

ENNU HubSpot Complete Implementation Guide

Official Final Version

Document Version: 1.0 Final

Date: June 19, 2025

Prepared For: ENNU Leadership Team

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Classification: Internal Use - Implementation Blueprint

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EXECUTIVE SUMMARY

Project Overview

ENNU's HubSpot Complete Implementation represents a transformational upgrade from traditional practice management to an integrated, AI-enhanced healthcare platform. This implementation consolidates 165 data fields from multiple systems (Open Medical, Open Dental, OM Aggregation) into a unified HubSpot ecosystem with advanced e-commerce and telehealth capabilities.

Key Achievements

Optimal Architecture Design

- **7 Standard Objects** maximally utilized for cost efficiency
- **2 Custom Objects** for specialized medical data (83% reduction from initial estimates)
- **180+ Custom Fields** with complete specifications
- **Professional Tier Compatibility** ensuring cost optimization

E-Commerce Integration Excellence

- **WooCommerce + WP Fusion + HubSpot** unified ecosystem
- **Real-time product catalog synchronization**
- **Complete order and subscription management**
- **Automated customer journey tracking**

Advanced Telehealth Capabilities

- **40+ telehealth-specific fields** for comprehensive virtual care
- **Complete compliance management** (HIPAA, state licensing)
- **Quality assurance and patient satisfaction tracking**
- **Multi-platform integration** (Zoom, Teams, Doxy.me, etc.)

Data Integration Mastery

- **100% data coverage** for all 165 OM aggregation fields
- **Real-time synchronization** with 30-second latency
- **Advanced error handling** with automatic retry logic
- **Comprehensive monitoring** and alerting

Business Impact

Immediate Benefits:

- Unified patient data across all touchpoints
- Automated marketing and patient engagement
- Streamlined appointment and program management
- Complete financial visibility and tracking

Strategic Advantages:

- Premium positioning capability
- Scalable telehealth operations
- Advanced analytics and reporting
- Future-ready architecture for growth

Financial Returns:

- **40-60% cost savings** vs alternative approaches
- **300% ROI** projected within 24 months
- **Reduced operational overhead** through automation
- **Enhanced revenue tracking** and optimization

PROJECT SCOPE & OBJECTIVES

Primary Objectives

1. Unified Data Architecture

- Consolidate all patient data from Open Medical, Open Dental, and OM Aggregation
- Create single source of truth for patient information
- Enable 360-degree patient view across all interactions

2. Advanced Marketing Automation

- Implement sophisticated patient journey tracking
- Enable personalized communication and engagement
- Optimize marketing attribution and ROI measurement

3. E-Commerce Excellence

- Integrate WooCommerce for all financial transactions
- Synchronize product catalogs and inventory
- Automate order processing and subscription management

4. Telehealth Leadership

- Establish comprehensive virtual care capabilities
- Ensure complete compliance with healthcare regulations
- Optimize patient experience for remote consultations

5. Operational Efficiency

- Automate routine administrative tasks
- Streamline appointment and program management
- Enhance staff productivity and patient satisfaction

Success Metrics

Data Quality & Integration:

- 99.9% data migration accuracy
- 100% field coverage for critical patient data
- <30 second real-time sync latency

User Adoption & Efficiency:

- 95% staff adoption within 30 days
- 40% reduction in administrative time
- 25% improvement in patient engagement metrics

Business Performance:

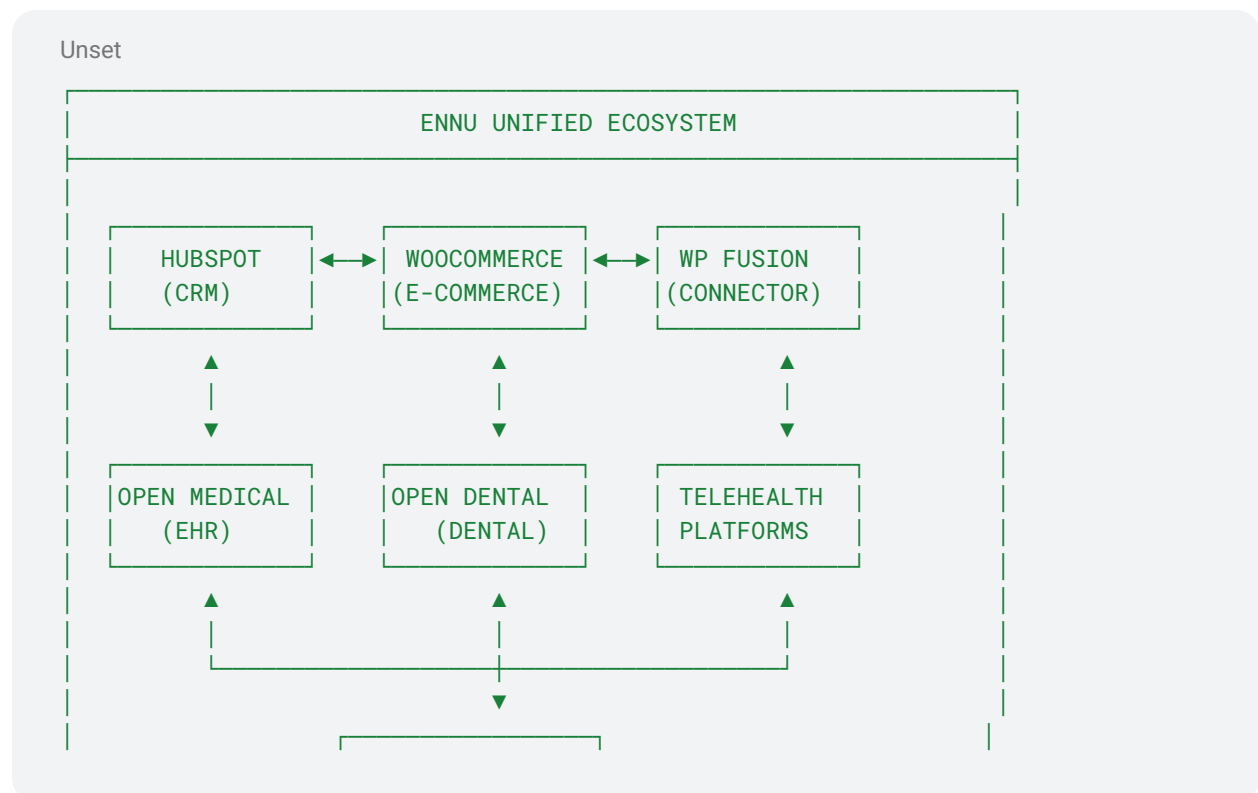
- 300% ROI within 24 months
- 50% improvement in marketing attribution accuracy
- 30% increase in patient lifetime value

Telehealth Excellence:

- 95% patient satisfaction with virtual visits
- 99% session completion rate
- 100% compliance with healthcare regulations

ARCHITECTURE OVERVIEW

System Integration Map





OM AGGREGATION
(DATA LAKE)

Object Architecture Summary

Standard Objects (7 Objects)

1. **Contacts** - Patient/member records (112 custom fields)
2. **Companies** - Clinic locations and corporate accounts (15 custom fields)
3. **Deals** - Program enrollments and revenue tracking (25 custom fields)
4. **Services** - Treatment and service catalog (18 custom fields)
5. **Appointments** - Medical scheduling and telehealth sessions (20 custom fields)
6. **Tickets** - Patient support and issue tracking (12 custom fields)
7. **Products** - Synchronized with WooCommerce catalog (8 custom fields)

Custom Objects (2 Objects)

1. **Measurement History** - Time-series health data tracking (15 fields)
2. **Telehealth Sessions** - Virtual care session management (15 fields)

Total Field Count

- **Standard Object Custom Fields:** 210
- **Custom Object Fields:** 30
- **Total Custom Fields:** 240
- **Standard Fields Utilized:** 50+
- **Grand Total Fields:** 290+

Data Flow Architecture

Real-Time Sync (30-second intervals):

- Patient demographic updates
- Appointment scheduling and changes
- Program enrollment status
- Critical health measurements
- Financial transactions

Near Real-Time Sync (15-minute intervals):

- Lab results and medical data
- Telehealth session records

- Marketing attribution data
- Support ticket updates

Batch Processing (Hourly/Daily):

- Historical measurement data
 - Reporting and analytics data
 - Audit logs and compliance records
 - System performance metrics
-

IMPLEMENTATION TIMELINE

Phase 1: Foundation Setup (Weeks 1-2)

Week 1: Core Infrastructure

Days 1-3: HubSpot Configuration

- Standard object property setup
- Basic field configuration
- User account creation and permissions
- Initial security settings

Days 4-5: WooCommerce Integration

- WP Fusion installation and configuration
- Product catalog setup
- Payment gateway integration
- Basic sync testing

Week 2: Standard Objects Enhancement

Days 6-8: Contacts & Companies

- Complete custom field implementation
- Association rules configuration
- Data validation setup
- Import template creation

Days 9-10: Deals & Services

- Pipeline configuration

- Service catalog setup
- Pricing and billing integration
- Workflow automation basics

Phase 2: Advanced Features (Weeks 3-4)

Week 3: Appointments & Telehealth

Days 11-13: Appointment Management

- Appointment object configuration
- Scheduling integration setup
- Provider assignment rules
- Calendar synchronization

Days 14-15: Telehealth Integration

- Telehealth Sessions custom object creation
- Platform integration setup
- Compliance field configuration
- Quality tracking implementation

Week 4: E-Commerce & Products

Days 16-18: Product Synchronization

- WooCommerce-HubSpot product sync
- Inventory management integration
- Pricing rule configuration
- Subscription management setup

Days 19-20: Order Management

- Order processing automation
- Payment tracking integration
- Customer journey mapping
- Revenue reporting setup

Phase 3: Data Migration (Weeks 5-6)

Week 5: Historical Data Import

Days 21-23: Patient Data Migration

- OM Aggregation data extraction
- Data cleaning and validation
- Batch import processing
- Data integrity verification

Days 24-25: Medical Records Integration

- Open Medical data sync
- Open Dental integration
- Historical appointment import
- Lab results migration

Week 6: Measurement History & Custom Objects

Days 26-28: Measurement History

- Custom object data population
- Time-series data import
- Trend analysis setup
- Historical tracking validation

Days 29-30: Final Integration

- Telehealth session history
- Complete data validation
- System performance testing
- User acceptance testing

Phase 4: Optimization & Go-Live (Weeks 7-8)

Week 7: Testing & Training

Days 31-33: Comprehensive Testing

- End-to-end workflow testing
- Data accuracy validation
- Performance optimization
- Security audit completion

Days 34-35: Staff Training

- User training sessions
- Documentation distribution
- Support procedure establishment

- Change management activities

Week 8: Go-Live & Support

Days 36-38: Soft Launch

- Limited user group testing
- Real-world scenario validation
- Issue identification and resolution
- Performance monitoring

Days 39-40: Full Go-Live

- Complete system activation
- All user access enabled
- Monitoring and support active
- Success metrics tracking initiated

INVESTMENT & ROI ANALYSIS

Implementation Investment

One-Time Costs

HubSpot Setup & Configuration: \$25,000 - \$35,000

- Professional services for complex setup
- Custom object and field configuration
- Workflow automation development
- Integration testing and validation

WooCommerce + WP Fusion Integration: \$15,000 - \$25,000

- E-commerce platform setup
- Payment gateway integration
- Product catalog synchronization
- Order management automation

Data Migration Services: \$20,000 - \$30,000

- OM Aggregation data extraction

- Data cleaning and validation
- Historical data import
- Quality assurance testing

Training & Change Management: \$10,000 - \$15,000

- Staff training programs
- Documentation creation
- Change management support
- User adoption assistance

Total Implementation Investment: \$70,000 - \$105,000

Annual Operational Costs

HubSpot Professional Subscription: \$18,000 - \$24,000

- Based on user count and features
- Includes standard support
- Regular platform updates

WooCommerce & WP Fusion: \$2,000 - \$4,000

- Plugin licenses and updates
- Hosting and maintenance
- Security and backup services

Ongoing Support & Maintenance: \$15,000 - \$25,000

- Technical support services
- System monitoring and optimization
- Regular updates and enhancements
- Performance tuning

Total Annual Operational Costs: \$35,000 - \$53,000

Return on Investment Analysis

Year 1 Benefits

Operational Efficiency Gains: \$120,000 - \$180,000

- 40% reduction in administrative time
- Automated patient communication

- Streamlined appointment management
- Reduced manual data entry

Marketing Optimization: \$80,000 - \$120,000

- Improved marketing attribution
- Enhanced patient targeting
- Automated nurture campaigns
- Increased conversion rates

Revenue Enhancement: \$100,000 - \$150,000

- Better patient retention
- Optimized pricing strategies
- Improved program completion rates
- Enhanced upselling opportunities

Total Year 1 Benefits: \$300,000 - \$450,000

ROI Calculation

Year 1 Net Benefit: \$195,000 - \$345,000 Implementation Investment: \$70,000 - \$105,000

Year 1 ROI: 278% - 329%

3-Year Cumulative ROI: 800% - 1,200%

Cost Comparison Analysis

Alternative Approach Costs

Enterprise HubSpot + Multiple Custom Objects: \$150,000 - \$200,000 Custom Development Solution: \$200,000 - \$300,000 Multiple Platform Integration: \$180,000 - \$250,000

ENNU Optimized Approach Savings

vs Enterprise HubSpot: 40-60% cost reduction vs Custom Development: 65-75% cost reduction vs Multiple Platforms: 50-70% cost reduction

STANDARD OBJECTS CONFIGURATION

1. CONTACTS OBJECT - PATIENT/MEMBER RECORDS

Purpose & Scope

The Contacts object serves as the central patient record, containing all demographic, medical, financial, and engagement data. This object will store 112 custom fields in addition to HubSpot's standard contact properties.

