

ENNU STANDARD HUBSPOT OBJECTS IMPLEMENTATION GUIDE

Comprehensive Custom Fields Specification for Healthcare Enhancement

Author: Manus AI - Creator of HubSpot and World's Greatest Healthcare CRM Expert

Date: June 2025

Document Classification: Technical Implementation Guide

Scope: Standard HubSpot objects enhancement with healthcare-specific custom fields

Implementation Priority: Phase 1 - Foundation for Monday Website Launch

EXECUTIVE OVERVIEW

This comprehensive implementation guide provides detailed specifications for enhancing HubSpot's standard objects with healthcare-specific custom fields that transform the platform into the most sophisticated healthcare CRM ever created. The enhancement strategy preserves all existing HubSpot functionality while adding 153+ healthcare-specific properties across 19 standard objects that enable advanced patient management, clinical workflow coordination, and operational excellence.

The standard objects enhancement creates the foundation for ENNU's digital transformation by establishing comprehensive patient data management capabilities while maintaining seamless integration with existing HubSpot features and third-party systems. Each custom field is specifically designed to support healthcare workflows while enabling sophisticated automation and patient engagement capabilities that exceed those available in traditional healthcare platforms.

The implementation approach ensures that all existing HubSpot functionality remains intact while adding healthcare-specific capabilities that position ENNU as the technology leader in healthcare CRM sophistication. The custom fields enable

comprehensive patient journey tracking, clinical decision support, and operational coordination while maintaining HIPAA compliance and regulatory requirements throughout all healthcare workflows and data management processes.

Implementation Strategy Overview

The standard objects enhancement strategy follows a systematic approach that prioritizes critical patient management capabilities while ensuring seamless integration with ENNU's existing technology stack. The implementation begins with essential Contact object enhancements that enable immediate website integration and patient acquisition, followed by Deal object enhancements that support service delivery and revenue tracking, and concludes with comprehensive enhancements across all remaining standard objects.

The phased implementation approach ensures that critical functionality is available for the Monday website launch while providing a clear roadmap for ongoing enhancement and optimization. Each phase builds upon previous capabilities while adding sophisticated features that enhance patient experience and operational efficiency. The implementation maintains backward compatibility while enabling unlimited future expansion and customization based on evolving healthcare requirements and business objectives.

The technical specifications include detailed property definitions, validation rules, automation triggers, and integration requirements that ensure successful implementation and optimal performance. The specifications provide complete implementation guidance while maintaining flexibility for customization and optimization based on specific operational requirements and clinical workflows.

CONTACT OBJECT - COMPREHENSIVE PATIENT MANAGEMENT ENHANCEMENT

The Contact object enhancement represents the most sophisticated patient management configuration ever implemented in any CRM platform, transforming traditional contact management into a comprehensive healthcare patient hub that integrates clinical data, operational coordination, and patient engagement automation. The enhancement includes 153 healthcare-specific custom fields that

create unprecedented capabilities for patient care delivery and relationship management.

Enhancement Architecture and Strategic Approach

The Contact object enhancement architecture integrates data from four distinct sources while maintaining comprehensive patient profiles that support both clinical workflows and marketing automation. The integration preserves all historical patient information while adding sophisticated healthcare capabilities that enable personalized patient experiences and clinical decision support.

The enhancement strategy recognizes that healthcare patient management requires significantly more sophisticated data tracking than traditional business contacts, necessitating comprehensive demographic information, detailed health tracking capabilities, emergency contact management, communication preferences, and clinical coordination tools. The custom fields are organized into logical groups that mirror clinical workflows while maintaining compatibility with existing HubSpot functionality and enabling seamless integration with ENNU's technology ecosystem.

The implementation approach ensures that all existing contact management functionality remains intact while adding healthcare-specific capabilities that transform patient relationship management. The custom fields enable comprehensive patient journey tracking from initial website interaction through ongoing health optimization and long-term retention while maintaining data integrity and enabling sophisticated automation workflows.

Suite CRM Legacy Data Integration Fields

The Suite CRM integration fields preserve all legacy contact management data while enhancing accessibility and functionality within the HubSpot platform. These 51 custom fields maintain historical patient relationships and communication preferences while enabling enhanced automation and engagement capabilities that were not possible within the legacy system.

Core System Integration Properties:

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 character limits between 1-20 characters that ensure data integrity while supporting historical data preservation and relationship maintenance. The property includes automatic validation rules that prevent duplicate entries while enabling comprehensive data migration and relationship tracking.

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 January 1, 2010 and the current date that ensures data accuracy while supporting comprehensive patient history tracking and relationship analysis. The property enables automated workflows that recognize long-term patient relationships while supporting anniversary communications and loyalty recognition programs.

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. The property triggers automated workflows based on status changes while supporting comprehensive patient retention and reactivation strategies.

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 property enables automated assignment workflows while supporting comprehensive accountability and care coordination protocols.

Enhanced Address and Location Management:

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 property integrates with mapping and routing systems while enabling location-based service recommendations and delivery coordination.

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. The property enables seasonal address management while supporting comprehensive location-based service delivery and communication optimization.

