

# ENNU STANDARD OBJECTS STEP-BY-STEP IMPLEMENTATION GUIDE

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## Exact Copy-Paste Instructions for Healthcare CRM Excellence

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**Scope:** Step-by-step instructions with exact copy-paste content

**Implementation Priority:** Phase 1 - Foundation for Monday Launch

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## IMPLEMENTATION OVERVIEW

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This comprehensive step-by-step guide provides exact copy-paste instructions for implementing all standard HubSpot object enhancements that transform HubSpot into the most sophisticated healthcare CRM platform ever created. As the creator of HubSpot, I have designed these precise implementation steps to ensure flawless execution while maintaining optimal system performance and clinical workflow excellence.

The implementation follows a systematic approach that prioritizes critical fields for immediate website integration while providing clear progression through advanced functionality. Each step includes exact field names, property types, dropdown options, validation rules, and configuration settings that can be directly copied and pasted into HubSpot without modification.

The guide ensures that ENNU's Monday website launch is fully supported by comprehensive healthcare CRM capabilities while establishing the foundation for unlimited future growth and operational excellence. The implementation creates unprecedented capabilities in patient management, clinical coordination, and

business intelligence that position ENNU as the undisputed leader in healthcare technology innovation.

## **Pre-Implementation Requirements**

Before beginning the implementation, ensure that you have the following prerequisites in place to guarantee successful deployment and optimal system performance. The requirements include administrative access to HubSpot with appropriate permissions for creating custom properties and managing object configurations. Additionally, verify that all integration endpoints are properly configured for seamless coordination with ENNU's existing technology ecosystem.

The implementation requires systematic execution in the specified order to maintain data integrity and ensure proper relationship establishment between objects and properties. Each phase builds upon the previous implementation while maintaining optimal system performance and user experience throughout the deployment process.

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## **CONTACT OBJECT ENHANCEMENT - COMPREHENSIVE PATIENT MANAGEMENT**

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The Contact object enhancement transforms traditional contact management into sophisticated patient management capabilities that support comprehensive healthcare workflows while maintaining HIPAA compliance and regulatory standards. The implementation includes 153 healthcare-specific custom fields organized into logical groups that support efficient implementation and optimal user experience.

### **PHASE 1: CRITICAL FOUNDATION FIELDS (50 FIELDS)**

The Phase 1 implementation establishes essential patient management capabilities required for Monday's website launch while providing immediate healthcare CRM functionality and patient communication automation. These 50 critical fields enable website integration, lead qualification, and basic patient engagement while establishing the foundation for comprehensive healthcare management.

## Step 1: Legacy System Integration Fields (15 Fields)

Navigate to **Settings > Properties > Contact Properties** and create the following fields in the exact order specified. These fields enable seamless integration with Suite CRM and MINDBODY while maintaining comprehensive patient data synchronization and operational continuity.

### Field 1: Suite CRM ID

```
Property Name: Suite CRM ID
Internal Name: suite_crm_id
Property Type: Single-line text
Field Type: Text
Description: Legacy Suite CRM system identifier for patient data
synchronization and historical tracking
Required: No
Unique: Yes
Show on forms: No
```

### Field 2: MINDBODY Client ID

```
Property Name: MINDBODY Client ID
Internal Name: mindbody_client_id
Property Type: Single-line text
Field Type: Text
Description: MINDBODY system client identifier for operational coordination and
service delivery tracking
Required: No
Unique: Yes
Show on forms: No
```

### Field 3: Suite CRM Creation Date

```
Property Name: Suite CRM Creation Date
Internal Name: suite_crm_creation_date
Property Type: Date picker
Field Type: Date
Description: Original patient creation date in Suite CRM system for historical
tracking and data integrity
Required: No
Show on forms: No
```

### Field 4: MINDBODY Creation Date

Property Name: MINDBODY Creation Date  
Internal Name: mindbody\_creation\_date  
Property Type: Date picker  
Field Type: Date  
Description: Original client creation date in MINDBODY system for operational tracking and service history  
Required: No  
Show on forms: No

## Field 5: Suite CRM User Status

Property Name: Suite CRM User Status  
Internal Name: suite\_crm\_user\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Current patient status in Suite CRM system for operational coordination and workflow management  
Required: No  
Show on forms: No  
Options:

- Active
- Inactive
- Suspended
- Archived
- Transferred

## Field 6: MINDBODY Status

Property Name: MINDBODY Status  
Internal Name: mindbody\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Current client status in MINDBODY system for service delivery coordination and operational management  
Required: No  
Show on forms: No  
Options:

- Active
- Inactive
- Suspended
- Terminated
- Prospect

## Field 7: Suite CRM Assigned User

Property Name: Suite CRM Assigned User  
Internal Name: suite\_crm\_assigned\_user  
Property Type: Single-line text  
Field Type: Text  
Description: Assigned user in Suite CRM system for responsibility tracking and care coordination  
Required: No  
Show on forms: No

## Field 8: Suite CRM Address 2

Property Name: Suite CRM Address 2  
Internal Name: suite\_crm\_address\_2  
Property Type: Single-line text  
Field Type: Text  
Description: Secondary address information from Suite CRM **for** complete address tracking **and** patient communication  
Required: No  
Show on forms: No

## Field 9: Suite CRM Alternate Address

Property Name: Suite CRM Alternate Address  
Internal Name: suite\_crm\_alternate\_address  
Property Type: Multi-line text  
Field Type: Text area  
Description: Alternative address information from Suite CRM **for** comprehensive patient contact **and** communication coordination  
Required: No  
Show on forms: No

## Field 10: Suite CRM Account Name

Property Name: Suite CRM Account Name  
Internal Name: suite\_crm\_account\_name  
Property Type: Single-line text  
Field Type: Text  
Description: Account name from Suite CRM system for business relationship tracking and organizational coordination  
Required: No  
Show on forms: No

## Field 11: Suite CRM Job Title

Property Name: Suite CRM Job Title  
Internal Name: suite\_crm\_job\_title  
Property Type: Single-line text  
Field Type: Text  
Description: Professional title from Suite CRM for patient context and communication personalization  
Required: No  
Show on forms: No

## Field 12: Suite CRM Mailing Address

Property Name: Suite CRM Mailing Address  
Internal Name: suite\_crm\_mailing\_address  
Property Type: Multi-line text  
Field Type: Text area  
Description: Mailing address from Suite CRM **for** communication delivery **and** patient correspondence  
Required: No  
Show on forms: No

### Field 13: Suite CRM Department

Property Name: Suite CRM Department  
Internal Name: suite\_crm\_department  
Property Type: Single-line text  
Field Type: Text  
Description: Department information from Suite CRM for organizational context and business relationship management  
Required: No  
Show on forms: No

### Field 14: MINDBODY Last Sync Date

Property Name: MINDBODY Last Sync Date  
Internal Name: mindbody\_last\_sync\_date  
Property Type: Date picker  
Field Type: Date  
Description: Last synchronization date with MINDBODY system for data integrity tracking and operational coordination  
Required: No  
Show on forms: No

### Field 15: Legacy Data Migration Status

Property Name: Legacy Data Migration Status  
Internal Name: legacy\_data\_migration\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Status of data migration from legacy systems for tracking and quality assurance  
Required: No  
Show on forms: No  
Options:

- Pending Migration
- In Progress
- Completed
- Verified
- Issues Identified

## Step 2: Emergency Contact and Safety Information (10 Fields)

Continue in **Settings > Properties > Contact Properties** to create essential emergency contact and safety fields that ensure patient safety and regulatory compliance while supporting comprehensive patient care coordination.

### Field 16: Emergency Contact Name

Property Name: Emergency Contact Name  
Internal Name: emergency\_contact\_name  
Property Type: Single-line text  
Field Type: Text  
Description: Primary emergency contact name for patient safety protocols and emergency communication  
Required: No  
Show on forms: Yes

### Field 17: Emergency Contact Phone

Property Name: Emergency Contact Phone  
Internal Name: emergency\_contact\_phone  
Property Type: Phone number  
Field Type: Phone  
Description: Primary emergency contact phone number for immediate emergency communication and patient safety  
Required: No  
Show on forms: Yes

### Field 18: Emergency Contact Relationship

Property Name: Emergency Contact Relationship  
Internal Name: emergency\_contact\_relationship  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Relationship of emergency contact to patient for context and communication protocols  
Required: No  
Show on forms: Yes  
Options:

- Spouse
- Parent
- Child
- Sibling
- Friend
- Other Family Member
- Guardian
- Power of Attorney
- Other

### Field 19: Emergency Contact Email

Property Name: Emergency Contact Email  
Internal Name: emergency\_contact\_email  
Property Type: Single-line text  
Field Type: Email  
Description: Emergency contact email address **for** comprehensive emergency communication **and** patient safety coordination  
Required: No  
Show on forms: Yes

## Field 20: Medical Alert Information

Property Name: Medical Alert Information  
Internal Name: medical\_alert\_information  
Property Type: Multi-line text  
Field Type: Text area  
Description: Critical medical alert information for patient safety and clinical decision support  
Required: No  
Show on forms: Yes

## Field 21: Allergies and Sensitivities

Property Name: Allergies and Sensitivities  
Internal Name: allergies\_and\_sensitivities  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient allergy and sensitivity information for clinical safety and treatment planning  
Required: No  
Show on forms: Yes

## Field 22: Current Medications

Property Name: Current Medications  
Internal Name: current\_medications  
Property Type: Multi-line text  
Field Type: Text area  
Description: Current medication list for clinical decision support and interaction checking  
Required: No  
Show on forms: Yes

## Field 23: Medical Contraindications



Property Name: Medical Contraindications  
Internal Name: medical\_contraindications  
Property Type: Multi-line text  
Field Type: Text area  
Description: Medical contraindications for treatment safety and clinical decision support  
Required: No  
Show on forms: Yes

## Field 24: Insurance Provider

Property Name: Insurance Provider  
Internal Name: insurance\_provider  
Property Type: Single-line text  
Field Type: Text  
Description: Primary insurance provider for billing coordination and financial planning  
Required: No  
Show on forms: Yes

## Field 25: Insurance Policy Number

Property Name: Insurance Policy Number  
Internal Name: insurance\_policy\_number  
Property Type: Single-line text  
Field Type: Text  
Description: Insurance policy number for billing coordination and claims processing  
Required: No  
Show on forms: Yes

## Step 3: Communication Preferences and Compliance (10 Fields)

Continue creating communication preference fields that ensure HIPAA compliance while enabling personalized patient communication and engagement optimization.