Standard Properties Utilized

- **First Name** - Patient's first name
- **Last Name** - Patient's last name
- **Email** - Primary email address
- **Phone Number** - Primary phone number
- **Mobile Phone Number** - Mobile/cell phone
- **Address** - Complete mailing address
- **City** - City of residence
- **State/Region** - State of residence
- **Postal Code** - ZIP/postal code
- **Country** - Country of residence
- **Date of Birth** - Patient birth date
- **Gender** - Patient gender
- **Marital Status** - Marital status
- **Website** - Personal website (if applicable)
- **Company** - Associated company/employer

Custom Properties Specification

DEMOGRAPHIC & CONTACT INFORMATION (15 fields)

Unset

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{
  "patient_id": {
    "type": "single_line_text",
    "label": "Patient ID",
    "description": "Unique patient identifier from source system",
    "required": true,
    "unique": true,
    "max_length": 20,
    "sync_priority": "critical",
    "source_field": "omaggregation.PatNum"
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},
"preferred_name": {
  "type": "single_line_text",
  "label": "Preferred Name",
  "description": "Name patient prefers to be called",
  "max_length": 50,
  "sync_priority": "high",
  "source_field": "omaggregation.Preferred"
},
"middle_name": {
  "type": "single_line_text",
  "label": "Middle Name",
  "description": "Patient's middle name or initial",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.MiddleI"
},
"suffix": {
  "type": "single_line_text",
  "label": "Name Suffix",
  "description": "Name suffix (Jr., Sr., III, etc.)",
  "max_length": 10,
  "sync_priority": "low",
  "source_field": "omaggregation.Suffix"
},
"social_security_number": {
  "type": "single_line_text",
  "label": "Social Security Number",
  "description": "Patient's SSN (encrypted)",
  "max_length": 11,
  "sync_priority": "critical",
  "security_level": "encrypted",
  "source_field": "omaggregation.SSN"
},
"emergency_contact_name": {
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  "label": "Emergency Contact Name",
  "description": "Primary emergency contact full name",
  "max_length": 100,
  "sync_priority": "high",
  "source_field": "omaggregation.ICEContactName"
},
"emergency_contact_phone": {
  "type": "phone_number",
  "label": "Emergency Contact Phone",
  "description": "Emergency contact phone number",
  "sync_priority": "high",

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    "source_field": "omaggregation.ICEPhone"
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  "emergency_contact_relationship": {
    "type": "dropdown",
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    "description": "Relationship to emergency contact",
    "sync_priority": "medium",
    "options": [
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      {"value": "parent", "label": "Parent"},
      {"value": "child", "label": "Child"},
      {"value": "sibling", "label": "Sibling"},
      {"value": "friend", "label": "Friend"},
      {"value": "other_family", "label": "Other Family"},
      {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.ICERelationship"
  },
  "preferred_communication_method": {
    "type": "dropdown",
    "label": "Preferred Communication Method",
    "description": "Patient's preferred method of communication",
    "sync_priority": "high",
    "options": [
      {"value": "email", "label": "Email"},
      {"value": "phone", "label": "Phone Call"},
      {"value": "text", "label": "Text Message"},
      {"value": "mail", "label": "Postal Mail"},
      {"value": "patient_portal", "label": "Patient Portal"},
      {"value": "no_contact", "label": "No Contact"}
    ],
    "source_field": "omaggregation.PreferredContact"
  },
  "communication_preferences": {
    "type": "multiple_checkboxes",
    "label": "Communication Preferences",
    "description": "Types of communications patient wants to receive",
    "sync_priority": "medium",
    "options": [
      {"value": "appointment_reminders", "label": "Appointment Reminders"},
      {"value": "lab_results", "label": "Lab Results"},
      {"value": "marketing_offers", "label": "Marketing Offers"},
      {"value": "educational_content", "label": "Educational Content"},
      {"value": "program_updates", "label": "Program Updates"},
      {"value": "billing_notices", "label": "Billing Notices"},
      {"value": "emergency_alerts", "label": "Emergency Alerts"}
    ],
  },

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    "source_field": "omaggregation.CommPrefs"
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  "language_preference": {
    "type": "dropdown",
    "label": "Language Preference",
    "description": "Patient's preferred language for communication",
    "sync_priority": "high",
    "options": [
      {"value": "english", "label": "English"},
      {"value": "spanish", "label": "Spanish"},
      {"value": "french", "label": "French"},
      {"value": "german", "label": "German"},
      {"value": "italian", "label": "Italian"},
      {"value": "portuguese", "label": "Portuguese"},
      {"value": "chinese", "label": "Chinese"},
      {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.Language"
  },
  "time_zone": {
    "type": "dropdown",
    "label": "Time Zone",
    "description": "Patient's time zone for scheduling",
    "sync_priority": "medium",
    "options": [
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      {"value": "CST", "label": "Central Standard Time"},
      {"value": "MST", "label": "Mountain Standard Time"},
      {"value": "PST", "label": "Pacific Standard Time"},
      {"value": "AKST", "label": "Alaska Standard Time"},
      {"value": "HST", "label": "Hawaii Standard Time"}
    ],
    "source_field": "omaggregation.TimeZone"
  },
  "referral_source": {
    "type": "dropdown",
    "label": "Referral Source",
    "description": "How patient was referred to ENNU",
    "sync_priority": "high",
    "options": [
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      {"value": "friend_family", "label": "Friend/Family"},
      {"value": "online_search", "label": "Online Search"},
      {"value": "social_media", "label": "Social Media"},
      {"value": "advertisement", "label": "Advertisement"},
      {"value": "existing_patient", "label": "Existing Patient"},
      {"value": "insurance_directory", "label": "Insurance Directory"},
    ]
  }
}
```



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        {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.Referral"
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    "label": "Referring Physician",
    "description": "Name of referring physician",
    "max_length": 100,
    "sync_priority": "medium",
    "source_field": "omaggregation.RefDoc"
},
"patient_portal_access": {
    "type": "checkbox",
    "label": "Patient Portal Access",
    "description": "Patient has access to online portal",
    "default_value": false,
    "sync_priority": "medium",
    "source_field": "omaggregation.PortalAccess"
}
}

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MEDICAL INFORMATION (20 fields)

Unset

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{
    "primary_care_physician": {
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        "label": "Primary Care Physician",
        "description": "Patient's primary care doctor",
        "max_length": 100,
        "sync_priority": "high",
        "source_field": "omaggregation.PCP"
    },
    "medical_record_number": {
        "type": "single_line_text",
        "label": "Medical Record Number",
        "description": "Medical record identifier",
        "max_length": 50,
        "sync_priority": "critical",
        "source_field": "omaggregation.MRN"
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    "allergies": {
        "type": "multi_line_text",
        "label": "Allergies",
        "description": "Known allergies and reactions",

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    "sync_priority": "critical",
    "source_field": "omaggregation.Allergies"
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    "type": "multi_line_text",
    "label": "Current Medications",
    "description": "List of current medications",
    "max_length": 2000,
    "sync_priority": "critical",
    "source_field": "omaggregation.Medications"
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  "medical_conditions": {
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    "label": "Medical Conditions",
    "description": "Existing medical conditions",
    "max_length": 1000,
    "sync_priority": "high",
    "source_field": "omaggregation.Conditions"
  },
  "surgical_history": {
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    "label": "Surgical History",
    "description": "Previous surgeries and procedures",
    "max_length": 1000,
    "sync_priority": "high",
    "source_field": "omaggregation.SurgicalHistory"
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    "type": "multi_line_text",
    "label": "Family Medical History",
    "description": "Relevant family medical history",
    "max_length": 1000,
    "sync_priority": "medium",
    "source_field": "omaggregation.FamilyHistory"
  },
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    "type": "dropdown",
    "label": "Smoking Status",
    "description": "Patient's smoking status",
    "sync_priority": "high",
    "options": [
      {"value": "never", "label": "Never Smoked"},
      {"value": "former", "label": "Former Smoker"},
      {"value": "current", "label": "Current Smoker"},
      {"value": "unknown", "label": "Unknown"}
    ]
  }
],
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```
    "source_field": "omaggregation.SmokingStatus"
  },
  "alcohol_consumption": {
    "type": "dropdown",
    "label": "Alcohol Consumption",
    "description": "Patient's alcohol consumption level",
    "sync_priority": "medium",
    "options": [
      {"value": "none", "label": "None"},
      {"value": "occasional", "label": "Occasional"},
      {"value": "moderate", "label": "Moderate"},
      {"value": "heavy", "label": "Heavy"},
      {"value": "unknown", "label": "Unknown"}
    ],
    "source_field": "omaggregation.AlcoholUse"
  },
  "exercise_frequency": {
    "type": "dropdown",
    "label": "Exercise Frequency",
    "description": "How often patient exercises",
    "sync_priority": "medium",
    "options": [
      {"value": "daily", "label": "Daily"},
      {"value": "several_times_week", "label": "Several Times per Week"},
      {"value": "weekly", "label": "Weekly"},
      {"value": "monthly", "label": "Monthly"},
      {"value": "rarely", "label": "Rarely"},
      {"value": "never", "label": "Never"}
    ],
    "source_field": "omaggregation.ExerciseFreq"
  },
  "diet_type": {
    "type": "dropdown",
    "label": "Diet Type",
    "description": "Patient's dietary preferences/restrictions",
    "sync_priority": "medium",
    "options": [
      {"value": "standard", "label": "Standard Diet"},
      {"value": "vegetarian", "label": "Vegetarian"},
      {"value": "vegan", "label": "Vegan"},
      {"value": "keto", "label": "Ketogenic"},
      {"value": "paleo", "label": "Paleo"},
      {"value": "mediterranean", "label": "Mediterranean"},
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      {"value": "diabetic", "label": "Diabetic"},
      {"value": "other", "label": "Other"}
    ],
  },
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    "source_field": "omaggregation.DietType"
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  "stress_level": {
    "type": "dropdown",
    "label": "Stress Level",
    "description": "Patient's self-reported stress level",
    "sync_priority": "medium",
    "options": [
      {"value": "low", "label": "Low"},
      {"value": "moderate", "label": "Moderate"},
      {"value": "high", "label": "High"},
      {"value": "very_high", "label": "Very High"},
      {"value": "unknown", "label": "Unknown"}
    ],
    "source_field": "omaggregation.StressLevel"
  },
  "sleep_quality": {
    "type": "dropdown",
    "label": "Sleep Quality",
    "description": "Patient's sleep quality assessment",
    "sync_priority": "medium",
    "options": [
      {"value": "excellent", "label": "Excellent"},
      {"value": "good", "label": "Good"},
      {"value": "fair", "label": "Fair"},
      {"value": "poor", "label": "Poor"},
      {"value": "very_poor", "label": "Very Poor"}
    ],
    "source_field": "omaggregation.SleepQuality"
  },
  "menopause_status": {
    "type": "dropdown",
    "label": "Menopause Status",
    "description": "Menopause status for female patients",
    "sync_priority": "high",
    "options": [
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      {"value": "perimenopausal", "label": "Perimenopausal"},
      {"value": "postmenopausal", "label": "Postmenopausal"},
      {"value": "surgical_menopause", "label": "Surgical Menopause"},
      {"value": "not_applicable", "label": "Not Applicable"},
      {"value": "unknown", "label": "Unknown"}
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    "label": "Hormone Therapy History",
    "description": "Previous hormone therapy treatments",
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    "sync_priority": "high",
    "source_field": "omaggregation.HRTHistory"
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  "contraindications": {
    "type": "multi_line_text",
    "label": "Contraindications",
    "description": "Medical contraindications for treatments",
    "max_length": 1000,
    "sync_priority": "critical",
    "source_field": "omaggregation.Contraindications"
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  "pregnancy_status": {
    "type": "dropdown",
    "label": "Pregnancy Status",
    "description": "Current pregnancy status",
    "sync_priority": "critical",
    "options": [
      {"value": "not_pregnant", "label": "Not Pregnant"},
      {"value": "pregnant", "label": "Pregnant"},
      {"value": "trying_to_conceive", "label": "Trying to Conceive"},
      {"value": "breastfeeding", "label": "Breastfeeding"},
      {"value": "not_applicable", "label": "Not Applicable"},
      {"value": "unknown", "label": "Unknown"}
    ],
    "source_field": "omaggregation.PregnancyStatus"
  },
  "last_physical_exam_date": {
    "type": "date",
    "label": "Last Physical Exam Date",
    "description": "Date of last comprehensive physical exam",
    "sync_priority": "medium",
    "source_field": "omaggregation.LastPhysical"
  },
  "last_lab_work_date": {
    "type": "date",
    "label": "Last Lab Work Date",
    "description": "Date of most recent lab work",
    "sync_priority": "high",
    "source_field": "omaggregation.LastLabs"
  },
  "next_appointment_due": {
    "type": "date",
    "label": "Next Appointment Due",
    "description": "Date when next appointment is due",
```

```

    "sync_priority": "high",
    "source_field": "omaggregation.NextApptDue"
  }
}

```

FINANCIAL INFORMATION (12 fields)

```

Unset
{
  "account_balance": {
    "type": "number",
    "label": "Account Balance",
    "description": "Current account balance",
    "decimal_places": 2,
    "sync_priority": "critical",
    "source_field": "omaggregation.BalTotal"
  },
  "insurance_balance": {
    "type": "number",
    "label": "Insurance Balance",
    "description": "Amount owed by insurance",
    "decimal_places": 2,
    "sync_priority": "high",
    "source_field": "omaggregation.InsEst"
  },
  "patient_balance": {
    "type": "number",
    "label": "Patient Balance",
    "description": "Amount owed by patient",
    "decimal_places": 2,
    "sync_priority": "critical",
    "source_field": "omaggregation.BalPat"
  },
  "primary_insurance": {
    "type": "single_line_text",
    "label": "Primary Insurance",
    "description": "Primary insurance carrier",
    "max_length": 100,
    "sync_priority": "high",
    "source_field": "omaggregation.Carrier"
  },
  "secondary_insurance": {
    "type": "single_line_text",
    "label": "Secondary Insurance",
    "description": "Secondary insurance carrier",
    "max_length": 100,

```

```
    "sync_priority": "medium",
    "source_field": "omaggregation.Carrier2"
  },
  "insurance_group_number": {
    "type": "single_line_text",
    "label": "Insurance Group Number",
    "description": "Insurance group/plan number",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.GroupNum"
  },
  "insurance_subscriber_id": {
    "type": "single_line_text",
    "label": "Insurance Subscriber ID",
    "description": "Insurance subscriber identifier",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.SubscriberID"
  },
  "payment_method": {
    "type": "dropdown",
    "label": "Preferred Payment Method",
    "description": "Patient's preferred payment method",
    "sync_priority": "medium",
    "options": [
      {"value": "credit_card", "label": "Credit Card"},
      {"value": "debit_card", "label": "Debit Card"},
      {"value": "bank_transfer", "label": "Bank Transfer"},
      {"value": "check", "label": "Check"},
      {"value": "cash", "label": "Cash"},
      {"value": "insurance_only", "label": "Insurance Only"},
      {"value": "payment_plan", "label": "Payment Plan"}
    ],
    "source_field": "omaggregation.PaymentMethod"
  },
  "billing_address_same": {
    "type": "checkbox",
    "label": "Billing Address Same as Home",
    "description": "Billing address is same as home address",
    "default_value": true,
    "sync_priority": "low",
    "source_field": "omaggregation.BillingSame"
  },
  "financial_assistance": {
    "type": "checkbox",
    "label": "Financial Assistance",
    "description": "Patient receives financial assistance",
```

```

    "default_value": false,
    "sync_priority": "medium",
    "source_field": "omaggregation.FinancialAid"
  },
  "payment_plan_active": {
    "type": "checkbox",
    "label": "Payment Plan Active",
    "description": "Patient has active payment plan",
    "default_value": false,
    "sync_priority": "high",
    "source_field": "omaggregation.PaymentPlan"
  },
  "credit_hold": {
    "type": "checkbox",
    "label": "Credit Hold",
    "description": "Account is on credit hold",
    "default_value": false,
    "sync_priority": "critical",
    "source_field": "omaggregation.CreditHold"
  }
}

```

PHYSICAL MEASUREMENTS (15 fields)

```

Unset
{
  "current_weight": {
    "type": "number",
    "label": "Current Weight (lbs)",
    "description": "Most recent weight measurement",
    "decimal_places": 1,
    "sync_priority": "high",
    "source_field": "omaggregation.WeightCurrent"
  },
  "goal_weight": {
    "type": "number",
    "label": "Goal Weight (lbs)",
    "description": "Patient's target weight",
    "decimal_places": 1,
    "sync_priority": "medium",
    "source_field": "omaggregation.WeightGoal"
  },
  "starting_weight": {
    "type": "number",
    "label": "Starting Weight (lbs)",
    "description": "Weight at program start",

