ENNU HUBSPOT OBJECTS COMPREHENSIVE SPECIFICATION

Complete Technical Documentation for All Standard and Custom Objects

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Scope: Complete HubSpot objects architecture for ENNU healthcare CRM
Implementation Target: 267+ properties across 29 objects

EXECUTIVE OVERVIEW

This comprehensive technical specification document provides complete implementation details for ENNU's sophisticated HubSpot objects architecture, representing the most advanced healthcare Customer Relationship Management configuration ever designed. The implementation encompasses 19 enhanced standard objects and 10 custom objects that create a unified healthcare ecosystem capable of managing complex clinical workflows, patient engagement automation, and operational coordination across ENNU's multi-system technology stack.

The objects architecture transforms HubSpot from a traditional CRM platform into a comprehensive healthcare management system that integrates clinical data management with marketing automation, operational efficiency, and patient engagement capabilities. Each object is specifically designed to support ENNU's unique healthcare delivery model while maintaining HIPAA compliance and enabling sophisticated automation workflows that enhance both patient outcomes and operational efficiency.

The technical specifications provided in this document include complete property definitions, object relationships, automation workflows, and integration requirements that enable seamless coordination across ENNU's 11-system technology ecosystem. The implementation preserves all existing data while enabling enhanced capabilities that position ENNU as the technology leader in healthcare CRM sophistication and patient engagement excellence.

Architecture Overview

The HubSpot objects architecture consists of three primary categories that work together to create a comprehensive healthcare management platform. The enhanced standard objects provide the foundation for patient management, communication tracking, and business operations while maintaining compatibility with existing HubSpot functionality and third-party integrations. The core custom objects enable sophisticated clinical data management and patient engagement capabilities that exceed those available in traditional healthcare CRM platforms. The advanced custom objects provide specialized functionality for complex clinical workflows and operational optimization that support ENNU's premium healthcare delivery model.

The object relationships create sophisticated data flows that enable comprehensive patient journey tracking from initial website interaction through ongoing health optimization and long-term retention. The relationships support both automated workflows and manual processes while maintaining data integrity and enabling comprehensive reporting and analytics capabilities. The architecture ensures that all patient interactions and clinical activities are properly tracked and coordinated across all systems while maintaining the flexibility required for complex healthcare operational requirements.

The integration architecture ensures seamless coordination with ENNU's existing technology stack including Open Medical EHR, WordPress ecosystem components, Google Workspace, MINDBODY scheduling, and communication platforms. The integrations maintain clear data ownership and synchronization protocols while enabling real-time coordination and automated workflow triggers that enhance operational efficiency and patient satisfaction. The architecture supports unlimited scalability while maintaining optimal performance and user experience across all operational scenarios.

STANDARD OBJECTS ENHANCEMENT SPECIFICATIONS

CONTACT OBJECT - COMPREHENSIVE PATIENT MANAGEMENT HUB

The Contact object serves as the central hub for all patient information and represents the most sophisticated healthcare contact management configuration ever implemented in HubSpot. The enhancement includes 153 healthcare-specific properties that integrate data from four distinct sources while enabling advanced patient engagement automation and clinical decision support capabilities.

Core Enhancement Strategy

The Contact object enhancement strategy integrates Suite CRM legacy data, MINDBODY operational information, Open Medical clinical data, and website assessment results into a unified patient profile that preserves all historical information while enabling advanced healthcare CRM capabilities. The integration maintains data integrity from all source systems while adding sophisticated automation and engagement tools that enhance patient satisfaction and clinical outcomes.

The property architecture includes comprehensive demographic information, detailed health tracking capabilities, emergency contact management, communication preferences, and clinical coordination tools that support both automated workflows and manual processes. The properties are organized into logical groups that mirror clinical workflows while maintaining compatibility with existing HubSpot functionality and third-party integrations.

The automation capabilities include sophisticated lead scoring, patient journey automation, clinical alert systems, and communication optimization that enhance patient engagement while reducing administrative overhead. The automation maintains clinical appropriateness and regulatory compliance while enabling personalized patient experiences that demonstrate measurable value and encourage long-term program commitment.

Suite CRM Integration Properties (51 Fields)

The Suite CRM integration preserves all legacy contact management data while enhancing accessibility and functionality within the HubSpot platform. These

properties maintain historical patient relationships and communication preferences while enabling enhanced automation and engagement capabilities that were not possible within the legacy system.

Core Identification and System Fields:

The suite_crm_id property serves as the primary identifier for maintaining relationships with legacy data while enabling seamless transition to the enhanced platform. This single-line text field stores the original Suite CRM identifier with alphanumeric validation and 1-20 character limits that ensure data integrity while supporting historical data preservation and relationship maintenance.

The suite_crm_creation_date property preserves the original creation timestamp from the legacy system while enabling comprehensive patient relationship tracking and historical analysis. This date picker field includes validation between 2010-01-01 and today that ensures data accuracy while supporting comprehensive patient history tracking and relationship analysis.

The suite_crm_user_status property tracks the original patient status from the legacy system while enabling enhanced status management and workflow automation within the HubSpot platform. This dropdown field includes options for Active, Inactive, Archived, Deleted, and Unknown that preserve historical status information while enabling enhanced patient lifecycle management and engagement optimization.

Enhanced Contact Information and Communication:

The suite_crm_assigned_user property preserves the original user assignment from the legacy system while enabling enhanced team coordination and responsibility tracking within the HubSpot platform. This single-line text field maintains historical assignment information while supporting enhanced team management and patient care coordination capabilities.

The suite_crm_address_2 property captures additional address information from the legacy system while enabling comprehensive location tracking and service delivery coordination. This single-line text field preserves detailed address information while supporting enhanced geographic analysis and service delivery optimization.

The suite_crm_alternate_address property stores secondary address information from the legacy system while enabling comprehensive patient location tracking and communication optimization. This multi-line text field preserves complete address

information while supporting enhanced patient communication and service delivery coordination.

Business Relationship and Professional Information:

The suite_crm_account_name property preserves associated account information from the legacy system while enabling enhanced business relationship tracking and corporate wellness coordination. This single-line text field maintains historical business relationships while supporting enhanced B2B healthcare services and corporate wellness program management.

The suite_crm_job_title property captures professional information from the legacy system while enabling enhanced patient profiling and service customization based on professional requirements and lifestyle factors. This single-line text field preserves professional information while supporting enhanced patient segmentation and personalized service delivery.

Communication Preferences and Compliance:

The do_not_call property preserves communication preferences from the legacy system while ensuring compliance with patient communication preferences and regulatory requirements. This checkbox field maintains historical communication preferences while supporting enhanced communication automation and compliance management.

The email_opt_out property tracks email communication preferences from the legacy system while enabling sophisticated email marketing automation and compliance management. This checkbox field preserves historical preferences while supporting enhanced email marketing campaigns and communication optimization.

MINDBODY Integration Properties (35+ Fields)

The MINDBODY integration enables real-time operational coordination while preserving all scheduling and service delivery information within the comprehensive patient management platform. These properties support seamless appointment scheduling, service delivery tracking, and operational coordination while maintaining synchronization with the MINDBODY operational system.

Client Identification and Operational Coordination:

The mindbody_client_id property serves as the primary identifier for maintaining synchronization with the MINDBODY operational system while enabling seamless appointment scheduling and service delivery coordination. This single-line text field stores the MINDBODY client identifier with alphanumeric validation that ensures data integrity while supporting real-time operational coordination and appointment management.

The mindbody_creation_date property preserves the original client creation date from the MINDBODY system while enabling comprehensive patient relationship tracking and operational analysis. This date picker field maintains historical information while supporting enhanced patient lifecycle management and operational optimization.

The mindbody_status property tracks the current client status within the MINDBODY system while enabling enhanced patient lifecycle management and service delivery coordination. This dropdown field includes options for Active, Inactive, Suspended, and Archived that maintain operational status information while supporting enhanced patient management and service optimization.

Emergency Contact and Safety Information:

The emergency_contact_name property captures essential emergency contact information required for healthcare service delivery while ensuring patient safety and regulatory compliance. This single-line text field stores emergency contact names with validation requirements that ensure complete information while supporting clinical safety protocols and emergency response procedures.

The emergency_contact_phone property stores emergency contact telephone information required for healthcare safety protocols while enabling immediate contact capabilities during clinical emergencies. This phone number field includes validation and formatting that ensures accurate contact information while supporting emergency response procedures and patient safety protocols.

The emergency_contact_relationship property captures the relationship between the patient and emergency contact while providing essential context for emergency situations and clinical decision making. This single-line text field stores relationship information while supporting enhanced emergency response protocols and clinical safety procedures.

Service Preferences and Delivery Optimization:

The preferred_service_types property tracks patient service preferences from the MINDBODY system while enabling personalized service recommendations and delivery optimization. This multi-select dropdown field includes options for Medical, Aesthetic, Wellness, Telehealth, and Consultation services that support enhanced service delivery and patient satisfaction optimization.

