

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 :**

A **Named Credential** in Salesforce is a secure and reusable configuration that specifies the URL of an external service and the authentication parameters required to access it. This simplifies the process of making authenticated callouts from Apex code, flows, or external services by centralizing authentication details in one place

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Label

Twilio_Credentials

Name

Twilio_Credentials

URL

<https://api.twilio.com>

Enabled for Callouts



Authentication

External Credential

[Twilio_External](#)

Client Certificate

Callout Options

Generate Authorization Header ⓘ



Allow Formulas in HTTP Header ⓘ



A Twilio Managed Client for HTTP Headers

```

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 :

Remote Site Settings in Salesforce define a list of external domains that your Salesforce organization can communicate with. These settings are crucial for enabling outbound integrations, such as callouts from Apex code, Lightning components, or external services, to external systems.

Remote Site Settings

Remote Site Details

Remote Site Detail

Remote Site Name: Twilio_API

Remote Site URL: https://api.twilio.com

Disable Protocol Security: ☐

Description:

Active: ☒

Created By: Chitra Beotra, 9/27/2025, 4:54 AM

Modified By: Chitra Beotra, 9/27/2025, 4:54 AM

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3. PLATFORM EVENTS :

Platform Events in Salesforce are a scalable and secure messaging mechanism that enables apps to communicate within Salesforce or with external systems in real-time.



SETUP

Platform Events

Platform Event

AppointmentScheduledEvent

[Help for this Page](#)[Standard Fields \(6\)](#) | [Custom Fields & Relationships \(2\)](#)

Platform Event Definition Detail

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Singular Label AppointmentScheduledEvent

Description

Plural Label AppointmentScheduledEvents

Deployment Status Deployed

Object Name AppointmentScheduledEvent

API Name AppointmentScheduledEvent__e

Event Type High Volume [X](#)Publish Behavior Publish Immediately [X](#)Created By [Choux.Bedra](#) 9/27/2025, 5:10 AMModified By [Choux.Bedra](#) 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](#)