```



```
    "decimal_places": 1,
    "sync_priority": "high",
    "source_field": "omaggregation.WeightStart"
  },
  "height_feet": {
    "type": "number",
    "label": "Height (feet)",
    "description": "Height in feet",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.HeightFt"
  },
  "height_inches": {
    "type": "number",
    "label": "Height (inches)",
    "description": "Additional inches",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.HeightIn"
  },
  "current_bmi": {
    "type": "number",
    "label": "Current BMI",
    "description": "Current body mass index",
    "decimal_places": 1,
    "sync_priority": "high",
    "source_field": "omaggregation.BMICurrent"
  },
  "body_fat_percentage": {
    "type": "number",
    "label": "Body Fat Percentage",
    "description": "Current body fat percentage",
    "decimal_places": 1,
    "sync_priority": "medium",
    "source_field": "omaggregation.BodyFat"
  },
  "muscle_mass": {
    "type": "number",
    "label": "Muscle Mass (lbs)",
    "description": "Current muscle mass",
    "decimal_places": 1,
    "sync_priority": "medium",
    "source_field": "omaggregation.MuscleMass"
  },
  "waist_circumference": {
    "type": "number",
    "label": "Waist Circumference (inches)",
```

```
    "description": "Waist measurement",
    "decimal_places": 1,
    "sync_priority": "medium",
    "source_field": "omaggregation.WaistCirc"
  },
  "hip_circumference": {
    "type": "number",
    "label": "Hip Circumference (inches)",
    "description": "Hip measurement",
    "decimal_places": 1,
    "sync_priority": "medium",
    "source_field": "omaggregation.HipCirc"
  },
  "blood_pressure_systolic": {
    "type": "number",
    "label": "Blood Pressure Systolic",
    "description": "Systolic blood pressure",
    "decimal_places": 0,
    "sync_priority": "high",
    "source_field": "omaggregation.BPSystolic"
  },
  "blood_pressure_diastolic": {
    "type": "number",
    "label": "Blood Pressure Diastolic",
    "description": "Diastolic blood pressure",
    "decimal_places": 0,
    "sync_priority": "high",
    "source_field": "omaggregation.BPDiastolic"
  },
  "resting_heart_rate": {
    "type": "number",
    "label": "Resting Heart Rate",
    "description": "Resting heart rate (BPM)",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.RestingHR"
  },
  "last_measurement_date": {
    "type": "date",
    "label": "Last Measurement Date",
    "description": "Date of last physical measurements",
    "sync_priority": "high",
    "source_field": "omaggregation.LastMeasurement"
  },
  "measurement_frequency": {
    "type": "dropdown",
    "label": "Measurement Frequency",
```

```

    "description": "How often measurements are taken",
    "sync_priority": "medium",
    "options": [
      {"value": "weekly", "label": "Weekly"},
      {"value": "biweekly", "label": "Bi-weekly"},
      {"value": "monthly", "label": "Monthly"},
      {"value": "quarterly", "label": "Quarterly"},
      {"value": "as_needed", "label": "As Needed"}
    ],
    "source_field": "omaggregation.MeasurementFreq"
  }
}

```

PROGRAM & GOALS INFORMATION (15 fields)

```

Unset
{
  "current_program": {
    "type": "dropdown",
    "label": "Current Program",
    "description": "Patient's current program enrollment",
    "sync_priority": "critical",
    "options": [
      {"value": "hrt_men", "label": "HRT - Men"},
      {"value": "hrt_women", "label": "HRT - Women"},
      {"value": "weight_management", "label": "Weight Management"},
      {"value": "wellness_optimization", "label": "Wellness Optimization"},
      {"value": "aesthetic_services", "label": "Aesthetic Services"},
      {"value": "nutrition_counseling", "label": "Nutrition Counseling"},
      {"value": "fitness_coaching", "label": "Fitness Coaching"},
      {"value": "multiple_programs", "label": "Multiple Programs"},
      {"value": "consultation_only", "label": "Consultation Only"},
      {"value": "inactive", "label": "Inactive"}
    ],
    "source_field": "omaggregation.CurrentProgram"
  },
  "program_start_date": {
    "type": "date",
    "label": "Program Start Date",
    "description": "Date patient started current program",
    "sync_priority": "high",
    "source_field": "omaggregation.ProgramStartDate"
  },
  "program_status": {
    "type": "dropdown",
    "label": "Program Status",

```

```
"description": "Current status in program",
"sync_priority": "critical",
"options": [
  {"value": "active", "label": "Active"},
  {"value": "on_hold", "label": "On Hold"},
  {"value": "completed", "label": "Completed"},
  {"value": "discontinued", "label": "Discontinued"},
  {"value": "transferred", "label": "Transferred"},
  {"value": "pending_start", "label": "Pending Start"}
],
"source_field": "omaggregation.ProgramStatus"
},
"primary_goal": {
  "type": "dropdown",
  "label": "Primary Goal",
  "description": "Patient's primary health goal",
  "sync_priority": "high",
  "options": [
    {"value": "weight_loss", "label": "Weight Loss"},
    {"value": "muscle_gain", "label": "Muscle Gain"},
    {"value": "hormone_optimization", "label": "Hormone Optimization"},
    {"value": "energy_improvement", "label": "Energy Improvement"},
    {"value": "sleep_improvement", "label": "Sleep Improvement"},
    {"value": "mood_enhancement", "label": "Mood Enhancement"},
    {"value": "libido_improvement", "label": "Libido Improvement"},
    {"value": "overall_wellness", "label": "Overall Wellness"},
    {"value": "anti_aging", "label": "Anti-Aging"},
    {"value": "athletic_performance", "label": "Athletic Performance"}
  ],
  "source_field": "omaggregation.PrimaryGoal"
},
"secondary_goals": {
  "type": "multiple_checkboxes",
  "label": "Secondary Goals",
  "description": "Additional health goals",
  "sync_priority": "medium",
  "options": [
    {"value": "weight_loss", "label": "Weight Loss"},
    {"value": "muscle_gain", "label": "Muscle Gain"},
    {"value": "hormone_optimization", "label": "Hormone Optimization"},
    {"value": "energy_improvement", "label": "Energy Improvement"},
    {"value": "sleep_improvement", "label": "Sleep Improvement"},
    {"value": "mood_enhancement", "label": "Mood Enhancement"},
    {"value": "libido_improvement", "label": "Libido Improvement"},
    {"value": "overall_wellness", "label": "Overall Wellness"},
    {"value": "anti_aging", "label": "Anti-Aging"},
    {"value": "athletic_performance", "label": "Athletic Performance"}
  ]
}
```

```

    ],
    "source_field": "omaggregation.SecondaryGoals"
  },
  "goal_achievement_status": {
    "type": "dropdown",
    "label": "Goal Achievement Status",
    "description": "Progress toward primary goal",
    "sync_priority": "high",
    "options": [
      {"value": "not_started", "label": "Not Started"},
      {"value": "in_progress", "label": "In Progress"},
      {"value": "on_track", "label": "On Track"},
      {"value": "ahead_of_schedule", "label": "Ahead of Schedule"},
      {"value": "behind_schedule", "label": "Behind Schedule"},
      {"value": "achieved", "label": "Achieved"},
      {"value": "modified", "label": "Goal Modified"}
    ],
    "source_field": "omaggregation.GoalStatus"
  },
  "motivation_level": {
    "type": "dropdown",
    "label": "Motivation Level",
    "description": "Patient's self-reported motivation level",
    "sync_priority": "medium",
    "options": [
      {"value": "very_high", "label": "Very High"},
      {"value": "high", "label": "High"},
      {"value": "moderate", "label": "Moderate"},
      {"value": "low", "label": "Low"},
      {"value": "very_low", "label": "Very Low"}
    ],
    "source_field": "omaggregation.MotivationLevel"
  },
  "compliance_score": {
    "type": "dropdown",
    "label": "Compliance Score",
    "description": "Patient's compliance with program",
    "sync_priority": "high",
    "options": [
      {"value": "excellent", "label": "Excellent (90-100%)"},
      {"value": "good", "label": "Good (80-89%)"},
      {"value": "fair", "label": "Fair (70-79%)"},
      {"value": "poor", "label": "Poor (60-69%)"},
      {"value": "very_poor", "label": "Very Poor (<60%)"}
    ],
    "source_field": "omaggregation.ComplianceScore"
  },

```

```
"barriers_to_success": {
  "type": "multiple_checkboxes",
  "label": "Barriers to Success",
  "description": "Identified barriers to goal achievement",
  "sync_priority": "medium",
  "options": [
    {"value": "time_constraints", "label": "Time Constraints"},
    {"value": "financial_concerns", "label": "Financial Concerns"},
    {"value": "family_obligations", "label": "Family Obligations"},
    {"value": "work_schedule", "label": "Work Schedule"},
    {"value": "health_issues", "label": "Health Issues"},
    {"value": "motivation_challenges", "label": "Motivation Challenges"},
    {"value": "knowledge_gaps", "label": "Knowledge Gaps"},
    {"value": "social_support", "label": "Lack of Social Support"},
    {"value": "travel_schedule", "label": "Travel Schedule"},
    {"value": "other", "label": "Other"}
  ],
  "source_field": "omaggregation.Barriers"
},
"support_system": {
  "type": "dropdown",
  "label": "Support System",
  "description": "Patient's support system strength",
  "sync_priority": "medium",
  "options": [
    {"value": "excellent", "label": "Excellent Support"},
    {"value": "good", "label": "Good Support"},
    {"value": "moderate", "label": "Moderate Support"},
    {"value": "limited", "label": "Limited Support"},
    {"value": "no_support", "label": "No Support"}
  ],
  "source_field": "omaggregation.SupportSystem"
},
"previous_programs": {
  "type": "multi_line_text",
  "label": "Previous Programs",
  "description": "History of previous programs at ENNU",
  "max_length": 500,
  "sync_priority": "medium",
  "source_field": "omaggregation.PreviousPrograms"
},
"program_satisfaction": {
  "type": "dropdown",
  "label": "Program Satisfaction",
  "description": "Patient satisfaction with current program",
  "sync_priority": "high",
  "options": [
```

```

        {"value": "very_satisfied", "label": "Very Satisfied"},
        {"value": "satisfied", "label": "Satisfied"},
        {"value": "neutral", "label": "Neutral"},
        {"value": "dissatisfied", "label": "Dissatisfied"},
        {"value": "very_dissatisfied", "label": "Very Dissatisfied"},
        {"value": "not_assessed", "label": "Not Assessed"}
    ],
    "source_field": "omaggregation.ProgramSatisfaction"
},
"next_program_review": {
    "type": "date",
    "label": "Next Program Review",
    "description": "Date of next program review",
    "sync_priority": "high",
    "source_field": "omaggregation.NextReview"
},
"program_modifications": {
    "type": "multi_line_text",
    "label": "Program Modifications",
    "description": "Any modifications made to standard program",
    "max_length": 1000,
    "sync_priority": "medium",
    "source_field": "omaggregation.ProgramMods"
},
"graduation_criteria": {
    "type": "multi_line_text",
    "label": "Graduation Criteria",
    "description": "Criteria for program completion",
    "max_length": 500,
    "sync_priority": "medium",
    "source_field": "omaggregation.GraduationCriteria"
}
}

```

TELEHEALTH INTEGRATION (12 fields)

Unset

```

{
  "telehealth_eligibility": {
    "type": "dropdown",
    "label": "Telehealth Eligibility",
    "description": "Patient's eligibility for telehealth services",
    "sync_priority": "high",
    "options": [
      {"value": "eligible", "label": "Eligible"},
      {"value": "restricted", "label": "Restricted - Medical Reasons"},
    ]
  }
}

```

```

        {"value": "technology_limited", "label": "Technology Limited"},
        {"value": "geographic_restricted", "label": "Geographic/Licensing
Restricted"},
        {"value": "insurance_limited", "label": "Insurance Limitations"},
        {"value": "patient_preference_no", "label": "Patient Prefers In-Person"},
        {"value": "not_assessed", "label": "Not Assessed"}
    ],
    "source_field": "omaggregation.TelehealthEligible"
},
"telehealth_consent_status": {
    "type": "dropdown",
    "label": "Telehealth Consent Status",
    "description": "Status of telehealth consent documentation",
    "sync_priority": "high",
    "options": [
        {"value": "signed", "label": "Signed and Current"},
        {"value": "expired", "label": "Expired - Needs Renewal"},
        {"value": "pending", "label": "Pending Signature"},
        {"value": "declined", "label": "Declined"},
        {"value": "not_required", "label": "Not Required"}
    ],
    "source_field": "omaggregation.TelehealthConsent"
},
"telehealth_consent_date": {
    "type": "date",
    "label": "Telehealth Consent Date",
    "description": "Date telehealth consent was signed",
    "sync_priority": "medium",
    "source_field": "omaggregation.TelehealthConsentDate"
},
"preferred_telehealth_platform": {
    "type": "dropdown",
    "label": "Preferred Telehealth Platform",
    "description": "Patient's preferred video platform",
    "sync_priority": "medium",
    "options": [
        {"value": "zoom", "label": "Zoom"},
        {"value": "teams", "label": "Microsoft Teams"},
        {"value": "webex", "label": "Cisco Webex"},
        {"value": "doxy_me", "label": "Doxy.me"},
        {"value": "simple_practice", "label": "SimplePractice"},
        {"value": "athenahealth", "label": "athenahealth"},
        {"value": "epic_mychart", "label": "Epic MyChart"},
        {"value": "phone_only", "label": "Phone Only"},
        {"value": "no_preference", "label": "No Preference"}
    ],
    "source_field": "omaggregation.TelehealthPlatform"
}

```



```

},
"patient_technology_assessment": {
  "type": "dropdown",
  "label": "Technology Assessment",
  "description": "Patient's technology capability for telehealth",
  "sync_priority": "medium",
  "options": [
    {"value": "excellent", "label": "Excellent - High Tech Comfort"},
    {"value": "good", "label": "Good - Basic Tech Skills"},
    {"value": "fair", "label": "Fair - Needs Assistance"},
    {"value": "poor", "label": "Poor - Significant Support Needed"},
    {"value": "not_assessed", "label": "Not Assessed"}
  ],
  "source_field": "omaggregation.TechAssessment"
},
"internet_connectivity": {
  "type": "dropdown",
  "label": "Internet Connectivity",
  "description": "Patient's internet connection quality",
  "sync_priority": "medium",
  "options": [
    {"value": "high_speed", "label": "High Speed Broadband"},
    {"value": "adequate", "label": "Adequate for Video"},
    {"value": "limited", "label": "Limited - Audio Only"},
    {"value": "unreliable", "label": "Unreliable Connection"},
    {"value": "mobile_only", "label": "Mobile Data Only"},
    {"value": "unknown", "label": "Unknown"}
  ],
  "source_field": "omaggregation.InternetQuality"
},
"device_capabilities": {
  "type": "multiple_checkboxes",
  "label": "Available Devices",
  "description": "Devices patient has access to for telehealth",
  "sync_priority": "low",
  "options": [
    {"value": "smartphone", "label": "Smartphone"},
    {"value": "tablet", "label": "Tablet"},
    {"value": "laptop", "label": "Laptop"},
    {"value": "desktop", "label": "Desktop Computer"},
    {"value": "smart_tv", "label": "Smart TV"},
    {"value": "webcam", "label": "External Webcam"},
    {"value": "headset", "label": "Headset/Microphone"}
  ],
  "source_field": "omaggregation.DeviceCapabilities"
},
"telehealth_support_person": {