The preferred_appointment_times property captures patient scheduling preferences while enabling optimized appointment scheduling and provider utilization. This multi-line text field stores detailed scheduling preferences while supporting enhanced appointment coordination and patient satisfaction optimization.

The preferred_providers property tracks patient provider preferences while enabling enhanced care continuity and patient satisfaction through consistent provider relationships. This multi-line text field stores provider preferences while supporting enhanced care coordination and patient relationship management.

Communication Preferences and Marketing Optimization:

The email_marketing_opt_in property tracks patient consent for marketing communications while enabling sophisticated email marketing campaigns and patient engagement automation. This checkbox field maintains consent information while supporting enhanced marketing automation and patient engagement optimization.

The sms_marketing_opt_in property captures patient consent for SMS marketing communications while enabling personalized text message campaigns and appointment reminders. This checkbox field maintains consent information while supporting enhanced SMS marketing and patient communication optimization.

The phone_marketing_opt_in property tracks patient consent for telephone marketing communications while enabling personalized outreach and patient engagement campaigns. This checkbox field maintains consent information while supporting enhanced phone marketing and patient relationship management.

Enhanced Website Assessment Properties (47 Fields)

The website assessment integration captures comprehensive patient health information and qualification data from ENNU's sophisticated website forms while enabling automated lead processing and personalized patient journey automation. These properties transform website interactions into comprehensive patient intelligence that supports enhanced conversion optimization and patient engagement.

Health Assessment and Qualification Data:

The assessment_completion_status property tracks the progress of patient health assessments while enabling automated follow-up workflows and conversion optimization. This dropdown field includes options for Complete, Partial, In Progress, and Not Started that support enhanced lead management and patient engagement automation.

The health_interest_primary property captures the primary health focus area from patient assessments while enabling personalized service recommendations and targeted marketing campaigns. This dropdown field includes options for Weight Loss, Hormone Optimization, Aesthetic Enhancement, Wellness Programs, and General Health that support enhanced patient segmentation and service delivery optimization.

The qualification_score property provides automated patient qualification scoring based on assessment responses while enabling prioritized follow-up and conversion optimization. This number field stores calculated scores from 1-100 that support enhanced lead management and sales process optimization.

Medical Screening and Safety Information:

The medical_contraindications property captures potential medical contraindications identified through website assessments while ensuring patient safety and appropriate service recommendations. This multi-line text field stores detailed contraindication information while supporting enhanced clinical safety protocols and service delivery optimization.

The current_medications property tracks patient medication information from website assessments while enabling clinical decision support and safety screening. This multi-line text field stores medication information while supporting enhanced clinical coordination and patient safety protocols.

The medical_history_summary property captures relevant medical history information from patient assessments while enabling comprehensive clinical context and decision support. This multi-line text field stores medical history information while supporting enhanced clinical coordination and patient care optimization.

Lifestyle and Preference Information:

The lifestyle_factors property captures relevant lifestyle information from patient assessments while enabling personalized service recommendations and health

optimization strategies. This multi-line text field stores lifestyle information while supporting enhanced patient care personalization and service delivery optimization.

The health_goals property tracks patient health objectives from website assessments while enabling personalized care plans and progress tracking. This multi-line text field stores health goals while supporting enhanced patient engagement and care plan optimization.

The preferred_communication_method property captures patient communication preferences from website assessments while enabling optimized patient communication and engagement strategies. This dropdown field includes options for Email, SMS, Phone, Video Call, and In-Person that support enhanced communication optimization and patient satisfaction.

Clinical Integration and Biomarker Properties (20+ Fields)

The clinical integration properties enable comprehensive health tracking and clinical decision support while maintaining synchronization with Open Medical EHR and supporting sophisticated health optimization protocols. These properties transform clinical data into actionable patient engagement tools while maintaining clinical accuracy and regulatory compliance.

Biomarker Tracking and Health Optimization:

The current_health_score property provides real-time health scoring based on comprehensive biomarker analysis while enabling patient engagement and progress tracking. This number field stores calculated health scores from 0-100 that support enhanced patient communication and health optimization tracking.

The last_lab_date property tracks the most recent laboratory testing date while enabling automated follow-up scheduling and clinical workflow coordination. This date picker field maintains testing schedules while supporting enhanced clinical coordination and patient care optimization.

The biomarker_optimization_status property tracks patient progress in biomarker optimization while enabling personalized treatment recommendations and progress communication. This dropdown field includes options for Optimal, Improving, Stable, Declining, and Needs Attention that support enhanced clinical decision support and patient engagement.

Treatment Tracking and Care Coordination:

The current_treatment_plan property captures the active treatment protocol while enabling comprehensive care coordination and progress tracking. This multi-line text field stores treatment information while supporting enhanced clinical coordination and patient care optimization.

The provider_assignments property tracks assigned healthcare providers while enabling comprehensive care team coordination and communication. This multi-line text field stores provider information while supporting enhanced care coordination and team communication.

The next_appointment_type property captures the recommended next appointment type while enabling automated scheduling and care coordination. This dropdown field includes options for Medical Consultation, Lab Review, Follow-up, Aesthetic Consultation, and Wellness Coaching that support enhanced appointment coordination and patient care optimization.

DEAL OBJECT - COMPREHENSIVE REVENUE AND SERVICE MANAGEMENT

The Deal object enhancement transforms traditional sales pipeline management into a sophisticated healthcare service delivery and revenue tracking system that supports ENNU's complex service offerings while maintaining comprehensive financial tracking and patient journey coordination. The enhancement includes healthcare-specific properties that enable service package management, treatment protocol tracking, and revenue optimization while maintaining integration with WooCommerce and MINDBODY operational systems.

Healthcare Service Deal Configuration

The Deal object configuration supports ENNU's diverse service portfolio including medical consultations, aesthetic treatments, wellness programs, telehealth sessions, and comprehensive health optimization packages. The configuration enables complex service bundling, subscription management, and treatment protocol tracking while maintaining comprehensive revenue analysis and patient satisfaction measurement.

The deal_type property categorizes healthcare services while enabling specialized workflow automation and reporting analysis. This dropdown field includes options for Medical Consultation, Aesthetic Treatment, Wellness Program, Telehealth Session,

Health Optimization Package, Corporate Wellness, and Membership Subscription that support enhanced service delivery tracking and revenue optimization.

The service_delivery_status property tracks the progress of healthcare service delivery while enabling comprehensive patient care coordination and quality assurance. This dropdown field includes options for Scheduled, In Progress, Completed, Cancelled, Rescheduled, and Follow-up Required that support enhanced service delivery management and patient satisfaction optimization.

The treatment_protocol property captures the specific treatment approach for medical and aesthetic services while enabling clinical coordination and outcome tracking. This multi-line text field stores detailed treatment information while supporting enhanced clinical documentation and care coordination.

Financial Management and Revenue Optimization

The financial management properties enable comprehensive revenue tracking, cost analysis, and profitability measurement while supporting complex healthcare billing requirements and insurance coordination. The properties integrate with WooCommerce for e-commerce transactions and MINDBODY for service delivery billing while maintaining comprehensive financial reporting and analysis capabilities.

The package_credits_included property tracks service credits included in package deals while enabling comprehensive service utilization tracking and revenue recognition. This number field stores credit quantities while supporting enhanced package management and service delivery optimization.

The package_credits_used property monitors service credit utilization while enabling real-time package status tracking and renewal optimization. This number field tracks credit usage while supporting enhanced customer success and retention management.

The insurance_coverage_amount property captures insurance coverage information for applicable services while enabling comprehensive billing coordination and revenue optimization. This currency field stores coverage amounts while supporting enhanced financial management and billing coordination.

The out_of_pocket_amount property tracks patient responsibility for service costs while enabling comprehensive financial planning and payment coordination. This

currency field stores patient payment amounts while supporting enhanced financial management and patient communication.

Patient Journey and Outcome Tracking

The patient journey properties enable comprehensive tracking of patient progress through service delivery while supporting outcome measurement and satisfaction optimization. The properties integrate with clinical data to provide comprehensive patient care coordination and quality assurance capabilities.

The patient_satisfaction_score property captures patient satisfaction ratings for completed services while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores from 1-10 while supporting enhanced quality management and service optimization.

The clinical_outcomes_achieved property tracks measurable health improvements resulting from service delivery while enabling outcome-based care and patient engagement. This multi-line text field stores outcome information while supporting enhanced clinical documentation and patient communication.

The referral_source_detail property captures detailed referral attribution while enabling comprehensive marketing analysis and referral program optimization. This single-line text field stores referral information while supporting enhanced marketing attribution and business development.

TICKET OBJECT - COMPREHENSIVE PATIENT SUPPORT AND CLINICAL COORDINATION

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 enhancement enables HIPAA-compliant patient communication while supporting clinical workflow coordination and quality assurance protocols.

Healthcare Support Ticket Configuration

The Ticket object configuration supports diverse patient support requirements including clinical questions, appointment scheduling, billing inquiries, technical support, and emergency communications. The configuration enables prioritized

response protocols, clinical escalation procedures, and comprehensive resolution tracking while maintaining regulatory compliance and patient satisfaction optimization.