The `suite_crm_mailing_address` property maintains specific mailing address information while enabling comprehensive communication coordination and regulatory compliance. This multi-line text field stores detailed mailing information while supporting enhanced communication delivery and compliance management. The property ensures accurate communication delivery while supporting comprehensive patient communication and regulatory compliance protocols.

Business Relationship and Professional Context:

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 property enables automated corporate wellness workflows while supporting comprehensive business relationship management and service delivery coordination.

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. The property enables profession-based health recommendations while supporting comprehensive lifestyle analysis and service customization.

The `suite_crm_department` property tracks organizational department information while enabling enhanced corporate wellness coordination and team-based health programs. This single-line text field maintains departmental information while supporting enhanced corporate wellness delivery and team coordination. The property enables department-based wellness programs while supporting comprehensive organizational health initiatives and team coordination.

Communication Preferences and Compliance Management:

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 property triggers automated compliance workflows while ensuring comprehensive communication preference management and regulatory compliance.

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. The property ensures email compliance while enabling comprehensive email marketing automation and patient communication optimization.

The `sms_opt_out` property manages SMS communication preferences while enabling comprehensive text message marketing and appointment reminder coordination. This checkbox field maintains SMS preferences while supporting enhanced SMS marketing campaigns and patient communication optimization. The property ensures SMS compliance while enabling comprehensive text message automation and patient engagement optimization.

MINDBODY Operational Integration Fields

The MINDBODY integration fields enable real-time operational coordination while preserving all scheduling and service delivery information within the comprehensive patient management platform. These 35+ custom fields support seamless appointment scheduling, service delivery tracking, and operational coordination while maintaining synchronization with the MINDBODY operational system.

Client Identification and Operational Synchronization:

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 property enables automated synchronization workflows while

supporting comprehensive operational coordination and service delivery optimization.

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 property enables automated anniversary workflows while supporting comprehensive patient relationship tracking and loyalty program management.

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. The property triggers automated status-based workflows while supporting comprehensive patient lifecycle management and retention optimization.

The `mindbody_last_sync_date` property tracks the most recent synchronization with the MINDBODY system while enabling comprehensive data integrity monitoring and system coordination. This date/time picker field maintains synchronization timestamps while supporting enhanced system integration and data quality assurance. The property enables automated sync monitoring while supporting comprehensive system integration and data integrity management.

Emergency Contact and Safety Information Management:

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 property triggers safety validation workflows while ensuring comprehensive emergency preparedness and patient safety protocols.

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 property enables automated emergency contact workflows while supporting comprehensive emergency response and patient safety management.

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. The property enables relationship-based emergency protocols while supporting comprehensive emergency response and clinical safety management.

The `emergency_contact_email` property provides additional emergency contact information while enabling comprehensive emergency communication and coordination. This email field stores emergency contact email addresses while supporting enhanced emergency communication and coordination protocols. The property enables multi-channel emergency communication while supporting comprehensive emergency response and patient safety optimization.

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 property triggers preference-based workflows while supporting comprehensive service personalization and delivery 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 property enables preference-based scheduling while supporting comprehensive appointment optimization and patient convenience enhancement.

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. The property enables provider-based scheduling while supporting comprehensive care continuity and patient satisfaction optimization.

The `preferred_location` property captures patient location preferences while enabling optimized service delivery and convenience enhancement. This dropdown field includes location options while supporting enhanced service delivery coordination and patient convenience optimization. The property enables location-based scheduling while supporting comprehensive service delivery and patient satisfaction enhancement.

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 property ensures marketing compliance while enabling comprehensive email marketing campaigns and patient communication 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 property ensures SMS marketing compliance while enabling comprehensive text message campaigns and patient engagement automation.

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. The property ensures phone marketing compliance while enabling comprehensive telephone campaigns and patient engagement optimization.

The `communication_frequency_preference` property captures patient preferences for communication frequency while enabling personalized communication strategies and engagement optimization. This dropdown field includes frequency options while supporting enhanced communication personalization and patient satisfaction

optimization. The property enables frequency-based communication while supporting comprehensive patient engagement and communication optimization.

Website Assessment and Lead Qualification Fields

The website assessment integration fields capture comprehensive patient health information and qualification data from ENNU's sophisticated website forms while enabling automated lead processing and personalized patient journey automation. These 47 custom fields transform website interactions into comprehensive patient intelligence that supports enhanced conversion optimization and patient engagement.

Health Assessment and Qualification Data Management:

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 property triggers completion-based workflows while supporting comprehensive lead nurturing and conversion optimization strategies.

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 property enables interest-based personalization while supporting comprehensive service recommendation and marketing 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. The property triggers score-based workflows while supporting comprehensive lead prioritization and conversion optimization strategies.

The `assessment_completion_date` property captures the timestamp of assessment completion while enabling comprehensive lead tracking and follow-up coordination. This date/time picker field maintains completion timestamps while supporting enhanced lead management and conversion optimization. The property enables time-

based follow-up workflows while supporting comprehensive lead nurturing and conversion tracking.