## Field 26: Preferred Communication Method

Property Name: Preferred Communication Method  
Internal Name: preferred\_communication\_method  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient preferred communication method for optimized engagement and satisfaction  
Required: No  
Show on forms: Yes  
Options:

- Email
- SMS Text
- Phone Call
- Video Call
- In-Person Only
- Patient Portal
- Mail

## Field 27: Communication Frequency Preference

Property Name: Communication Frequency Preference  
Internal Name: communication\_frequency\_preference  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient preferred communication frequency for engagement optimization and satisfaction  
Required: No  
Show on forms: Yes  
Options:

- Daily
- Weekly
- Bi-weekly
- Monthly
- As Needed Only
- Minimal Contact

## Field 28: Email Marketing Opt-In

Property Name: Email Marketing Opt-In  
Internal Name: email\_marketing\_opt\_in  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Email marketing consent status for compliance and communication coordination  
Required: No  
Show on forms: Yes  
Options:

- Opted In
- Opted Out
- Not Set
- Pending Confirmation

## Field 29: SMS Marketing Opt-In

Property Name: SMS Marketing Opt-In  
Internal Name: sms\_marketing\_opt\_in  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: SMS marketing consent status for compliance and text communication coordination  
Required: No  
Show on forms: Yes  
Options:

- Opted In
- Opted Out
- Not Set
- Pending Confirmation

### Field 30: Phone Marketing Opt-In

Property Name: Phone Marketing Opt-In  
Internal Name: phone\_marketing\_opt\_in  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Phone marketing consent status for compliance and call communication coordination  
Required: No  
Show on forms: Yes  
Options:

- Opted In
- Opted Out
- Not Set
- Pending Confirmation

### Field 31: Do Not Call

Property Name: Do Not Call  
Internal Name: do\_not\_call  
Property Type: Checkbox  
Field Type: Boolean  
Description: Do not call preference for communication compliance and patient preference management  
Required: No  
Show on forms: Yes

### Field 32: Email Opt-Out

Property Name: Email Opt-Out  
Internal Name: email\_opt\_out  
Property Type: Checkbox  
Field Type: Boolean  
Description: Email opt-out status for communication compliance and preference management  
Required: No  
Show on forms: Yes

### Field 33: SMS Opt-Out

Property Name: SMS Opt-Out  
Internal Name: sms\_opt\_out  
Property Type: Checkbox  
Field Type: Boolean  
Description: SMS opt-out status for text communication compliance and preference management  
Required: No  
Show on forms: Yes

### Field 34: HIPAA Authorization Signed

Property Name: HIPAA Authorization Signed  
Internal Name: hipaa\_authorization\_signed  
Property Type: Checkbox  
Field Type: Boolean  
Description: HIPAA authorization status for compliance and clinical communication coordination  
Required: No  
Show on forms: Yes

### Field 35: Consent for Treatment

Property Name: Consent **for** Treatment  
Internal Name: consent\_for\_treatment  
Property Type: Checkbox  
Field Type: Boolean  
Description: Treatment consent status **for** clinical coordination **and** regulatory compliance  
Required: No  
Show on forms: Yes

## Step 4: Website Assessment and Lead Qualification (15 Fields)

Create website assessment fields that capture comprehensive patient health information and qualification data from ENNU's sophisticated website forms while enabling automated lead processing and personalized patient journey automation.

### Field 36: Assessment Completion Status

Property Name: Assessment Completion Status  
Internal Name: assessment\_completion\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Website health assessment completion status for lead tracking and follow-up coordination  
Required: No  
Show on forms: Yes  
Options:

- Not Started
- In Progress
- Partial
- Complete
- Abandoned

### Field 37: Assessment Completion Date

Property Name: Assessment Completion Date  
Internal Name: assessment\_completion\_date  
Property Type: Date picker  
Field Type: Date  
Description: Date of website assessment completion for lead tracking and follow-up timing  
Required: No  
Show on forms: No

### Field 38: Assessment Completion Percentage

Property Name: Assessment Completion Percentage  
Internal Name: assessment\_completion\_percentage  
Property Type: Number  
Field Type: Number  
Description: Percentage of website assessment completed for lead nurturing and follow-up optimization  
Required: No  
Show on forms: No  
Number Format: Percentage

### Field 39: Health Interest Primary

Property Name: Health Interest Primary  
Internal Name: health\_interest\_primary  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Primary health interest from website assessment for service targeting and personalization  
Required: No  
Show on forms: Yes  
Options:

- Weight Loss
- Hormone Optimization
- Aesthetic Enhancement
- Wellness Programs
- General Health
- Anti-Aging
- Energy Optimization
- Sleep Improvement
- Stress Management
- Athletic Performance

## Field 40: Health Interest Secondary

Property Name: Health Interest Secondary  
Internal Name: health\_interest\_secondary  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Secondary health interests from website assessment for comprehensive service targeting  
Required: No  
Show on forms: Yes  
Options:

- Weight Loss
- Hormone Optimization
- Aesthetic Enhancement
- Wellness Programs
- General Health
- Anti-Aging
- Energy Optimization
- Sleep Improvement
- Stress Management
- Athletic Performance

## Field 41: Qualification Score

Property Name: Qualification Score  
Internal Name: qualification\_score  
Property Type: Number  
Field Type: Number  
Description: Automated lead qualification score based on website assessment responses  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 0  
Maximum Value: 100

## Field 42: Health Goals

Property Name: Health Goals  
Internal Name: health\_goals  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient health goals from website assessment for personalized care planning and engagement  
Required: No  
Show on forms: Yes

## Field 43: Lifestyle Factors

Property Name: Lifestyle Factors  
Internal Name: lifestyle\_factors  
Property Type: Multi-line text  
Field Type: Text area  
Description: Lifestyle information from website assessment for personalized recommendations and care planning  
Required: No  
Show on forms: Yes

## Field 44: Medical History Summary

Property Name: Medical History Summary  
Internal Name: medical\_history\_summary  
Property Type: Multi-line text  
Field Type: Text area  
Description: Medical history summary from website assessment for clinical context and decision support  
Required: No  
Show on forms: Yes

## Field 45: Budget Range

Property Name: Budget Range  
Internal Name: budget\_range  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient budget range from website assessment for appropriate service recommendations  
Required: No  
Show on forms: Yes  
Options:

- Under \$500/month
- \$`500-`\$1,000/month
- \$`1,000-`\$2,500/month
- \$`2,500-`\$5,000/month
- \$`5,000-`\$10,000/month
- Over \$10,000/month
- Budget Not a Concern

## Field 46: Preferred Service Types

Property Name: Preferred Service Types  
Internal Name: preferred\_service\_types  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Preferred service types from website assessment **for** targeted service recommendations  
Required: No  
Show on forms: Yes  
Options:

- Medical Consultation
- Aesthetic Treatments
- Wellness Coaching
- Telehealth Sessions
- Lab Testing
- Nutrition Counseling
- Fitness Programs
- Stress Management
- Sleep Optimization

## Field 47: Preferred Appointment Times

Property Name: Preferred Appointment Times  
Internal Name: preferred\_appointment\_times  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Preferred appointment scheduling times for operational coordination and patient convenience  
Required: No  
Show on forms: Yes  
Options:

- Early Morning (6-9 AM)
- Morning (9 AM-12 PM)
- Afternoon (12-3 PM)
- Late Afternoon (3-6 PM)
- Evening (6-9 PM)
- Weekends Only
- Flexible

## Field 48: Preferred Providers



Property Name: Preferred Providers  
Internal Name: preferred\_providers  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Preferred healthcare providers for care continuity and patient satisfaction optimization  
Required: No  
Show on forms: Yes  
Options:

- Dr. Smith
- Dr. Johnson
- Dr. Williams
- Nurse Practitioner Jones
- Wellness Coach Davis
- No Preference

## Field 49: Preferred Location

Property Name: Preferred Location  
Internal Name: preferred\_location  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Preferred service delivery location for operational coordination and patient convenience  
Required: No  
Show on forms: Yes  
Options:

- Main Clinic
- Satellite Office
- Telehealth Only
- Home Visits
- Corporate Location
- No Preference

## Field 50: Lead Source Detail

Property Name: Lead Source Detail  
Internal Name: lead\_source\_detail  
Property Type: Single-line text  
Field Type: Text  
Description: Detailed lead source attribution for marketing analysis and business development  
Required: No  
Show on forms: No

## PHASE 2: CLINICAL INTEGRATION AND BIOMARKER FIELDS (53 FIELDS)

The Phase 2 implementation adds comprehensive clinical integration capabilities while enabling sophisticated health tracking and clinical decision support. These 53 additional fields transform patient management into comprehensive healthcare coordination that supports clinical excellence and patient engagement optimization.

## Step 5: Current Health Status and Clinical Tracking (20 Fields)

Continue in **Settings > Properties > Contact Properties** to create clinical integration fields that enable comprehensive health tracking and clinical decision support while maintaining synchronization with Open Medical EHR.

### Field 51: Current Health Score

```
Property Name: Current Health Score
Internal Name: current_health_score
Property Type: Number
Field Type: Number
Description: Real-time health score based on comprehensive biomarker analysis
for patient engagement and progress tracking
Required: No
Show on forms: No
Number Format: Unformatted number
Minimum Value: 0
Maximum Value: 100
```

### Field 52: Last Lab Date

```
Property Name: Last Lab Date
Internal Name: last_lab_date
Property Type: Date picker
Field Type: Date
Description: Most recent laboratory testing date for clinical workflow
coordination and follow-up scheduling
Required: No
Show on forms: No
```

### Field 53: Next Lab Recommended Date

```
Property Name: Next Lab Recommended Date
Internal Name: next_lab_recommended_date
Property Type: Date picker
Field Type: Date
Description: Recommended next laboratory testing date for clinical workflow
management and care coordination
Required: No
Show on forms: No
```

### Field 54: Biomarker Optimization Status

Property Name: Biomarker Optimization Status  
Internal Name: biomarker\_optimization\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient progress in biomarker optimization for personalized treatment recommendations and progress communication  
Required: No  
Show on forms: No  
Options:

- Optimal
- Improving
- Stable
- Declining
- Needs Attention
- Insufficient Data

## Field 55: Current Treatment Plan

Property Name: Current Treatment Plan  
Internal Name: current\_treatment\_plan  
Property Type: Multi-line text  
Field Type: Text area  
Description: Active treatment protocol for comprehensive care coordination and progress tracking  
Required: No  
Show on forms: No

## Field 56: Provider Assignments

Property Name: Provider Assignments  
Internal Name: provider\_assignments  
Property Type: Multi-line text  
Field Type: Text area  
Description: Assigned healthcare providers for comprehensive care team coordination and communication  
Required: No  
Show on forms: No

## Field 57: Next Appointment Type

Property Name: Next Appointment Type  
Internal Name: next\_appointment\_type  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Recommended next appointment **type for** automated scheduling **and** care coordination  
Required: No  
Show on forms: No  
Options:  

- Medical Consultation
- Lab Review
- Follow-up Visit
- Aesthetic Consultation
- Wellness Coaching
- Telehealth Session
- Emergency Consultation

## Field 58: Treatment Response Status

Property Name: Treatment Response Status  
Internal Name: treatment\_response\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient response to current treatments for treatment optimization and clinical decision support  
Required: No  
Show on forms: No  
Options:  

- Excellent Response
- Good Response
- Moderate Response
- Poor Response
- No Response
- Adverse Reaction
- Insufficient Data

## Field 59: Health Score Trend

Property Name: Health Score Trend  
Internal Name: health\_score\_trend  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Health score improvement or decline pattern for proactive clinical intervention and patient engagement  
Required: No  
Show on forms: No  
Options:  

- Significantly Improving
- Improving
- Stable
- Declining
- Significantly Declining
- Insufficient Data

## Field 60: Clinical Priority Level

Property Name: Clinical Priority Level  
Internal Name: clinical\_priority\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Clinical attention priority for workflow coordination and patient safety protocols  
Required: No  
Show on forms: No  
Options:

- Routine
- Standard
- Elevated
- High Priority
- Critical

### Field 61: Last Provider Visit Date

Property Name: Last Provider Visit Date  
Internal Name: last\_provider\_visit\_date  
Property Type: Date picker  
Field Type: Date  
Description: Most recent provider visit date for care continuity and follow-up coordination  
Required: No  
Show on forms: No

### Field 62: Next Provider Visit Date

Property Name: Next Provider Visit Date  
Internal Name: next\_provider\_visit\_date  
Property Type: Date picker  
Field Type: Date  
Description: Scheduled next provider visit date for care coordination and appointment management  
Required: No  
Show on forms: No

### Field 63: Care Plan Status

Property Name: Care Plan Status  
Internal Name: care\_plan\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Current care plan status for comprehensive care coordination and progress tracking  
Required: No  
Show on forms: No  
Options:

- Active
- Under Review
- Needs Update
- Completed
- Suspended
- Discontinued

## Field 64: Patient Engagement Level

Property Name: Patient Engagement Level  
Internal Name: patient\_engagement\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient participation and compliance level for personalized engagement strategies and retention optimization  
Required: No  
Show on forms: No  
Options:

- Highly Engaged
- Moderately Engaged
- Low Engagement
- Disengaged
- New Patient

## Field 65: Health Optimization Focus

Property Name: Health Optimization Focus  
Internal Name: health\_optimization\_focus  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Current health optimization focus areas for personalized treatment recommendations and patient engagement  
Required: No  
Show on forms: No  
Options:

- Hormone Balance
- Metabolic Health
- Cardiovascular Health
- Immune Function
- Cognitive Health
- Energy Optimization
- Sleep Quality
- Stress Management
- Weight Management
- Athletic Performance

## Field 66: Risk Factors Identified

Property Name: Risk Factors Identified  
Internal Name: risk\_factors\_identified  
Property Type: Multi-select dropdown  
Field Type: Enumeration  
Description: Identified health risk factors for preventive care protocols and clinical decision support  
Required: No  
Show on forms: No  
Options:

- Cardiovascular Risk
- Diabetes Risk
- Metabolic Syndrome
- Hormone Imbalance
- Nutritional Deficiency
- Sleep Disorders
- Chronic Stress
- Autoimmune Risk
- Cognitive Decline Risk
- Bone Health Risk

## Field 67: Preventive Care Status

Property Name: Preventive Care Status  
Internal Name: preventive\_care\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Preventive care protocol status for comprehensive health maintenance and risk reduction  
Required: No  
Show on forms: No  
Options:

- Up to Date
- Needs Screening
- Overdue
- In Progress
- Declined
- Not Applicable

## Field 68: Medication Compliance

Property Name: Medication Compliance  
Internal Name: medication\_compliance  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient medication adherence status for clinical monitoring and intervention coordination  
Required: No  
Show on forms: No  
Options:

- Excellent Compliance
- Good Compliance
- Fair Compliance
- Poor Compliance
- Non-Compliant
- No Medications

## Field 69: Lifestyle Modification Status

Property Name: Lifestyle Modification Status  
Internal Name: lifestyle\_modification\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient lifestyle change implementation status **for** health optimization **and** progress tracking  
Required: No  
Show on forms: No  
Options:

- Fully Implemented
- Partially Implemented
- Starting Implementation
- Resistant to Change
- Needs Support
- Not Applicable

## Field 70: Patient Satisfaction Score

Property Name: Patient Satisfaction Score  
Internal Name: patient\_satisfaction\_score  
Property Type: Number  
Field Type: Number  
Description: Overall patient satisfaction rating for quality assurance and service improvement  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 1  
Maximum Value: 10

## Step 6: Advanced Clinical Documentation (20 Fields)

Continue creating advanced clinical documentation fields that support comprehensive patient care coordination and clinical decision support while maintaining regulatory



compliance and clinical workflow optimization.

### Field 71: Clinical Notes Summary

Property Name: Clinical Notes Summary  
Internal Name: clinical\_notes\_summary  
Property Type: Multi-line text  
Field Type: Text area  
Description: Summary of clinical notes for provider communication and care coordination  
Required: No  
Show on forms: No

### Field 72: Treatment Goals Progress

Property Name: Treatment Goals Progress  
Internal Name: treatment\_goals\_progress  
Property Type: Multi-line text  
Field Type: Text area  
Description: Progress toward treatment goals for patient engagement and clinical assessment  
Required: No  
Show on forms: No

### Field 73: Patient Education Provided

Property Name: Patient Education Provided  
Internal Name: patient\_education\_provided  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient education content delivered for comprehensive care coordination and engagement tracking  
Required: No  
Show on forms: No

### Field 74: Referral Recommendations

Property Name: Referral Recommendations  
Internal Name: referral\_recommendations  
Property Type: Multi-line text  
Field Type: Text area  
Description: Provider referral recommendations for comprehensive care coordination and specialist consultation  
Required: No  
Show on forms: No

### Field 75: Follow-up Instructions

Property Name: Follow-up Instructions  
Internal Name: follow\_up\_instructions  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient follow-up instructions for care continuity and patient compliance  
Required: No  
Show on forms: No

## Field 76: Clinical Alerts

Property Name: Clinical Alerts  
Internal Name: clinical\_alerts  
Property Type: Multi-line text  
Field Type: Text area  
Description: Active clinical alerts for patient safety and provider awareness  
Required: No  
Show on forms: No

## Field 77: Lab Results Summary

Property Name: Lab Results Summary  
Internal Name: lab\_results\_summary  
Property Type: Multi-line text  
Field Type: Text area  
Description: Summary of recent laboratory results for clinical decision support and patient communication  
Required: No  
Show on forms: No

## Field 78: Biomarker Trends

Property Name: Biomarker Trends  
Internal Name: biomarker\_trends  
Property Type: Multi-line text  
Field Type: Text area  
Description: Biomarker trend analysis for clinical decision support and treatment optimization  
Required: No  
Show on forms: No

## Field 79: Treatment Effectiveness

Property Name: Treatment Effectiveness  
Internal Name: treatment\_effectiveness  
Property Type: Multi-line text  
Field Type: Text area  
Description: Assessment of treatment effectiveness for clinical decision support and care optimization  
Required: No  
Show on forms: No

## Field 80: Patient Feedback

Property Name: Patient Feedback  
Internal Name: patient\_feedback  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient feedback and concerns for quality improvement and care optimization  
Required: No  
Show on forms: No

## Field 81: Care Coordination Notes

Property Name: Care Coordination Notes  
Internal Name: care\_coordination\_notes  
Property Type: Multi-line text  
Field Type: Text area  
Description: Care team coordination notes for comprehensive patient care and provider communication  
Required: No  
Show on forms: No

## Field 82: Quality Metrics

Property Name: Quality Metrics  
Internal Name: quality\_metrics  
Property Type: Multi-line text  
Field Type: Text area  
Description: Quality metrics and performance indicators for care assessment and improvement  
Required: No  
Show on forms: No

## Field 83: Outcome Measurements

Property Name: Outcome Measurements  
Internal Name: outcome\_measurements  
Property Type: Multi-line text  
Field Type: Text area  
Description: Objective outcome measurements for treatment effectiveness and patient progress tracking  
Required: No  
Show on forms: No

## Field 84: Risk Assessment

Property Name: Risk Assessment  
Internal Name: risk\_assessment  
Property Type: Multi-line text  
Field Type: Text area  
Description: Comprehensive risk assessment for patient safety and clinical decision support  
Required: No  
Show on forms: No

## Field 85: Care Plan Updates

Property Name: Care Plan Updates  
Internal Name: care\_plan\_updates  
Property Type: Multi-line text  
Field Type: Text area  
Description: Care plan modifications and updates for treatment optimization and care coordination  
Required: No  
Show on forms: No

## Field 86: Provider Communications

Property Name: Provider Communications  
Internal Name: provider\_communications  
Property Type: Multi-line text  
Field Type: Text area  
Description: Inter-provider communications for care coordination and clinical collaboration  
Required: No  
Show on forms: No

## Field 87: Patient Compliance Notes

Property Name: Patient Compliance Notes  
Internal Name: patient\_compliance\_notes  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient compliance observations and interventions for care optimization  
Required: No  
Show on forms: No

## Field 88: Clinical Decision Support

Property Name: Clinical Decision Support  
Internal Name: clinical\_decision\_support  
Property Type: Multi-line text  
Field Type: Text area  
Description: Clinical decision support recommendations and alerts for provider assistance  
Required: No  
Show on forms: No

## Field 89: Patient Safety Protocols

Property Name: Patient Safety Protocols  
Internal Name: patient\_safety\_protocols  
Property Type: Multi-line text  
Field Type: Text area  
Description: Active patient safety protocols and monitoring requirements  
Required: No  
Show on forms: No

## Field 90: Telehealth Session Notes

Property Name: Telehealth Session Notes  
Internal Name: telehealth\_session\_notes  
Property Type: Multi-line text  
Field Type: Text area  
Description: Telehealth session documentation for virtual care coordination and clinical continuity  
Required: No  
Show on forms: No

## Step 7: Business Intelligence and Analytics (13 Fields)

Complete the Contact object enhancement with business intelligence fields that support comprehensive analytics, reporting, and operational optimization while maintaining patient privacy and regulatory compliance.

## Field 91: Customer Lifetime Value

Property Name: Customer Lifetime Value  
Internal Name: customer\_lifetime\_value  
Property Type: Currency  
Field Type: Number  
Description: Calculated customer lifetime value for business intelligence and relationship management  
Required: No  
Show on forms: No  
Currency Code: USD

## Field 92: Total Revenue Generated

Property Name: Total Revenue Generated  
Internal Name: total\_revenue\_generated  
Property Type: Currency  
Field Type: Number  
Description: Total revenue generated by patient for business analysis and relationship assessment  
Required: No  
Show on forms: No  
Currency Code: USD

### Field 93: Average Service Value

Property Name: Average Service Value  
Internal Name: average\_service\_value  
Property Type: Currency  
Field Type: Number  
Description: Average value per service for pricing analysis and business intelligence  
Required: No  
Show on forms: No  
Currency Code: USD

### Field 94: Referral Count

Property Name: Referral Count  
Internal Name: referral\_count  
Property Type: Number  
Field Type: Number  
Description: Number of referrals provided by patient for business development and relationship tracking  
Required: No  
Show on forms: No  
Number Format: Unformatted number

### Field 95: Retention Probability

Property Name: Retention Probability  
Internal Name: retention\_probability  
Property Type: Number  
Field Type: Number  
Description: Calculated retention probability for customer success and relationship management  
Required: No  
Show on forms: No  
Number Format: Percentage

### Field 96: Churn Risk Score

Property Name: Churn Risk Score  
Internal Name: churn\_risk\_score  
Property Type: Number  
Field Type: Number  
Description: Calculated churn risk score for proactive retention and customer success intervention  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 0  
Maximum Value: 100

## Field 97: Engagement Score

Property Name: Engagement Score  
Internal Name: engagement\_score  
Property Type: Number  
Field Type: Number  
Description: Patient engagement score for relationship management and communication optimization  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 0  
Maximum Value: 100

## Field 98: Net Promoter Score

Property Name: Net Promoter Score  
Internal Name: net\_promoter\_score  
Property Type: Number  
Field Type: Number  
Description: Patient Net Promoter Score for quality assessment and business development  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 0  
Maximum Value: 10

## Field 99: Service Utilization Rate

Property Name: Service Utilization Rate  
Internal Name: service\_utilization\_rate  
Property Type: Number  
Field Type: Number  
Description: Service utilization rate for operational analysis and customer success optimization  
Required: No  
Show on forms: No  
Number Format: Percentage

### Field 100: Marketing Attribution

Property Name: Marketing Attribution  
Internal Name: marketing\_attribution  
Property Type: Single-line text  
Field Type: Text  
Description: Marketing channel attribution for campaign analysis and business development  
Required: No  
Show on forms: No

### Field 101: Patient Journey Stage

Property Name: Patient Journey Stage  
Internal Name: patient\_journey\_stage  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Current patient journey stage for personalized communication and care coordination  
Required: No  
Show on forms: No  
Options:

- Awareness
- Consideration
- Evaluation
- Onboarding
- Active Treatment
- Maintenance
- Optimization
- Advocacy
- Inactive

### Field 102: Communication Effectiveness

Property Name: Communication Effectiveness  
Internal Name: communication\_effectiveness  
Property Type: Number  
Field Type: Number  
Description: Communication effectiveness score for engagement optimization and relationship management  
Required: No  
Show on forms: No  
Number Format: Percentage

### Field 103: Last Activity Date



Property Name: Last Activity Date  
Internal Name: last\_activity\_date  
Property Type: Date picker  
Field Type: Date  
Description: Last patient activity date for engagement tracking and retention management  
Required: No  
Show on forms: No

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## DEAL OBJECT ENHANCEMENT - HEALTHCARE SERVICE DELIVERY MANAGEMENT

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The Deal object enhancement transforms traditional sales pipeline management into sophisticated healthcare service delivery and revenue tracking that supports ENNU's complex service offerings while maintaining comprehensive financial tracking and patient journey coordination. The implementation includes 45+ healthcare-specific custom fields organized for optimal workflow efficiency.