The ticket_type property categorizes patient support requests while enabling specialized workflow automation and response protocols. This dropdown field includes options for Clinical Question, Appointment Request, Billing Inquiry, Technical Support, Emergency Communication, Lab Result Question, and General Inquiry that support enhanced support delivery and response optimization.

The clinical_priority_level property establishes response priority for clinical communications while ensuring appropriate clinical attention and patient safety. This dropdown field includes options for Emergency, Urgent, Standard, and Low Priority that support enhanced clinical workflow coordination and patient safety protocols.

The patient_safety_concern property identifies potential patient safety issues while enabling immediate clinical attention and appropriate escalation procedures. This checkbox field triggers safety protocols while supporting enhanced patient safety and clinical quality assurance.

Clinical Coordination and Communication

The clinical coordination properties enable comprehensive healthcare provider communication while supporting clinical decision making and patient care coordination. The properties integrate with Open Medical EHR while maintaining HIPAA compliance and clinical workflow optimization.

The assigned_provider property tracks the healthcare provider responsible for ticket resolution while enabling comprehensive care coordination and clinical accountability. This HubSpot user field assigns provider responsibility while supporting enhanced clinical workflow management and patient care coordination.

The clinical_notes property captures detailed clinical information related to ticket resolution while enabling comprehensive documentation and care coordination. This multi-line text field stores clinical notes while supporting enhanced clinical documentation and provider communication.

The follow_up_required property indicates whether additional clinical follow-up is needed while enabling comprehensive care coordination and patient safety protocols.

This checkbox field triggers follow-up workflows while supporting enhanced clinical care and patient safety management.

Resolution Tracking and Quality Assurance

The resolution tracking properties enable comprehensive support quality measurement while supporting continuous improvement and patient satisfaction optimization. The properties provide detailed analytics and reporting capabilities that support operational excellence and clinical quality assurance.

The resolution_satisfaction property captures patient satisfaction with support resolution while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores from 1-10 while supporting enhanced quality management and support optimization.

The resolution_time_hours property tracks the time required for ticket resolution while enabling performance measurement and workflow optimization. This number field stores resolution time while supporting enhanced operational efficiency and service delivery optimization.

The escalation_required property indicates whether ticket escalation was necessary while enabling workflow analysis and process improvement. This checkbox field tracks escalation events while supporting enhanced workflow optimization and quality assurance.

COMPANY OBJECT - CORPORATE WELLNESS AND B2B HEALTHCARE MANAGEMENT

The Company object enhancement enables comprehensive corporate wellness program management and B2B healthcare service delivery while supporting complex organizational relationships and service coordination. The enhancement includes properties that support corporate health programs, employee wellness initiatives, and business-to-business healthcare service delivery.

Corporate Wellness Program Configuration

The Company object configuration supports ENNU's corporate wellness initiatives including employee health programs, executive health services, and organizational wellness consulting. The configuration enables complex organizational relationship

tracking, program management, and outcome measurement while maintaining comprehensive business intelligence and program optimization capabilities.

The company_wellness_program_type property categorizes corporate wellness engagements while enabling specialized program management and service delivery. This dropdown field includes options for Employee Wellness, Executive Health, Organizational Consulting, Health Screenings, and Custom Programs that support enhanced corporate service delivery and program optimization.

The employee_count property tracks the size of corporate wellness programs while enabling resource planning and program scaling. This number field stores employee quantities while supporting enhanced program management and resource allocation optimization.

The wellness_program_status property monitors the progress of corporate wellness initiatives while enabling comprehensive program coordination and outcome tracking. This dropdown field includes options for Planning, Active, Completed, Suspended, and Renewal that support enhanced program management and client relationship optimization.

Corporate Relationship Management

The corporate relationship properties enable comprehensive B2B healthcare relationship management while supporting complex organizational structures and decision-making processes. The properties support account management, stakeholder coordination, and business development while maintaining comprehensive relationship tracking and communication optimization.

The primary_wellness_contact property identifies the main organizational contact for wellness programs while enabling comprehensive relationship management and communication coordination. This single-line text field stores contact information while supporting enhanced account management and stakeholder coordination.

The decision_maker_title property captures the organizational role of wellness program decision makers while enabling targeted communication and relationship management. This single-line text field stores title information while supporting enhanced business development and account management.

The wellness_budget_range property tracks the financial scope of corporate wellness programs while enabling appropriate service recommendations and proposal

development. This dropdown field includes budget ranges while supporting enhanced business development and program planning.

Program Outcomes and Business Intelligence

The program outcomes properties enable comprehensive corporate wellness program measurement while supporting outcome-based service delivery and client satisfaction optimization. The properties provide detailed analytics and reporting capabilities that support business development and program improvement initiatives.

The employee_participation_rate property measures engagement in corporate wellness programs while enabling program optimization and client satisfaction improvement. This percentage field tracks participation while supporting enhanced program management and outcome optimization.

The wellness_program_roi property captures return on investment measurements for corporate wellness initiatives while enabling value demonstration and program justification. This currency field stores ROI calculations while supporting enhanced business development and client relationship management.

The program_satisfaction_score property tracks client satisfaction with corporate wellness programs while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores from 1-10 while supporting enhanced quality management and client relationship optimization.

COMMERCE OBJECTS - INTEGRATED E-COMMERCE AND MEMBERSHIP MANAGEMENT

The commerce objects enhancement creates comprehensive e-commerce and membership management capabilities that integrate seamlessly with WooCommerce while supporting ENNU's complex service offerings and subscription models. The enhancement includes Product, Order, Cart, Commerce Payment, Invoice, and Subscription objects that enable sophisticated revenue management and customer experience optimization.

PRODUCT OBJECT - HEALTHCARE SERVICE CATALOG MANAGEMENT

The Product object enhancement transforms traditional product management into a comprehensive healthcare service catalog that supports ENNU's diverse service

offerings while enabling sophisticated pricing strategies and service delivery coordination. The enhancement includes healthcare-specific properties that support service bundling, subscription management, and clinical coordination.

The product_type property categorizes healthcare services while enabling specialized management and delivery coordination. This dropdown field includes options for Medical Service, Aesthetic Treatment, Wellness Program, Telehealth Session, Health Package, Membership Subscription, and Digital Product that support enhanced service management and delivery optimization.

The clinical_requirements property captures medical prerequisites for service delivery while ensuring patient safety and appropriate service recommendations. This multi-line text field stores clinical requirements while supporting enhanced patient safety and service delivery optimization.

The provider_requirements property identifies healthcare provider qualifications needed for service delivery while enabling appropriate provider assignment and care coordination. This multi-line text field stores provider requirements while supporting enhanced care coordination and service delivery optimization.

The service_duration property tracks the expected time required for service delivery while enabling scheduling optimization and resource planning. This number field stores duration in minutes while supporting enhanced operational efficiency and appointment coordination.

SUBSCRIPTION OBJECT - MEMBERSHIP AND RECURRING SERVICE MANAGEMENT

The Subscription object enhancement enables comprehensive membership management and recurring service delivery while supporting ENNU's subscription-based health optimization programs. The enhancement includes properties that support membership lifecycle management, service credit tracking, and automated billing coordination.

The subscription_type property categorizes membership and recurring service offerings while enabling specialized management and service delivery. This dropdown field includes options for Health Optimization Membership, Telehealth Subscription, Wellness Program, Aesthetic Package, and Corporate Wellness that support enhanced subscription management and service delivery optimization.

The service_credits_balance property tracks remaining service credits for subscription members while enabling real-time utilization monitoring and renewal optimization. This number field stores credit balances while supporting enhanced membership management and customer success optimization.

The membership_tier property identifies the level of membership benefits while enabling appropriate service delivery and customer experience optimization. This dropdown field includes options for Basic, Premium, Elite, and Corporate that support enhanced membership management and service delivery coordination.

The auto_renewal_status property tracks automatic renewal preferences while enabling subscription lifecycle management and revenue optimization. This checkbox field manages renewal settings while supporting enhanced subscription management and customer retention optimization.

ORDER AND PAYMENT INTEGRATION

The Order and Commerce Payment objects enable comprehensive transaction management while integrating seamlessly with WooCommerce and supporting complex healthcare billing requirements. The integration maintains comprehensive financial tracking while enabling automated billing coordination and revenue optimization.

The order_type property categorizes transaction types while enabling specialized processing and financial management. This dropdown field includes options for Service Purchase, Membership Subscription, Package Deal, Corporate Contract, and Insurance Billing that support enhanced financial management and transaction processing.

The payment_method property tracks payment processing methods while enabling comprehensive financial coordination and billing optimization. This dropdown field includes options for Credit Card, Bank Transfer, Insurance, Corporate Billing, and Payment Plan that support enhanced financial management and payment processing optimization.

The insurance_claim_status property monitors insurance billing progress while enabling comprehensive revenue cycle management and financial coordination. This dropdown field includes options for Submitted, Pending, Approved, Denied, and Resubmitted that support enhanced insurance billing and revenue optimization.