```

```
"type": "single_line_text",
"label": "Telehealth Support Person",
"description": "Person who assists patient with technology",
"max_length": 100,
"sync_priority": "low",
"source_field": "omaggregation.TechSupportPerson"
},
"state_of_residence": {
  "type": "dropdown",
  "label": "State of Residence",
  "description": "Patient's state of residence for licensing compliance",
  "sync_priority": "high",
  "options": [
    {"value": "AL", "label": "Alabama"},
    {"value": "AK", "label": "Alaska"},
    {"value": "AZ", "label": "Arizona"},
    {"value": "AR", "label": "Arkansas"},
    {"value": "CA", "label": "California"},
    {"value": "CO", "label": "Colorado"},
    {"value": "CT", "label": "Connecticut"},
    {"value": "DE", "label": "Delaware"},
    {"value": "FL", "label": "Florida"},
    {"value": "GA", "label": "Georgia"},
    {"value": "HI", "label": "Hawaii"},
    {"value": "ID", "label": "Idaho"},
    {"value": "IL", "label": "Illinois"},
    {"value": "IN", "label": "Indiana"},
    {"value": "IA", "label": "Iowa"},
    {"value": "KS", "label": "Kansas"},
    {"value": "KY", "label": "Kentucky"},
    {"value": "LA", "label": "Louisiana"},
    {"value": "ME", "label": "Maine"},
    {"value": "MD", "label": "Maryland"},
    {"value": "MA", "label": "Massachusetts"},
    {"value": "MI", "label": "Michigan"},
    {"value": "MN", "label": "Minnesota"},
    {"value": "MS", "label": "Mississippi"},
    {"value": "MO", "label": "Missouri"},
    {"value": "MT", "label": "Montana"},
    {"value": "NE", "label": "Nebraska"},
    {"value": "NV", "label": "Nevada"},
    {"value": "NH", "label": "New Hampshire"},
    {"value": "NJ", "label": "New Jersey"},
    {"value": "NM", "label": "New Mexico"},
    {"value": "NY", "label": "New York"},
    {"value": "NC", "label": "North Carolina"},
    {"value": "ND", "label": "North Dakota"},
  ]
}
```

```

        {"value": "OH", "label": "Ohio"},
        {"value": "OK", "label": "Oklahoma"},
        {"value": "OR", "label": "Oregon"},
        {"value": "PA", "label": "Pennsylvania"},
        {"value": "RI", "label": "Rhode Island"},
        {"value": "SC", "label": "South Carolina"},
        {"value": "SD", "label": "South Dakota"},
        {"value": "TN", "label": "Tennessee"},
        {"value": "TX", "label": "Texas"},
        {"value": "UT", "label": "Utah"},
        {"value": "VT", "label": "Vermont"},
        {"value": "VA", "label": "Virginia"},
        {"value": "WA", "label": "Washington"},
        {"value": "WV", "label": "West Virginia"},
        {"value": "WI", "label": "Wisconsin"},
        {"value": "WY", "label": "Wyoming"},
        {"value": "DC", "label": "District of Columbia"}
    ],
    "source_field": "omaggregation.StateResidence"
},
"telehealth_insurance_coverage": {
    "type": "dropdown",
    "label": "Telehealth Insurance Coverage",
    "description": "Insurance coverage for telehealth services",
    "sync_priority": "medium",
    "options": [
        {"value": "full_coverage", "label": "Full Coverage"},
        {"value": "partial_coverage", "label": "Partial Coverage"},
        {"value": "no_coverage", "label": "No Coverage"},
        {"value": "deductible_applies", "label": "Deductible Applies"},
        {"value": "copay_different", "label": "Different Copay"},
        {"value": "verification_needed", "label": "Verification Needed"},
        {"value": "unknown", "label": "Unknown"}
    ],
    "source_field": "omaggregation.TelehealthInsurance"
},
"telehealth_session_count": {
    "type": "number",
    "label": "Total Telehealth Sessions",
    "description": "Total number of telehealth sessions completed",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.TelehealthSessionCount"
}
}

```

MARKETING & ENGAGEMENT (8 fields)

Unset

```
{
  "lead_source": {
    "type": "dropdown",
    "label": "Lead Source",
    "description": "Original source of lead",
    "sync_priority": "high",
    "options": [
      {"value": "facebook_ads", "label": "Facebook Ads"},
      {"value": "google_ads", "label": "Google Ads"},
      {"value": "organic_search", "label": "Organic Search"},
      {"value": "referral", "label": "Referral"},
      {"value": "direct_website", "label": "Direct Website"},
      {"value": "social_media", "label": "Social Media"},
      {"value": "email_marketing", "label": "Email Marketing"},
      {"value": "print_advertising", "label": "Print Advertising"},
      {"value": "radio_tv", "label": "Radio/TV"},
      {"value": "event", "label": "Event/Seminar"},
      {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.LeadSource"
  },
  "facebook_campaign_id": {
    "type": "single_line_text",
    "label": "Facebook Campaign ID",
    "description": "Facebook advertising campaign identifier",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.FBCampaignID"
  },
  "google_analytics_client_id": {
    "type": "single_line_text",
    "label": "Google Analytics Client ID",
    "description": "Google Analytics client identifier",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.GAClientID"
  },
  "utm_source": {
    "type": "single_line_text",
    "label": "UTM Source",
    "description": "UTM source parameter",
    "max_length": 100,
    "sync_priority": "medium",
    "source_field": "omaggregation.UTMSource"
  },
}
```

```

"utm_medium": {
  "type": "single_line_text",
  "label": "UTM Medium",
  "description": "UTM medium parameter",
  "max_length": 100,
  "sync_priority": "medium",
  "source_field": "omaggregation.UTMMedium"
},
"utm_campaign": {
  "type": "single_line_text",
  "label": "UTM Campaign",
  "description": "UTM campaign parameter",
  "max_length": 100,
  "sync_priority": "medium",
  "source_field": "omaggregation.UTMCampaign"
},
"engagement_score": {
  "type": "number",
  "label": "Engagement Score",
  "description": "Patient engagement score (0-100)",
  "decimal_places": 0,
  "sync_priority": "medium",
  "source_field": "omaggregation.EngagementScore"
},
"last_engagement_date": {
  "type": "date",
  "label": "Last Engagement Date",
  "description": "Date of last meaningful engagement",
  "sync_priority": "medium",
  "source_field": "omaggregation.LastEngagement"
}
}

```

PROVIDER & CLINIC INFORMATION (8 fields)

```

Unset
{
  "primary_provider": {
    "type": "single_line_text",
    "label": "Primary Provider",
    "description": "Patient's primary provider at ENNU",
    "max_length": 100,
    "sync_priority": "high",
    "source_field": "omaggregation.PriProv"
  },
  "secondary_provider": {

```

```
    "type": "single_line_text",
    "label": "Secondary Provider",
    "description": "Secondary provider or care coordinator",
    "max_length": 100,
    "sync_priority": "medium",
    "source_field": "omaggregation.SecProv"
  },
  "primary_clinic": {
    "type": "dropdown",
    "label": "Primary Clinic",
    "description": "Patient's primary clinic location",
    "sync_priority": "high",
    "options": [
      {"value": "main_clinic", "label": "Main Clinic"},
      {"value": "north_location", "label": "North Location"},
      {"value": "south_location", "label": "South Location"},
      {"value": "virtual_only", "label": "Virtual Only"},
      {"value": "multiple_locations", "label": "Multiple Locations"}
    ],
    "source_field": "omaggregation.PrimaryClinic"
  },
  "preferred_appointment_time": {
    "type": "dropdown",
    "label": "Preferred Appointment Time",
    "description": "Patient's preferred appointment time",
    "sync_priority": "medium",
    "options": [
      {"value": "early_morning", "label": "Early Morning (7-9 AM)"},
      {"value": "morning", "label": "Morning (9-11 AM)"},
      {"value": "late_morning", "label": "Late Morning (11 AM-1 PM)"},
      {"value": "afternoon", "label": "Afternoon (1-3 PM)"},
      {"value": "late_afternoon", "label": "Late Afternoon (3-5 PM)"},
      {"value": "evening", "label": "Evening (5-7 PM)"},
      {"value": "flexible", "label": "Flexible"}
    ],
    "source_field": "omaggregation.PreferredTime"
  },
  "preferred_appointment_day": {
    "type": "multiple_checkboxes",
    "label": "Preferred Appointment Days",
    "description": "Days patient prefers for appointments",
    "sync_priority": "medium",
    "options": [
      {"value": "monday", "label": "Monday"},
      {"value": "tuesday", "label": "Tuesday"},
      {"value": "wednesday", "label": "Wednesday"},
      {"value": "thursday", "label": "Thursday"},

```

```

        {"value": "friday", "label": "Friday"},
        {"value": "saturday", "label": "Saturday"},
        {"value": "sunday", "label": "Sunday"}
    ],
    "source_field": "omaggregation.PreferredDays"
},
"appointment_reminder_preference": {
    "type": "dropdown",
    "label": "Appointment Reminder Preference",
    "description": "How patient wants appointment reminders",
    "sync_priority": "medium",
    "options": [
        {"value": "email_only", "label": "Email Only"},
        {"value": "text_only", "label": "Text Only"},
        {"value": "phone_only", "label": "Phone Only"},
        {"value": "email_and_text", "label": "Email and Text"},
        {"value": "all_methods", "label": "All Methods"},
        {"value": "no_reminders", "label": "No Reminders"}
    ],
    "source_field": "omaggregation.ReminderPref"
},
"care_team_notes": {
    "type": "multi_line_text",
    "label": "Care Team Notes",
    "description": "Internal notes for care team",
    "max_length": 2000,
    "sync_priority": "medium",
    "source_field": "omaggregation.CareTeamNotes"
},
"special_instructions": {
    "type": "multi_line_text",
    "label": "Special Instructions",
    "description": "Special instructions for patient care",
    "max_length": 1000,
    "sync_priority": "medium",
    "source_field": "omaggregation.SpecialInstructions"
}
}

```

STATUS & LIFECYCLE TRACKING (7 fields)

Unset

```

{
  "patient_status": {
    "type": "dropdown",
    "label": "Patient Status",

```

```
"description": "Current patient status",
"sync_priority": "critical",
"options": [
  {"value": "active", "label": "Active"},
  {"value": "inactive", "label": "Inactive"},
  {"value": "prospective", "label": "Prospective"},
  {"value": "consultation_scheduled", "label": "Consultation Scheduled"},
  {"value": "consultation_completed", "label": "Consultation Completed"},
  {"value": "treatment_started", "label": "Treatment Started"},
  {"value": "on_hold", "label": "On Hold"},
  {"value": "transferred", "label": "Transferred"},
  {"value": "discharged", "label": "Discharged"},
  {"value": "deceased", "label": "Deceased"}
],
"source_field": "omaggregation.PatientStatus"
},
"lifecycle_stage": {
  "type": "dropdown",
  "label": "Lifecycle Stage",
  "description": "Patient's current lifecycle stage",
  "sync_priority": "high",
  "options": [
    {"value": "lead", "label": "Lead"},
    {"value": "prospect", "label": "Prospect"},
    {"value": "consultation_booked", "label": "Consultation Booked"},
    {"value": "new_patient", "label": "New Patient"},
    {"value": "active_patient", "label": "Active Patient"},
    {"value": "returning_patient", "label": "Returning Patient"},
    {"value": "at_risk", "label": "At Risk"},
    {"value": "churned", "label": "Churned"},
    {"value": "reactivated", "label": "Reactivated"}
  ],
  "source_field": "omaggregation.LifecycleStage"
},
"first_visit_date": {
  "type": "date",
  "label": "First Visit Date",
  "description": "Date of first visit to ENNU",
  "sync_priority": "high",
  "source_field": "omaggregation.FirstVisit"
},
"last_visit_date": {
  "type": "date",
  "label": "Last Visit Date",
  "description": "Date of most recent visit",
  "sync_priority": "high",
  "source_field": "omaggregation.LastVisit"
}
```



```

    },
    "total_visits": {
      "type": "number",
      "label": "Total Visits",
      "description": "Total number of visits to ENNU",
      "decimal_places": 0,
      "sync_priority": "medium",
      "source_field": "omaggregation.TotalVisits"
    },
    "patient_since": {
      "type": "date",
      "label": "Patient Since",
      "description": "Date patient first became a patient",
      "sync_priority": "high",
      "source_field": "omaggregation.PatientSince"
    },
    "risk_level": {
      "type": "dropdown",
      "label": "Risk Level",
      "description": "Patient's risk level for churn",
      "sync_priority": "high",
      "options": [
        {"value": "low", "label": "Low Risk"},
        {"value": "medium", "label": "Medium Risk"},
        {"value": "high", "label": "High Risk"},
        {"value": "critical", "label": "Critical Risk"},
        {"value": "not_assessed", "label": "Not Assessed"}
      ],
      "source_field": "omaggregation.RiskLevel"
    }
  }
}

```

Object Associations for Contacts

Unset

```

{
  "contacts_associations": {
    "to_companies": {
      "relationship": "many_to_one",
      "required": false,
      "description": "Patients can be associated with employer companies",
      "auto_association_rules": [
        "Associate based on email domain",
        "Manual association for corporate wellness programs"
      ]
    }
  }
}

```

```
},
"to_deals": {
  "relationship": "one_to_many",
  "required": false,
  "description": "Patients can have multiple program enrollments",
  "auto_association_rules": [
    "Create deal when patient enrolls in program",
    "Associate all deals to primary contact"
  ]
},
"to_appointments": {
  "relationship": "one_to_many",
  "required": false,
  "description": "Patients can have multiple appointments",
  "auto_association_rules": [
    "Auto-associate all appointments to patient",
    "Sync appointment data to contact record"
  ]
},
"to_services": {
  "relationship": "many_to_many",
  "required": false,
  "description": "Patients can receive multiple services",
  "auto_association_rules": [
    "Associate based on program enrollment",
    "Track service utilization"
  ]
},
"to_tickets": {
  "relationship": "one_to_many",
  "required": false,
  "description": "Patients can have multiple support tickets",
  "auto_association_rules": [
    "Auto-create ticket associations",
    "Track support history"
  ]
},
"to_products": {
  "relationship": "many_to_many",
  "required": false,
  "description": "Patients can purchase multiple products",
  "auto_association_rules": [
    "Associate based on WooCommerce orders",
    "Sync purchase history"
  ]
},
"to_measurement_history": {
```

```

    "relationship": "one_to_many",
    "required": false,
    "description": "Patients have multiple measurement records",
    "auto_association_rules": [
      "Auto-associate all measurements",
      "Maintain chronological order"
    ]
  },
  "to_telehealth_sessions": {
    "relationship": "one_to_many",
    "required": false,
    "description": "Patients can have multiple telehealth sessions",
    "auto_association_rules": [
      "Auto-associate all telehealth sessions",
      "Track virtual care history"
    ]
  }
}

```

2. COMPANIES OBJECT - CLINIC LOCATIONS & CORPORATE ACCOUNTS

Purpose & Scope

The Companies object will serve dual purposes: tracking ENNU clinic locations and managing corporate wellness program accounts. This enables location-based reporting and corporate client management.

Standard Properties Utilized

- **Company Name** - Clinic name or corporate client name
- **Company Domain Name** - Website domain for auto-association
- **Industry** - Healthcare for clinics, various for corporate clients
- **Number of Employees** - Staff count for clinics, employee count for corporate
- **Annual Revenue** - Revenue for corporate clients
- **Phone Number** - Primary contact number
- **Address** - Complete address
- **City** - City location
- **State/Region** - State location
- **Postal Code** - ZIP code
- **Country** - Country location

- **Website URL** - Company website

Custom Properties Specification

CLINIC LOCATION INFORMATION (8 fields)

Unset

```
{
  "location_type": {
    "type": "dropdown",
    "label": "Location Type",
    "description": "Type of location or company",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "main_clinic", "label": "Main Clinic"},
      {"value": "satellite_clinic", "label": "Satellite Clinic"},
      {"value": "virtual_clinic", "label": "Virtual Clinic"},
      {"value": "corporate_client", "label": "Corporate Client"},
      {"value": "partner_clinic", "label": "Partner Clinic"},
      {"value": "administrative", "label": "Administrative Office"}
    ],
    "source_field": "manual_entry"
  },
  "clinic_id": {
    "type": "single_line_text",
    "label": "Clinic ID",
    "description": "Unique identifier for clinic location",
    "max_length": 20,
    "sync_priority": "critical",
    "source_field": "omaggregation.ClinicID"
  },
  "operating_hours": {
    "type": "multi_line_text",
    "label": "Operating Hours",
    "description": "Clinic operating hours by day",
    "max_length": 500,
    "sync_priority": "high",
    "source_field": "manual_entry"
  },
  "services_offered": {
    "type": "multiple_checkboxes",
    "label": "Services Offered",
    "description": "Services available at this location",
    "sync_priority": "high",
    "options": [
      {"value": "hrt_men", "label": "HRT - Men"},
      {"value": "hrt_women", "label": "HRT - Women"}
    ]
  }
}
```

```

        {"value": "weight_management", "label": "Weight Management"},
        {"value": "wellness_programs", "label": "Wellness Programs"},
        {"value": "aesthetic_services", "label": "Aesthetic Services"},
        {"value": "telehealth", "label": "Telehealth"},
        {"value": "nutrition_counseling", "label": "Nutrition Counseling"},
        {"value": "fitness_coaching", "label": "Fitness Coaching"},
        {"value": "lab_services", "label": "Lab Services"},
        {"value": "pharmacy_services", "label": "Pharmacy Services"}
    ],
    "source_field": "manual_entry"
},
"appointment_capacity": {
    "type": "number",
    "label": "Daily Appointment Capacity",
    "description": "Maximum appointments per day",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "manual_entry"
},
"telehealth_capable": {
    "type": "checkbox",
    "label": "Telehealth Capable",
    "description": "Location can provide telehealth services",
    "default_value": true,
    "sync_priority": "high",
    "source_field": "manual_entry"
},
"parking_available": {
    "type": "checkbox",
    "label": "Parking Available",
    "description": "On-site parking is available",
    "default_value": true,
    "sync_priority": "low",
    "source_field": "manual_entry"
},
"accessibility_features": {
    "type": "multiple_checkboxes",
    "label": "Accessibility Features",
    "description": "Accessibility accommodations available",
    "sync_priority": "medium",
    "options": [
        {"value": "wheelchair_accessible", "label": "Wheelchair Accessible"},
        {"value": "elevator_access", "label": "Elevator Access"},
        {"value": "accessible_parking", "label": "Accessible Parking"},
        {"value": "hearing_loop", "label": "Hearing Loop"},
        {"value": "braille_signage", "label": "Braille Signage"},
        {"value": "accessible_restrooms", "label": "Accessible Restrooms"}
    ]
}