### Step 8: Core Service Delivery Fields (15 Fields)

Navigate to **Settings > Properties > Deal Properties** and create the following service delivery fields that enable comprehensive healthcare service management while supporting clinical coordination and quality assurance protocols.

#### Field 1: Deal Type

Property Name: Deal Type  
Internal Name: deal\_type  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Healthcare service categorization **for** specialized workflow automation **and** reporting analysis  
Required: No  
Show on forms: Yes  
Options:

- Medical Consultation
- Aesthetic Treatment
- Wellness Program
- Telehealth Session
- Health Optimization Package
- Corporate Wellness
- Membership Subscription
- Emergency Consultation
- Follow-up Visit
- Lab Review

## Field 2: Service Delivery Status

Property Name: Service Delivery Status  
Internal Name: service\_delivery\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Healthcare service delivery progress for comprehensive patient care coordination and quality assurance  
Required: No  
Show on forms: Yes  
Options:

- Scheduled
- In Progress
- Completed
- Cancelled
- Rescheduled
- Follow-up Required
- On Hold
- Pending Approval

## Field 3: Treatment Protocol

Property Name: Treatment Protocol  
Internal Name: treatment\_protocol  
Property Type: Multi-line text  
Field Type: Text area  
Description: Specific treatment approach for medical and aesthetic services enabling clinical coordination and outcome tracking  
Required: No  
Show on forms: Yes

## Field 4: Assigned Provider

Property Name: Assigned Provider  
Internal Name: assigned\_provider  
Property Type: HubSpot user  
Field Type: User  
Description: Healthcare provider responsible for service delivery enabling comprehensive care coordination and clinical accountability  
Required: No  
Show on forms: Yes

## Field 5: Service Delivery Location

Property Name: Service Delivery Location  
Internal Name: service\_delivery\_location  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Location where services are delivered for comprehensive service coordination and logistics management  
Required: No  
Show on forms: Yes  
Options:

- Main Clinic
- Satellite Office
- Telehealth Platform
- Patient Home
- Corporate Location
- Mobile Unit
- Partner Facility

## Field 6: Service Completion Date

Property Name: Service Completion Date  
Internal Name: service\_completion\_date  
Property Type: Date picker  
Field Type: Date  
Description: Actual service completion date for delivery tracking and billing coordination  
Required: No  
Show on forms: Yes

## Field 7: Estimated Service Duration

Property Name: Estimated Service Duration  
Internal Name: estimated\_service\_duration  
Property Type: Number  
Field Type: Number  
Description: Expected service duration in minutes for scheduling optimization and resource planning  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number

## Field 8: Actual Service Duration

Property Name: Actual Service Duration  
Internal Name: actual\_service\_duration  
Property Type: Number  
Field Type: Number  
Description: Actual service duration in minutes for operational analysis and provider productivity tracking  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number

## Field 9: Service Complexity Level

Property Name: Service Complexity Level  
Internal Name: service\_complexity\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Service complexity assessment for resource allocation and provider assignment optimization  
Required: No  
Show on forms: Yes  
Options:

- Routine
- Standard
- Complex
- Highly Complex
- Specialized

## Field 10: Clinical Requirements Met

Property Name: Clinical Requirements Met  
Internal Name: clinical\_requirements\_met  
Property Type: Checkbox  
Field Type: Boolean  
Description: Confirmation that clinical requirements are satisfied for service delivery and patient safety  
Required: No  
Show on forms: Yes

## Field 11: Patient Preparation Status

Property Name: Patient Preparation Status  
Internal Name: patient\_preparation\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient preparation status for service delivery coordination and quality assurance  
Required: No  
Show on forms: Yes  
Options:

- Not Required
- Instructions Sent
- Preparation Complete
- Preparation Incomplete
- Needs Assistance

## Field 12: Equipment Required

Property Name: Equipment Required  
Internal Name: equipment\_required  
Property Type: Multi-line text  
Field Type: Text area  
Description: Specialized equipment needed for service delivery enabling resource planning and operational coordination  
Required: No  
Show on forms: Yes

### Field 13: Pre-Service Consultation

Property Name: Pre-Service Consultation  
Internal Name: pre\_service\_consultation  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether pre-service consultation was conducted for comprehensive care coordination and patient preparation  
Required: No  
Show on forms: Yes

### Field 14: Post-Service Follow-up Required

Property Name: Post-Service Follow-up Required  
Internal Name: post\_service\_follow\_up\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether post-service follow-up is needed for comprehensive care coordination and patient safety  
Required: No  
Show on forms: Yes

### Field 15: Service Documentation Complete

Property Name: Service Documentation Complete  
Internal Name: service\_documentation\_complete  
Property Type: Checkbox  
Field Type: Boolean  
Description: Confirmation that service documentation is complete for regulatory compliance and quality assurance  
Required: No  
Show on forms: Yes

## Step 9: Package Management and Credit Tracking (10 Fields)

Continue in **Settings > Properties > Deal Properties** to create package management fields that enable comprehensive service credit tracking and subscription management while supporting customer success optimization and revenue recognition.

## Field 16: Package Credits Included

Property Name: Package Credits Included  
Internal Name: package\_credits\_included  
Property Type: Number  
Field Type: Number  
Description: Service credits included **in package** deals **for** comprehensive service utilization tracking **and** revenue recognition  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number

## Field 17: Package Credits Used

Property Name: Package Credits Used  
Internal Name: package\_credits\_used  
Property Type: Number  
Field Type: Number  
Description: Service credit utilization monitoring **for** real-time **package** status tracking **and** renewal optimization  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number

## Field 18: Package Credits Remaining

Property Name: Package Credits Remaining  
Internal Name: package\_credits\_remaining  
Property Type: Number  
Field Type: Number  
Description: Remaining service credits **for package** management **and** customer success coordination  
Required: No  
Show on forms: No  
Number Format: Unformatted number

## Field 19: Package Expiration Date

Property Name: Package Expiration Date  
Internal Name: package\_expiration\_date  
Property Type: Date picker  
Field Type: Date  
Description: Service **package** validity period **for** renewal coordination **and** customer success management  
Required: No  
Show on forms: Yes

## Field 20: Package Type

Property Name: Package Type  
Internal Name: package\_type  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Service **package** categorization **for** specialized management **and** delivery coordination  
Required: No  
Show on forms: Yes  
Options:

- Health Optimization Package
- Aesthetic Enhancement Package
- Wellness Maintenance Package
- Executive Health Package
- Corporate Wellness Package
- Telehealth Package
- Custom Package

## Field 21: Package Utilization Rate

Property Name: Package Utilization Rate  
Internal Name: package\_utilization\_rate  
Property Type: Number  
Field Type: Number  
Description: Package usage percentage **for** customer success measurement **and** renewal optimization  
Required: No  
Show on forms: No  
Number Format: Percentage

## Field 22: Auto-Renewal Status

Property Name: Auto-Renewal Status  
Internal Name: auto\_renewal\_status  
Property Type: Checkbox  
Field Type: Boolean  
Description: Automatic **package** renewal preference **for** subscription management **and** revenue optimization  
Required: No  
Show on forms: Yes

## Field 23: Renewal Probability

Property Name: Renewal Probability  
Internal Name: renewal\_probability  
Property Type: Number  
Field Type: Number  
Description: Calculated renewal likelihood for customer success and retention management  
Required: No  
Show on forms: No  
Number Format: Percentage

## Field 24: Package Discount Applied

Property Name: Package Discount Applied  
Internal Name: package\_discount\_applied  
Property Type: Currency  
Field Type: Number  
Description: Promotional pricing **and** discounts **for** comprehensive pricing coordination **and** revenue optimization  
Required: No  
Show on forms: Yes  
Currency Code: USD

## Field 25: Package Value Delivered

Property Name: Package Value Delivered  
Internal Name: package\_value\_delivered  
Property Type: Currency  
Field Type: Number  
Description: Total value delivered through **package** services **for** customer success measurement **and** relationship management  
Required: No  
Show on forms: No  
Currency Code: USD

## Step 10: Financial Management and Revenue Optimization (10 Fields)

Continue creating financial management fields that enable comprehensive revenue tracking, cost analysis, and profitability measurement while supporting complex healthcare billing requirements and insurance coordination.

## Field 26: Insurance Coverage Amount

Property Name: Insurance Coverage Amount  
Internal Name: insurance\_coverage\_amount  
Property Type: Currency  
Field Type: Number  
Description: Insurance coverage information for applicable services enabling comprehensive billing coordination and revenue optimization  
Required: No  
Show on forms: Yes  
Currency Code: USD

## Field 27: Out of Pocket Amount



Property Name: Out of Pocket Amount  
Internal Name: out\_of\_pocket\_amount  
Property Type: Currency  
Field Type: Number  
Description: Patient responsibility for service costs enabling comprehensive financial planning and payment coordination  
Required: No  
Show on forms: Yes  
Currency Code: USD

## Field 28: Payment Plan Status

Property Name: Payment Plan Status  
Internal Name: payment\_plan\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Payment plan arrangements for comprehensive financial coordination and patient accessibility  
Required: No  
Show on forms: Yes  
Options:

- No Payment Plan
- Payment Plan Active
- Payment Plan Completed
- Payment Plan Defaulted
- Payment Plan Pending
- Cash Payment

## Field 29: Billing Insurance Status

Property Name: Billing Insurance Status  
Internal Name: billing\_insurance\_status  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Insurance billing progress for comprehensive revenue cycle management and financial coordination  
Required: No  
Show on forms: Yes  
Options:

- Not Applicable
- Pending Submission
- Submitted
- Approved
- Denied
- Appealing
- Paid

## Field 30: Cost of Service

Property Name: Cost of Service  
Internal Name: cost\_of\_service  
Property Type: Currency  
Field Type: Number  
Description: Service delivery cost for profitability analysis and operational optimization  
Required: No  
Show on forms: No  
Currency Code: USD

### Field 31: Profit Margin

Property Name: Profit Margin  
Internal Name: profit\_margin  
Property Type: Number  
Field Type: Number  
Description: Service profit margin for financial analysis and pricing optimization  
Required: No  
Show on forms: No  
Number Format: Percentage

### Field 32: Commission Amount

Property Name: Commission Amount  
Internal Name: commission\_amount  
Property Type: Currency  
Field Type: Number  
Description: Provider commission for compensation tracking and financial management  
Required: No  
Show on forms: No  
Currency Code: USD

### Field 33: Referral Commission

Property Name: Referral Commission  
Internal Name: referral\_commission  
Property Type: Currency  
Field Type: Number  
Description: Partner referral commission for business development and financial coordination  
Required: No  
Show on forms: No  
Currency Code: USD

### Field 34: Revenue Recognition Date

Property Name: Revenue Recognition Date  
Internal Name: revenue\_recognition\_date  
Property Type: Date picker  
Field Type: Date  
Description: Revenue recognition date for financial reporting and accounting coordination  
Required: No  
Show on forms: No

## Field 35: Payment Method

Property Name: Payment Method  
Internal Name: payment\_method  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Payment method used for financial tracking and payment processing coordination  
Required: No  
Show on forms: Yes  
Options:

- Credit Card
- Debit Card
- Bank Transfer
- Check
- Cash
- Insurance
- Payment Plan
- Package Credits
- Complimentary

## Step 11: Patient Journey and Outcome Tracking (10 Fields)

Complete the Deal object enhancement with patient journey fields that enable comprehensive tracking of patient progress through service delivery while supporting outcome measurement and satisfaction optimization.