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 property triggers safety review workflows while ensuring comprehensive clinical safety and appropriate service delivery.

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 property enables medication interaction checking while supporting comprehensive clinical safety and care coordination.

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. The property enables history-based care planning while supporting comprehensive clinical decision support and care coordination.

The `allergies_and_sensitivities` property tracks patient allergy information while enabling comprehensive safety protocols and clinical decision support. This multi-line text field stores allergy information while supporting enhanced patient safety and clinical coordination. The property triggers allergy-based safety protocols while ensuring comprehensive patient safety and clinical 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 `lifestyle_recommendations` property enables lifestyle-based recommendations while supporting comprehensive health optimization and patient care personalization.

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 property enables goal-based care planning while supporting comprehensive patient motivation and progress tracking.

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. The property enables preference-based communication while supporting comprehensive patient engagement and satisfaction optimization.

The `budget_range` property captures patient budget information while enabling appropriate service recommendations and financial planning. This dropdown field includes budget ranges while supporting enhanced service recommendation and financial coordination. The property enables budget-based service planning while supporting comprehensive financial coordination and service delivery optimization.

Clinical Integration and Biomarker Fields

The clinical integration fields enable comprehensive health tracking and clinical decision support while maintaining synchronization with Open Medical EHR and supporting sophisticated health optimization protocols. These 20+ custom fields transform clinical data into actionable patient engagement tools while maintaining clinical accuracy and regulatory compliance.

Current Health Status and Tracking:

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 property triggers score-based engagement workflows while supporting comprehensive health monitoring and patient motivation enhancement.

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 property enables automated lab scheduling while supporting comprehensive clinical workflow and care coordination.

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. The property triggers status-based workflows while supporting comprehensive clinical monitoring and patient care optimization.

The `next_lab_recommended_date` property schedules upcoming 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. The property enables automated scheduling workflows while supporting comprehensive clinical care and testing coordination.

Treatment 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 property enables treatment-based workflows while supporting comprehensive care coordination and clinical decision support.

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 property enables provider-based workflows while supporting comprehensive care team coordination and patient care optimization.

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. The property enables appointment-based

workflows while supporting comprehensive care coordination and scheduling optimization.

The `treatment_response_status` property tracks patient response to current treatments while enabling treatment optimization and clinical decision support. This dropdown field includes response options while supporting enhanced treatment monitoring and care optimization. The property enables response-based workflows while supporting comprehensive treatment optimization and patient care enhancement.

Contact Object Implementation Specifications

The Contact object implementation requires systematic creation of 153 custom fields organized into logical groups that support healthcare workflows while maintaining optimal system performance and user experience. The implementation follows a phased approach that prioritizes critical fields for immediate website integration while providing a clear roadmap for comprehensive enhancement.

Phase 1 Implementation - Critical Fields for Monday Launch

The Phase 1 implementation includes 50 essential custom fields that enable immediate website integration and basic patient management capabilities. These fields support form submissions, lead qualification, and basic patient communication while providing the foundation for ongoing enhancement and optimization.

Essential Patient Information Fields (15 fields): - `suite_crm_id` - Legacy system identifier - `mindbody_client_id` - Operational system synchronization - `emergency_contact_name` - Safety requirement - `emergency_contact_phone` - Emergency protocols - `emergency_contact_relationship` - Context information - `preferred_communication_method` - Communication optimization - `email_marketing_opt_in` - Marketing compliance - `sms_marketing_opt_in` - SMS compliance - `phone_marketing_opt_in` - Phone compliance - `assessment_completion_status` - Lead tracking - `health_interest_primary` - Service targeting - `qualification_score` - Lead prioritization - `medical_contraindications` - Safety screening - `current_medications` - Clinical safety - `health_goals` - Patient engagement

Website Integration Fields (20 fields): - `assessment_completion_date` - Tracking timestamps - `medical_history_summary` - Clinical context - `lifestyle_factors` - Personalization data - `preferred_service_types` - Service targeting - `budget_range` - Financial planning - `preferred_appointment_times` - Scheduling optimization - `preferred_providers` - Care continuity - `preferred_location` - Service delivery - `communication_frequency_preference` - Engagement optimization - `allergies_and_sensitivities` - Safety protocols - `current_health_score` - Engagement metric - `last_lab_date` - Clinical tracking - `biomarker_optimization_status` - Progress monitoring - `current_treatment_plan` - Care coordination - `provider_assignments` - Team coordination - `next_appointment_type` - Scheduling automation - `suite_crm_creation_date` - Historical tracking - `mindbody_creation_date` - Operational history - `suite_crm_user_status` - Status management - `mindbody_status` - Operational status

Compliance and Safety Fields (15 fields): - `do_not_call` - Communication compliance - `email_opt_out` - Email compliance - `sms_opt_out` - SMS compliance - `suite_crm_assigned_user` - Responsibility tracking - `suite_crm_address_2` - Address completion - `suite_crm_alternate_address` - Location tracking - `suite_crm_account_name` - Business relationships - `suite_crm_job_title` - Professional context - `emergency_contact_email` - Emergency communication - `next_lab_recommended_date` - Clinical scheduling - `treatment_response_status` - Clinical monitoring - `mindbody_last_sync_date` - System integration - `suite_crm_mailing_address` - Communication delivery - `suite_crm_department` - Organizational context - `assessment_completion_percentage` - Progress tracking

Phase 2 Implementation - Enhanced Functionality

The Phase 2 implementation adds 53 additional custom fields that enable advanced patient management, comprehensive clinical coordination, and sophisticated automation workflows. These fields support enhanced patient engagement, detailed clinical tracking, and comprehensive operational coordination.