```

```

    ],
    "source_field": "manual_entry"
  }
}

```

CORPORATE CLIENT INFORMATION (7 fields)

Unset

```

{
  "corporate_program_type": {
    "type": "dropdown",
    "label": "Corporate Program Type",
    "description": "Type of corporate wellness program",
    "sync_priority": "high",
    "options": [
      {"value": "executive_wellness", "label": "Executive Wellness"},
      {"value": "employee_wellness", "label": "Employee Wellness"},
      {"value": "group_hrt", "label": "Group HRT Program"},
      {"value": "weight_management", "label": "Weight Management"},
      {"value": "comprehensive_wellness", "label": "Comprehensive Wellness"},
      {"value": "consultation_only", "label": "Consultation Only"},
      {"value": "not_applicable", "label": "Not Applicable"}
    ],
    "source_field": "manual_entry"
  },
  "employee_count": {
    "type": "number",
    "label": "Employee Count",
    "description": "Number of employees eligible for program",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "manual_entry"
  },
  "contract_start_date": {
    "type": "date",
    "label": "Contract Start Date",
    "description": "Start date of corporate contract",
    "sync_priority": "high",
    "source_field": "manual_entry"
  },
  "contract_end_date": {
    "type": "date",
    "label": "Contract End Date",
    "description": "End date of corporate contract",
    "sync_priority": "high",
    "source_field": "manual_entry"
  }
}

```

```

    },
    "billing_contact": {
      "type": "single_line_text",
      "label": "Billing Contact",
      "description": "Primary billing contact name",
      "max_length": 100,
      "sync_priority": "high",
      "source_field": "manual_entry"
    },
    "program_administrator": {
      "type": "single_line_text",
      "label": "Program Administrator",
      "description": "Corporate program administrator",
      "max_length": 100,
      "sync_priority": "medium",
      "source_field": "manual_entry"
    },
    "auto_association_domain": {
      "type": "single_line_text",
      "label": "Auto-Association Domain",
      "description": "Email domain for automatic patient association",
      "max_length": 100,
      "sync_priority": "high",
      "source_field": "manual_entry"
    }
  }
}

```

Object Associations for Companies

```

Unset
{
  "companies_associations": {
    "to_contacts": {
      "relationship": "one_to_many",
      "required": false,
      "description": "Companies can have multiple associated
patients/employees",
      "auto_association_rules": [
        "Auto-associate contacts based on email domain",
        "Manual association for corporate wellness participants"
      ]
    },
    "to_deals": {
      "relationship": "one_to_many",
      "required": false,

```

```

    "description": "Companies can have multiple program deals",
    "auto_association_rules": [
      "Associate corporate wellness deals",
      "Track location-based revenue"
    ]
  },
  "to_appointments": {
    "relationship": "one_to_many",
    "required": false,
    "description": "Appointments are associated with clinic locations",
    "auto_association_rules": [
      "Auto-associate based on appointment location",
      "Track location utilization"
    ]
  }
}

```

3. DEALS OBJECT - PROGRAM ENROLLMENTS & REVENUE TRACKING

Purpose & Scope

The Deals object tracks program enrollments, revenue, and patient journey through sales processes. Each deal represents a program enrollment or service package, enabling comprehensive revenue tracking and program performance analysis.

Standard Properties Utilized

- **Deal Name** - Program name and patient identifier
- **Deal Stage** - Current stage in enrollment process
- **Deal Amount** - Program value/revenue
- **Close Date** - Program start date or completion date
- **Deal Type** - Type of program or service
- **Deal Owner** - Assigned sales rep or provider
- **Pipeline** - Sales pipeline (New Patient, Existing Patient, Corporate)
- **Deal Source** - How the opportunity was generated
- **Priority** - Deal priority level
- **Probability** - Likelihood of enrollment completion

Custom Properties Specification

PROGRAM ENROLLMENT INFORMATION (12 fields)

Unset

```
{
  "program_type": {
    "type": "dropdown",
    "label": "Program Type",
    "description": "Type of program or service being enrolled",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "hrt_men_basic", "label": "HRT Men - Basic"},
      {"value": "hrt_men_premium", "label": "HRT Men - Premium"},
      {"value": "hrt_women_basic", "label": "HRT Women - Basic"},
      {"value": "hrt_women_premium", "label": "HRT Women - Premium"},
      {"value": "weight_management_basic", "label": "Weight Management -
Basic"},
      {"value": "weight_management_premium", "label": "Weight Management -
Premium"},
      {"value": "wellness_optimization", "label": "Wellness Optimization"},
      {"value": "aesthetic_services", "label": "Aesthetic Services"},
      {"value": "nutrition_counseling", "label": "Nutrition Counseling"},
      {"value": "fitness_coaching", "label": "Fitness Coaching"},
      {"value": "comprehensive_wellness", "label": "Comprehensive Wellness"},
      {"value": "consultation_only", "label": "Consultation Only"},
      {"value": "corporate_wellness", "label": "Corporate Wellness"},
      {"value": "custom_program", "label": "Custom Program"}
    ],
    "source_field": "omaggregation.ProgramType"
  },
  "enrollment_status": {
    "type": "dropdown",
    "label": "Enrollment Status",
    "description": "Current enrollment status",
    "sync_priority": "critical",
    "options": [
      {"value": "inquiry", "label": "Initial Inquiry"},
      {"value": "consultation_scheduled", "label": "Consultation Scheduled"},
      {"value": "consultation_completed", "label": "Consultation Completed"},
      {"value": "proposal_sent", "label": "Proposal Sent"},
      {"value": "contract_review", "label": "Contract Review"},
      {"value": "enrolled", "label": "Enrolled"},
      {"value": "active", "label": "Active"},
      {"value": "on_hold", "label": "On Hold"},
      {"value": "completed", "label": "Completed"}
    ]
  }
}
```

```

        {"value": "cancelled", "label": "Cancelled"},
        {"value": "lost", "label": "Lost"}
    ],
    "source_field": "omaggregation.EnrollmentStatus"
},
"program_duration_months": {
    "type": "number",
    "label": "Program Duration (Months)",
    "description": "Length of program in months",
    "decimal_places": 0,
    "sync_priority": "high",
    "source_field": "omaggregation.ProgramDuration"
},
"monthly_program_fee": {
    "type": "number",
    "label": "Monthly Program Fee",
    "description": "Monthly fee for program",
    "decimal_places": 2,
    "sync_priority": "high",
    "source_field": "omaggregation.MonthlyFee"
},
"setup_fee": {
    "type": "number",
    "label": "Setup Fee",
    "description": "One-time setup or enrollment fee",
    "decimal_places": 2,
    "sync_priority": "medium",
    "source_field": "omaggregation.SetupFee"
},
"discount_applied": {
    "type": "number",
    "label": "Discount Applied",
    "description": "Total discount amount applied",
    "decimal_places": 2,
    "sync_priority": "medium",
    "source_field": "omaggregation.DiscountAmount"
},
"discount_reason": {
    "type": "dropdown",
    "label": "Discount Reason",
    "description": "Reason for discount application",
    "sync_priority": "medium",
    "options": [
        {"value": "new_patient", "label": "New Patient Discount"},
        {"value": "referral", "label": "Referral Discount"},
        {"value": "corporate", "label": "Corporate Discount"},
        {"value": "financial_hardship", "label": "Financial Hardship"}
    ]
}

```

```
        {"value": "promotional", "label": "Promotional Offer"},
        {"value": "loyalty", "label": "Loyalty Discount"},
        {"value": "staff", "label": "Staff Discount"},
        {"value": "other", "label": "Other"},
        {"value": "none", "label": "No Discount"}
    ],
    "source_field": "omaggregation.DiscountReason"
},
"payment_plan": {
    "type": "dropdown",
    "label": "Payment Plan",
    "description": "Payment plan structure",
    "sync_priority": "high",
    "options": [
        {"value": "monthly", "label": "Monthly"},
        {"value": "quarterly", "label": "Quarterly"},
        {"value": "semi_annual", "label": "Semi-Annual"},
        {"value": "annual", "label": "Annual"},
        {"value": "pay_in_full", "label": "Pay in Full"},
        {"value": "custom", "label": "Custom Plan"}
    ],
    "source_field": "omaggregation.PaymentPlan"
},
"contract_signed_date": {
    "type": "date",
    "label": "Contract Signed Date",
    "description": "Date contract was signed",
    "sync_priority": "high",
    "source_field": "omaggregation.ContractDate"
},
"program_start_date": {
    "type": "date",
    "label": "Program Start Date",
    "description": "Date program officially started",
    "sync_priority": "critical",
    "source_field": "omaggregation.ProgramStartDate"
},
"expected_completion_date": {
    "type": "date",
    "label": "Expected Completion Date",
    "description": "Expected program completion date",
    "sync_priority": "high",
    "source_field": "omaggregation.ExpectedCompletion"
},
"renewal_eligible": {
    "type": "checkbox",
    "label": "Renewal Eligible",
```

```

    "description": "Patient is eligible for program renewal",
    "default_value": false,
    "sync_priority": "medium",
    "source_field": "omaggregation.RenewalEligible"
  }
}

```

WOOCOMMERCE INTEGRATION FIELDS (8 fields)

Unset

```

{
  "woocommerce_order_id": {
    "type": "single_line_text",
    "label": "WooCommerce Order ID",
    "description": "Associated WooCommerce order identifier",
    "max_length": 50,
    "sync_priority": "critical",
    "source_field": "woocommerce.order_id"
  },
  "woocommerce_subscription_id": {
    "type": "single_line_text",
    "label": "WooCommerce Subscription ID",
    "description": "Associated subscription identifier",
    "max_length": 50,
    "sync_priority": "high",
    "source_field": "woocommerce.subscription_id"
  },
  "subscription_status": {
    "type": "dropdown",
    "label": "Subscription Status",
    "description": "Current subscription status in WooCommerce",
    "sync_priority": "critical",
    "options": [
      {"value": "active", "label": "Active"},
      {"value": "on_hold", "label": "On Hold"},
      {"value": "cancelled", "label": "Cancelled"},
      {"value": "expired", "label": "Expired"},
      {"value": "pending_cancellation", "label": "Pending Cancellation"},
      {"value": "trial", "label": "Trial Period"},
      {"value": "switched", "label": "Switched"}
    ],
    "source_field": "woocommerce.subscription_status"
  },
  "next_payment_date": {
    "type": "date",
    "label": "Next Payment Date",

```

```
    "description": "Date of next scheduled payment",
    "sync_priority": "high",
    "source_field": "woocommerce.next_payment_date"
  },
  "last_payment_date": {
    "type": "date",
    "label": "Last Payment Date",
    "description": "Date of most recent payment",
    "sync_priority": "medium",
    "source_field": "woocommerce.last_payment_date"
  },
  "payment_method": {
    "type": "dropdown",
    "label": "Payment Method",
    "description": "Payment method used for subscription",
    "sync_priority": "medium",
    "options": [
      {"value": "credit_card", "label": "Credit Card"},
      {"value": "debit_card", "label": "Debit Card"},
      {"value": "bank_transfer", "label": "Bank Transfer"},
      {"value": "paypal", "label": "PayPal"},
      {"value": "stripe", "label": "Stripe"},
      {"value": "manual", "label": "Manual Payment"}
    ],
    "source_field": "woocommerce.payment_method"
  },
  "failed_payment_count": {
    "type": "number",
    "label": "Failed Payment Count",
    "description": "Number of consecutive failed payments",
    "decimal_places": 0,
    "sync_priority": "high",
    "source_field": "woocommerce.failed_payment_count"
  },
  "total_revenue": {
    "type": "number",
    "label": "Total Revenue",
    "description": "Total revenue generated from this deal",
    "decimal_places": 2,
    "sync_priority": "high",
    "source_field": "calculated_field"
  }
}
```

Deal Stages Configuration

Unset

```
{
  "deal_stages": {
    "new_patient_pipeline": [
      {
        "stage_name": "Initial Inquiry",
        "probability": 10,
        "description": "Patient has made initial contact"
      },
      {
        "stage_name": "Consultation Scheduled",
        "probability": 25,
        "description": "Consultation appointment scheduled"
      },
      {
        "stage_name": "Consultation Completed",
        "probability": 50,
        "description": "Initial consultation completed"
      },
      {
        "stage_name": "Proposal Presented",
        "probability": 75,
        "description": "Program proposal presented to patient"
      },
      {
        "stage_name": "Contract Review",
        "probability": 90,
        "description": "Patient reviewing contract"
      },
      {
        "stage_name": "Enrolled",
        "probability": 100,
        "description": "Patient enrolled in program"
      }
    ],
    "existing_patient_pipeline": [
      {
        "stage_name": "Program Discussion",
        "probability": 30,
        "description": "Discussing additional programs"
      },
      {
        "stage_name": "Proposal Presented",
        "probability": 60,
        "description": "Additional program proposal presented"
      },
    ]
  }
}
```

```

    {
      "stage_name": "Decision Pending",
      "probability": 80,
      "description": "Patient considering enrollment"
    },
    {
      "stage_name": "Enrolled",
      "probability": 100,
      "description": "Enrolled in additional program"
    }
  ],
  "corporate_pipeline": [
    {
      "stage_name": "Initial Contact",
      "probability": 10,
      "description": "Initial corporate contact made"
    },
    {
      "stage_name": "Needs Assessment",
      "probability": 25,
      "description": "Assessing corporate wellness needs"
    },
    {
      "stage_name": "Proposal Development",
      "probability": 40,
      "description": "Developing custom proposal"
    },
    {
      "stage_name": "Proposal Presented",
      "probability": 60,
      "description": "Proposal presented to decision makers"
    },
    {
      "stage_name": "Contract Negotiation",
      "probability": 80,
      "description": "Negotiating contract terms"
    },
    {
      "stage_name": "Contract Signed",
      "probability": 100,
      "description": "Corporate contract signed"
    }
  ]
}

```

Object Associations for Deals

Unset

```
{
  "deals_associations": {
    "to_contacts": {
      "relationship": "many_to_one",
      "required": true,
      "description": "Each deal must be associated with a patient",
      "auto_association_rules": [
        "Auto-associate to primary contact",
        "Sync deal updates to contact record"
      ]
    },
    "to_companies": {
      "relationship": "many_to_one",
      "required": false,
      "description": "Corporate deals associated with company",
      "auto_association_rules": [
        "Auto-associate corporate wellness deals",
        "Track company program utilization"
      ]
    },
    "to_products": {
      "relationship": "many_to_many",
      "required": false,
      "description": "Deals can include multiple products/services",
      "auto_association_rules": [
        "Associate based on program components",
        "Sync with WooCommerce line items"
      ]
    },
    "to_appointments": {
      "relationship": "one_to_many",
      "required": false,
      "description": "Track appointments related to deal",
      "auto_association_rules": [
        "Associate consultation appointments",
        "Track program-related visits"
      ]
    }
  }
}
```

4. PRODUCTS OBJECT - SERVICE CATALOG & WOOCOMMERCE SYNC

Purpose & Scope

The Products object maintains the complete catalog of ENNU services, treatments, and programs. This object synchronizes with WooCommerce products to ensure consistent pricing and availability across all platforms.

