Salesforce Project Implementation Phases with Concepts (Admin + Developer)

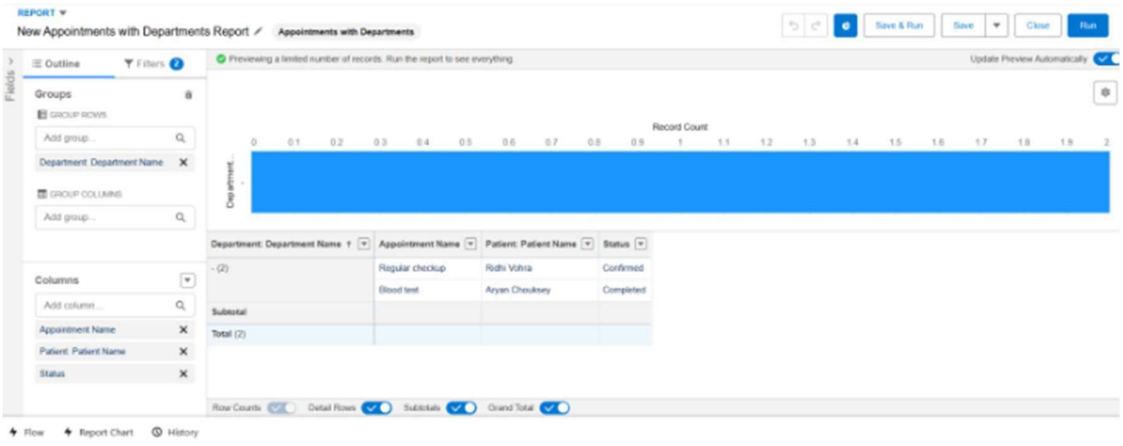
Problem Statement:

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.

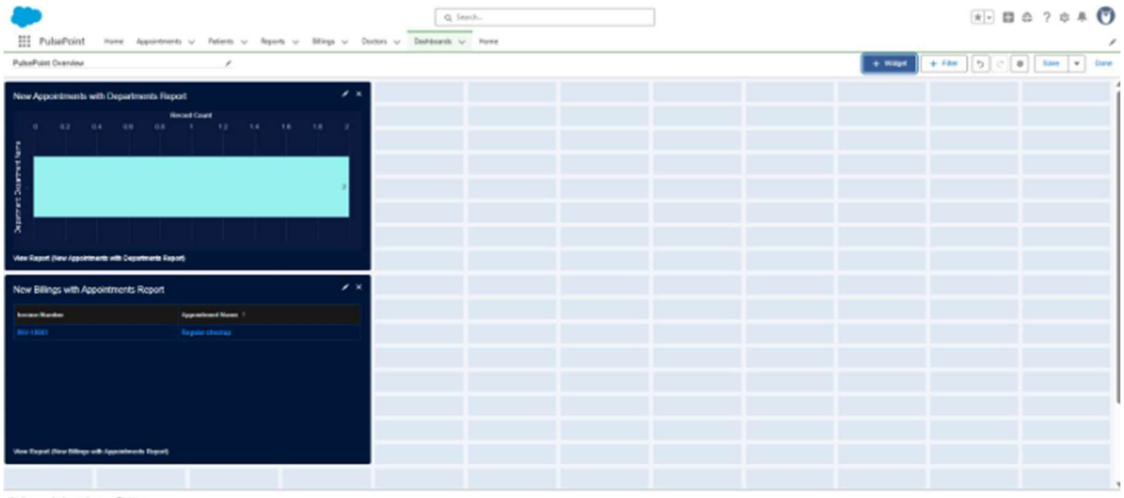
Phase 9: Reporting, Dashboards & Security Review

1. **REPORTS :**
   - A **report** is a collection of records (data) that satisfy certain criteria, displayed in rows columns (or grouped formats)
   - It helps to organize, filter, group, and present data so users can analyze, review, or share insights.



