

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

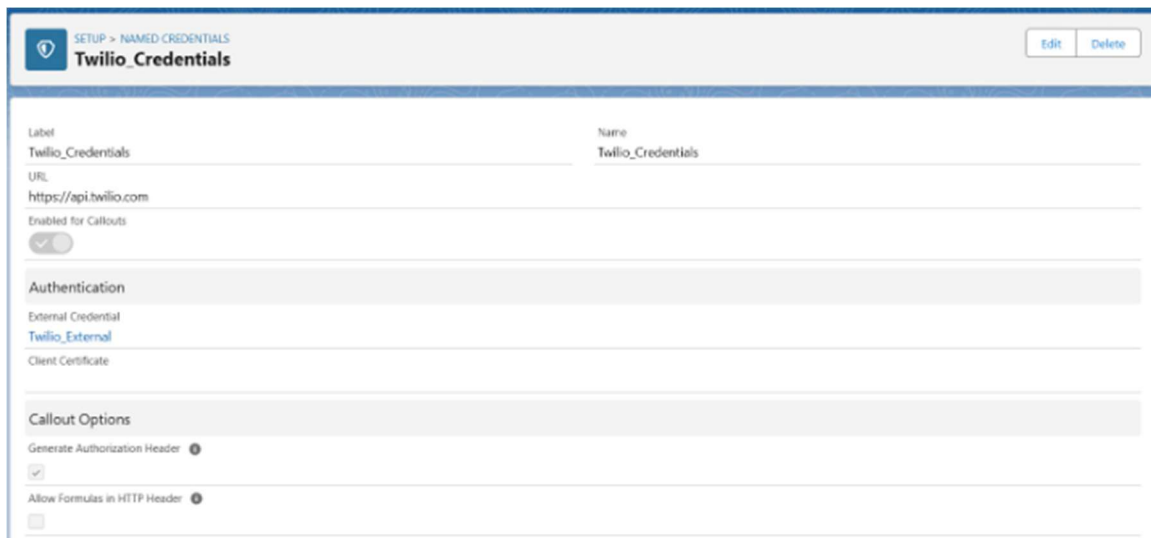
Problem Statement:

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 7: Integration & External Access

1. NAMED CREDENTIALS :



The screenshot displays the Salesforce Setup page for Named Credentials. The breadcrumb trail at the top reads "SETUP > NAMED CREDENTIALS". The page title is "Twilio_Credentials". In the top right corner, there are "Edit" and "Delete" buttons. The form contains the following fields and sections:

- Label:** Twilio_Credentials
- Name:** Twilio_Credentials
- URL:** https://api.twilio.com
- Enabled for Callouts:** A toggle switch that is currently turned on.
- Authentication:**
 - External Credential:** Twilio_External
 - Client Certificate:** (Empty field)
- Callout Options:**
 - Generate Authorization Header:** A checkbox that is checked.
 - Allow Formulas in HTTP Header:** A checkbox that is unchecked.


At the bottom of the page, there is a small text link: "Access Named Credentials Setup".

```

1 public class SmsService {
2     public static void sendSms(String phone, String msg) {
3         HttpRequest req = new HttpRequest();
4         req.setEndpoint('callout:Twilio_Credentials/Messages.json');
5         req.setMethod('POST');
6         req.setHeader('Content-Type', 'application/x-www-form-urlencoded');
7         req.setBody('To=' + phone + '&From=1234567890&Body=' + msg);
8
9         Http http = new Http();
10        HttpResponse res = http.send(req);
11        System.debug('Response: ' + res.getBody());
12    }
13 }
14

```

2. REMOTE SITE SETTINGS :



SETUP

Remote Site Settings

Remote Site Details

Help for this Page

Remote Site Detail

Edit Delete Close

Remote Site Name	Twilio_API	Modified By	Chouy Beotra 9/27/2025, 4:54 AM
Remote Site URL	https://api.twilio.com		
Disable Protocol Security	<input type="checkbox"/>		
Description			
Active	<input checked="" type="checkbox"/>		
Created By	Chouy Beotra 9/27/2025, 4:54 AM		

Edit Delete Close

3. PLATFORM EVENTS :



SETUP

Platform Events

Platform Event

AppointmentScheduledEvent

[Help for this Page](#)[Standard Fields 16](#) | [Custom Fields & Relationships 0](#)

Platform Event Definition Detail

[Edit](#)[Delete](#)

Singular Label	AppointmentScheduledEvent	Description	
Plural Label	AppointmentScheduledEvents	Deployment Status	Deployed
Object Name	AppointmentScheduledEvent		
API Name	AppointmentScheduledEvent__e		
Event Type	High Volume i		
Publish Behavior	Publish Immediately i		
Created By	Dhruv Bectora 9/27/2025, 5:10 AM	Modified By	Dhruv Bectora 9/27/2025, 5:10 AM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

[New](#)