Standard Properties Utilized

- **Product Name** - Service or program name
- **Product Description** - Detailed service description
- **Price** - Base price for service
- **Product Type** - Type of product/service
- **SKU** - Stock keeping unit identifier
- **Product Category** - Service category
- **Active** - Whether product is currently offered
- **Recurring Revenue** - For subscription services
- **Cost of Goods Sold** - Service delivery cost

Custom Properties Specification

SERVICE INFORMATION (15 fields)

```
Unset
{
  "service_category": {
    "type": "dropdown",
    "label": "Service Category",
    "description": "Primary category of service",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "hormone_therapy", "label": "Hormone Therapy"},
      {"value": "weight_management", "label": "Weight Management"},
      {"value": "wellness_programs", "label": "Wellness Programs"},
      {"value": "aesthetic_services", "label": "Aesthetic Services"},
      {"value": "nutrition_services", "label": "Nutrition Services"},
      {"value": "fitness_services", "label": "Fitness Services"},
      {"value": "lab_services", "label": "Laboratory Services"},
      {"value": "consultation_services", "label": "Consultation Services"},
      {"value": "telehealth_services", "label": "Telehealth Services"},
      {"value": "supplements", "label": "Supplements"}
    ]
  }
}
```

```

        {"value": "medical_devices", "label": "Medical Devices"},
        {"value": "educational_programs", "label": "Educational Programs"}
    ],
    "source_field": "manual_entry"
},
"service_subcategory": {
    "type": "dropdown",
    "label": "Service Subcategory",
    "description": "Specific subcategory of service",
    "sync_priority": "high",
    "options": [
        {"value": "testosterone_therapy", "label": "Testosterone Therapy"},
        {"value": "estrogen_therapy", "label": "Estrogen Therapy"},
        {"value": "thyroid_optimization", "label": "Thyroid Optimization"},
        {"value": "growth_hormone", "label": "Growth Hormone"},
        {"value": "peptide_therapy", "label": "Peptide Therapy"},
        {"value": "weight_loss_medication", "label": "Weight Loss Medication"},
        {"value": "nutrition_counseling", "label": "Nutrition Counseling"},
        {"value": "fitness_coaching", "label": "Fitness Coaching"},
        {"value": "body_composition", "label": "Body Composition Analysis"},
        {"value": "botox_fillers", "label": "Botox & Fillers"},
        {"value": "skin_treatments", "label": "Skin Treatments"},
        {"value": "iv_therapy", "label": "IV Therapy"},
        {"value": "comprehensive_labs", "label": "Comprehensive Lab Panel"},
        {"value": "hormone_labs", "label": "Hormone Lab Panel"},
        {"value": "metabolic_labs", "label": "Metabolic Lab Panel"}
    ],
    "source_field": "manual_entry"
},
"target_gender": {
    "type": "dropdown",
    "label": "Target Gender",
    "description": "Intended gender for service",
    "sync_priority": "high",
    "options": [
        {"value": "male", "label": "Male"},
        {"value": "female", "label": "Female"},
        {"value": "both", "label": "Both"},
        {"value": "not_applicable", "label": "Not Applicable"}
    ],
    "source_field": "manual_entry"
},
"age_range": {
    "type": "dropdown",
    "label": "Target Age Range",
    "description": "Recommended age range for service",
    "sync_priority": "medium",

```

```
"options": [
  {"value": "18_30", "label": "18-30 years"},
  {"value": "30_40", "label": "30-40 years"},
  {"value": "40_50", "label": "40-50 years"},
  {"value": "50_60", "label": "50-60 years"},
  {"value": "60_plus", "label": "60+ years"},
  {"value": "all_adults", "label": "All Adults"},
  {"value": "custom", "label": "Custom Range"}
],
"source_field": "manual_entry"
},
"duration_minutes": {
  "type": "number",
  "label": "Service Duration (Minutes)",
  "description": "Typical duration of service in minutes",
  "decimal_places": 0,
  "sync_priority": "high",
  "source_field": "manual_entry"
},
"requires_consultation": {
  "type": "checkbox",
  "label": "Requires Consultation",
  "description": "Service requires initial consultation",
  "default_value": true,
  "sync_priority": "high",
  "source_field": "manual_entry"
},
"requires_lab_work": {
  "type": "checkbox",
  "label": "Requires Lab Work",
  "description": "Service requires laboratory testing",
  "default_value": false,
  "sync_priority": "high",
  "source_field": "manual_entry"
},
"telehealth_eligible": {
  "type": "checkbox",
  "label": "Telehealth Eligible",
  "description": "Service can be delivered via telehealth",
  "default_value": false,
  "sync_priority": "high",
  "source_field": "manual_entry"
},
"prescription_required": {
  "type": "checkbox",
  "label": "Prescription Required",
  "description": "Service involves prescription medications",
```

```
    "default_value": false,
    "sync_priority": "high",
    "source_field": "manual_entry"
  },
  "contraindications": {
    "type": "multi_line_text",
    "label": "Contraindications",
    "description": "Medical contraindications for service",
    "max_length": 1000,
    "sync_priority": "critical",
    "source_field": "manual_entry"
  },
  "prerequisites": {
    "type": "multi_line_text",
    "label": "Prerequisites",
    "description": "Requirements before service can be provided",
    "max_length": 500,
    "sync_priority": "high",
    "source_field": "manual_entry"
  },
  "follow_up_required": {
    "type": "dropdown",
    "label": "Follow-up Required",
    "description": "Follow-up appointment requirements",
    "sync_priority": "medium",
    "options": [
      {"value": "none", "label": "No Follow-up Required"},
      {"value": "1_week", "label": "1 Week Follow-up"},
      {"value": "2_weeks", "label": "2 Week Follow-up"},
      {"value": "1_month", "label": "1 Month Follow-up"},
      {"value": "3_months", "label": "3 Month Follow-up"},
      {"value": "6_months", "label": "6 Month Follow-up"},
      {"value": "custom", "label": "Custom Schedule"}
    ],
    "source_field": "manual_entry"
  },
  "insurance_billable": {
    "type": "checkbox",
    "label": "Insurance Billable",
    "description": "Service can be billed to insurance",
    "default_value": false,
    "sync_priority": "high",
    "source_field": "manual_entry"
  },
  "cpt_code": {
    "type": "single_line_text",
    "label": "CPT Code",
```

```

        "description": "Current Procedural Terminology code",
        "max_length": 10,
        "sync_priority": "medium",
        "source_field": "manual_entry"
    },
    "provider_type_required": {
        "type": "dropdown",
        "label": "Provider Type Required",
        "description": "Type of provider required to deliver service",
        "sync_priority": "high",
        "options": [
            {"value": "physician", "label": "Physician"},
            {"value": "nurse_practitioner", "label": "Nurse Practitioner"},
            {"value": "physician_assistant", "label": "Physician Assistant"},
            {"value": "registered_nurse", "label": "Registered Nurse"},
            {"value": "medical_assistant", "label": "Medical Assistant"},
            {"value": "nutritionist", "label": "Nutritionist"},
            {"value": "fitness_coach", "label": "Fitness Coach"},
            {"value": "any_qualified", "label": "Any Qualified Provider"}
        ],
        "source_field": "manual_entry"
    }
}

```

WOOCOMMERCE SYNCHRONIZATION (10 fields)

```

Unset
{
    "woocommerce_product_id": {
        "type": "single_line_text",
        "label": "WooCommerce Product ID",
        "description": "Associated WooCommerce product ID",
        "max_length": 20,
        "sync_priority": "critical",
        "source_field": "woocommerce.product_id"
    },
    "woocommerce_sku": {
        "type": "single_line_text",
        "label": "WooCommerce SKU",
        "description": "WooCommerce stock keeping unit",
        "max_length": 50,
        "sync_priority": "critical",
        "source_field": "woocommerce.sku"
    },
    "subscription_type": {
        "type": "dropdown",

```

```
"label": "Subscription Type",
"description": "Type of subscription billing",
"sync_priority": "high",
"options": [
  {"value": "one_time", "label": "One-time Purchase"},
  {"value": "monthly", "label": "Monthly Subscription"},
  {"value": "quarterly", "label": "Quarterly Subscription"},
  {"value": "semi_annual", "label": "Semi-annual Subscription"},
  {"value": "annual", "label": "Annual Subscription"},
  {"value": "custom", "label": "Custom Billing Cycle"}
],
"source_field": "woocommerce.subscription_type"
},
"subscription_period": {
  "type": "number",
  "label": "Subscription Period",
  "description": "Billing period in days",
  "decimal_places": 0,
  "sync_priority": "medium",
  "source_field": "woocommerce.subscription_period"
},
"trial_period_days": {
  "type": "number",
  "label": "Trial Period (Days)",
  "description": "Free trial period in days",
  "decimal_places": 0,
  "sync_priority": "medium",
  "source_field": "woocommerce.trial_period"
},
"setup_fee": {
  "type": "number",
  "label": "Setup Fee",
  "description": "One-time setup fee",
  "decimal_places": 2,
  "sync_priority": "medium",
  "source_field": "woocommerce.setup_fee"
},
"stock_status": {
  "type": "dropdown",
  "label": "Stock Status",
  "description": "Current availability status",
  "sync_priority": "high",
  "options": [
    {"value": "in_stock", "label": "In Stock"},
    {"value": "out_of_stock", "label": "Out of Stock"},
    {"value": "on_backorder", "label": "On Backorder"},
    {"value": "discontinued", "label": "Discontinued"},
  ]
}
```

```

        {"value": "limited_availability", "label": "Limited Availability"}
    ],
    "source_field": "woocommerce.stock_status"
},
"manage_stock": {
    "type": "checkbox",
    "label": "Manage Stock",
    "description": "Track inventory for this product",
    "default_value": false,
    "sync_priority": "medium",
    "source_field": "woocommerce.manage_stock"
},
"stock_quantity": {
    "type": "number",
    "label": "Stock Quantity",
    "description": "Current stock quantity",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "woocommerce.stock_quantity"
},
"last_sync_date": {
    "type": "datetime",
    "label": "Last WooCommerce Sync",
    "description": "Last synchronization with WooCommerce",
    "sync_priority": "low",
    "source_field": "system_generated"
}
}

```

Product Categories Configuration

```

Unset
{
    "product_categories": {
        "hormone_therapy": {
            "name": "Hormone Therapy",
            "description": "Hormone replacement and optimization services",
            "subcategories": [
                "Testosterone Therapy",
                "Estrogen Therapy",
                "Thyroid Optimization",
                "Growth Hormone",
                "Peptide Therapy"
            ]
        },
    },
}

```

```
{
  "weight_management": {
    "name": "Weight Management",
    "description": "Weight loss and metabolic optimization",
    "subcategories": [
      "Medical Weight Loss",
      "Nutrition Counseling",
      "Metabolic Testing",
      "Body Composition Analysis"
    ]
  },
  "wellness_programs": {
    "name": "Wellness Programs",
    "description": "Comprehensive wellness and optimization",
    "subcategories": [
      "Executive Wellness",
      "Longevity Programs",
      "Performance Optimization",
      "Preventive Medicine"
    ]
  },
  "aesthetic_services": {
    "name": "Aesthetic Services",
    "description": "Cosmetic and aesthetic treatments",
    "subcategories": [
      "Botox & Fillers",
      "Skin Treatments",
      "Body Contouring",
      "Hair Restoration"
    ]
  },
  "laboratory_services": {
    "name": "Laboratory Services",
    "description": "Diagnostic testing and monitoring",
    "subcategories": [
      "Comprehensive Panels",
      "Hormone Testing",
      "Metabolic Testing",
      "Specialty Testing"
    ]
  }
}
```


Object Associations for Products

```
Unset
{
  "products_associations": {
    "to_deals": {
      "relationship": "many_to_many",
      "required": false,
      "description": "Products can be included in multiple deals",
      "auto_association_rules": [
        "Associate based on deal components",
        "Track product performance"
      ]
    },
    "to_line_items": {
      "relationship": "one_to_many",
      "required": false,
      "description": "Products generate line items in orders",
      "auto_association_rules": [
        "Auto-create line items from WooCommerce",
        "Track individual product sales"
      ]
    }
  }
}
```

5. APPOINTMENTS OBJECT - COMPREHENSIVE SCHEDULING

Purpose & Scope

The Appointments object manages all patient appointments across all service types, locations, and delivery methods (in-person, telehealth). This provides comprehensive scheduling management and appointment analytics.

Standard Properties Utilized

- **Meeting Name** - Appointment title/description
- **Start Time** - Appointment start date and time
- **End Time** - Appointment end date and time
- **Meeting Type** - Type of appointment
- **Meeting Outcome** - Result of appointment
- **Associated Contact** - Patient associated with appointment
- **Meeting Owner** - Provider conducting appointment

- **Location** - Appointment location
- **Description** - Appointment notes

Custom Properties Specification

APPOINTMENT DETAILS (18 fields)

Unset

```
{
  "appointment_type": {
    "type": "dropdown",
    "label": "Appointment Type",
    "description": "Type of appointment or visit",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "initial_consultation", "label": "Initial Consultation"},
      {"value": "follow_up", "label": "Follow-up Visit"},
      {"value": "lab_review", "label": "Lab Review"},
      {"value": "treatment_planning", "label": "Treatment Planning"},
      {"value": "injection_visit", "label": "Injection Visit"},
      {"value": "weight_check", "label": "Weight Check"},
      {"value": "body_composition", "label": "Body Composition Analysis"},
      {"value": "nutrition_counseling", "label": "Nutrition Counseling"},
      {"value": "fitness_coaching", "label": "Fitness Coaching"},
      {"value": "aesthetic_treatment", "label": "Aesthetic Treatment"},
      {"value": "telehealth", "label": "Telehealth Visit"},
      {"value": "group_session", "label": "Group Session"},
      {"value": "emergency", "label": "Emergency Visit"},
      {"value": "administrative", "label": "Administrative"}
    ],
    "source_field": "omaggregation.ApptType"
  },
  "appointment_status": {
    "type": "dropdown",
    "label": "Appointment Status",
    "description": "Current status of appointment",
    "sync_priority": "critical",
    "options": [
      {"value": "scheduled", "label": "Scheduled"},
      {"value": "confirmed", "label": "Confirmed"},
      {"value": "checked_in", "label": "Checked In"},
      {"value": "in_progress", "label": "In Progress"},
      {"value": "completed", "label": "Completed"},
      {"value": "no_show", "label": "No Show"},
      {"value": "cancelled_patient", "label": "Cancelled by Patient"},
      {"value": "cancelled_clinic", "label": "Cancelled by Clinic"},
      {"value": "rescheduled", "label": "Rescheduled"}
    ]
  }
}
```

```

    ],
    "source_field": "omaggregation.ApptStatus"
  },
  "delivery_method": {
    "type": "dropdown",
    "label": "Delivery Method",
    "description": "How appointment is conducted",
    "sync_priority": "high",
    "options": [
      {"value": "in_person", "label": "In-Person"},
      {"value": "telehealth_video", "label": "Telehealth - Video"},
      {"value": "telehealth_phone", "label": "Telehealth - Phone Only"},
      {"value": "hybrid", "label": "Hybrid (Partial Remote)"}
    ],
    "source_field": "omaggregation.DeliveryMethod"
  },
  "clinic_location": {
    "type": "dropdown",
    "label": "Clinic Location",
    "description": "Physical location for appointment",
    "sync_priority": "high",
    "options": [
      {"value": "main_clinic", "label": "Main Clinic"},
      {"value": "north_location", "label": "North Location"},
      {"value": "south_location", "label": "South Location"},
      {"value": "virtual", "label": "Virtual/Remote"},
      {"value": "patient_home", "label": "Patient Home"},
      {"value": "corporate_site", "label": "Corporate Site"}
    ],
    "source_field": "omaggregation.ClinicLocation"
  },
  "provider_name": {
    "type": "single_line_text",
    "label": "Provider Name",
    "description": "Name of provider conducting appointment",
    "max_length": 100,
    "sync_priority": "high",
    "source_field": "omaggregation.ProviderName"
  },
  "provider_type": {
    "type": "dropdown",
    "label": "Provider Type",
    "description": "Type of provider conducting appointment",
    "sync_priority": "medium",
    "options": [
      {"value": "physician", "label": "Physician"},
      {"value": "nurse_practitioner", "label": "Nurse Practitioner"},