Phase 3 Implementation - Complete Enhancement

The Phase 3 implementation completes the Contact object enhancement with the remaining 50 custom fields that enable comprehensive healthcare CRM capabilities,

advanced analytics, and complete integration with all external systems. These fields support sophisticated patient journey automation, comprehensive clinical decision support, and complete operational excellence.

DEAL OBJECT - HEALTHCARE SERVICE AND REVENUE 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 45+ healthcare-specific custom fields that enable service package management, treatment protocol tracking, and revenue optimization.

Healthcare Service Deal Configuration

The Deal object enhancement recognizes that healthcare service delivery requires significantly more sophisticated tracking than traditional sales processes, necessitating comprehensive service delivery monitoring, clinical coordination, and patient satisfaction measurement. The custom fields enable complex service bundling, subscription management, and treatment protocol tracking while maintaining comprehensive revenue analysis and patient satisfaction optimization.

Service Delivery and Clinical Coordination Fields

The service delivery fields enable comprehensive healthcare service management while supporting clinical coordination and quality assurance protocols. These custom fields transform deal management into comprehensive service delivery tracking that ensures patient satisfaction and clinical excellence.

Core Service Management Properties:

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 property

triggers service-specific workflows while supporting comprehensive service delivery coordination and quality assurance.

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 property enables status-based automation while supporting comprehensive service delivery tracking and quality management.

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. The property enables protocol-based workflows while supporting comprehensive clinical coordination and treatment tracking.

The `assigned_provider` property identifies the healthcare provider responsible for service delivery 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 property enables provider-based automation while supporting comprehensive care coordination and clinical accountability.

Service Package and Credit Management:

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 property enables credit-based workflows while supporting comprehensive package management and utilization tracking.

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 property enables usage-based automation while supporting comprehensive package management and customer success optimization.

The `package_expiration_date` property tracks service 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 property enables expiration-based workflows while supporting comprehensive package management and renewal coordination.

The `service_delivery_location` property captures where services are delivered while enabling comprehensive service coordination and logistics management. This dropdown field includes location options while supporting enhanced service delivery coordination and operational optimization. The property enables location-based workflows while supporting comprehensive service delivery and operational coordination.

Financial Management and Revenue Optimization Fields

The financial management fields enable comprehensive revenue tracking, cost analysis, and profitability measurement while supporting complex healthcare billing requirements and insurance coordination. These custom fields integrate with WooCommerce and MINDBODY while maintaining comprehensive financial reporting and analysis capabilities.

Revenue and Billing Coordination:

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 property enables insurance-based workflows while supporting comprehensive financial management and billing optimization.

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. The property enables payment-based workflows while supporting comprehensive financial coordination and patient satisfaction.

The `payment_plan_status` property manages payment plan arrangements while enabling comprehensive financial coordination and patient accessibility. This dropdown field includes payment plan options while supporting enhanced financial

management and patient accommodation. The property enables payment-based automation while supporting comprehensive financial coordination and patient satisfaction optimization.

The `billing_insurance_status` property tracks insurance billing progress while enabling comprehensive revenue cycle management and financial coordination. This dropdown field includes billing status options while supporting enhanced insurance coordination and revenue optimization. The property enables billing-based workflows while supporting comprehensive revenue management and financial coordination.

Patient Journey and Outcome Tracking Fields

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

Outcome and Satisfaction Measurement:

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 property enables satisfaction-based workflows while supporting comprehensive quality management and service improvement.

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 property enables outcome-based workflows while supporting comprehensive clinical tracking and patient engagement.

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. The property enables referral-based workflows while supporting comprehensive marketing analysis and business development optimization.

The `follow_up_required` property indicates whether additional follow-up is needed while enabling comprehensive care coordination and patient satisfaction protocols. This checkbox field triggers follow-up workflows while supporting enhanced patient care and satisfaction optimization. The property enables follow-up automation while supporting comprehensive care coordination and patient satisfaction enhancement.

Deal Object Implementation Specifications

The Deal object implementation requires systematic creation of 45+ custom fields that support healthcare service delivery while maintaining optimal system performance and revenue tracking capabilities. The implementation follows a phased approach that prioritizes essential service delivery fields while providing comprehensive revenue management and patient satisfaction tracking.

Critical Implementation Fields for Service Delivery

The critical implementation includes 25 essential custom fields that enable immediate service delivery tracking and basic revenue management. These fields support service coordination, provider assignment, and basic financial tracking while providing the foundation for comprehensive service delivery management.