CUSTOM OBJECTS ARCHITECTURE - ADVANCED HEALTHCARE MANAGEMENT

The custom objects architecture represents the most sophisticated healthcare CRM configuration ever designed, featuring 10 specialized objects that create capabilities exceeding those available in traditional healthcare platforms. The custom objects enable comprehensive clinical data management, patient engagement automation, and operational coordination while maintaining HIPAA compliance and supporting unlimited scalability.

LAB RESULTS OBJECT - COMPREHENSIVE LABORATORY DATA MANAGEMENT

The Lab Results object serves as the cornerstone of ENNU's clinical workflow optimization, transforming traditional laboratory data management into a sophisticated clinical tool that enhances provider efficiency while improving patient communication and engagement. The object groups related biomarkers into comprehensive lab panels that mirror clinical workflows while maintaining detailed individual biomarker tracking for trending and analysis.

Object Configuration and Clinical Architecture

The Lab Results object configuration recognizes that healthcare providers think about laboratory results as complete panels rather than individual tests, enabling more efficient clinical review and decision-making while maintaining the detailed biomarker tracking required for ENNU's sophisticated health optimization protocols. The design supports both routine laboratory management and specialized testing while providing the flexibility needed for personalized medicine approaches.

Core Object Settings: - Object Name: Lab Results - Object Label (Plural): Lab Results - Object ID: lab_results - Primary Property: lab_collection_date - Secondary Properties: patient_id, lab_panel_type, provider_reviewed - Record ID Format: LAB-{number} - Search Properties: patient_id, lab_panel_type, collection_date, provider_reviewed

The lab_collection_date property serves as the primary identifier while enabling chronological organization and trend analysis capabilities. This date picker field includes validation to ensure dates are not in the future and fall within reasonable

clinical timeframes while supporting comprehensive historical tracking and clinical decision support.

The patient_id property creates the essential relationship with Contact records while enabling comprehensive patient-specific laboratory tracking and clinical coordination. This Contact association field maintains one-to-many relationships that support comprehensive patient care while enabling efficient provider workflows and clinical decision support.

Laboratory Panel Management and Clinical Workflow

The laboratory panel management system enables efficient clinical review while maintaining detailed biomarker tracking and trend analysis capabilities. The system groups related biomarkers into clinically relevant panels while preserving individual biomarker data for detailed analysis and patient communication.

The lab_panel_type property categorizes laboratory testing into clinically relevant groups while enabling efficient provider review and workflow optimization. This dropdown field includes options for Comprehensive Metabolic Panel, Lipid Panel, Hormone Panel, Thyroid Panel, Inflammatory Markers, Nutritional Assessment, Cardiovascular Risk, and Custom Panel that support enhanced clinical workflow and provider efficiency.

The lab_panel_status property tracks the clinical review and communication status while enabling comprehensive workflow management and patient communication coordination. This dropdown field includes options for Pending Review, Provider Reviewed, Patient Notified, Follow-up Required, and Archived that support enhanced clinical workflow and patient communication optimization.

The provider_reviewed_by property identifies the healthcare provider responsible for laboratory review while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting enhanced clinical workflow management and patient care coordination.

The provider_review_date property captures the timestamp of clinical review while enabling workflow tracking and quality assurance measurement. This date/time picker field maintains review timestamps while supporting enhanced clinical workflow optimization and quality management.

Biomarker Tracking and Health Optimization

The biomarker tracking system enables comprehensive individual biomarker management while supporting ENNU's sophisticated health optimization protocols and personalized medicine approaches. The system maintains detailed biomarker data while enabling trend analysis and automated health scoring calculations.

The testosterone_total property tracks total testosterone levels while enabling gender-specific optimal range analysis and health optimization protocols. This number field stores laboratory values with validation ranges while supporting enhanced clinical decision support and patient engagement through personalized health optimization tracking.

The testosterone_free property monitors free testosterone levels while enabling comprehensive hormone optimization and clinical decision support. This number field maintains laboratory values while supporting enhanced hormone therapy protocols and patient health optimization tracking.

The estradiol property captures estradiol levels while enabling comprehensive hormone balance assessment and optimization protocols. This number field stores laboratory values while supporting enhanced hormone therapy and patient health optimization coordination.

The thyroid_stimulating_hormone property tracks TSH levels while enabling comprehensive thyroid function assessment and optimization protocols. This number field maintains laboratory values while supporting enhanced thyroid management and patient health optimization.

The hemoglobin_a1c property monitors long-term glucose control while enabling comprehensive metabolic health assessment and diabetes prevention protocols. This number field stores laboratory values while supporting enhanced metabolic optimization and patient health management.

Clinical Decision Support and Patient Communication

The clinical decision support system transforms laboratory data into actionable clinical insights while enabling automated patient communication and engagement workflows. The system provides providers with comprehensive clinical context while enabling personalized patient communication based on actual health improvements and optimization opportunities.

The clinical_significance property captures provider assessment of laboratory results while enabling comprehensive clinical documentation and patient communication. This dropdown field includes options for Normal, Optimal, Suboptimal, Concerning, and Critical that support enhanced clinical decision support and patient communication optimization.

The patient_communication_sent property tracks patient notification status while enabling comprehensive communication workflow management and patient engagement optimization. This checkbox field manages communication status while supporting enhanced patient communication and engagement coordination.

The follow_up_recommendations property captures provider recommendations based on laboratory results while enabling comprehensive care coordination and patient engagement. This multi-line text field stores clinical recommendations while supporting enhanced patient care and clinical workflow optimization.

The next_lab_recommended_date property schedules follow-up laboratory testing while enabling comprehensive care coordination and clinical workflow management. This date picker field maintains testing schedules while supporting enhanced clinical coordination and patient care optimization.

MEASUREMENT HISTORY OBJECT - COMPREHENSIVE BIOMARKER TRACKING

The Measurement History object provides sophisticated biomarker tracking with gender-specific optimal ranges that drive health score calculations and patient engagement workflows. The object enables comprehensive health monitoring while supporting ENNU's personalized medicine approach and health optimization protocols.

Object Configuration and Health Tracking Architecture

The Measurement History object configuration enables comprehensive tracking of 62 distinct biomarkers with gender-specific optimal ranges while supporting automated health scoring and patient engagement workflows. The design maintains detailed historical data while enabling trend analysis and clinical decision support capabilities.

Core Object Settings: - Object Name: Measurement History - Object Label (Plural): Measurement Histories - Object ID: measurement_history - Primary Property:

measurement_date - Secondary Properties: patient_id, biomarker_type, measured_value - Record ID Format: MH-{number} - Search Properties: patient_id, biomarker_type, measurement_date

The measurement_date property serves as the primary identifier while enabling chronological organization and comprehensive trend analysis capabilities. This date picker field includes validation to ensure accurate historical tracking while supporting comprehensive health monitoring and clinical decision support.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific biomarker tracking and health optimization coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and personalized medicine delivery.

Biomarker Type Management and Clinical Significance

The biomarker type management system enables comprehensive tracking of 62 distinct biomarkers while maintaining clinical significance and optimal range analysis capabilities. The system supports both routine health monitoring and specialized biomarker tracking while enabling personalized health optimization protocols.

The biomarker_type property categorizes biomarker measurements while enabling specialized tracking and analysis workflows. This dropdown field includes 62 biomarker options including Testosterone Total, Testosterone Free, Estradiol, Progesterone, DHEA-S, Cortisol, TSH, Free T3, Free T4, Reverse T3, C-Reactive Protein, Hemoglobin A1c, Fasting Glucose, Fasting Insulin, HOMA-IR, LDL Cholesterol, HDL Cholesterol, Total Cholesterol, Triglycerides, Vitamin D3, Vitamin B12, Folate, and others that support comprehensive health monitoring and optimization.

The measured_value property stores the actual biomarker measurement while enabling comprehensive tracking and trend analysis capabilities. This number field maintains measurement values with appropriate validation ranges while supporting enhanced clinical decision support and patient engagement through health optimization tracking.

The optimal_range_min property defines the minimum optimal value for gender-specific biomarker ranges while enabling automated health scoring and clinical decision support. This number field stores optimal range minimums while supporting enhanced health optimization and patient engagement through personalized range analysis.

The optimal_range_max property defines the maximum optimal value for gender-specific biomarker ranges while enabling comprehensive health assessment and optimization protocols. This number field stores optimal range maximums while supporting enhanced clinical decision support and patient health optimization.

Health Scoring and Optimization Tracking

The health scoring system transforms biomarker data into comprehensive health assessments while enabling patient engagement and clinical decision support. The system calculates weighted health scores based on biomarker values and optimal ranges while supporting personalized health optimization protocols.

The biomarker_score property calculates individual biomarker scores based on optimal range analysis while enabling comprehensive health assessment and patient engagement. This calculated number field generates scores from 0-100 while supporting enhanced health monitoring and patient communication optimization.

The trend_direction property identifies biomarker improvement or decline patterns while enabling proactive clinical intervention and patient engagement. This dropdown field includes options for Improving, Stable, Declining, and Insufficient Data that support enhanced clinical decision support and patient health optimization.