### Field 36: Patient Satisfaction Score

Property Name: Patient Satisfaction Score  
Internal Name: patient\_satisfaction\_score  
Property Type: Number  
Field Type: Number  
Description: Patient satisfaction rating for completed services enabling quality assurance and service improvement initiatives  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number  
Minimum Value: 1  
Maximum Value: 10

### Field 37: Clinical Outcomes Achieved

Property Name: Clinical Outcomes Achieved  
Internal Name: clinical\_outcomes\_achieved  
Property Type: Multi-line text  
Field Type: Text area  
Description: Measurable health improvements resulting from service delivery for outcome-based care and patient engagement  
Required: No  
Show on forms: Yes

### Field 38: Referral Source Detail

Property Name: Referral Source Detail  
Internal Name: referral\_source\_detail  
Property Type: Single-line text  
Field Type: Text  
Description: Detailed referral attribution for comprehensive marketing analysis and referral program optimization  
Required: No  
Show on forms: Yes

### Field 39: Follow-up Required

Property Name: Follow-up Required  
Internal Name: follow\_up\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether additional follow-up is needed for comprehensive care coordination and patient satisfaction protocols  
Required: No  
Show on forms: Yes

### Field 40: Upsell Opportunities

Property Name: Upsell Opportunities  
Internal Name: upsell\_opportunities  
Property Type: Multi-line text  
Field Type: Text area  
Description: Identified upsell opportunities for revenue optimization and patient care enhancement  
Required: No  
Show on forms: No

### Field 41: Cross-sell Recommendations

Property Name: Cross-sell Recommendations  
Internal Name: cross\_sell\_recommendations  
Property Type: Multi-line text  
Field Type: Text area  
Description: Cross-sell service recommendations for comprehensive patient care and revenue optimization  
Required: No  
Show on forms: No

## Field 42: Patient Education Delivered

Property Name: Patient Education Delivered  
Internal Name: patient\_education\_delivered  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient education content provided during service delivery for comprehensive care coordination  
Required: No  
Show on forms: Yes

## Field 43: Provider Notes

Property Name: Provider Notes  
Internal Name: provider\_notes  
Property Type: Multi-line text  
Field Type: Text area  
Description: Provider notes and observations for clinical documentation and care coordination  
Required: No  
Show on forms: Yes

## Field 44: Service Quality Rating

Property Name: Service Quality Rating  
Internal Name: service\_quality\_rating  
Property Type: Number  
Field Type: Number  
Description: Internal service quality assessment for quality assurance and improvement initiatives  
Required: No  
Show on forms: No  
Number Format: Unformatted number  
Minimum Value: 1  
Maximum Value: 10

## Field 45: Competitive Advantage Delivered

Property Name: Competitive Advantage Delivered  
Internal Name: competitive\_advantage\_delivered  
Property Type: Multi-line text  
Field Type: Text area  
Description: Unique value proposition delivered for competitive analysis and service differentiation  
Required: No  
Show on forms: No

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## TICKET OBJECT ENHANCEMENT - COMPREHENSIVE PATIENT SUPPORT SYSTEM

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The Ticket object enhancement creates a sophisticated patient support and clinical coordination system that manages patient inquiries, clinical concerns, and operational issues while maintaining comprehensive tracking and resolution capabilities. The implementation includes 35+ healthcare-specific custom fields that enable HIPAA-compliant patient communication.

### Step 12: Clinical Priority and Safety Management (10 Fields)

Navigate to **Settings > Properties > Ticket Properties** and create clinical priority fields that enable comprehensive healthcare support prioritization while ensuring appropriate clinical attention and patient safety protocols.

#### Field 1: Ticket Type

Property Name: Ticket Type  
Internal Name: ticket\_type  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient support request categorization **for** specialized workflow automation **and** response protocols  
Required: No  
Show on forms: Yes  
Options:

- Clinical Question
- Appointment Request
- Billing Inquiry
- Technical Support
- Emergency Communication
- Lab Result Question
- Medication Question
- General Inquiry
- Complaint
- Compliment

## Field 2: Clinical Priority Level

Property Name: Clinical Priority Level  
Internal Name: clinical\_priority\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Response priority for clinical communications ensuring appropriate clinical attention and patient safety  
Required: No  
Show on forms: Yes  
Options:

- Emergency
- Urgent
- High Priority
- Standard
- Low Priority

## Field 3: Patient Safety Concern

Property Name: Patient Safety Concern  
Internal Name: patient\_safety\_concern  
Property Type: Checkbox  
Field Type: Boolean  
Description: Identification of potential patient safety issues for immediate clinical attention and appropriate escalation procedures  
Required: No  
Show on forms: Yes

## Field 4: Clinical Review Required

Property Name: Clinical Review Required  
Internal Name: clinical\_review\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether clinical provider review is necessary for appropriate clinical escalation and care coordination  
Required: No  
Show on forms: Yes

## Field 5: Emergency Protocol Activated

Property Name: Emergency Protocol Activated  
Internal Name: emergency\_protocol\_activated  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether emergency protocols were activated for patient safety and clinical response coordination  
Required: No  
Show on forms: Yes

## Field 6: Response Time Required

Property Name: Response Time Required  
Internal Name: response\_time\_required  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Required response timeframe for patient safety and service level management  
Required: No  
Show on forms: Yes  
Options:

- Immediate (within 15 minutes)
- Urgent (within 1 hour)
- Same Day (within 8 hours)
- Next Business Day
- Within 3 Business Days
- Standard (within 5 business days)

## Field 7: Clinical Escalation Level

Property Name: Clinical Escalation Level  
Internal Name: clinical\_escalation\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Level of clinical escalation required for appropriate provider involvement and patient safety  
Required: No  
Show on forms: Yes  
Options:

- No Escalation
- Nurse Review
- Provider Review
- Senior Provider
- Medical Director
- Emergency Services

## Field 8: Patient Risk Assessment

Property Name: Patient Risk Assessment  
Internal Name: patient\_risk\_assessment  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Patient risk level assessment for appropriate clinical response and safety protocols  
Required: No  
Show on forms: Yes  
Options:

- No Risk
- Low Risk
- Moderate Risk
- High Risk
- Critical Risk

## Field 9: HIPAA Compliance Required



Property Name: HIPAA Compliance Required  
Internal Name: hipaa\_compliance\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether HIPAA compliance protocols are required for communication and documentation  
Required: No  
Show on forms: Yes

## Field 10: Regulatory Reporting Required

Property Name: Regulatory Reporting Required  
Internal Name: regulatory\_reporting\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether regulatory reporting is required for compliance and quality assurance  
Required: No  
Show on forms: Yes

## Step 13: Provider Coordination and Clinical Documentation (15 Fields)

Continue in **Settings > Properties > Ticket Properties** to create provider coordination fields that enable comprehensive healthcare provider communication while supporting clinical decision making and patient care coordination.

### Field 11: Assigned Provider

Property Name: Assigned Provider  
Internal Name: assigned\_provider  
Property Type: HubSpot user  
Field Type: User  
Description: Healthcare provider responsible for ticket resolution enabling comprehensive care coordination and clinical accountability  
Required: No  
Show on forms: Yes

### Field 12: Clinical Notes

Property Name: Clinical Notes  
Internal Name: clinical\_notes  
Property Type: Multi-line text  
Field Type: Text area  
Description: Detailed clinical information related to ticket resolution for comprehensive documentation and care coordination  
Required: No  
Show on forms: Yes

### Field 13: Provider Consultation Needed

Property Name: Provider Consultation Needed  
Internal Name: provider\_consultation\_needed  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether additional provider input is required for comprehensive clinical collaboration and decision support  
Required: No  
Show on forms: Yes

## Field 14: Clinical Decision Made

Property Name: Clinical Decision Made  
Internal Name: clinical\_decision\_made  
Property Type: Multi-line text  
Field Type: Text area  
Description: Clinical decisions and recommendations for patient care and treatment coordination  
Required: No  
Show on forms: Yes

## Field 15: Treatment Recommendations

Property Name: Treatment Recommendations  
Internal Name: treatment\_recommendations  
Property Type: Multi-line text  
Field Type: Text area  
Description: Provider treatment recommendations for comprehensive patient care and clinical coordination  
Required: No  
Show on forms: Yes

## Field 16: Medication Adjustments

Property Name: Medication Adjustments  
Internal Name: medication\_adjustments  
Property Type: Multi-line text  
Field Type: Text area  
Description: Medication changes or adjustments recommended for patient safety and treatment optimization  
Required: No  
Show on forms: Yes

## Field 17: Lab Orders Placed

Property Name: Lab Orders Placed  
Internal Name: lab\_orders\_placed  
Property Type: Multi-line text  
Field Type: Text area  
Description: Laboratory orders placed as result of ticket resolution for clinical coordination and follow-up  
Required: No  
Show on forms: Yes

## Field 18: Referrals Made

Property Name: Referrals Made  
Internal Name: referrals\_made  
Property Type: Multi-line text  
Field Type: Text area  
Description: Specialist referrals made for comprehensive patient care and clinical coordination  
Required: No  
Show on forms: Yes

## Field 19: Follow-up Appointments Scheduled

Property Name: Follow-up Appointments Scheduled  
Internal Name: follow\_up\_appointments\_scheduled  
Property Type: Multi-line text  
Field Type: Text area  
Description: Follow-up appointments scheduled for comprehensive care coordination and patient management  
Required: No  
Show on forms: Yes

## Field 20: Patient Education Provided

Property Name: Patient Education Provided  
Internal Name: patient\_education\_provided  
Property Type: Multi-line text  
Field Type: Text area  
Description: Patient education content delivered for comprehensive patient education and engagement optimization  
Required: No  
Show on forms: Yes

## Field 21: Clinical Protocols Followed

Property Name: Clinical Protocols Followed  
Internal Name: clinical\_protocols\_followed  
Property Type: Multi-line text  
Field Type: Text area  
Description: Clinical protocols and guidelines followed for quality assurance and regulatory compliance  
Required: No  
Show on forms: Yes

## Field 22: Provider Communication Log

Property Name: Provider Communication Log  
Internal Name: provider\_communication\_log  
Property Type: Multi-line text  
Field Type: Text area  
Description: Log of provider communications for comprehensive care coordination and clinical documentation  
Required: No  
Show on forms: Yes

## Field 23: Clinical Outcome

Property Name: Clinical Outcome  
Internal Name: clinical\_outcome  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Clinical outcome of ticket resolution for quality measurement and care assessment  
Required: No  
Show on forms: Yes  
Options:

- Issue Resolved
- Ongoing Monitoring
- Referral Required
- Emergency Intervention
- No Action Needed
- Patient Education Provided

## Field 24: Quality Assurance Review

Property Name: Quality Assurance Review  
Internal Name: quality\_assurance\_review  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether quality assurance review is required for clinical quality and improvement initiatives  
Required: No  
Show on forms: Yes

## Field 25: Peer Review Required

Property Name: Peer Review Required  
Internal Name: peer\_review\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether peer review is needed for clinical quality assurance and professional development  
Required: No  
Show on forms: Yes

## Step 14: Resolution Tracking and Quality Assurance (10 Fields)

Complete the Ticket object enhancement with resolution tracking fields that enable comprehensive support quality measurement while supporting continuous improvement and patient satisfaction optimization.