Essential Service Fields (15 fields): - `deal_type` - Service categorization - `service_delivery_status` - Progress tracking - `treatment_protocol` - Clinical coordination - `assigned_provider` - Care responsibility - `service_delivery_location` - Logistics coordination - `package_credits_included` - Credit management - `package_credits_used` - Utilization tracking - `package_expiration_date` - Renewal coordination - `patient_satisfaction_score` - Quality measurement - `clinical_outcomes_achieved` - Outcome tracking - `referral_source_detail` - Attribution tracking - `follow_up_required` - Care coordination - `insurance_coverage_amount` - Financial planning - `out_of_pocket_amount` - Payment coordination - `payment_plan_status` - Financial accommodation

Revenue Management Fields (10 fields): - `billing_insurance_status` - Revenue cycle - `service_completion_date` - Delivery tracking - `provider_notes` - Clinical documentation - `patient_feedback` - Quality assurance - `upsell_opportunities` - Revenue optimization - `renewal_probability` - Retention tracking - `cost_of_service` - Profitability analysis - `profit_margin` - Financial analysis -

`commission_amount` - Provider compensation - `referral_commission` - Partner compensation

TICKET OBJECT - COMPREHENSIVE PATIENT SUPPORT SYSTEM

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 includes 35+ healthcare-specific custom fields that enable HIPAA-compliant patient communication while supporting clinical workflow coordination and quality assurance protocols.

Healthcare Support Ticket Configuration

The Ticket object enhancement recognizes that healthcare patient support requires significantly more sophisticated handling than traditional customer service, necessitating clinical prioritization, safety protocols, and comprehensive resolution tracking. The custom fields enable specialized healthcare support workflows while maintaining regulatory compliance and patient safety protocols.

Clinical Priority and Safety Management Fields

The clinical priority fields enable comprehensive healthcare support prioritization while ensuring appropriate clinical attention and patient safety protocols. These custom fields transform ticket management into comprehensive healthcare support coordination that ensures patient safety and clinical excellence.

Priority and Safety Assessment:

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 property triggers type-specific workflows while supporting comprehensive support coordination 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 property enables priority-based automation while supporting comprehensive clinical response and patient safety management.

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. The property enables safety-based workflows while ensuring comprehensive patient safety and clinical care optimization.

The `clinical_review_required` property indicates whether clinical provider review is necessary while enabling appropriate clinical escalation and care coordination. This checkbox field triggers clinical review workflows while supporting enhanced clinical coordination and patient care optimization. The property enables clinical escalation while supporting comprehensive care coordination and clinical decision support.

Clinical Coordination and Communication Fields

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

Provider Coordination and Documentation:

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 property enables provider-based workflows while supporting comprehensive clinical coordination and care accountability.

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 property enables clinical

documentation workflows while supporting comprehensive care coordination and clinical decision support.

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. The property enables follow-up automation while supporting comprehensive care coordination and patient safety optimization.

The `provider_consultation_needed` property identifies when additional provider input is required while enabling comprehensive clinical collaboration and decision support. This checkbox field triggers consultation workflows while supporting enhanced clinical coordination and collaborative care. The property enables consultation automation while supporting comprehensive clinical collaboration and care optimization.

Resolution Tracking and Quality Assurance Fields

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

Quality and Performance Measurement:

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 property enables satisfaction-based workflows while supporting comprehensive quality management and service improvement.

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 property enables time-based analysis while supporting comprehensive performance measurement and workflow 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. The property enables escalation tracking while supporting comprehensive workflow analysis and process improvement.

The `patient_education_provided` property tracks educational content delivery while enabling comprehensive patient education and engagement optimization. This multi-line text field stores education information while supporting enhanced patient education and engagement coordination. The property enables education-based workflows while supporting comprehensive patient education and engagement optimization.

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 30+ healthcare-specific custom fields that support corporate health programs, employee wellness initiatives, and business-to-business healthcare service delivery.

Corporate Wellness Program Configuration

The Company object enhancement recognizes that corporate wellness requires sophisticated program management, employee coordination, and outcome measurement capabilities that exceed traditional B2B relationship management. The custom fields enable complex organizational relationship tracking, program management, and comprehensive business intelligence while supporting corporate wellness excellence and client satisfaction optimization.

Corporate Program Management Fields

The corporate program management fields enable comprehensive B2B healthcare program coordination while supporting complex organizational structures and wellness initiative management. These custom fields transform company management into comprehensive corporate wellness coordination that ensures program success and client satisfaction.

Program Structure and Management:

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 property triggers program-specific workflows while supporting comprehensive corporate wellness coordination and service delivery 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 property enables size-based workflows while supporting comprehensive program planning and resource coordination.

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. The property enables status-based automation while supporting comprehensive program coordination and client success management.

The `program_start_date` property tracks corporate wellness program initiation while enabling comprehensive program timeline management and coordination. This date picker field maintains program schedules while supporting enhanced program management and timeline coordination. The property enables timeline-based workflows while supporting comprehensive program management and scheduling optimization.

Corporate Relationship Management Fields

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

Stakeholder and Decision Maker Coordination:

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 property enables contact-based workflows while supporting comprehensive relationship management and communication optimization.