The clinical_action_required property indicates whether biomarker values require immediate clinical attention while enabling automated workflow triggers and patient safety protocols. This checkbox field triggers clinical workflows while supporting enhanced patient safety and clinical quality assurance.

The patient_notification_sent property tracks patient communication regarding biomarker results while enabling comprehensive communication workflow management and patient engagement optimization. This checkbox field manages communication status while supporting enhanced patient engagement and clinical coordination.

HEALTH SCORES OBJECT - ADVANCED ANALYTICS AND PATIENT ENGAGEMENT

The Health Scores object transforms complex clinical data into compelling patient engagement tools that quantify health optimization progress while providing providers with objective measures of treatment effectiveness. The object enables

sophisticated patient communication campaigns based on actual health improvements while supporting outcome-based treatment protocols.

Object Configuration and Analytics Architecture

The Health Scores object configuration recreates the complex calculation logic from the OM Aggregation database while adding enhanced patient communication capabilities and clinical decision support. The design enables real-time health scoring based on multiple biomarkers and physical measurements while supporting comprehensive patient engagement and clinical workflow optimization.

Core Object Settings: - Object Name: Health Scores - Object Label (Plural): Health Scores - Object ID: health_scores - Primary Property: calculation_date - Secondary Properties: patient_id, overall_health_score, score_category - Record ID Format: HS-{number} - Search Properties: patient_id, calculation_date, score_category

The calculation_date property serves as the primary identifier while enabling chronological tracking of health score improvements and patient progress monitoring. This date picker field maintains calculation timestamps while supporting comprehensive health optimization tracking and patient engagement workflows.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific health scoring and optimization tracking. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and personalized health optimization protocols.

Comprehensive Health Scoring Methodology

The health scoring methodology combines multiple biomarkers, physical measurements, and lifestyle factors into comprehensive health assessments while maintaining gender-specific calculations and clinical significance. The methodology enables objective health measurement while supporting patient engagement and clinical decision support.

The overall_health_score property provides comprehensive health assessment based on weighted biomarker analysis while enabling patient engagement and progress tracking. This calculated number field generates scores from 0-100 while supporting enhanced patient communication and health optimization tracking.

The hormone_optimization_score property focuses specifically on hormone balance and optimization while enabling specialized treatment protocols and patient engagement. This calculated number field generates hormone-specific scores while supporting enhanced hormone therapy and patient health optimization.

The metabolic_health_score property assesses metabolic function and optimization while enabling diabetes prevention and metabolic syndrome management. This calculated number field generates metabolic scores while supporting enhanced metabolic optimization and patient health management.

The cardiovascular_risk_score property evaluates cardiovascular health and risk factors while enabling preventive care protocols and patient engagement. This calculated number field generates cardiovascular scores while supporting enhanced cardiovascular health optimization and patient care coordination.

The inflammatory_markers_score property assesses systemic inflammation and immune function while enabling anti-inflammatory protocols and health optimization. This calculated number field generates inflammation scores while supporting enhanced immune system optimization and patient health management.

Patient Engagement and Progress Tracking

The patient engagement system transforms health scores into compelling communication tools while enabling automated patient engagement and motivation enhancement. The system provides objective progress measurement while supporting long-term patient retention and program compliance.

The score_improvement_percentage property calculates health score improvements over time while enabling patient motivation and engagement optimization. This calculated percentage field generates improvement metrics while supporting enhanced patient communication and retention strategies.

The score_category property categorizes health scores into meaningful ranges while enabling targeted patient communication and clinical protocols. This dropdown field includes options for Optimal, Good, Fair, Poor, and Critical that support enhanced patient engagement and clinical decision support.

The patient_engagement_level property assesses patient participation and compliance while enabling personalized engagement strategies and retention optimization. This dropdown field includes options for Highly Engaged, Moderately

Engaged, Low Engagement, and Disengaged that support enhanced patient success and retention management.

The next_optimization_focus property identifies priority areas for health improvement while enabling personalized treatment recommendations and patient engagement. This dropdown field includes focus areas while supporting enhanced clinical decision support and patient health optimization.

TELEHEALTH SESSIONS OBJECT - VIRTUAL CARE EXCELLENCE

The Telehealth Sessions object elevates virtual care from simple video calls to comprehensive clinical encounters with proper documentation, billing integration, and quality tracking. The object enables ENNU to deliver sophisticated virtual care that rivals in-person consultations while providing superior convenience and accessibility for patients.

Object Configuration and Virtual Care Architecture

The Telehealth Sessions object configuration supports comprehensive virtual healthcare delivery while maintaining clinical documentation standards and regulatory compliance. The design enables sophisticated virtual care workflows while supporting billing integration and quality assurance protocols.

Core Object Settings: - Object Name: Telehealth Sessions - Object Label (Plural): Telehealth Sessions - Object ID: telehealth_sessions - Primary Property: session_date - Secondary Properties: patient_id, provider_id, session_type - Record ID Format: TH-{number} - Search Properties: patient_id, provider_id, session_date, session_type

The session_date property serves as the primary identifier while enabling chronological organization and comprehensive virtual care tracking. This date/time picker field maintains session timestamps while supporting enhanced virtual care coordination and clinical documentation.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific virtual care tracking and clinical coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive virtual patient care and clinical workflow optimization.

Virtual Care Delivery and Clinical Documentation

The virtual care delivery system enables comprehensive clinical encounters through telehealth platforms while maintaining clinical documentation standards and regulatory compliance. The system supports diverse virtual care modalities while enabling clinical workflow optimization and patient satisfaction enhancement.

The session_type property categorizes virtual care encounters while enabling specialized workflow management and clinical documentation. This dropdown field includes options for Medical Consultation, Lab Review, Follow-up Visit, Aesthetic Consultation, Wellness Coaching, and Emergency Consultation that support enhanced virtual care delivery and clinical workflow optimization.

The provider_id property identifies the healthcare provider conducting virtual sessions while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting enhanced virtual care management and clinical workflow coordination.

The session_duration_minutes property tracks the length of virtual care encounters while enabling billing coordination and quality assurance measurement. This number field stores session duration while supporting enhanced virtual care optimization and provider productivity tracking.

The clinical_notes property captures comprehensive clinical documentation from virtual encounters while enabling clinical continuity and care coordination. This multi-line text field stores clinical notes while supporting enhanced clinical documentation and provider communication.

Technology Integration and Quality Assurance

The technology integration system enables seamless virtual care delivery while maintaining technical quality and patient satisfaction optimization. The system integrates with Zoom Healthcare and other platforms while supporting comprehensive quality tracking and technical support.

The zoom_meeting_id property links virtual sessions with Zoom Healthcare meetings while enabling comprehensive session tracking and technical coordination. This single-line text field stores meeting identifiers while supporting enhanced virtual care coordination and technical management.

The session_quality_rating property captures technical quality assessment while enabling virtual care optimization and patient satisfaction enhancement. This number field stores quality ratings from 1-10 while supporting enhanced virtual care delivery and technical optimization.

The patient_satisfaction_rating property tracks patient satisfaction with virtual care encounters while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores from 1-10 while supporting enhanced virtual care optimization and patient experience enhancement.

The technical_issues_reported property documents any technical challenges during virtual sessions while enabling technical support and system improvement. This multi-line text field stores technical information while supporting enhanced virtual care delivery and technical optimization.

STAFF MANAGEMENT OBJECT - PROVIDER COORDINATION EXCELLENCE

The Staff Management object provides comprehensive provider and staff coordination capabilities that optimize resource allocation while maintaining the flexibility required for complex healthcare scheduling requirements. The object integrates seamlessly with Google Workspace and other operational systems to create efficient staff management workflows.

Object Configuration and Resource Management Architecture

The Staff Management object configuration enables comprehensive provider coordination while supporting complex healthcare scheduling and resource allocation requirements. The design maintains operational flexibility while enabling comprehensive performance tracking and staff optimization.

Core Object Settings: - Object Name: Staff Management - Object Label (Plural): Staff Management - Object ID: staff_management - Primary Property: staff_member_name - Secondary Properties: staff_role, availability_status, specializations - Record ID Format: SM-{number} - Search Properties: staff_member_name, staff_role, availability_status

The staff_member_name property serves as the primary identifier while enabling comprehensive staff tracking and coordination capabilities. This single-line text field

stores staff names while supporting enhanced staff management and operational coordination.

The staff_role property categorizes staff members while enabling specialized scheduling and workflow management. This dropdown field includes options for Medical Provider, Aesthetic Provider, Wellness Coach, Nurse, Administrative Staff, and Support Staff that support enhanced staff coordination and operational optimization.

Scheduling and Availability Management

The scheduling management system enables comprehensive staff availability tracking while supporting complex healthcare scheduling requirements and operational optimization. The system integrates with Google Calendar and MINDBODY while maintaining real-time availability and scheduling coordination.

The availability_status property tracks real-time staff availability while enabling dynamic scheduling and resource allocation optimization. This dropdown field includes options for Available, Busy, Off Duty, Vacation, and Emergency that support enhanced scheduling coordination and operational efficiency.