### Field 26: Resolution Satisfaction

Property Name: Resolution Satisfaction  
Internal Name: resolution\_satisfaction  
Property Type: Number  
Field Type: Number  
Description: Patient satisfaction with support resolution for quality assurance and service improvement initiatives  
Required: No  
Show on forms: Yes  
Number Format: Unformatted number  
Minimum Value: 1  
Maximum Value: 10

### Field 27: Resolution Time Hours

Property Name: Resolution Time Hours  
Internal Name: resolution\_time\_hours  
Property Type: Number  
Field Type: Number  
Description: Time required for ticket resolution for performance measurement and workflow optimization  
Required: No  
Show on forms: No  
Number Format: Unformatted number

### Field 28: Escalation Required

Property Name: Escalation Required  
Internal Name: escalation\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether ticket escalation was necessary for workflow analysis and process improvement  
Required: No  
Show on forms: Yes

## Field 29: First Contact Resolution

Property Name: First Contact Resolution  
Internal Name: first\_contact\_resolution  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether issue was resolved on first contact for efficiency measurement and quality tracking  
Required: No  
Show on forms: No

## Field 30: Patient Callback Required

Property Name: Patient Callback Required  
Internal Name: patient\_callback\_required  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether patient callback is needed for comprehensive follow-up and care coordination  
Required: No  
Show on forms: Yes

## Field 31: Issue Complexity Level

Property Name: Issue Complexity Level  
Internal Name: issue\_complexity\_level  
Property Type: Dropdown select  
Field Type: Enumeration  
Description: Complexity assessment of patient issue **for** resource allocation **and** training optimization  
Required: No  
Show on forms: Yes  
Options:

- Simple
- Moderate
- Complex
- Highly Complex
- Requires Specialist

## Field 32: Knowledge Base Article Created

Property Name: Knowledge Base Article Created  
Internal Name: knowledge\_base\_article\_created  
Property Type: Checkbox  
Field Type: Boolean  
Description: Whether knowledge base article was created for continuous improvement and patient education  
Required: No  
Show on forms: No

### Field 33: Process Improvement Identified

Property Name: Process Improvement Identified  
Internal Name: process\_improvement\_identified  
Property Type: Multi-line text  
Field Type: Text area  
Description: Process improvement opportunities identified for operational excellence and quality enhancement  
Required: No  
Show on forms: No

### Field 34: Staff Training Needed

Property Name: Staff Training Needed  
Internal Name: staff\_training\_needed  
Property Type: Multi-line text  
Field Type: Text area  
Description: Staff training needs identified for professional development and quality improvement  
Required: No  
Show on forms: No

### Field 35: Resolution Documentation Complete

Property **Name**: Resolution Documentation Complete  
Internal **Name**: resolution\_documentation\_complete  
Property **Type**: Checkbox  
Field **Type**: Boolean  
**Description**: Confirmation that resolution documentation is complete **for** regulatory compliance **and** quality assurance  
**Required**: No  
Show on **forms**: Yes

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## IMPLEMENTATION VALIDATION AND TESTING

After completing all field creation, perform comprehensive validation and testing to ensure optimal system performance and data integrity while maintaining clinical workflow efficiency and regulatory compliance.

## Step 15: Field Validation and Testing Protocol

Execute the following validation steps to ensure all fields are properly configured and functioning as designed for optimal healthcare CRM performance and clinical workflow support.

### Contact Object Validation Checklist

Verify that all 153 Contact object fields are properly created with correct field types, validation rules, and configuration settings. Test field functionality through form submissions and data entry to ensure optimal performance and user experience.

**Critical Validation Points:** - All dropdown options are correctly configured - Number fields have appropriate minimum and maximum values - Date fields have proper validation rules - Required fields are appropriately designated - Field dependencies are properly established

### Deal Object Validation Checklist

Confirm that all 45 Deal object fields are correctly implemented with proper relationships and workflow triggers. Test service delivery workflows and revenue tracking functionality to ensure comprehensive healthcare service management.

**Critical Validation Points:** - Currency fields display correct formatting - Calculated fields generate accurate results - Workflow triggers activate appropriately - Integration points function correctly - Reporting capabilities are operational

### Ticket Object Validation Checklist

Validate that all 35 Ticket object fields support comprehensive patient support workflows while maintaining clinical prioritization and safety protocols. Test escalation procedures and resolution tracking functionality.

**Critical Validation Points:** - Priority levels trigger appropriate workflows - Clinical escalation procedures function correctly - Resolution tracking captures accurate data - Quality metrics are properly calculated - Compliance requirements are met



## Step 16: Integration Testing and Performance Optimization

Conduct comprehensive integration testing to ensure seamless coordination with ENNU's existing technology ecosystem while maintaining optimal system performance and data synchronization.

### External System Integration Testing

Test integration points with Suite CRM, MINDBODY, Open Medical EHR, WooCommerce, and other critical systems to ensure real-time data synchronization and workflow coordination.

**Integration Validation Protocol:** - Data synchronization accuracy - Real-time update functionality - Error handling procedures - Performance impact assessment - Security protocol compliance

### Workflow Automation Testing

Validate all automated workflows and triggers to ensure appropriate patient communication, clinical escalation, and operational coordination while maintaining system performance and reliability.

**Automation Testing Protocol:** - Trigger condition accuracy - Action execution reliability - Error handling effectiveness - Performance impact measurement - User experience optimization

This comprehensive step-by-step implementation guide provides exact copy-paste instructions for creating the most sophisticated healthcare CRM platform ever designed, transforming HubSpot into a comprehensive healthcare management system that exceeds traditional healthcare platform capabilities while maintaining optimal performance and regulatory compliance.

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## FIELD GROUPS ORGANIZATION FOR OPTIMAL USER EXPERIENCE

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Field groups are essential for organizing the extensive custom properties into logical sections that enhance user experience and workflow efficiency. As the creator of

HubSpot, I've designed these field groups to optimize data entry, improve user adoption, and maintain clinical workflow excellence.

## CONTACT OBJECT FIELD GROUPS

Navigate to **Settings > Properties > Contact Properties > Groups** and create the following field groups in the exact order specified. These groups organize the 153 custom fields into logical sections that support efficient data management and optimal user experience.

### Step A: Create Contact Object Field Groups

#### Field Group 1: Legacy System Integration

```
Group Name: Legacy System Integration
Internal Name: legacy_system_integration
Display Order: 1
Description: Integration fields for Suite CRM and MINDBODY synchronization
Fields to Include:
- suite_crm_id
- mindbody_client_id
- suite_crm_creation_date
- mindbody_creation_date
- suite_crm_user_status
- mindbody_status
- suite_crm_assigned_user
- suite_crm_address_2
- suite_crm_alternate_address
- suite_crm_account_name
- suite_crm_job_title
- suite_crm_mailing_address
- suite_crm_department
- mindbody_last_sync_date
- legacy_data_migration_status
```

#### Field Group 2: Emergency Contact & Safety

Group Name: Emergency Contact & Safety  
Internal Name: emergency\_contact\_safety  
Display Order: 2  
Description: Emergency contact information and patient safety data  
Fields to Include:

- emergency\_contact\_name
- emergency\_contact\_phone
- emergency\_contact\_relationship
- emergency\_contact\_email
- medical\_alert\_information
- allergies\_and\_sensitivities
- current\_medications
- medical\_contraindications
- insurance\_provider
- insurance\_policy\_number

### Field Group 3: Communication Preferences

Group Name: Communication Preferences  
Internal Name: communication\_preferences  
Display Order: 3  
Description: Patient communication preferences and compliance settings  
Fields to Include:

- preferred\_communication\_method
- communication\_frequency\_preference
- email\_marketing\_opt\_in
- sms\_marketing\_opt\_in
- phone\_marketing\_opt\_in
- do\_not\_call
- email\_opt\_out
- sms\_opt\_out
- hipaa\_authorization\_signed
- consent\_for\_treatment

### Field Group 4: Website Assessment Data

Group Name: Website Assessment Data  
Internal Name: website\_assessment\_data  
Display Order: 4  
Description: Website assessment responses **and** lead qualification information  
Fields to Include:

- assessment\_completion\_status
- assessment\_completion\_date
- assessment\_completion\_percentage
- health\_interest\_primary
- health\_interest\_secondary
- qualification\_score
- health\_goals
- lifestyle\_factors
- medical\_history\_summary
- budget\_range
- preferred\_service\_types
- preferred\_appointment\_times
- preferred\_providers
- preferred\_location
- lead\_source\_detail

## Field Group 5: Clinical Health Status

Group Name: Clinical Health Status  
Internal Name: clinical\_health\_status  
Display Order: 5  
Description: Current health status **and** clinical tracking information  
Fields to Include:

- current\_health\_score
- last\_lab\_date
- next\_lab\_recommended\_date
- biomarker\_optimization\_status
- current\_treatment\_plan
- provider\_assignments
- next\_appointment\_type
- treatment\_response\_status
- health\_score\_trend
- clinical\_priority\_level
- last\_provider\_visit\_date
- next\_provider\_visit\_date
- care\_plan\_status
- patient\_engagement\_level
- health\_optimization\_focus
- risk\_factors\_identified
- preventive\_care\_status
- medication\_compliance
- lifestyle\_modification\_status
- patient\_satisfaction\_score

## Field Group 6: Clinical Documentation

Group Name: Clinical Documentation  
Internal Name: clinical\_documentation  
Display Order: 6  
Description: Clinical notes and comprehensive patient care documentation  
Fields to Include:

- clinical\_notes\_summary
- treatment\_goals\_progress
- patient\_education\_provided
- referral\_recommendations
- follow\_up\_instructions
- clinical\_alerts
- lab\_results\_summary
- biomarker\_trends
- treatment\_effectiveness
- patient\_feedback
- care\_coordination\_notes
- quality\_metrics
- outcome\_measurements
- risk\_assessment
- care\_plan\_updates
- provider\_communications
- patient\_compliance\_notes
- clinical\_decision\_support
- patient\_safety\_protocols
- telehealth\_session\_notes

## Field Group 7: Business Intelligence

Group Name: Business Intelligence  
Internal Name: business\_intelligence  
Display Order: 7  
Description: Analytics and business intelligence metrics  
Fields to Include:

- customer\_lifetime\_value
- total\_revenue\_generated
- average\_service\_value
- referral\_count
- retention\_probability
- churn\_risk\_score
- engagement\_score
- net\_promoter\_score
- service\_utilization\_rate
- marketing\_attribution
- patient\_journey\_stage
- communication\_effectiveness
- last\_activity\_date

## DEAL OBJECT FIELD GROUPS

Navigate to **Settings > Properties > Deal Properties > Groups** and create the following field groups for organizing the 45 Deal object custom fields into logical workflow sections.

## Step B: Create Deal Object Field Groups

### Field Group 1: Service Delivery Management

```
Group Name: Service Delivery Management
Internal Name: service_delivery_management
Display Order: 1
Description: Core service delivery tracking and coordination
Fields to Include:
- deal_type
- service_delivery_status
- treatment_protocol
- assigned_provider
- service_delivery_location
- service_completion_date
- estimated_service_duration
- actual_service_duration
- service_complexity_level
- clinical_requirements_met
- patient_preparation_status
- equipment_required
- pre_service_consultation
- post_service_follow_up_required
- service_documentation_complete
```

### Field Group 2: Package & Credit Management

```
Group Name: Package & Credit Management
Internal Name: package_credit_management
Display Order: 2
Description: Service package and credit tracking
Fields to Include:
- package_credits_included
- package_credits_used
- package_credits_remaining
- package_expiration_date
- package_type
- package_utilization_rate
- auto_renewal_status
- renewal_probability
- package_discount_applied
- package_value_delivered
```

### Field Group 3: Financial Management

Group Name: Financial Management  
Internal Name: financial\_management  
Display Order: 3  
Description: Revenue tracking and financial coordination  
Fields to Include:

- insurance\_coverage\_amount
- out\_of\_pocket\_amount
- payment\_plan\_status
- billing\_insurance\_status
- cost\_of\_service
- profit\_margin
- commission\_amount
- referral\_commission
- revenue\_recognition\_date
- payment\_method

## Field Group 4: Patient Journey & Outcomes

Group Name: Patient Journey & Outcomes  
Internal Name: patient\_journey\_outcomes  
Display Order: 4  
Description: Patient experience and outcome tracking  
Fields to Include:

- patient\_satisfaction\_score
- clinical\_outcomes\_achieved
- referral\_source\_detail
- follow\_up\_required
- upsell\_opportunities
- cross\_sell\_recommendations
- patient\_education\_delivered
- provider\_notes
- service\_quality\_rating
- competitive\_advantage\_delivered

## TICKET OBJECT FIELD GROUPS

Navigate to **Settings > Properties > Ticket Properties > Groups** and create the following field groups for organizing the 35 Ticket object custom fields into clinical support workflow sections.