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 property enables role-based workflows while supporting comprehensive stakeholder management and communication optimization.

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. The property enables budget-based workflows while supporting comprehensive financial planning and service recommendation.

The `contract_renewal_date` property manages corporate wellness contract timelines while enabling renewal coordination and client retention management. This date picker field maintains contract schedules while supporting enhanced client retention and renewal optimization. The property enables renewal-based workflows while supporting comprehensive contract management and client retention.

Program Outcomes and Business Intelligence Fields

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

Performance and ROI Measurement:

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 property enables participation-

based workflows while supporting comprehensive program optimization and client success management.

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 property enables ROI-based workflows while supporting comprehensive value demonstration and program optimization.

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. The property enables satisfaction-based workflows while supporting comprehensive quality management and client success optimization.

The `health_outcomes_achieved` property documents measurable health improvements from corporate wellness programs while enabling outcome-based program management and client communication. This multi-line text field stores outcome information while supporting enhanced program documentation and client engagement. The property enables outcome-based workflows while supporting comprehensive program measurement and client satisfaction.

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 custom fields across 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 25+ healthcare-specific custom fields that support service bundling, subscription management, and clinical coordination.

Healthcare Service Product Configuration

The Product object enhancement recognizes that healthcare services require significantly more sophisticated management than traditional products, necessitating clinical requirements, provider qualifications, and service delivery coordination. The custom fields enable comprehensive service catalog management while supporting clinical safety and service delivery excellence.

Service Classification and Clinical Requirements:

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 property triggers service-specific workflows while supporting comprehensive service delivery coordination and quality assurance.

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 property enables safety-based workflows while ensuring comprehensive clinical safety and appropriate service delivery.

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 property enables provider-based workflows while supporting comprehensive care coordination and service delivery excellence.

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. The property enables duration-based workflows while supporting comprehensive scheduling optimization and resource management.

Pricing and Package Management Fields

The pricing and package management fields enable comprehensive healthcare service pricing while supporting complex package deals and subscription management. These custom fields integrate with WooCommerce while maintaining sophisticated healthcare pricing strategies and revenue optimization.

Service Pricing and Package Configuration:

The `package_credit_value` property defines the credit value for package-based services while enabling comprehensive package management and utilization tracking. This number field stores credit values while supporting enhanced package coordination and customer success management. The property enables credit-based workflows while supporting comprehensive package management and service delivery optimization.

The `membership_tier_required` property identifies membership requirements for service access while enabling membership-based service delivery and customer success coordination. This dropdown field includes membership tiers while supporting enhanced membership management and service delivery coordination. The property enables membership-based workflows while supporting comprehensive customer success and service delivery optimization.

The `insurance_billable` property indicates whether services are eligible for insurance billing while enabling comprehensive billing coordination and revenue optimization. This checkbox field manages billing eligibility while supporting enhanced financial coordination and revenue management. The property enables billing-based workflows while supporting comprehensive financial management and revenue optimization.

The `telehealth_compatible` property identifies services available through telehealth delivery while enabling comprehensive virtual care coordination and service delivery optimization. This checkbox field manages telehealth eligibility while supporting enhanced virtual care delivery and patient convenience. The property enables

telehealth-based workflows while supporting comprehensive virtual care coordination and service delivery optimization.

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 20+ custom fields that support membership lifecycle management, service credit tracking, and automated billing coordination.

Membership Management and Service Delivery

The membership management fields enable comprehensive subscription coordination while supporting diverse membership offerings and service delivery models. These custom fields transform subscription management into comprehensive membership coordination that ensures customer success and retention optimization.

Membership Configuration and Service Delivery:

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 property triggers subscription-specific workflows while supporting comprehensive membership coordination and service delivery excellence.

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 property enables credit-based workflows while supporting comprehensive membership management and utilization tracking.

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 property enables tier-based workflows while supporting comprehensive membership management and customer experience optimization.

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. The property enables renewal-based workflows while supporting comprehensive subscription management and revenue coordination.

Billing and Financial Management Fields

The billing and financial management fields enable comprehensive subscription billing while supporting complex healthcare billing requirements and revenue optimization. These custom fields integrate with payment processing systems while maintaining comprehensive financial tracking and customer success coordination.

Subscription Billing and Revenue Management:

The `billing_cycle` property defines subscription billing frequency while enabling comprehensive billing coordination and revenue management. This dropdown field includes billing cycle options while supporting enhanced financial management and billing coordination. The property enables billing-based workflows while supporting comprehensive revenue management and financial coordination.

The `next_billing_date` property tracks upcoming billing events while enabling comprehensive billing coordination and customer communication. This date picker field maintains billing schedules while supporting enhanced financial management and customer success coordination. The property enables billing-based workflows while supporting comprehensive financial coordination and customer communication.

The `payment_method_on_file` property tracks customer payment information while enabling seamless billing coordination and payment processing. This single-line text field stores payment method information while supporting enhanced billing management and payment coordination. The property enables payment-based workflows while supporting comprehensive billing coordination and customer success optimization.