The weekly_schedule property captures standard staff schedules while enabling predictable scheduling and resource planning. This multi-line text field stores schedule information while supporting enhanced operational coordination and staff management.

The specializations property identifies staff expertise areas while enabling appropriate patient assignment and care coordination. This multi-select dropdown field includes specialization options while supporting enhanced care coordination and patient satisfaction optimization.

The current_patient_load property tracks staff workload while enabling balanced resource allocation and operational optimization. This number field stores patient counts while supporting enhanced staff management and operational efficiency.

Performance Tracking and Quality Assurance

The performance tracking system enables comprehensive staff performance measurement while supporting continuous improvement and quality assurance protocols. The system provides detailed analytics while supporting staff development and operational excellence.

The patient_satisfaction_average property tracks staff-specific patient satisfaction while enabling quality assurance and performance improvement. This calculated number field generates satisfaction averages while supporting enhanced staff development and patient experience optimization.

The productivity_metrics property captures staff productivity measurements while enabling performance optimization and resource allocation. This multi-line text field stores productivity data while supporting enhanced staff management and operational efficiency.

The training_certifications property tracks staff qualifications and continuing education while enabling compliance management and quality assurance. This multi-line text field stores certification information while supporting enhanced staff development and regulatory compliance.

ASSESSMENT RESULTS OBJECT - INTELLIGENT LEAD QUALIFICATION

The Assessment Results object creates sophisticated lead qualification and patient engagement capabilities that transform website interactions into comprehensive patient intelligence. The object enables personalized patient journeys and targeted marketing campaigns based on detailed health interests and qualification criteria.

Object Configuration and Lead Intelligence Architecture

The Assessment Results object configuration captures comprehensive patient assessment data while enabling automated lead qualification and personalized patient journey automation. The design transforms website interactions into actionable patient intelligence while supporting conversion optimization and patient acquisition strategies.

Core Object Settings: - Object Name: Assessment Results - Object Label (Plural): Assessment Results - Object ID: assessment_results - Primary Property: assessment_date - Secondary Properties: patient_id, assessment_type, qualification_score - Record ID Format: AR-{number} - Search Properties: patient_id, assessment_type, assessment_date

The assessment_date property serves as the primary identifier while enabling chronological tracking of patient assessment completion and lead qualification workflows. This date/time picker field maintains assessment timestamps while supporting enhanced lead management and patient engagement automation.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific assessment tracking and lead qualification coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive lead management and patient acquisition optimization.

Assessment Type Management and Qualification Scoring

The assessment type management system enables comprehensive tracking of diverse patient assessments while supporting specialized qualification workflows and patient engagement automation. The system captures detailed assessment data while enabling personalized patient journey automation and conversion optimization.

The assessment_type property categorizes patient assessments while enabling specialized qualification workflows and patient engagement automation. This dropdown field includes options for Weight Loss Quiz, Health Survey, Membership Calculator, Medical Screening, Aesthetic Consultation, and Wellness Assessment that support enhanced lead qualification and patient engagement optimization.

The qualification_score property provides automated lead scoring based on assessment responses while enabling prioritized follow-up and conversion optimization. This calculated number field generates scores from 0-100 while supporting enhanced lead management and sales process optimization.

The assessment_completion_percentage property tracks assessment progress while enabling follow-up automation and conversion optimization. This percentage field monitors completion status while supporting enhanced lead nurturing and patient engagement workflows.

The health_interest_categories property captures specific health focus areas from assessments while enabling personalized service recommendations and targeted marketing campaigns. This multi-select dropdown field includes interest categories while supporting enhanced patient segmentation and service delivery optimization.

Lead Qualification and Conversion Optimization

The lead qualification system transforms assessment data into actionable lead intelligence while enabling automated follow-up workflows and conversion optimization. The system provides comprehensive lead scoring while supporting personalized patient engagement and sales process optimization.

The conversion_probability property calculates likelihood of service purchase based on assessment responses while enabling prioritized sales efforts and resource allocation. This calculated percentage field generates conversion probabilities while supporting enhanced sales process optimization and lead management.

The recommended_services property identifies appropriate service recommendations based on assessment results while enabling personalized patient communication and conversion optimization. This multi-select dropdown field includes service recommendations while supporting enhanced patient engagement and sales process coordination.

The follow_up_priority property establishes contact priority based on qualification scoring while enabling optimized sales workflows and resource allocation. This dropdown field includes priority levels while supporting enhanced lead management and sales process optimization.

The next_action_recommended property identifies optimal follow-up actions based on assessment results while enabling automated workflow triggers and sales process optimization. This dropdown field includes action recommendations while supporting enhanced lead nurturing and conversion optimization.

ADVANCED CUSTOM OBJECTS - SPECIALIZED HEALTHCARE FUNCTIONALITY

The advanced custom objects provide specialized functionality for complex clinical workflows and operational optimization that support ENNU's premium healthcare delivery model. These objects enable sophisticated clinical decision support, treatment protocol management, and operational excellence while maintaining comprehensive integration with the core healthcare management platform.

CLINICAL TRIGGERS OBJECT - AUTOMATED PATIENT SAFETY SYSTEM

The Clinical Triggers object creates a sophisticated patient safety system that monitors clinical data for concerning patterns while enabling automated interventions and provider notifications. The object ensures patient safety through proactive monitoring while supporting clinical quality assurance and risk management protocols.

Object Configuration and Safety Monitoring Architecture

The Clinical Triggers object configuration enables comprehensive patient safety monitoring while supporting automated clinical interventions and provider notification systems. The design maintains patient safety through proactive monitoring while enabling clinical workflow optimization and quality assurance protocols.

Core Object Settings: - Object Name: Clinical Triggers - Object Label (Plural): Clinical Triggers - Object ID: clinical_triggers - Primary Property: trigger_date - Secondary Properties: patient_id, trigger_type, severity_level - Record ID Format: CT-{number} - Search Properties: patient_id, trigger_type, trigger_date, severity_level

The trigger_date property serves as the primary identifier while enabling chronological tracking of clinical safety events and intervention coordination. This date/time picker field maintains trigger timestamps while supporting enhanced patient safety monitoring and clinical workflow coordination.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific safety monitoring and clinical intervention coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient safety and clinical quality assurance.

Clinical Safety Monitoring and Risk Assessment

The clinical safety monitoring system enables comprehensive patient risk assessment while supporting automated intervention protocols and provider notification systems. The system monitors clinical data for concerning patterns while enabling proactive clinical intervention and patient safety optimization.

The trigger_type property categorizes clinical safety concerns while enabling specialized intervention protocols and provider notification systems. This dropdown field includes options for Critical Lab Value, Medication Interaction, Contraindication Alert, Emergency Contact, and Safety Protocol that support enhanced patient safety and clinical quality assurance.

The severity_level property establishes intervention priority while enabling appropriate clinical response and resource allocation. This dropdown field includes options for Critical, High, Medium, and Low that support enhanced clinical workflow coordination and patient safety protocols.

The clinical_data_source property identifies the origin of safety triggers while enabling comprehensive data tracking and quality assurance. This dropdown field includes data sources while supporting enhanced clinical monitoring and safety protocol optimization.

The automated_action_taken property tracks system responses to safety triggers while enabling comprehensive intervention tracking and quality assurance. This multi-line text field stores action information while supporting enhanced patient safety and clinical workflow optimization.

Provider Notification and Intervention Coordination

The provider notification system ensures immediate clinical attention for patient safety concerns while supporting comprehensive intervention coordination and quality assurance protocols. The system enables rapid provider response while maintaining comprehensive documentation and follow-up tracking.

The provider_notified property identifies healthcare providers alerted to safety concerns while enabling clinical accountability and intervention coordination. This HubSpot user field assigns provider responsibility while supporting enhanced patient safety and clinical workflow management.

The notification_method property tracks communication channels used for provider alerts while enabling comprehensive notification tracking and quality assurance. This dropdown field includes notification methods while supporting enhanced clinical communication and safety protocol optimization.

The intervention_required property indicates whether immediate clinical intervention is needed while enabling automated workflow triggers and patient safety protocols. This checkbox field triggers intervention workflows while supporting enhanced patient safety and clinical quality assurance.

The resolution_status property tracks the progress of safety concern resolution while enabling comprehensive intervention tracking and quality assurance. This dropdown field includes resolution statuses while supporting enhanced patient safety and clinical workflow optimization.

TREATMENT PLANS OBJECT - COMPREHENSIVE CARE COORDINATION

The Treatment Plans object enables sophisticated clinical decision support by tracking individual treatment protocols and progress while supporting personalized care delivery and outcome measurement. The object creates comprehensive care plans while enabling clinical coordination and patient engagement optimization.

Object Configuration and Care Planning Architecture

The Treatment Plans object configuration enables comprehensive treatment protocol management while supporting personalized care delivery and clinical coordination. The design maintains clinical flexibility while enabling comprehensive progress tracking and outcome measurement.

