

# 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.

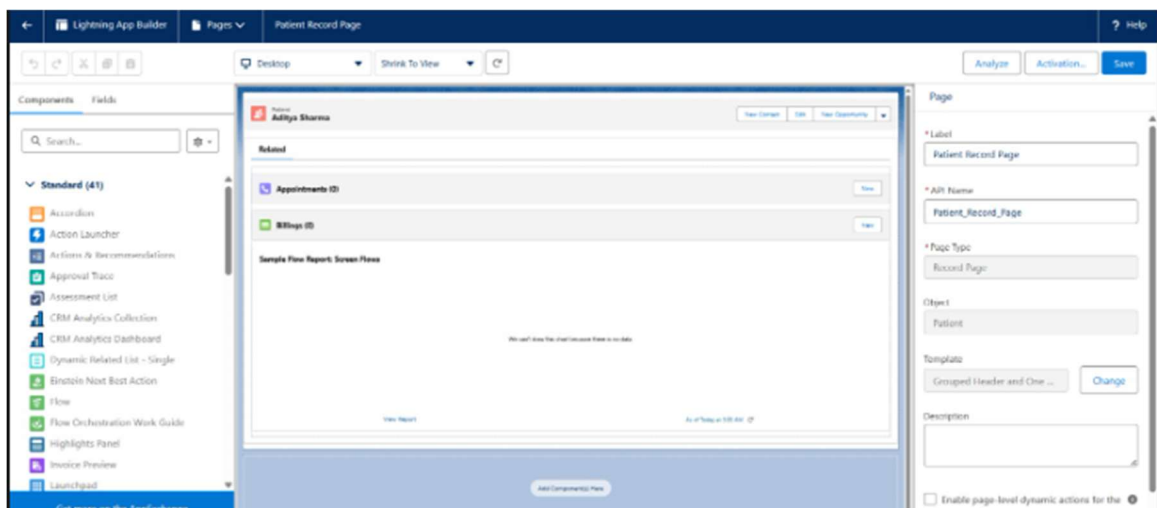
**Proposed Solution :** A tailored CRM solution, PulsePoint CRM, is designed to centralize patient data, streamline appointment scheduling, automate billing generation, and enable doctors and staff to have real-time access to patient information. This solution improves healthcare workflow efficiency,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

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## Phase 6: User Interface Development

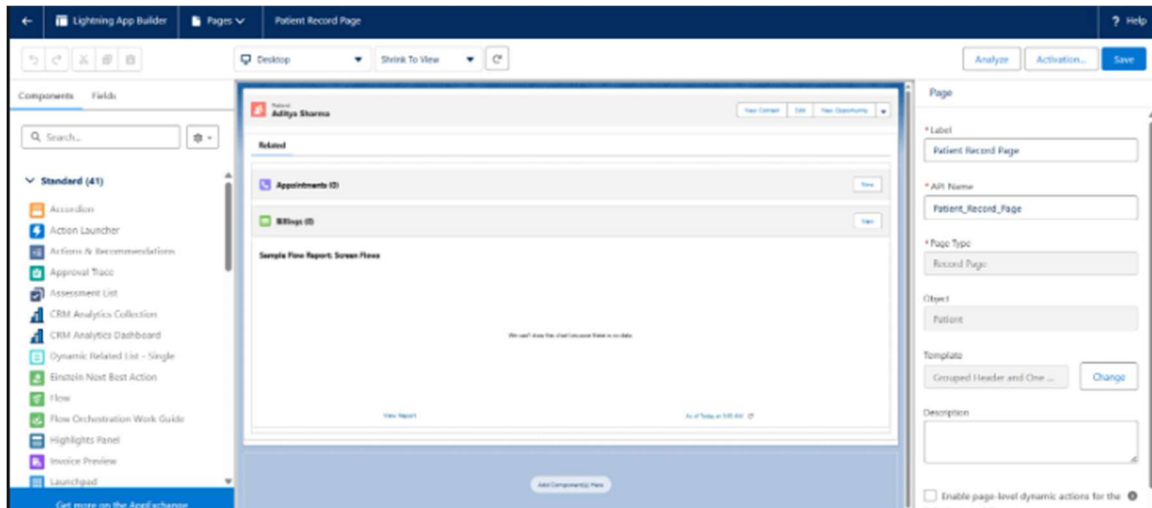
### 1. LIGHTNING APP BUILDER :

Build custom pages for user without coding .



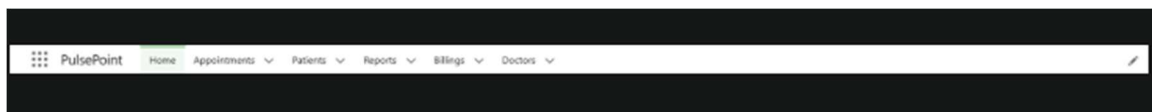
## 2. RECORD PAGES :

Customize how individual records display.



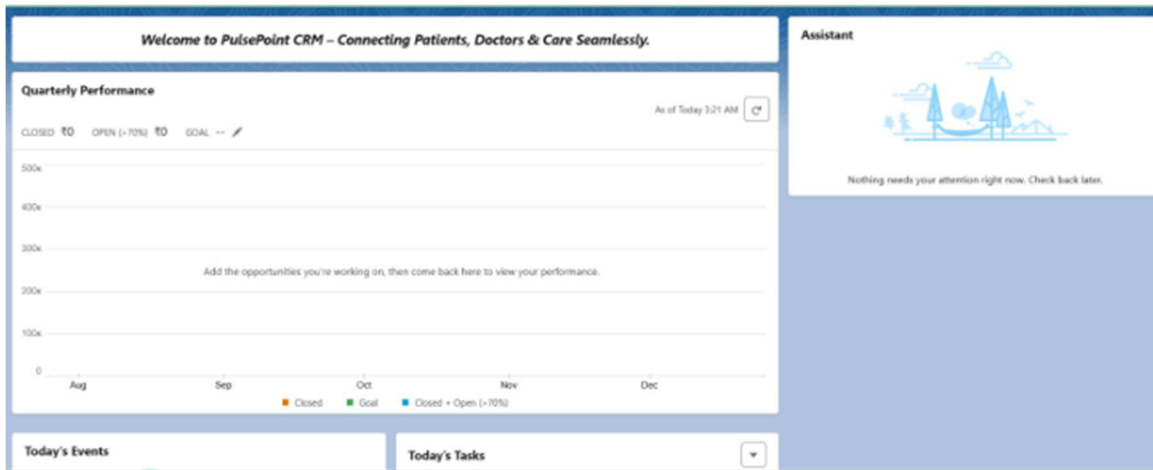
## 3. TABS:

Provide easy navigation to objects or apps.



## 4. HOME PAGE LAYOUTS:

Customize dashboards for users on login.



## 5. UTILITY ITEMS:

Lightning App Builder | App Settings | Pages | PulsePoint | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

### Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#) | Utility Bar Alignment: Default

- Flow**
- Report Chart
- History
- Notes

**PROPERTIES**

Flow

**Utility Item Properties**

\*Label:

Icon:

Panel Width:

Panel Height:

☐ Start automatically

**Component Properties**

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

