

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

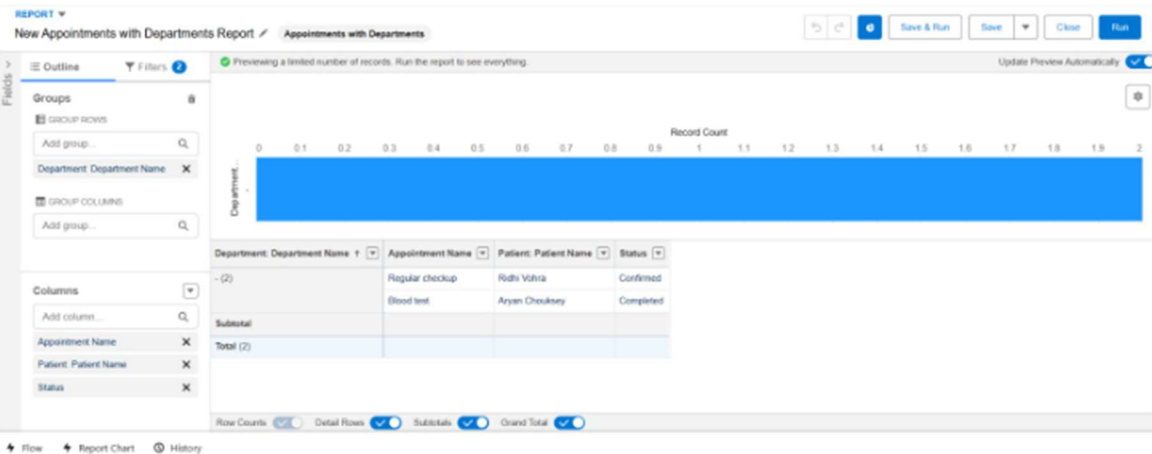
Problem Statement:

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.

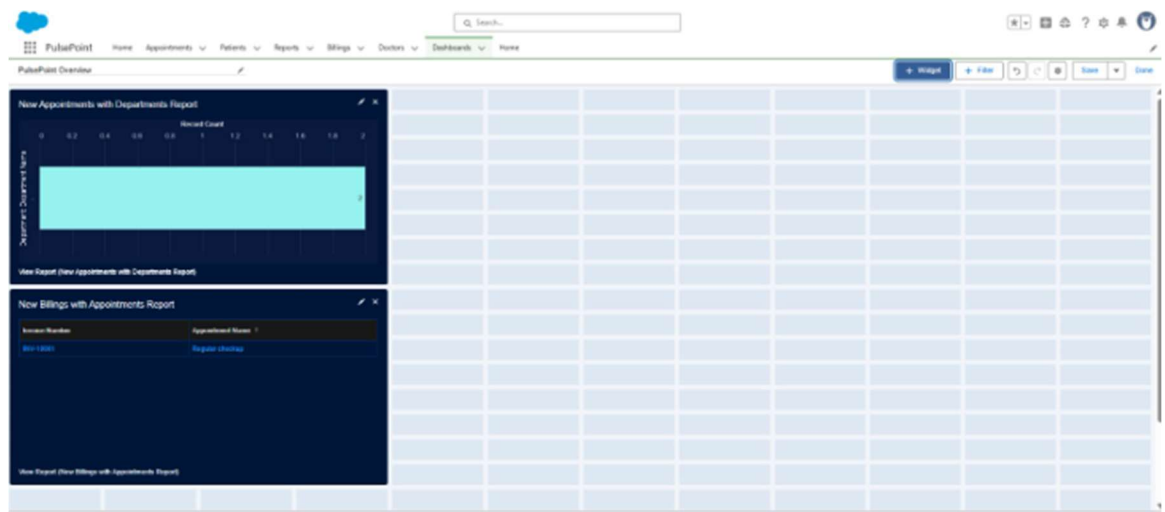
Proposed Solution : A tailored CRM solution, PulsePoint CRM, is designed to centralize patient data, streamline appointment scheduling, automate billing generation, and enable doctors and staff to have real-time access to patient information. This solution improves healthcare workflow efficiency, reduces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

Phase 9: Reporting, Dashboards & Security Review

1. REPORTS :



2. DASHBOARDS :



3. SHARING SETTINGS:

Sharing Settings			
Organization-Wide Defaults			
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. AUDIT TRAILS:

View Setup Audit Trail					
View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
10/4/2025, 9:29:45 PM PDT	dbetra25835@agentforce.com		Created record type: Partner Account	Customize Accounts	
10/4/2025, 9:27:17 PM PDT	dbetra25835@agentforce.com		Created record type: Customer Account	Customize Accounts	
9/30/2025, 4:41:41 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:41:20 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandler Apex Class code	Apex Class	
9/30/2025, 4:34:47 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:33:42 AM PDT	dbetra25835@agentforce.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/30/2025, 4:27:46 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:26:54 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:24:12 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:23:15 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:23:15 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:18:38 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:13:52 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:10:22 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 4:02:44 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:57:12 AM PDT	dbetra25835@agentforce.com		Changed AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:46:16 AM PDT	dbetra25835@agentforce.com		Created AppointmentHandlerTest Apex Class code	Apex Class	
9/30/2025, 3:45:57 AM PDT	dbetra25835@agentforce.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/30/2025, 3:45:29 AM PDT	dbetra25835@agentforce.com		Created Appointment Trigger code: AppointmentTrigger	Apex Trigger	