Core Object Settings: - Object Name: Treatment Plans - Object Label (Plural): Treatment Plans - Object ID: treatment_plans - Primary Property: plan_creation_date - Secondary Properties: patient_id, treatment_type, plan_status - Record ID Format: TP-{number} - Search Properties: patient_id, treatment_type, plan_creation_date

The plan_creation_date property serves as the primary identifier while enabling chronological tracking of treatment plan development and care coordination. This date picker field maintains plan timestamps while supporting enhanced clinical coordination and care planning optimization.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific treatment planning and care coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and clinical workflow optimization.

Treatment Protocol Management and Clinical Coordination

The treatment protocol management system enables comprehensive care planning while supporting personalized treatment delivery and clinical coordination. The system maintains treatment protocols while enabling progress tracking and outcome measurement.

The treatment_type property categorizes treatment protocols while enabling specialized care coordination and clinical workflow management. This dropdown field includes options for Hormone Optimization, Weight Management, Aesthetic

Enhancement, Wellness Program, and Comprehensive Health that support enhanced care coordination and treatment delivery optimization.

The plan_status property tracks treatment plan progress while enabling comprehensive care coordination and clinical workflow management. This dropdown field includes options for Active, Completed, Modified, Suspended, and Discontinued that support enhanced clinical coordination and care planning optimization.

The treatment_goals property captures specific treatment objectives while enabling progress measurement and patient engagement. This multi-line text field stores treatment goals while supporting enhanced care coordination and patient communication optimization.

The treatment_protocols property details specific treatment approaches while enabling clinical coordination and care delivery optimization. This multi-line text field stores protocol information while supporting enhanced clinical documentation and care coordination.

Progress Tracking and Outcome Measurement

The progress tracking system enables comprehensive treatment outcome measurement while supporting clinical decision support and patient engagement optimization. The system provides objective progress measurement while supporting care plan optimization and patient satisfaction enhancement.

The progress_milestones property tracks treatment progress achievements while enabling patient engagement and motivation enhancement. This multi-line text field stores milestone information while supporting enhanced patient communication and care coordination.

The outcome_measurements property captures objective treatment results while enabling clinical decision support and care plan optimization. This multi-line text field stores outcome data while supporting enhanced clinical documentation and patient engagement.

The plan_effectiveness_score property assesses treatment plan success while enabling care plan optimization and clinical decision support. This number field stores effectiveness scores while supporting enhanced clinical coordination and treatment optimization.

The next_plan_review_date property schedules treatment plan evaluations while enabling comprehensive care coordination and clinical workflow management. This date picker field maintains review schedules while supporting enhanced clinical coordination and care planning optimization.

MEDICATION MANAGEMENT OBJECT - PRESCRIPTION TRACKING AND SAFETY

The Medication Management object provides comprehensive prescription tracking and medication safety monitoring while supporting clinical decision support and patient safety protocols. The object enables sophisticated medication management while maintaining regulatory compliance and clinical workflow optimization.

Object Configuration and Medication Safety Architecture

The Medication Management object configuration enables comprehensive prescription tracking while supporting medication safety monitoring and clinical decision support. The design maintains medication safety while enabling clinical workflow optimization and regulatory compliance.

Core Object Settings: - Object Name: Medication Management - Object Label (Plural): Medication Management - Object ID: medication_management - Primary Property: prescription_date - Secondary Properties: patient_id, medication_name, prescribing_provider - Record ID Format: MM-{number} - Search Properties: patient_id, medication_name, prescription_date

The prescription_date property serves as the primary identifier while enabling chronological tracking of medication prescriptions and safety monitoring. This date picker field maintains prescription timestamps while supporting enhanced medication management and clinical coordination.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific medication tracking and safety monitoring. This Contact association field maintains one-to-many relationships while supporting comprehensive medication management and clinical safety protocols.

Prescription Management and Clinical Coordination

The prescription management system enables comprehensive medication tracking while supporting clinical decision support and safety monitoring. The system maintains prescription information while enabling interaction checking and clinical coordination.

The medication_name property identifies prescribed medications while enabling comprehensive tracking and interaction monitoring. This single-line text field stores medication names while supporting enhanced medication management and clinical safety protocols.

The prescribing_provider property identifies healthcare providers responsible for prescriptions while enabling clinical accountability and coordination. This HubSpot user field assigns provider responsibility while supporting enhanced medication management and clinical workflow coordination.

The dosage_instructions property captures detailed prescription information while enabling patient education and compliance monitoring. This multi-line text field stores dosage information while supporting enhanced medication management and patient safety protocols.

The prescription_status property tracks medication prescription progress while enabling comprehensive medication management and clinical coordination. This dropdown field includes options for Active, Discontinued, Modified, and Completed that support enhanced medication tracking and clinical workflow optimization.

Safety Monitoring and Interaction Management

The safety monitoring system enables comprehensive medication interaction checking while supporting patient safety protocols and clinical decision support. The system monitors medication combinations while enabling proactive safety intervention and clinical coordination.

The interaction_warnings property identifies potential medication interactions while enabling clinical decision support and patient safety protocols. This multi-line text field stores interaction information while supporting enhanced medication safety and clinical coordination.

The contraindication_alerts property captures medication contraindications while enabling patient safety monitoring and clinical decision support. This multi-line text

field stores contraindication information while supporting enhanced patient safety and medication management.

The monitoring_requirements property identifies necessary monitoring protocols while enabling comprehensive medication safety and clinical coordination. This multi-line text field stores monitoring information while supporting enhanced medication management and patient safety protocols.

The patient_compliance_status property tracks medication adherence while enabling patient education and clinical intervention. This dropdown field includes compliance statuses while supporting enhanced medication management and patient care optimization.

PACKAGE CREDITS OBJECT - SERVICE UTILIZATION MANAGEMENT

The Package Credits object enables comprehensive service package management and credit tracking while supporting subscription-based healthcare delivery and revenue optimization. The object maintains service credit balances while enabling utilization tracking and customer success optimization.

Object Configuration and Service Management Architecture

The Package Credits object configuration enables comprehensive service package tracking while supporting subscription management and customer success optimization. The design maintains service credit balances while enabling utilization monitoring and revenue optimization.

Core Object Settings: - Object Name: Package Credits - Object Label (Plural): Package Credits - Object ID: package_credits - Primary Property: package_purchase_date - Secondary Properties: patient_id, package_type, credits_remaining - Record ID Format: PC-{number} - Search Properties: patient_id, package_type, purchase_date

The package_purchase_date property serves as the primary identifier while enabling chronological tracking of service package purchases and utilization monitoring. This date picker field maintains purchase timestamps while supporting enhanced package management and customer success optimization.

The patient_id property creates essential relationships with Contact records while enabling comprehensive patient-specific package tracking and service utilization

monitoring. This Contact association field maintains one-to-many relationships while supporting comprehensive package management and customer success coordination.

Service Package Management and Credit Tracking

The service package management system enables comprehensive package tracking while supporting service utilization monitoring and customer success optimization. The system maintains credit balances while enabling utilization analysis and renewal optimization.

The package_type property categorizes service packages while enabling specialized tracking and utilization analysis. This dropdown field includes options for Health Optimization Package, Aesthetic Package, Wellness Program, Telehealth Package, and Custom Package that support enhanced package management and service delivery optimization.

The credits_included property tracks total service credits in packages while enabling comprehensive utilization analysis and customer success measurement. This number field stores credit quantities while supporting enhanced package management and service delivery coordination.

The credits_remaining property monitors current credit balances while enabling real-time utilization tracking and renewal optimization. This calculated number field maintains credit balances while supporting enhanced customer success and package management optimization.

The credits_used property tracks service credit utilization while enabling comprehensive usage analysis and customer success measurement. This calculated number field monitors credit usage while supporting enhanced package management and service delivery optimization.

Utilization Analysis and Customer Success

The utilization analysis system enables comprehensive package performance measurement while supporting customer success optimization and renewal strategies. The system provides detailed utilization analytics while supporting customer engagement and retention optimization.

The utilization_rate property calculates package usage percentages while enabling customer success measurement and renewal optimization. This calculated percentage

field generates utilization rates while supporting enhanced customer success and package management optimization.

The package_expiration_date property tracks package validity periods while enabling renewal coordination and customer success management. This date picker field maintains expiration dates while supporting enhanced package management and customer retention optimization.

The renewal_probability property assesses likelihood of package renewal while enabling customer success intervention and retention optimization. This calculated percentage field generates renewal probabilities while supporting enhanced customer success and retention management.

The customer_satisfaction_score property tracks satisfaction with package services while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores while supporting enhanced customer success and service delivery optimization.

OBJECT RELATIONSHIPS AND DATA FLOW ARCHITECTURE

The object relationships create sophisticated data flows that enable comprehensive patient journey tracking while supporting automated workflows and clinical decision support. The relationships maintain data integrity while enabling complex healthcare workflows and operational coordination across ENNU's integrated technology ecosystem.

Primary Relationship Architecture

The primary relationship architecture establishes the foundational data connections that enable comprehensive patient management while supporting clinical workflows and operational coordination. The relationships create a unified data model that supports both automated processes and manual workflows while maintaining data integrity and performance optimization.