### Step C: Create Ticket Object Field Groups

#### Field Group 1: Clinical Priority & Safety

Group Name: Clinical Priority & Safety  
Internal Name: clinical\_priority\_safety  
Display Order: 1  
Description: Clinical prioritization **and** patient safety management  
Fields to Include:  
- ticket\_type  
- clinical\_priority\_level  
- patient\_safety\_concern  
- clinical\_review\_required  
- emergency\_protocol\_activated  
- response\_time\_required  
- clinical\_escalation\_level  
- patient\_risk\_assessment  
- hipaa\_compliance\_required  
- regulatory\_reporting\_required

## Field Group 2: Provider Coordination

Group Name: Provider Coordination  
Internal Name: provider\_coordination  
Display Order: 2  
Description: Healthcare provider coordination **and** clinical documentation  
Fields to Include:  
- assigned\_provider  
- clinical\_notes  
- provider\_consultation\_needed  
- clinical\_decision\_made  
- treatment\_recommendations  
- medication\_adjustments  
- lab\_orders\_placed  
- referrals\_made  
- follow\_up\_appointments\_scheduled  
- patient\_education\_provided  
- clinical\_protocols\_followed  
- provider\_communication\_log  
- clinical\_outcome  
- quality\_assurance\_review  
- peer\_review\_required

## Field Group 3: Resolution & Quality Tracking



Group Name: Resolution & Quality Tracking  
Internal Name: resolution\_quality\_tracking  
Display Order: 3  
Description: Resolution tracking and quality assurance measurement  
Fields to Include:

- resolution\_satisfaction
- resolution\_time\_hours
- escalation\_required
- first\_contact\_resolution
- patient\_callback\_required
- issue\_complexity\_level
- knowledge\_base\_article\_created
- process\_improvement\_identified
- staff\_training\_needed
- resolution\_documentation\_complete

## FIELD GROUP IMPLEMENTATION INSTRUCTIONS

### Step D: Field Group Creation Process

#### 1. Navigate to Field Groups Section

2. Go to Settings > Properties > [Object] Properties

3. Click on the "Groups" tab

4. Click "Create group" button

#### 5. Configure Each Field Group

6. Enter the exact Group Name as specified

7. Use the Internal Name provided

8. Set the Display Order as indicated

9. Add the Description text

10. Save the group

#### 11. Assign Fields to Groups

12. After creating all groups, go back to the Properties tab

13. For each field listed under a group, edit the field

14. In the "Group" dropdown, select the appropriate group

15. Save the field assignment

## 16. **Verify Group Organization**

- 17. Navigate to a Contact/Deal/Ticket record
- 18. Verify that fields appear in the correct groups
- 19. Confirm logical organization enhances user experience
- 20. Test data entry workflow efficiency

## **Step E: Group Display Optimization**

Configure group display settings for optimal user experience and workflow efficiency:

**Contact Record Layout Optimization:** - Set Legacy System Integration group to collapsed by default - Keep Emergency Contact & Safety expanded for immediate visibility - Set Communication Preferences to expanded for easy access - Configure Website Assessment Data as expanded for lead management - Set Clinical Health Status to expanded for provider workflow - Configure Clinical Documentation as collapsed to reduce clutter - Set Business Intelligence to collapsed for executive access only

**Deal Record Layout Optimization:** - Keep Service Delivery Management expanded for operational workflow - Set Package & Credit Management expanded for service coordination - Configure Financial Management as expanded for billing workflow - Set Patient Journey & Outcomes expanded for quality tracking

**Ticket Record Layout Optimization:** - Keep Clinical Priority & Safety expanded for immediate assessment - Set Provider Coordination expanded for clinical workflow - Configure Resolution & Quality Tracking expanded for performance measurement

This comprehensive field group organization ensures that the 233+ custom fields across all standard objects are logically organized for optimal user experience, efficient data entry, and enhanced clinical workflow coordination while maintaining the sophisticated healthcare CRM capabilities that position ENNU as the industry leader in healthcare technology innovation.

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# CONTEXTUAL INSIGHTS: WHY EACH FIELD GROUP EXISTS AND WHAT IT ACCOMPLISHES

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Understanding the strategic purpose and operational benefits of each field group is essential for effective implementation and optimal system utilization. As the creator of HubSpot and the world's greatest healthcare CRM expert, I've designed these field groups to address specific clinical workflows, operational requirements, and business intelligence needs that transform ENNU into the most sophisticated healthcare organization ever created.

## CONTACT OBJECT FIELD GROUPS - STRATEGIC CONTEXT AND PURPOSE

### Field Group 1: Legacy System Integration - The Foundation of Data Continuity

**Strategic Purpose:** This field group serves as the critical bridge between ENNU's legacy systems and the new HubSpot platform, ensuring zero data loss and maintaining operational continuity during the digital transformation. Without these fields, ENNU would lose years of valuable patient history and operational intelligence.

**Clinical Workflow Impact:** Healthcare providers need immediate access to historical patient data to make informed clinical decisions. These fields enable providers to reference previous treatments, understand patient history, and maintain care continuity without disruption. The integration fields ensure that when a provider looks up a patient, they have complete context from day one of the new system implementation.

**Operational Benefits:** - **Seamless Data Migration:** Suite CRM and MINDBODY identifiers enable precise data mapping and synchronization - **Audit Trail Maintenance:** Creation dates and status fields provide comprehensive historical tracking - **Dual System Operation:** During transition periods, staff can operate both systems simultaneously - **Quality Assurance:** Migration status tracking ensures data integrity and identifies any synchronization issues

**Business Intelligence Value:** These fields enable comprehensive analysis of patient journey evolution, system performance comparison, and migration success measurement. The data provides insights into which legacy system features were most valuable and how patient engagement has evolved post-migration.

**Why These Specific Fields:** Each field addresses a specific integration challenge. The Suite CRM ID enables patient record matching, while status fields ensure operational workflows continue seamlessly. Address fields maintain communication continuity, and sync dates enable real-time coordination between systems.

## **Field Group 2: Emergency Contact & Safety - Patient Safety Excellence**

**Strategic Purpose:** This field group establishes ENNU as the gold standard in patient safety by ensuring immediate access to critical safety information during any patient interaction. These fields can literally save lives by providing instant access to emergency contacts, medical alerts, and safety contraindications.

**Clinical Workflow Impact:** When a patient calls with a medical concern or arrives for treatment, providers immediately see allergies, current medications, and contraindications. This prevents dangerous drug interactions, allergic reactions, and inappropriate treatments. Emergency contact information enables immediate family notification during medical emergencies.

**Operational Benefits:** - **Immediate Safety Assessment:** Providers can quickly identify potential risks before any treatment - **Emergency Response Coordination:** Emergency contacts enable rapid family notification and medical history sharing - **Insurance Coordination:** Insurance information streamlines billing and pre-authorization processes - **Regulatory Compliance:** Comprehensive safety documentation meets healthcare regulatory requirements

**Business Intelligence Value:** Safety data enables analysis of patient risk profiles, common contraindications, and emergency response effectiveness. This information supports quality improvement initiatives and risk management protocols.

**Why These Specific Fields:** Medical alert information provides immediate safety warnings, while allergy and medication fields prevent dangerous interactions. Emergency contact fields enable rapid response coordination, and insurance fields support financial planning and billing efficiency.

## **Field Group 3: Communication Preferences - Personalized Patient Engagement**

**Strategic Purpose:** This field group transforms patient communication from generic messaging to personalized engagement that respects patient preferences while maintaining regulatory compliance. It enables ENNU to deliver the right message through the right channel at the right frequency for each individual patient.

**Clinical Workflow Impact:** Providers can communicate with patients through their preferred channels, increasing response rates and patient satisfaction. HIPAA authorization tracking ensures compliant communication, while opt-in status prevents unwanted contact that could damage patient relationships.

**Operational Benefits:** - **Compliance Assurance:** Opt-in tracking prevents regulatory violations and maintains patient trust - **Communication Efficiency:** Preferred method selection increases message delivery success rates - **Patient Satisfaction:** Respecting communication preferences enhances patient experience - **Marketing Optimization:** Consent tracking enables targeted marketing while maintaining compliance

**Business Intelligence Value:** Communication preference data enables analysis of patient engagement patterns, channel effectiveness, and compliance metrics. This information supports communication strategy optimization and patient satisfaction improvement.

**Why These Specific Fields:** Each communication channel requires separate consent tracking for regulatory compliance. Frequency preferences prevent communication fatigue, while HIPAA authorization ensures legal protection. Do-not-call and opt-out fields provide granular control over patient communication preferences.

#### **Field Group 4: Website Assessment Data - Intelligent Lead Qualification**

**Strategic Purpose:** This field group transforms website visitors into qualified leads by capturing comprehensive health interests and qualification criteria. It enables ENNU to provide personalized service recommendations and targeted follow-up that converts prospects into patients more effectively than any healthcare organization in history.

**Clinical Workflow Impact:** Assessment data provides providers with patient health goals and interests before the first appointment, enabling personalized consultation and targeted treatment recommendations. Medical history summaries give clinical context that improves first-visit effectiveness.

**Operational Benefits:** - **Lead Qualification:** Scoring algorithms prioritize high-value prospects for immediate follow-up - **Personalized Service Targeting:** Health interests enable appropriate service recommendations - **Appointment Optimization:** Preferred times and providers streamline scheduling coordination - **Budget Alignment:** Budget ranges ensure appropriate service recommendations and financial planning

**Business Intelligence Value:** Assessment data enables analysis of patient acquisition patterns, service demand trends, and conversion optimization opportunities. This information supports marketing strategy development and service offering optimization.

**Why These Specific Fields:** Completion tracking enables follow-up automation, while health interests support service targeting. Qualification scoring prioritizes sales efforts, and lifestyle factors enable personalized recommendations. Budget and preference fields ensure appropriate service matching and operational efficiency.

### **Field Group 5: Clinical Health Status - Real-Time Health Intelligence**

**Strategic Purpose:** This field group establishes ENNU as the leader in personalized medicine by providing real-time health intelligence that enables proactive clinical intervention and patient engagement. It transforms reactive healthcare into predictive health optimization that prevents problems before they occur.

**Clinical Workflow Impact:** Providers have immediate access to current health scores, biomarker trends, and treatment responses, enabling data-driven clinical decisions. Priority levels ensure appropriate clinical attention, while engagement tracking identifies patients who need additional support.

**Operational Benefits:** - **Proactive Clinical Care:** Health score trends enable early intervention before problems develop - **Treatment Optimization:** Response tracking enables rapid treatment adjustments for better outcomes - **Resource Allocation:** Priority levels ensure appropriate clinical attention and resource distribution - **Patient Engagement:** Engagement tracking identifies patients who need additional support or motivation

**Business Intelligence Value:** Health status data enables analysis of treatment effectiveness, patient progress patterns, and clinical outcome optimization. This information supports evidence-based medicine and continuous quality improvement.

**Why These Specific Fields:** Health scores provide objective progress measurement, while trend analysis enables proactive intervention. Treatment response tracking supports clinical optimization, and engagement levels enable personalized patient support. Risk factors enable preventive care protocols.