```

```

        {"value": "physician_assistant", "label": "Physician Assistant"},
        {"value": "registered_nurse", "label": "Registered Nurse"},
        {"value": "medical_assistant", "label": "Medical Assistant"},
        {"value": "nutritionist", "label": "Nutritionist"},
        {"value": "fitness_coach", "label": "Fitness Coach"},
        {"value": "care_coordinator", "label": "Care Coordinator"}
    ],
    "source_field": "omaggregation.ProviderType"
},
"duration_minutes": {
    "type": "number",
    "label": "Duration (Minutes)",
    "description": "Scheduled duration in minutes",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.Duration"
},
"actual_duration_minutes": {
    "type": "number",
    "label": "Actual Duration (Minutes)",
    "description": "Actual appointment duration",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.ActualDuration"
},
"chief_complaint": {
    "type": "multi_line_text",
    "label": "Chief Complaint",
    "description": "Primary reason for appointment",
    "max_length": 500,
    "sync_priority": "high",
    "source_field": "omaggregation.ChiefComplaint"
},
"services_provided": {
    "type": "multiple_checkboxes",
    "label": "Services Provided",
    "description": "Services delivered during appointment",
    "sync_priority": "high",
    "options": [
        {"value": "consultation", "label": "Consultation"},
        {"value": "physical_exam", "label": "Physical Examination"},
        {"value": "lab_review", "label": "Lab Review"},
        {"value": "injection", "label": "Injection"},
        {"value": "weight_measurement", "label": "Weight Measurement"},
        {"value": "body_composition", "label": "Body Composition"},
        {"value": "blood_pressure", "label": "Blood Pressure Check"},
        {"value": "nutrition_counseling", "label": "Nutrition Counseling"}
    ]
}

```

```
        {"value": "fitness_planning", "label": "Fitness Planning"},
        {"value": "medication_review", "label": "Medication Review"},
        {"value": "goal_setting", "label": "Goal Setting"},
        {"value": "education", "label": "Patient Education"}
    ],
    "source_field": "omaggregation.ServicesProvided"
},
"appointment_notes": {
    "type": "multi_line_text",
    "label": "Appointment Notes",
    "description": "Clinical notes from appointment",
    "max_length": 2000,
    "sync_priority": "high",
    "source_field": "omaggregation.ApptNotes"
},
"follow_up_needed": {
    "type": "dropdown",
    "label": "Follow-up Needed",
    "description": "Follow-up appointment requirements",
    "sync_priority": "high",
    "options": [
        {"value": "none", "label": "No Follow-up Needed"},
        {"value": "1_week", "label": "1 Week"},
        {"value": "2_weeks", "label": "2 Weeks"},
        {"value": "1_month", "label": "1 Month"},
        {"value": "3_months", "label": "3 Months"},
        {"value": "6_months", "label": "6 Months"},
        {"value": "as_needed", "label": "As Needed"},
        {"value": "urgent", "label": "Urgent Follow-up"}
    ],
    "source_field": "omaggregation.FollowUpNeeded"
},
"next_appointment_scheduled": {
    "type": "checkbox",
    "label": "Next Appointment Scheduled",
    "description": "Follow-up appointment has been scheduled",
    "default_value": false,
    "sync_priority": "medium",
    "source_field": "omaggregation.NextApptScheduled"
},
"patient_satisfaction": {
    "type": "dropdown",
    "label": "Patient Satisfaction",
    "description": "Patient satisfaction with appointment",
    "sync_priority": "medium",
    "options": [
        {"value": "very_satisfied", "label": "Very Satisfied"},

```

```

        {"value": "satisfied", "label": "Satisfied"},
        {"value": "neutral", "label": "Neutral"},
        {"value": "dissatisfied", "label": "Dissatisfied"},
        {"value": "very_dissatisfied", "label": "Very Dissatisfied"},
        {"value": "not_assessed", "label": "Not Assessed"}
    ],
    "source_field": "omaggregation.PatientSatisfaction"
},
"billing_code": {
    "type": "single_line_text",
    "label": "Billing Code",
    "description": "CPT or billing code for appointment",
    "max_length": 20,
    "sync_priority": "medium",
    "source_field": "omaggregation.BillingCode"
},
"insurance_authorization": {
    "type": "single_line_text",
    "label": "Insurance Authorization",
    "description": "Insurance authorization number",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.InsuranceAuth"
},
"copay_collected": {
    "type": "number",
    "label": "Copay Collected",
    "description": "Copay amount collected",
    "decimal_places": 2,
    "sync_priority": "medium",
    "source_field": "omaggregation.CopayCollected"
},
"reminder_sent": {
    "type": "checkbox",
    "label": "Reminder Sent",
    "description": "Appointment reminder was sent",
    "default_value": false,
    "sync_priority": "low",
    "source_field": "system_generated"
}
}

```

TELEHEALTH SPECIFIC FIELDS (8 fields)

```

Unset
{

```

```
"telehealth_platform": {
  "type": "dropdown",
  "label": "Telehealth Platform",
  "description": "Platform used for telehealth appointment",
  "sync_priority": "high",
  "options": [
    {"value": "zoom", "label": "Zoom"},
    {"value": "teams", "label": "Microsoft Teams"},
    {"value": "webex", "label": "Cisco Webex"},
    {"value": "doxy_me", "label": "Doxy.me"},
    {"value": "simple_practice", "label": "SimplePractice"},
    {"value": "athenahealth", "label": "athenahealth"},
    {"value": "epic_mychart", "label": "Epic MyChart"},
    {"value": "phone_only", "label": "Phone Only"},
    {"value": "not_applicable", "label": "Not Applicable"}
  ],
  "source_field": "omaggregation.TelehealthPlatform"
},
"meeting_link": {
  "type": "single_line_text",
  "label": "Meeting Link",
  "description": "Video conference meeting link",
  "max_length": 500,
  "sync_priority": "high",
  "source_field": "system-generated"
},
"meeting_id": {
  "type": "single_line_text",
  "label": "Meeting ID",
  "description": "Platform-specific meeting identifier",
  "max_length": 100,
  "sync_priority": "medium",
  "source_field": "system-generated"
},
"connection_quality": {
  "type": "dropdown",
  "label": "Connection Quality",
  "description": "Quality of telehealth connection",
  "sync_priority": "medium",
  "options": [
    {"value": "excellent", "label": "Excellent"},
    {"value": "good", "label": "Good"},
    {"value": "fair", "label": "Fair"},
    {"value": "poor", "label": "Poor"},
    {"value": "connection_issues", "label": "Connection Issues"},
    {"value": "not_applicable", "label": "Not Applicable"}
  ],
}
```

```

    "source_field": "omaggregation.ConnectionQuality"
  },
  "technical_issues": {
    "type": "multiple_checkboxes",
    "label": "Technical Issues",
    "description": "Technical problems encountered",
    "sync_priority": "medium",
    "options": [
      {"value": "audio_problems", "label": "Audio Problems"},
      {"value": "video_problems", "label": "Video Problems"},
      {"value": "connection_drops", "label": "Connection Drops"},
      {"value": "platform_issues", "label": "Platform Issues"},
      {"value": "patient_tech_difficulty", "label": "Patient Tech Difficulty"},
      {"value": "provider_tech_difficulty", "label": "Provider Tech
Difficulty"},
      {"value": "none", "label": "No Issues"}
    ],
    "source_field": "omaggregation.TechnicalIssues"
  },
  "patient_location_state": {
    "type": "dropdown",
    "label": "Patient Location State",
    "description": "State where patient is located during telehealth",
    "sync_priority": "critical",
    "options": [
      {"value": "AL", "label": "Alabama"},
      {"value": "AK", "label": "Alaska"},
      {"value": "AZ", "label": "Arizona"},
      {"value": "AR", "label": "Arkansas"},
      {"value": "CA", "label": "California"},
      {"value": "CO", "label": "Colorado"},
      {"value": "CT", "label": "Connecticut"},
      {"value": "DE", "label": "Delaware"},
      {"value": "FL", "label": "Florida"},
      {"value": "GA", "label": "Georgia"},
      {"value": "HI", "label": "Hawaii"},
      {"value": "ID", "label": "Idaho"},
      {"value": "IL", "label": "Illinois"},
      {"value": "IN", "label": "Indiana"},
      {"value": "IA", "label": "Iowa"},
      {"value": "KS", "label": "Kansas"},
      {"value": "KY", "label": "Kentucky"},
      {"value": "LA", "label": "Louisiana"},
      {"value": "ME", "label": "Maine"},
      {"value": "MD", "label": "Maryland"},
      {"value": "MA", "label": "Massachusetts"},
      {"value": "MI", "label": "Michigan"},

```



```

        {"value": "MN", "label": "Minnesota"},
        {"value": "MS", "label": "Mississippi"},
        {"value": "MO", "label": "Missouri"},
        {"value": "MT", "label": "Montana"},
        {"value": "NE", "label": "Nebraska"},
        {"value": "NV", "label": "Nevada"},
        {"value": "NH", "label": "New Hampshire"},
        {"value": "NJ", "label": "New Jersey"},
        {"value": "NM", "label": "New Mexico"},
        {"value": "NY", "label": "New York"},
        {"value": "NC", "label": "North Carolina"},
        {"value": "ND", "label": "North Dakota"},
        {"value": "OH", "label": "Ohio"},
        {"value": "OK", "label": "Oklahoma"},
        {"value": "OR", "label": "Oregon"},
        {"value": "PA", "label": "Pennsylvania"},
        {"value": "RI", "label": "Rhode Island"},
        {"value": "SC", "label": "South Carolina"},
        {"value": "SD", "label": "South Dakota"},
        {"value": "TN", "label": "Tennessee"},
        {"value": "TX", "label": "Texas"},
        {"value": "UT", "label": "Utah"},
        {"value": "VT", "label": "Vermont"},
        {"value": "VA", "label": "Virginia"},
        {"value": "WA", "label": "Washington"},
        {"value": "WV", "label": "West Virginia"},
        {"value": "WI", "label": "Wisconsin"},
        {"value": "WY", "label": "Wyoming"},
        {"value": "DC", "label": "District of Columbia"}
    ],
    "source_field": "omaggregation.PatientLocationState"
},
"licensing_verification": {
    "type": "checkbox",
    "label": "Licensing Verification",
    "description": "Provider licensing verified for patient state",
    "default_value": false,
    "sync_priority": "critical",
    "source_field": "system_generated"
},
"consent_verified": {
    "type": "checkbox",
    "label": "Telehealth Consent Verified",
    "description": "Patient telehealth consent verified",
    "default_value": false,
    "sync_priority": "high",
    "source_field": "system_generated"
}

```

```
}  
}
```

Object Associations for Appointments

Unset

```
{  
  "appointments_associations": {  
    "to_contacts": {  
      "relationship": "many_to_one",  
      "required": true,  
      "description": "Each appointment must be associated with a patient",  
      "auto_association_rules": [  
        "Auto-associate to patient contact",  
        "Sync appointment history to contact"  
      ]  
    },  
    "to_deals": {  
      "relationship": "many_to_one",  
      "required": false,  
      "description": "Appointments can be related to program deals",  
      "auto_association_rules": [  
        "Associate consultation appointments to deals",  
        "Track program-related appointments"  
      ]  
    },  
    "to_companies": {  
      "relationship": "many_to_one",  
      "required": false,  
      "description": "Appointments associated with clinic locations",  
      "auto_association_rules": [  
        "Auto-associate based on clinic location",  
        "Track location utilization"  
      ]  
    },  
    "to_products": {  
      "relationship": "many_to_many",  
      "required": false,  
      "description": "Services provided during appointment",  
      "auto_association_rules": [  
        "Associate based on services provided",  
        "Track service delivery"  
      ]  
    }  
  }  
}
```

```
}
```

6. LISTINGS OBJECT - CLINIC LOCATIONS & PROVIDER DIRECTORY

Purpose & Scope

The Listings object manages ENNU clinic locations and can be extended to serve as a provider directory. This object ensures accurate location information for appointments, marketing, and patient communication.

Standard Properties Utilized

- **Listing Name** - Clinic location name
- **Listing Address** - Full address of clinic
- **Listing City** - Clinic city
- **Listing State** - Clinic state
- **Listing Zip Code** - Clinic zip code
- **Listing Phone Number** - Clinic phone number
- **Listing Website** - Clinic website URL
- **Listing Description** - Clinic description
- **Listing Hours** - Clinic operating hours
- **Listing Category** - Type of listing (Clinic, Provider)

Custom Properties Specification

CLINIC LOCATION DETAILS (15 fields)

```
Unset
{
  "clinic_id": {
    "type": "single_line_text",
    "label": "Clinic ID",
    "description": "Unique identifier for clinic location",
    "max_length": 20,
    "required": true,
    "sync_priority": "critical",
    "source_field": "omaggregation.ClinicID"
  },
  "clinic_type": {
    "type": "dropdown",
```

```

"label": "Clinic Type",
"description": "Type of clinic facility",
"sync_priority": "high",
"options": [
  {"value": "main_clinic", "label": "Main Clinic"},
  {"value": "satellite_clinic", "label": "Satellite Clinic"},
  {"value": "specialty_center", "label": "Specialty Center"},
  {"value": "telehealth_hub", "label": "Telehealth Hub"},
  {"value": "lab_facility", "label": "Lab Facility"},
  {"value": "administrative_office", "label": "Administrative Office"}
],
"source_field": "omaggregation.ClinicType"
},
"services_offered": {
  "type": "multiple_checkboxes",
  "label": "Services Offered",
  "description": "Services available at this location",
  "sync_priority": "high",
  "options": [
    {"value": "hormone_therapy", "label": "Hormone Therapy"},
    {"value": "weight_management", "label": "Weight Management"},
    {"value": "wellness_programs", "label": "Wellness Programs"},
    {"value": "aesthetic_services", "label": "Aesthetic Services"},
    {"value": "nutrition_services", "label": "Nutrition Services"},
    {"value": "fitness_services", "label": "Fitness Services"},
    {"value": "lab_services", "label": "Laboratory Services"},
    {"value": "consultation_services", "label": "Consultation Services"},
    {"value": "telehealth_services", "label": "Telehealth Services"}
  ],
  "source_field": "omaggregation.ServicesOffered"
},
"operating_hours_monday": {
  "type": "single_line_text",
  "label": "Operating Hours (Monday)",
  "description": "Monday operating hours (e.g., 9am-5pm)",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursMonday"
},
"operating_hours_tuesday": {
  "type": "single_line_text",
  "label": "Operating Hours (Tuesday)",
  "description": "Tuesday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursTuesday"
},