2. DASHBOARDS :

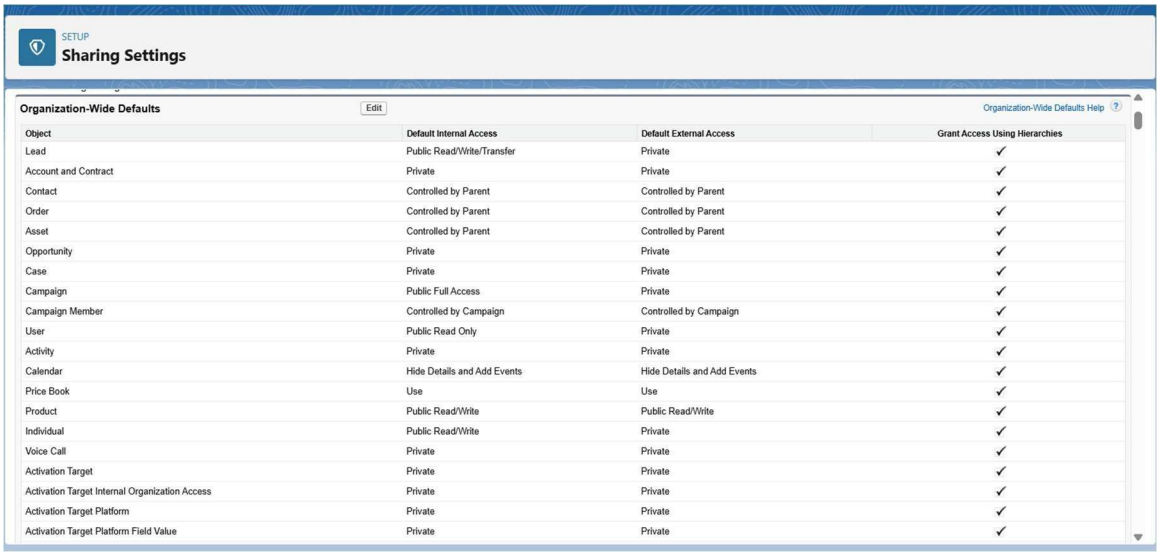
A **dashboard** is a visual summary of one or more reports in Salesforce. It shows key metrics and performance indicators (KPIs) using charts, tables, gauges, metrics, etc.



3. **<u>SHARING SETTINGS :</u>**

   Sharing Settings control how records (data) are shared among users in Salesforce — who can view, edit, or delete which records.

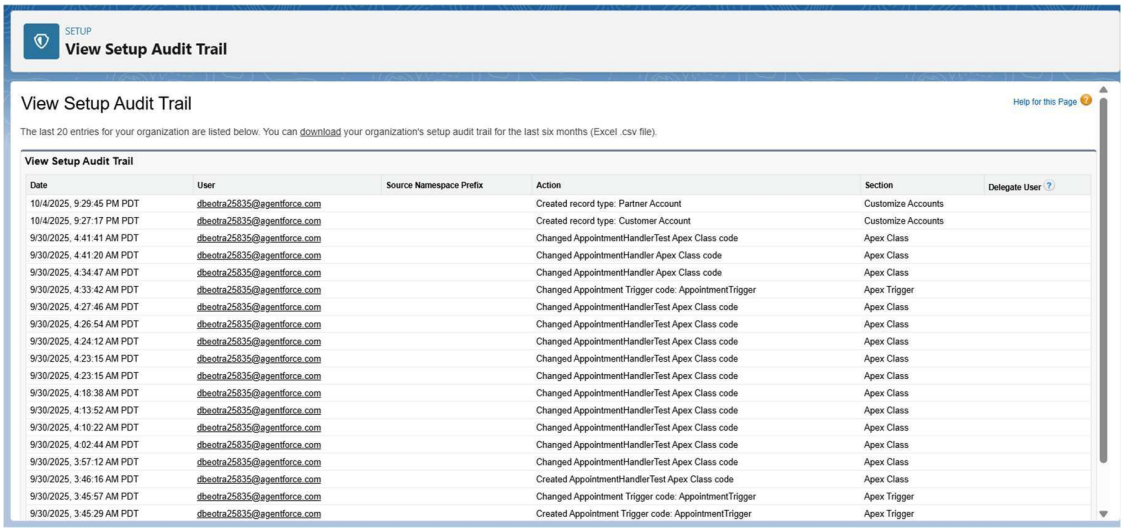
   It starts with a **baseline** (Org-Wide Defaults) and then layer by layer you can open (grant) more access via role hierarchy, sharing rules, manual sharing, etc.



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓

4. **<u>AUDIT TRAILS:</u>**

   An **audit trail** (or audit log) is a chronological record of changes, events or actions that have taken place in a system. It shows *who* did *what*, *when*, and *where*.



SETUP

View Setup Audit Trail

View Setup Audit Trail

Help for this Page

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
10/4/2025, 9:29:45 PM PDT	dbeotra25835@agentforce.com		Created record type: Partner Account	Customize Accounts	
10/4/2025, 9:27:17 PM PDT	dbeotra25835@agentforce.com		Created record type: Customer Account	Customize Accounts	
9/30/2025, 4:41:41 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:41:20 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandler Apex Class code	Apex Class	
9/30/2025, 4:34:47 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandler Apex Class code	Apex Class	
9/30/2025, 4:33:42 AM PDT	dbeotra25835@agentforce.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/30/2025, 4:27:46 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:26:54 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:24:12 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:23:15 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:23:15 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:18:38 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:13:52 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:10:22 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:02:44 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:57:12 AM PDT	dbeotra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:46:16 AM PDT	dbeotra25835@agentforce.com		Created AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:45:57 AM PDT	dbeotra25835@agentforce.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/30/2025, 3:45:29 AM PDT	dbeotra25835@agentforce.com		Created Appointment Trigger code: AppointmentTrigger	Apex Trigger	