Contact-Centric Relationship Model

The Contact object serves as the central hub for all patient relationships while enabling comprehensive data coordination and workflow automation. The Contact-centric model ensures that all patient information is accessible from a single location while maintaining specialized object functionality and data organization.

Contact to Lab Results Relationship: - Relationship Type: One-to-Many - Association Label: Patient Lab Results - Primary Property: patient_id (Lab Results) → Contact ID - Workflow Triggers: New lab results trigger patient communication workflows - Clinical Significance: Enables comprehensive laboratory tracking and clinical decision support

Contact to Measurement History Relationship: - Relationship Type: One-to-Many - Association Label: Patient Biomarker History - Primary Property: patient_id (Measurement History) → Contact ID - Workflow Triggers: New measurements trigger health score calculations - Clinical Significance: Enables comprehensive biomarker tracking and health optimization

Contact to Health Scores Relationship: - Relationship Type: One-to-Many - Association Label: Patient Health Assessments - Primary Property: patient_id (Health Scores) → Contact ID - Workflow Triggers: Score changes trigger patient engagement workflows - Clinical Significance: Enables comprehensive health assessment and patient communication

Clinical Workflow Relationships

The clinical workflow relationships enable comprehensive care coordination while supporting clinical decision support and patient safety protocols. The relationships create automated workflows that enhance clinical efficiency while maintaining patient safety and quality assurance.

Lab Results to Health Scores Relationship: - Relationship Type: Many-to-One - Association Label: Health Score Calculations - Data Flow: Lab Results → Biomarker Values → Health Score Calculations - Automation: New lab results automatically trigger health score updates - Clinical Impact: Enables real-time health assessment and patient engagement

Measurement History to Clinical Triggers Relationship: - Relationship Type: One-to-Many - Association Label: Safety Monitoring - Data Flow: Measurement History → Clinical Triggers → Provider Notifications - Automation: Concerning values

automatically trigger safety protocols - Clinical Impact: Ensures patient safety through proactive monitoring

Treatment Plans to Medication Management Relationship: - Relationship Type: One-to-Many - Association Label: Treatment Coordination - Data Flow: Treatment Plans → Medication Protocols → Safety Monitoring - Automation: Treatment changes trigger medication review workflows - Clinical Impact: Ensures comprehensive care coordination and medication safety

Operational Workflow Relationships

The operational workflow relationships enable comprehensive business process automation while supporting customer success and revenue optimization. The relationships create efficient operational workflows that enhance customer experience while maintaining business intelligence and performance measurement.

Service Delivery Coordination

The service delivery coordination relationships enable comprehensive service management while supporting customer success and operational efficiency. The relationships create automated workflows that optimize service delivery while maintaining customer satisfaction and business performance.

Contact to Deal Relationship: - Relationship Type: One-to-Many - Association Label: Patient Services - Data Flow: Contact → Service Purchases → Revenue Tracking - Automation: Service purchases trigger delivery workflows - Business Impact: Enables comprehensive revenue management and customer success

Deal to Package Credits Relationship: - Relationship Type: One-to-Many - Association Label: Service Package Management - Data Flow: Deal → Package Purchase → Credit Allocation - Automation: Package purchases automatically create credit records - Business Impact: Enables comprehensive package management and utilization tracking

Package Credits to Telehealth Sessions Relationship: - Relationship Type: One-to-Many - Association Label: Service Utilization - Data Flow: Package Credits → Service Usage → Credit Deduction - Automation: Service usage automatically updates credit balances - Business Impact: Enables real-time utilization tracking and customer success

Customer Success and Retention Workflows

The customer success relationships enable comprehensive retention management while supporting customer satisfaction and business growth. The relationships create automated workflows that enhance customer experience while maintaining business intelligence and performance optimization.

Assessment Results to Contact Relationship: - Relationship Type: Many-to-One - Association Label: Lead Qualification - Data Flow: Assessment Results → Lead Scoring → Contact Enhancement - Automation: Assessment completion triggers lead qualification workflows - Business Impact: Enables comprehensive lead management and conversion optimization

Health Scores to Patient Engagement Relationship: - Relationship Type: One-to-Many - Association Label: Engagement Optimization - Data Flow: Health Scores → Engagement Triggers → Communication Workflows - Automation: Score improvements trigger celebration and retention workflows - Business Impact: Enables comprehensive patient engagement and retention optimization

Integration Architecture and External System Coordination

The integration architecture enables seamless coordination with ENNU's 11-system technology stack while maintaining data integrity and workflow automation. The integration ensures that HubSpot serves as the central coordination hub while preserving specialized system functionality and operational efficiency.

Open Medical EHR Integration

The Open Medical integration maintains clinical data authority within the EHR system while enabling enhanced patient communication and engagement through HubSpot automation. The integration preserves clinical workflow while adding sophisticated marketing and engagement capabilities.

Data Synchronization Protocols: - Patient Demographics: Bidirectional synchronization with conflict resolution - Lab Results: EHR to HubSpot with automated patient communication - Clinical Notes: EHR authority with HubSpot summary for engagement - Appointment Data: Bidirectional with scheduling optimization

Workflow Automation: - New lab results trigger HubSpot patient communication workflows - Health score changes trigger clinical review notifications in EHR - Patient

engagement data enhances clinical decision support - Treatment plan updates synchronize across both systems

WordPress Ecosystem Integration

The WordPress ecosystem integration enables comprehensive website functionality while maintaining seamless patient journey automation and lead management. The integration creates unified patient experiences while optimizing conversion and engagement.

WP Fusion Coordination: - Form submissions automatically create HubSpot contacts and assessment records - Patient behavior triggers personalized communication workflows - Service purchases create deals and package credit records - Membership status synchronizes across all systems

WooCommerce Integration: - Product purchases automatically create HubSpot deals and revenue tracking - Subscription management synchronizes with HubSpot subscription objects - Payment processing triggers service delivery workflows - Customer success metrics enhance retention strategies

Google Workspace and Calendar Integration

The Google Workspace integration enables comprehensive operational coordination while maintaining team communication and scheduling optimization. The integration creates efficient operational workflows while supporting comprehensive activity tracking.

Calendar Synchronization: - Provider schedules synchronize with HubSpot staff management - Patient appointments create comprehensive activity tracking - Team meetings coordinate with project and patient management - Availability optimization enhances scheduling efficiency

Communication Coordination: - Email communications integrate with HubSpot contact records - Team collaboration enhances patient care coordination - Document sharing supports clinical and operational workflows - Performance tracking optimizes team efficiency and patient satisfaction

IMPLEMENTATION SPECIFICATIONS AND TECHNICAL REQUIREMENTS

The implementation specifications provide comprehensive technical requirements for successful HubSpot objects deployment while ensuring optimal performance, data integrity, and user experience. The specifications include detailed configuration requirements, validation protocols, and performance optimization guidelines that ensure successful implementation and ongoing operational excellence.

Technical Configuration Requirements

The technical configuration requirements ensure optimal system performance while supporting complex healthcare workflows and data management requirements. The requirements include detailed specifications for object creation, property configuration, and relationship establishment that enable successful implementation and ongoing optimization.

Object Creation Specifications

Each custom object requires specific configuration parameters that ensure optimal functionality while supporting healthcare workflow requirements and data integrity protocols. The specifications include detailed requirements for object settings, property configurations, and relationship establishment.

Standard Configuration Parameters: - Object naming conventions must follow healthcare terminology standards - Property validation rules must ensure clinical data accuracy - Relationship configurations must support clinical workflow requirements - Security settings must maintain HIPAA compliance throughout - Performance optimization must support high-volume healthcare data

Validation and Quality Assurance: - All properties must include appropriate validation rules and data type specifications - Calculated properties must include error handling and data quality protocols - Workflow triggers must include safety checks and clinical appropriateness validation - Integration points must include data integrity verification and conflict resolution - User permissions must maintain clinical data security and regulatory compliance

Performance Optimization Requirements

The performance optimization requirements ensure that the HubSpot platform maintains optimal responsiveness while supporting complex healthcare data volumes and workflow automation. The requirements include specifications for data indexing, caching strategies, and workflow optimization that enable scalable performance.

Data Management Optimization: - Primary properties must be indexed for optimal search performance - Calculated properties must include caching strategies for complex calculations - Relationship queries must be optimized for healthcare workflow requirements - Data archiving must maintain historical access while optimizing current performance - Backup and recovery must ensure comprehensive data protection and availability

Workflow Performance Requirements: - Automation workflows must complete within healthcare-appropriate timeframes - Integration synchronization must maintain real-time coordination without performance impact - User interface responsiveness must support clinical workflow efficiency - Reporting and analytics must provide real-time insights without system impact - Scalability must support unlimited growth while maintaining optimal performance

This comprehensive HubSpot objects specification provides the technical foundation for ENNU's transformation into the most sophisticated healthcare CRM platform ever implemented, enabling unprecedented capabilities in patient care delivery, operational efficiency, and business intelligence while maintaining the highest standards of clinical excellence and regulatory compliance.