organizations often face challenges in managing patient records, scheduling appointments, tracking billing, and maintaining communication between patients, doctors, and administrative staff. Since updates and interactions are scattered across calls, paper records, and separate systems, this leads to inefficiency, missed appointments, delayed billing, and lower patient satisfaction.

## Proposed Solution:

A tailored CRM solution, PulsePoint CRM, is designed to centralize patient data, streamline appointment scheduling, automate billing generation, and enable doctors and staff to have real-time access to patient information. This solution improves healthcare workflow efficiency, reduces manual errors, and enhances overall patient care.

## Phase 3: Data Modeling & Relationships

### 1. Standard and Custom Objects

Objects Used:

#### CUSTOM OBJECTS:

- Patient – Stores patient details like Name, DOB, Gender, Contact info.
- Appointment – Captures scheduling between Patient and Doctor, with date, time, and status.
- Billing – Auto-generated invoices linked to Appointments and Patients.
- Doctor – Stores doctor details like specialization, department, and availability.
- Department – Represents hospital/clinic departments (Cardiology, Pediatrics, etc.).

#### STANDARD OBJECTS:

- Account – Represents external insurance companies or partner organizations.
- Contact – Represents individuals associated with external accounts.

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

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name

Patient\_\_c

Custom

✓

Singular Label

Patient

Plural Label

Patients

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Appointment

Details

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Object Access

Details

Description

API Name

Appointment\_\_c

Custom

✓

Singular Label

Appointment

Plural Label

Appointments

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Billing

Details

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Object Access

Details

Description

API Name

Billing\_\_c

Custom

✓

Singular Label

Billing

Plural Label

Billings

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

## Department

**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
- Validation Rules

**Details**

Edit Delete

Description

API Name  
Department\_\_c

Custom

✓

Singular Label  
Department

Plural Label  
Departments

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

## Doctor

**Details**

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- Search Layouts
- List View Button Layout
- Validation Rules

**Details**

Edit Delete

Description

API Name  
Doctor\_\_c

Custom

✓

Singular Label  
Doctor

Plural Label  
Doctors

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

### Relationships and Fields in PulsePoint CRM

1. Appointment → Patient: Each Appointment is linked to a Patient (lookup).
2. Appointment → Doctor: Each Appointment is linked to a Doctor (lookup).
3. Appointment → Department: Each Appointment is associated with a Department (lookup).
4. Billing → Appointment: Each Billing is linked to an Appointment (lookup).
5. Billing → Patient: Each Billing is also linked directly to a Patient (lookup).

SETUP > OBJECT MANAGER

Doctor

Details

Fields & Relationships

Page Layouts

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Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

10 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
Contact Number	Contact_Number__c	Phone		
Created By	CreatedById	Lookup(User)		
Doctor Name	Name	Text(80)		✓
Email	Email__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(100)		
Owner	OwnerId	Lookup(User,Group)		✓
Specialty	Specialty__c	Picklist		
User	User__c	Lookup(User)		✓

SETUP > OBJECT MANAGER

Department

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

Fields & Relationships

5 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
Created By	CreatedById	Lookup(User)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(100)		
Owner	OwnerId	Lookup(User,Group)		✓

SETUP > OBJECT MANAGER

Billing

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

Fields & Relationships

8 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
Amount	Amount__c	Currency(18, 0)		
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Invoice Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient	Patient__c	Lookup(Patient)		✓
Status	Status__c	Picklist		

<div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Patient</div> </div>																																																	
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Page Layouts
   
 Customize what fields & sections users see, based on their profiles.

SETUP > OBJECT MANAGER

Patient

Details

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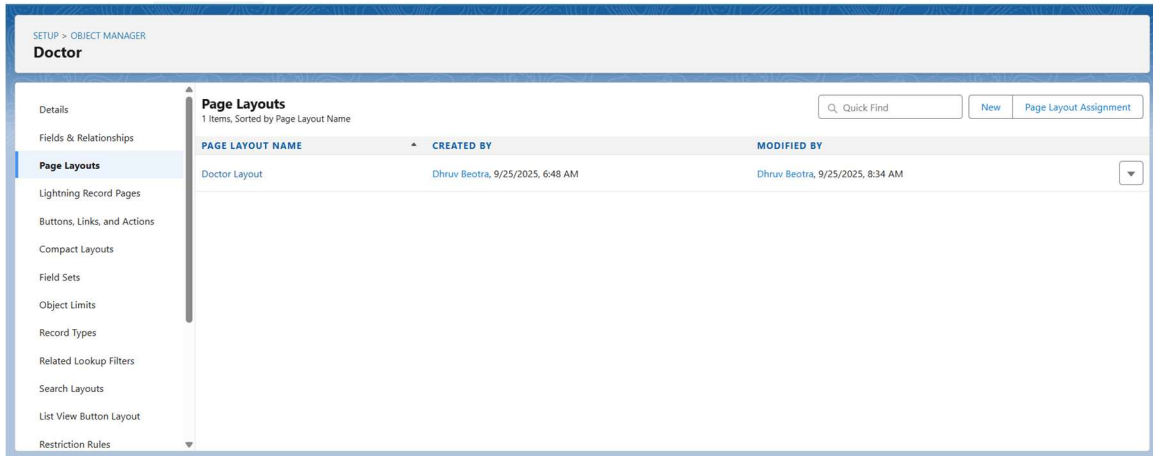
1 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Patient Layout	Dhruv Beotra, 9/25/2025, 6:22 AM	Dhruv Beotra, 9/25/2025, 1:11 PM	



## Schema Builder

Use Schema Builder to visualize the relationships between Patient, Appointment, Billing, Doctor, and Department.