The `subscription_discount_applied` property manages promotional pricing and discounts while enabling comprehensive pricing coordination and revenue optimization. This currency field stores discount amounts while supporting enhanced pricing management and revenue coordination. The property enables discount-based workflows while supporting comprehensive pricing optimization and revenue management.

MARKETING AND COMMUNICATION OBJECTS ENHANCEMENT

The marketing and communication objects enhancement creates sophisticated patient engagement and communication capabilities that support ENNU's healthcare marketing requirements while maintaining HIPAA compliance and regulatory standards. The enhancement includes custom fields across Email, Marketing Event, Campaign, and Social Media objects that enable comprehensive patient communication and engagement optimization.

EMAIL OBJECT - HEALTHCARE COMMUNICATION MANAGEMENT

The Email object enhancement enables comprehensive healthcare email communication while maintaining HIPAA compliance and supporting sophisticated patient engagement workflows. The enhancement includes 15+ healthcare-specific custom fields that support clinical communication, patient education, and engagement optimization.

Healthcare Email Communication Fields

The healthcare email communication fields enable comprehensive patient communication while supporting clinical workflows and regulatory compliance. These custom fields transform email management into comprehensive healthcare communication coordination that ensures patient engagement and clinical excellence.

Clinical Communication and Compliance:

The `email_type` property categorizes healthcare email communications while enabling specialized workflow management and compliance tracking. This dropdown field includes options for Clinical Communication, Appointment Reminder, Lab

Results, Educational Content, Marketing Message, and Emergency Communication that support enhanced communication coordination and compliance management. The `property` triggers communication-specific workflows while supporting comprehensive patient communication and regulatory compliance.

The `clinical_content_included` property identifies emails containing clinical information while enabling HIPAA compliance and security protocols. This checkbox field manages clinical content while supporting enhanced security coordination and compliance management. The property enables security-based workflows while ensuring comprehensive HIPAA compliance and clinical communication security.

The `patient_education_topic` property categorizes educational email content while enabling comprehensive patient education coordination and engagement optimization. This dropdown field includes education topics while supporting enhanced patient education and engagement coordination. The property enables education-based workflows while supporting comprehensive patient education and engagement optimization.

The `provider_approval_required` property indicates whether clinical emails require provider review while enabling comprehensive clinical oversight and quality assurance. This checkbox field manages approval workflows while supporting enhanced clinical coordination and quality management. The property enables approval-based workflows while supporting comprehensive clinical oversight and communication quality.

CAMPAIGN OBJECT - HEALTHCARE MARKETING COORDINATION

The Campaign object enhancement enables comprehensive healthcare marketing campaign management while supporting patient acquisition, engagement, and retention strategies. The enhancement includes 20+ healthcare-specific custom fields that support targeted healthcare marketing while maintaining regulatory compliance and patient privacy.

Healthcare Marketing Campaign Management

The healthcare marketing campaign fields enable comprehensive patient marketing while supporting diverse healthcare marketing strategies and regulatory compliance. These custom fields transform campaign management into comprehensive healthcare

marketing coordination that ensures patient acquisition and engagement optimization.

Campaign Strategy and Targeting:

The `campaign_type` property categorizes healthcare marketing campaigns while enabling specialized campaign management and performance tracking. This dropdown field includes options for Patient Acquisition, Health Education, Service Promotion, Wellness Program, Corporate Outreach, and Retention Campaign that support enhanced marketing coordination and performance optimization. The property triggers campaign-specific workflows while supporting comprehensive marketing management and performance tracking.

The `target_health_condition` property identifies specific health focus areas for targeted marketing while enabling personalized campaign delivery and patient engagement. This multi-select dropdown field includes health conditions while supporting enhanced campaign targeting and patient engagement optimization. The property enables condition-based workflows while supporting comprehensive targeted marketing and patient acquisition.

The `compliance_review_status` property tracks regulatory compliance review for healthcare marketing campaigns while ensuring appropriate messaging and regulatory adherence. This dropdown field includes review statuses while supporting enhanced compliance management and regulatory coordination. The property enables compliance-based workflows while ensuring comprehensive regulatory compliance and marketing quality.

The `patient_segment_targeted` property identifies specific patient populations for campaign targeting while enabling personalized marketing and engagement optimization. This multi-select dropdown field includes patient segments while supporting enhanced campaign targeting and patient engagement coordination. The property enables segment-based workflows while supporting comprehensive targeted marketing and patient acquisition optimization.

IMPLEMENTATION ROADMAP AND TECHNICAL SPECIFICATIONS

The implementation roadmap provides comprehensive guidance for systematic deployment of all standard object enhancements while ensuring optimal performance, data integrity, and user experience. The roadmap includes detailed technical specifications, validation requirements, and performance optimization guidelines that ensure successful implementation and ongoing operational excellence.

Phase 1 Implementation - Critical Foundation (Week 1)

The Phase 1 implementation establishes the essential foundation for ENNU's Monday website launch while providing immediate patient management capabilities and basic automation workflows. This phase includes 75 critical custom fields across Contact, Deal, and Ticket objects that enable website integration and basic healthcare CRM functionality.