## Field Group 6: Clinical Documentation - Comprehensive Care Coordination

**Strategic Purpose:** This field group ensures comprehensive clinical documentation that supports provider communication, regulatory compliance, and quality assurance. It enables seamless care coordination across multiple providers while maintaining detailed records for clinical decision support and legal protection.

**Clinical Workflow Impact:** Providers can quickly review previous clinical notes, treatment progress, and patient education provided. Care coordination notes enable seamless handoffs between providers, while clinical alerts ensure important information is never missed.

**Operational Benefits:** - **Provider Communication:** Comprehensive notes enable effective care team coordination - **Quality Assurance:** Documentation supports quality measurement and improvement initiatives - **Regulatory Compliance:** Detailed records meet healthcare documentation requirements - **Clinical Decision Support:** Historical notes provide context for current treatment decisions

**Business Intelligence Value:** Clinical documentation enables analysis of care quality, provider performance, and patient outcome patterns. This information supports clinical protocol optimization and provider training development.

**Why These Specific Fields:** Clinical notes provide comprehensive care documentation, while treatment progress tracking enables outcome measurement. Patient education tracking ensures comprehensive care delivery, and care coordination notes enable seamless provider communication.

## Field Group 7: Business Intelligence - Strategic Decision Support

**Strategic Purpose:** This field group transforms patient data into strategic business intelligence that enables data-driven decision making and competitive advantage. It provides the metrics and analytics that position ENNU as the most sophisticated healthcare organization in the industry.

**Clinical Workflow Impact:** Patient engagement and satisfaction metrics enable providers to identify patients who need additional attention or support. Journey stage tracking enables appropriate communication and care coordination based on patient status.

**Operational Benefits:** - **Revenue Optimization:** Lifetime value and revenue tracking enable strategic account management - **Retention Management:** Churn risk scoring

enables proactive retention interventions - **Performance Measurement:** Engagement and satisfaction metrics support quality improvement - **Marketing Attribution:** Source tracking enables marketing strategy optimization and ROI measurement

**Business Intelligence Value:** These fields provide comprehensive business analytics that enable strategic planning, performance optimization, and competitive positioning. The data supports executive decision making and business growth strategies.

**Why These Specific Fields:** Customer lifetime value enables strategic account prioritization, while churn risk enables proactive retention. Engagement scores support relationship management, and marketing attribution enables campaign optimization. Journey stage tracking enables personalized communication strategies.

## **DEAL OBJECT FIELD GROUPS - SERVICE DELIVERY EXCELLENCE**

### **Field Group 1: Service Delivery Management - Operational Excellence**

**Strategic Purpose:** This field group transforms service delivery from basic appointment scheduling into sophisticated healthcare service coordination that ensures clinical excellence, patient satisfaction, and operational efficiency. It enables ENNU to deliver healthcare services with precision and quality that exceeds patient expectations.

**Clinical Workflow Impact:** Providers have complete visibility into service requirements, patient preparation status, and clinical protocols. Treatment protocols ensure consistent care delivery, while complexity levels enable appropriate resource allocation and provider assignment.

**Operational Benefits:** - **Service Coordination:** Comprehensive tracking ensures smooth service delivery and patient experience - **Resource Planning:** Duration estimates and complexity levels enable optimal scheduling and staffing - **Quality Assurance:** Documentation requirements ensure comprehensive service records - **Patient Preparation:** Preparation tracking ensures patients are ready for optimal service delivery

**Business Intelligence Value:** Service delivery data enables analysis of operational efficiency, provider productivity, and service quality metrics. This information supports operational optimization and quality improvement initiatives.



**Why These Specific Fields:** Service type categorization enables specialized workflows, while status tracking provides real-time coordination. Provider assignment ensures accountability, and location tracking supports logistics coordination. Duration tracking enables productivity measurement and scheduling optimization.

## **Field Group 2: Package & Credit Management - Customer Success Optimization**

**Strategic Purpose:** This field group enables sophisticated subscription and package management that maximizes customer lifetime value while ensuring optimal service utilization. It transforms traditional fee-for-service healthcare into value-based service delivery that enhances patient outcomes and business performance.

**Clinical Workflow Impact:** Providers can see remaining service credits and package status, enabling appropriate service recommendations and utilization optimization. Expiration tracking ensures patients maximize their package value while maintaining service continuity.

**Operational Benefits:** - **Utilization Optimization:** Credit tracking ensures patients receive maximum package value - **Renewal Coordination:** Expiration and renewal tracking enables proactive customer success management - **Revenue Recognition:** Package tracking supports accurate financial reporting and revenue management - **Customer Success:** Utilization rates identify customers who need additional engagement or support

**Business Intelligence Value:** Package data enables analysis of service utilization patterns, renewal rates, and customer success metrics. This information supports package optimization and customer retention strategies.

**Why These Specific Fields:** Credit tracking enables real-time utilization monitoring, while expiration dates support renewal coordination. Package types enable specialized management, and utilization rates support customer success optimization. Renewal probability enables proactive retention management.

## **Field Group 3: Financial Management - Revenue Optimization**

**Strategic Purpose:** This field group enables comprehensive financial management that maximizes revenue while supporting patient accessibility through flexible payment options. It transforms healthcare billing from transactional processing into strategic financial coordination that enhances both business performance and patient satisfaction.

**Clinical Workflow Impact:** Providers can see insurance coverage and payment arrangements, enabling appropriate service recommendations that align with patient financial capabilities. Payment plan status ensures providers understand patient financial commitments.

**Operational Benefits:** - **Billing Coordination:** Insurance and payment tracking streamlines billing processes and reduces errors - **Financial Planning:** Cost and profit tracking enables strategic pricing and service optimization - **Revenue Management:** Comprehensive financial tracking supports accurate reporting and analysis - **Patient Accessibility:** Payment plan options ensure financial barriers don't prevent necessary care

**Business Intelligence Value:** Financial data enables analysis of profitability, payment patterns, and revenue optimization opportunities. This information supports strategic pricing decisions and financial performance improvement.

**Why These Specific Fields:** Insurance tracking enables billing coordination, while payment plans support patient accessibility. Cost tracking enables profitability analysis, and commission fields support provider compensation. Revenue recognition ensures accurate financial reporting.

#### **Field Group 4: Patient Journey & Outcomes - Quality Excellence**

**Strategic Purpose:** This field group ensures comprehensive outcome tracking and patient experience measurement that positions ENNU as the leader in healthcare quality and patient satisfaction. It enables continuous improvement and evidence-based care that demonstrates superior clinical outcomes.

**Clinical Workflow Impact:** Providers can document clinical outcomes and patient satisfaction, enabling continuous improvement and quality measurement. Education tracking ensures comprehensive patient care and engagement optimization.

**Operational Benefits:** - **Quality Measurement:** Satisfaction and outcome tracking enables quality assurance and improvement - **Patient Experience:** Comprehensive tracking ensures optimal patient experience and satisfaction - **Clinical Evidence:** Outcome documentation supports evidence-based care and protocol optimization - **Business Development:** Referral tracking and upsell identification support business growth

**Business Intelligence Value:** Outcome data enables analysis of clinical effectiveness, patient satisfaction trends, and quality improvement opportunities. This information supports clinical protocol optimization and competitive positioning.

**Why These Specific Fields:** Satisfaction scoring enables quality measurement, while outcome tracking supports clinical evidence. Referral tracking supports business development, and education documentation ensures comprehensive care delivery. Provider notes enable clinical coordination and quality assurance.

## **TICKET OBJECT FIELD GROUPS - PATIENT SUPPORT EXCELLENCE**

### **Field Group 1: Clinical Priority & Safety - Patient Safety Leadership**

**Strategic Purpose:** This field group establishes ENNU as the leader in patient safety by ensuring immediate identification and appropriate response to clinical concerns. It transforms patient support from basic customer service into sophisticated clinical triage that protects patient safety while optimizing provider resources.

**Clinical Workflow Impact:** Support staff can immediately identify clinical priorities and safety concerns, ensuring appropriate escalation and response. Emergency protocols ensure patient safety while regulatory compliance protects both patients and the organization.

**Operational Benefits:** - **Patient Safety:** Priority assessment ensures appropriate clinical attention and response timing - **Resource Optimization:** Priority levels enable efficient provider resource allocation - **Regulatory Compliance:** Compliance tracking ensures adherence to healthcare regulations - **Risk Management:** Safety assessment and escalation protocols minimize organizational risk

**Business Intelligence Value:** Priority and safety data enables analysis of patient support patterns, response effectiveness, and safety protocol optimization. This information supports quality improvement and risk management initiatives.

**Why These Specific Fields:** Ticket categorization enables specialized workflows, while priority levels ensure appropriate response timing. Safety concerns trigger immediate attention, and escalation levels ensure proper clinical involvement. Compliance tracking protects regulatory standing.

## Field Group 2: Provider Coordination - Clinical Excellence

**Strategic Purpose:** This field group ensures seamless coordination between patient support and clinical providers, enabling comprehensive patient care that addresses both immediate concerns and long-term health optimization. It transforms support tickets into clinical care opportunities that enhance patient outcomes.

**Clinical Workflow Impact:** Providers receive comprehensive clinical context and documentation, enabling informed decision making and appropriate patient care. Clinical outcomes tracking ensures quality measurement and continuous improvement.

**Operational Benefits:**

- **Clinical Coordination:** Provider assignment and communication ensure appropriate clinical involvement
- **Documentation Excellence:** Comprehensive notes support clinical decision making and regulatory compliance
- **Quality Assurance:** Outcome tracking and review processes ensure clinical excellence
- **Care Continuity:** Follow-up coordination ensures comprehensive patient care and satisfaction

**Business Intelligence Value:** Provider coordination data enables analysis of clinical response effectiveness, provider performance, and patient care quality. This information supports clinical protocol optimization and provider training development.

**Why These Specific Fields:** Provider assignment ensures clinical accountability, while clinical notes provide comprehensive documentation. Treatment recommendations support clinical care, and outcome tracking enables quality measurement. Communication logs ensure provider coordination.

## Field Group 3: Resolution & Quality Tracking - Continuous Improvement

**Strategic Purpose:** This field group enables comprehensive quality measurement and continuous improvement that positions ENNU as the leader in patient support excellence. It transforms support resolution from basic problem solving into strategic quality enhancement that drives patient satisfaction and operational excellence.

**Clinical Workflow Impact:** Resolution tracking and quality measurement enable continuous improvement in patient support processes. First contact resolution and satisfaction metrics ensure optimal patient experience and provider efficiency.

**Operational Benefits:** - **Quality Measurement:** Satisfaction and resolution tracking enable performance optimization - **Process Improvement:** Issue complexity and improvement identification support operational excellence - **Training Development:** Training needs identification ensures staff development and quality enhancement - **Performance Optimization:** Resolution time and escalation tracking enable workflow optimization

**Business Intelligence Value:** Resolution data enables analysis of support effectiveness, quality trends, and improvement opportunities. This information supports operational optimization and patient satisfaction enhancement.

**Why These Specific Fields:** Satisfaction scoring enables quality measurement, while resolution time tracking supports efficiency optimization. Escalation tracking identifies process improvements, and complexity assessment supports resource allocation. Documentation completion ensures regulatory compliance.

## IMPLEMENTATION SUCCESS FACTORS

Understanding these contextual insights ensures that implementers can:

1. **Configure Fields Appropriately:** Knowing the purpose enables proper validation rules and workflow setup
2. **Optimize User Experience:** Understanding workflows enables logical field organization and display optimization
3. **Ensure Data Quality:** Knowing field relationships enables proper data validation and integrity checks
4. **Support Training:** Understanding purpose enables effective staff training and user adoption
5. **Enable Analytics:** Knowing business value enables proper reporting and dashboard configuration

This comprehensive contextual understanding transforms field creation from mechanical data entry into strategic healthcare CRM implementation that positions ENNU as the undisputed leader in healthcare technology innovation and patient care excellence.