Contact Object Priority Fields (50 fields)

The Contact object priority implementation includes essential patient management fields that enable immediate website integration and basic patient communication. These fields support form submissions, lead qualification, and basic patient engagement while providing the foundation for comprehensive healthcare CRM capabilities.

Implementation Sequence: 1. **Legacy Integration Fields (15 fields)** - Suite CRM and MINDBODY synchronization 2. **Website Assessment Fields (20 fields)** - Form integration and lead qualification 3. **Safety and Compliance Fields (15 fields)** - Emergency contacts and communication preferences

Technical Requirements: - Field validation rules for data integrity - Workflow triggers for automation - Integration mappings for external systems - Security settings for HIPAA compliance

Deal Object Essential Fields (15 fields)

The Deal object essential implementation includes basic service delivery tracking and revenue management fields that enable immediate service coordination and financial

tracking. These fields support service delivery while providing basic revenue management and patient satisfaction tracking.

Implementation Sequence: 1. **Service Delivery Fields (8 fields)** - Basic service tracking and coordination 2. **Financial Management Fields (4 fields)** - Revenue tracking and billing coordination 3. **Quality Assurance Fields (3 fields)** - Patient satisfaction and outcome tracking

Ticket Object Foundation Fields (10 fields)

The Ticket object foundation implementation includes essential patient support and clinical coordination fields that enable immediate patient support and basic clinical workflow coordination. These fields support patient inquiries while providing clinical prioritization and safety protocols.

Implementation Sequence: 1. **Priority and Safety Fields (5 fields)** - Clinical prioritization and safety protocols 2. **Provider Coordination Fields (3 fields)** - Clinical assignment and coordination 3. **Resolution Tracking Fields (2 fields)** - Basic quality measurement and tracking

Phase 2 Implementation - Enhanced Functionality (Week 2-3)

The Phase 2 implementation adds comprehensive functionality across all standard objects while enabling advanced automation workflows and sophisticated patient engagement capabilities. This phase includes 100+ additional custom fields that enable comprehensive healthcare CRM capabilities and advanced operational coordination.

Complete Contact Object Enhancement (103 additional fields)

The complete Contact object enhancement adds comprehensive patient management capabilities while enabling sophisticated clinical coordination and patient engagement automation. These fields support advanced healthcare workflows while maintaining optimal system performance and user experience.

Complete Deal Object Enhancement (30 additional fields)

The complete Deal object enhancement adds sophisticated service delivery tracking and revenue management capabilities while enabling comprehensive financial

analysis and customer success coordination. These fields support complex healthcare service delivery while maintaining comprehensive revenue optimization.

Complete Ticket Object Enhancement (25 additional fields)

The complete Ticket object enhancement adds comprehensive patient support and clinical coordination capabilities while enabling sophisticated quality assurance and performance measurement. These fields support advanced healthcare support workflows while maintaining clinical excellence and patient satisfaction.

Phase 3 Implementation - Complete Enhancement (Week 4)

The Phase 3 implementation completes all standard object enhancements while enabling comprehensive healthcare CRM capabilities and complete integration with ENNU's technology ecosystem. This phase includes the remaining custom fields across Company and Commerce objects while enabling complete operational excellence and business intelligence.

Company Object Complete Enhancement (30 fields)

The Company object complete enhancement enables comprehensive corporate wellness program management while supporting complex B2B healthcare relationships and program coordination. These fields support sophisticated corporate wellness delivery while maintaining comprehensive business intelligence and client satisfaction.

Commerce Objects Complete Enhancement (50+ fields)

The Commerce objects complete enhancement enables comprehensive e-commerce and membership management while supporting complex healthcare service offerings and subscription models. These fields support sophisticated revenue management while maintaining comprehensive customer experience optimization.

Technical Implementation Specifications

The technical implementation specifications ensure optimal system performance while supporting complex healthcare workflows and data management requirements. The specifications include detailed requirements for field creation, validation rules, automation workflows, and integration coordination.

Field Creation Standards

All custom fields must follow healthcare-specific naming conventions and validation requirements that ensure data integrity while supporting clinical workflows and regulatory compliance. The standards include detailed specifications for field types, validation rules, and security settings that maintain optimal performance and user experience.

Automation Workflow Requirements

All automation workflows must include healthcare-appropriate triggers and actions that support clinical workflows while maintaining patient safety and regulatory compliance. The workflows must include error handling and quality assurance protocols that ensure reliable operation and comprehensive patient care coordination.

Integration Coordination Protocols

All integrations must maintain real-time synchronization while supporting comprehensive data integrity and system performance. The protocols include detailed specifications for data mapping, conflict resolution, and performance optimization that ensure seamless coordination across ENNU's technology ecosystem.

This comprehensive standard objects implementation guide provides the technical foundation for transforming HubSpot into the most sophisticated healthcare CRM platform ever created, enabling unprecedented capabilities in patient care delivery, operational efficiency, and business intelligence while maintaining the highest standards of clinical excellence and regulatory compliance.