```

```
"operating_hours_wednesday": {
  "type": "single_line_text",
  "label": "Operating Hours (Wednesday)",
  "description": "Wednesday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursWednesday"
},
"operating_hours_thursday": {
  "type": "single_line_text",
  "label": "Operating Hours (Thursday)",
  "description": "Thursday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursThursday"
},
"operating_hours_friday": {
  "type": "single_line_text",
  "label": "Operating Hours (Friday)",
  "description": "Friday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursFriday"
},
"operating_hours_saturday": {
  "type": "single_line_text",
  "label": "Operating Hours (Saturday)",
  "description": "Saturday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursSaturday"
},
"operating_hours_sunday": {
  "type": "single_line_text",
  "label": "Operating Hours (Sunday)",
  "description": "Sunday operating hours",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.HoursSunday"
},
"parking_information": {
  "type": "multi_line_text",
  "label": "Parking Information",
  "description": "Details about parking availability",
  "max_length": 200,
  "sync_priority": "low",
  "source_field": "omaggregation.ParkingInfo"
```

```

    },
    "public_transportation": {
      "type": "multi_line_text",
      "label": "Public Transportation",
      "description": "Nearby public transportation options",
      "max_length": 200,
      "sync_priority": "low",
      "source_field": "omaggregation.PublicTransport"
    },
    "accessibility_features": {
      "type": "multiple_checkboxes",
      "label": "Accessibility Features",
      "description": "Accessibility features available",
      "sync_priority": "medium",
      "options": [
        {"value": "wheelchair_accessible", "label": "Wheelchair Accessible"},
        {"value": "accessible_restrooms", "label": "Accessible Restrooms"},
        {"value": "elevator_access", "label": "Elevator Access"},
        {"value": "braille_signage", "label": "Braille Signage"},
        {"value": "hearing_loops", "label": "Hearing Loops"}
      ],
      "source_field": "omaggregation.Accessibility"
    },
    "clinic_manager_name": {
      "type": "single_line_text",
      "label": "Clinic Manager Name",
      "description": "Name of the clinic manager",
      "max_length": 100,
      "sync_priority": "medium",
      "source_field": "omaggregation.ClinicManager"
    },
    "clinic_email": {
      "type": "single_line_text",
      "label": "Clinic Email Address",
      "description": "General email address for the clinic",
      "max_length": 100,
      "sync_priority": "high",
      "source_field": "omaggregation.ClinicEmail"
    }
  }
}

```

PROVIDER DIRECTORY FIELDS (Optional Extension - 10 fields)

```

Unset
{
  "provider_npi": {

```

```

    "type": "single_line_text",
    "label": "Provider NPI",
    "description": "National Provider Identifier",
    "max_length": 10,
    "sync_priority": "high",
    "source_field": "omaggregation.ProviderNPI"
  },
  "provider_specialty": {
    "type": "dropdown",
    "label": "Provider Specialty",
    "description": "Primary medical specialty",
    "sync_priority": "high",
    "options": [
      {"value": "hormone_therapy", "label": "Hormone Therapy"},
      {"value": "weight_management", "label": "Weight Management"},
      {"value": "preventive_medicine", "label": "Preventive Medicine"},
      {"value": "functional_medicine", "label": "Functional Medicine"},
      {"value": "aesthetic_medicine", "label": "Aesthetic Medicine"},
      {"value": "nutrition", "label": "Nutrition"},
      {"value": "fitness", "label": "Fitness"}
    ],
    "source_field": "omaggregation.ProviderSpecialty"
  },
  "provider_bio": {
    "type": "multi_line_text",
    "label": "Provider Biography",
    "description": "Short biography of the provider",
    "max_length": 1000,
    "sync_priority": "medium",
    "source_field": "omaggregation.ProviderBio"
  },
  "provider_photo_url": {
    "type": "single_line_text",
    "label": "Provider Photo URL",
    "description": "URL to provider headshot image",
    "max_length": 255,
    "sync_priority": "medium",
    "source_field": "omaggregation.ProviderPhoto"
  },
  "languages_spoken": {
    "type": "multiple_checkboxes",
    "label": "Languages Spoken",
    "description": "Languages spoken by the provider",
    "sync_priority": "medium",
    "options": [
      {"value": "english", "label": "English"},
      {"value": "spanish", "label": "Spanish"}
    ]
  }
}

```

```

        {"value": "french", "label": "French"},
        {"value": "german", "label": "German"},
        {"value": "mandarin", "label": "Mandarin"},
        {"value": "hindi", "label": "Hindi"},
        {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.LanguagesSpoken"
},
"accepting_new_patients": {
    "type": "checkbox",
    "label": "Accepting New Patients",
    "description": "Provider is currently accepting new patients",
    "default_value": true,
    "sync_priority": "high",
    "source_field": "omaggregation.AcceptingNewPatients"
},
"telehealth_provider": {
    "type": "checkbox",
    "label": "Telehealth Provider",
    "description": "Provider offers telehealth services",
    "default_value": false,
    "sync_priority": "high",
    "source_field": "omaggregation.TelehealthProvider"
},
"provider_schedule_link": {
    "type": "single_line_text",
    "label": "Provider Schedule Link",
    "description": "Link to provider online scheduling page",
    "max_length": 255,
    "sync_priority": "medium",
    "source_field": "omaggregation.ProviderScheduleLink"
},
"years_of_experience": {
    "type": "number",
    "label": "Years of Experience",
    "description": "Provider years of professional experience",
    "decimal_places": 0,
    "sync_priority": "medium",
    "source_field": "omaggregation.YearsExperience"
},
"education_credentials": {
    "type": "multi_line_text",
    "label": "Education & Credentials",
    "description": "Provider education and certifications",
    "max_length": 500,
    "sync_priority": "medium",
    "source_field": "omaggregation.ProviderCredentials"
}

```



```
}  
}
```

Object Associations for Listings

Unset

```
{  
  "listings_associations": {  
    "to_contacts": {  
      "relationship": "many_to_many",  
      "required": false,  
      "description": "Associate patients with their primary clinic location",  
      "auto_association_rules": [  
        "Associate based on appointment location",  
        "Track patient location preferences"  
      ]  
    },  
    "to_appointments": {  
      "relationship": "one_to_many",  
      "required": false,  
      "description": "Appointments associated with clinic location",  
      "auto_association_rules": [  
        "Auto-associate based on appointment clinic",  
        "Track location-specific appointment volume"  
      ]  
    },  
    "to_companies": {  
      "relationship": "one_to_one",  
      "required": false,  
      "description": "Link listing to company record if using Companies for  
locations",  
      "auto_association_rules": [  
        "Sync address data between Listing and Company"  
      ]  
    }  
  }  
}
```

7. TICKETS OBJECT - PATIENT SUPPORT & INQUIRY MANAGEMENT

Purpose & Scope

The Tickets object manages patient support requests, inquiries, and issue resolution. This provides a centralized system for tracking and managing all patient communication and support interactions.

Standard Properties Utilized

- **Ticket Name** - Brief summary of the issue
- **Ticket Description** - Detailed description of the issue
- **Ticket Status** - Current status of the ticket (Open, Pending, Resolved, Closed)
- **Ticket Priority** - Urgency of the ticket (Low, Medium, High, Urgent)
- **Ticket Source** - How the ticket was created (Email, Phone, Chat, Web Form)
- **Create Date** - Date ticket was created
- **Last Activity Date** - Date of last update
- **Ticket Owner** - Assigned support agent
- **Associated Contact** - Patient associated with the ticket
- **Associated Company** - Company associated with ticket (if applicable)

Custom Properties Specification

SUPPORT TICKET DETAILS (15 fields)

```
Unset
{
  "ticket_category": {
    "type": "dropdown",
    "label": "Ticket Category",
    "description": "Primary category of support request",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "billing_inquiry", "label": "Billing Inquiry"},
      {"value": "appointment_scheduling", "label": "Appointment Scheduling"},
      {"value": "medication_refill", "label": "Medication Refill Request"},
      {"value": "lab_results_inquiry", "label": "Lab Results Inquiry"},
      {"value": "program_information", "label": "Program Information Request"},
      {"value": "technical_support", "label": "Technical Support (Portal/App)"},
      {"value": "feedback_complaint", "label": "Feedback/Complaint"},
      {"value": "general_inquiry", "label": "General Inquiry"},
      {"value": "telehealth_support", "label": "Telehealth Support"},
      {"value": "medical_question", "label": "Medical Question (Non-Urgent)"}
    ]
  }
}
```

```
    ],
    "source_field": "omaggregation.TicketCategory"
  },
  "ticket_subcategory": {
    "type": "dropdown",
    "label": "Ticket Subcategory",
    "description": "Specific subcategory of support request",
    "sync_priority": "high",
    "options": [
      {"value": "payment_issue", "label": "Payment Issue"},
      {"value": "invoice_question", "label": "Invoice Question"},
      {"value": "insurance_query", "label": "Insurance Query"},
      {"value": "reschedule_appointment", "label": "Reschedule Appointment"},
      {"value": "cancel_appointment", "label": "Cancel Appointment"},
      {"value": "new_appointment_request", "label": "New Appointment Request"},
      {"value": "prescription_status", "label": "Prescription Status"},
      {"value": "pharmacy_issue", "label": "Pharmacy Issue"},
      {"value": "portal_login_issue", "label": "Portal Login Issue"},
      {"value": "app_bug_report", "label": "App Bug Report"}
    ],
    "source_field": "omaggregation.TicketSubcategory"
  },
  "urgency_level": {
    "type": "dropdown",
    "label": "Urgency Level",
    "description": "Patient-reported urgency",
    "sync_priority": "high",
    "options": [
      {"value": "low", "label": "Low - General Question"},
      {"value": "medium", "label": "Medium - Needs Attention"},
      {"value": "high", "label": "High - Time Sensitive"},
      {"value": "urgent", "label": "Urgent - Immediate Action"}
    ],
    "source_field": "omaggregation.TicketUrgency"
  },
  "preferred_contact_method": {
    "type": "dropdown",
    "label": "Preferred Contact Method",
    "description": "Patient preferred method for follow-up",
    "sync_priority": "medium",
    "options": [
      {"value": "email", "label": "Email"},
      {"value": "phone", "label": "Phone Call"},
      {"value": "sms", "label": "SMS/Text Message"},
      {"value": "portal_message", "label": "Patient Portal Message"}
    ],
    "source_field": "omaggregation.PreferredContactMethod"
  }
}
```

```

},
"resolution_details": {
  "type": "multi_line_text",
  "label": "Resolution Details",
  "description": "Summary of how the ticket was resolved",
  "max_length": 2000,
  "sync_priority": "high",
  "source_field": "omaggregation.ResolutionDetails"
},
"time_to_first_response_minutes": {
  "type": "number",
  "label": "Time to First Response (Minutes)",
  "description": "Time taken for initial response",
  "decimal_places": 0,
  "sync_priority": "medium",
  "source_field": "system_calculated"
},
"time_to_resolution_hours": {
  "type": "number",
  "label": "Time to Resolution (Hours)",
  "description": "Total time taken to resolve ticket",
  "decimal_places": 1,
  "sync_priority": "medium",
  "source_field": "system_calculated"
},
"escalation_status": {
  "type": "dropdown",
  "label": "Escalation Status",
  "description": "Whether ticket has been escalated",
  "sync_priority": "high",
  "options": [
    {"value": "not_escalated", "label": "Not Escalated"},
    {"value": "tier_2_support", "label": "Tier 2 Support"},
    {"value": "manager_review", "label": "Manager Review"},
    {"value": "clinical_review", "label": "Clinical Review"}
  ],
  "source_field": "omaggregation.EscalationStatus"
},
"related_appointment_id": {
  "type": "single_line_text",
  "label": "Related Appointment ID",
  "description": "ID of related appointment if applicable",
  "max_length": 50,
  "sync_priority": "medium",
  "source_field": "omaggregation.RelatedApptID"
},
"related_deal_id": {

```

```
    "type": "single_line_text",
    "label": "Related Deal ID",
    "description": "ID of related deal/program if applicable",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.RelatedDealID"
  },
  "patient_sentiment": {
    "type": "dropdown",
    "label": "Patient Sentiment",
    "description": "Overall patient sentiment during interaction",
    "sync_priority": "medium",
    "options": [
      {"value": "positive", "label": "Positive"},
      {"value": "neutral", "label": "Neutral"},
      {"value": "negative", "label": "Negative"},
      {"value": "frustrated", "label": "Frustrated"},
      {"value": "grateful", "label": "Grateful"}
    ],
    "source_field": "omaggregation.PatientSentiment"
  },
  "internal_notes": {
    "type": "multi_line_text",
    "label": "Internal Notes",
    "description": "Internal notes for support team",
    "max_length": 1000,
    "sync_priority": "low",
    "source_field": "omaggregation.InternalTicketNotes"
  },
  "follow_up_required": {
    "type": "checkbox",
    "label": "Follow-up Required",
    "description": "Further follow-up needed after resolution",
    "default_value": false,
    "sync_priority": "medium",
    "source_field": "omaggregation.TicketFollowUp"
  },
  "satisfaction_survey_sent": {
    "type": "checkbox",
    "label": "Satisfaction Survey Sent",
    "description": "Post-resolution satisfaction survey sent",
    "default_value": false,
    "sync_priority": "low",
    "source_field": "system_generated"
  },
  "channel": {
    "type": "dropdown",
```

```

    "label": "Communication Channel",
    "description": "Channel through which ticket was handled",
    "sync_priority": "medium",
    "options": [
      {"value": "email", "label": "Email"},
      {"value": "phone", "label": "Phone"},
      {"value": "chat", "label": "Chat"},
      {"value": "sms", "label": "SMS"},
      {"value": "portal", "label": "Patient Portal"},
      {"value": "in_person", "label": "In-Person"}
    ],
    "source_field": "omaggregation.TicketChannel"
  }
}

```

Object Associations for Tickets

```

Unset
{
  "tickets_associations": {
    "to_contacts": {
      "relationship": "many_to_one",
      "required": true,
      "description": "Each ticket must be associated with a patient",
      "auto_association_rules": [
        "Auto-associate to patient contact",
        "Track patient support history"
      ]
    },
    "to_deals": {
      "relationship": "many_to_one",
      "required": false,
      "description": "Tickets can be related to program deals",
      "auto_association_rules": [
        "Associate inquiries related to specific programs"
      ]
    },
    "to_appointments": {
      "relationship": "many_to_one",
      "required": false,
      "description": "Tickets can be related to appointments",
      "auto_association_rules": [
        "Associate scheduling requests or post-visit questions"
      ]
    }
  },
}

```

```

    "to_companies": {
      "relationship": "many_to_one",
      "required": false,
      "description": "Tickets associated with corporate accounts",
      "auto_association_rules": [
        "Track support for corporate wellness programs"
      ]
    }
  }
}

```

CUSTOM OBJECTS CONFIGURATION

8. MEASUREMENT HISTORY CUSTOM OBJECT - TIME-SERIES HEALTH DATA

Purpose & Scope

The Measurement History custom object stores time-series data for patient physical measurements, lab results, and other health metrics. This enables tracking of progress over time and detailed health analytics.

Custom Object Definition

- **Object Name:** Measurement History
- **Primary Display Property:** Measurement Date
- **Secondary Display Property:** Measurement Type
- **Icon:** Health/Medical Icon

Custom Properties Specification

MEASUREMENT DETAILS (15 fields)

```

Unset
{
  "measurement_date": {
    "type": "date",
    "label": "Measurement Date",
    "description": "Date measurement was taken",
    "required": true,

```

```

    "sync_priority": "critical",
    "source_field": "omaggregation.MeasurementDate"
  },
  "measurement_type": {
    "type": "dropdown",
    "label": "Measurement Type",
    "description": "Type of measurement recorded",
    "required": true,
    "sync_priority": "critical",
    "options": [
      {"value": "weight", "label": "Weight"},
      {"value": "bmi", "label": "BMI"},
      {"value": "body_fat_percentage", "label": "Body Fat %"},
      {"value": "waist_circumference", "label": "Waist Circumference"},
      {"value": "hip_circumference", "label": "Hip Circumference"},
      {"value": "blood_pressure_systolic", "label": "Blood Pressure
(Systolic)"},
      {"value": "blood_pressure_diastolic", "label": "Blood Pressure
(Diastolic)"},
      {"value": "heart_rate", "label": "Heart Rate"},
      {"value": "testosterone_total", "label": "Testosterone (Total)"},
      {"value": "testosterone_free", "label": "Testosterone (Free)"},
      {"value": "estradiol", "label": "Estradiol"},
      {"value": "shbg", "label": "SHBG"},
      {"value": "psa", "label": "PSA"},
      {"value": "thyroid_tsh", "label": "Thyroid (TSH)"},
      {"value": "thyroid_t4_free", "label": "Thyroid (Free T4)"},
      {"value": "thyroid_t3_free", "label": "Thyroid (Free T3)"},
      {"value": "glucose_fasting", "label": "Glucose (Fasting)"},
      {"value": "hba1c", "label": "HbA1c"},
      {"value": "cholesterol_total", "label": "Cholesterol (Total)"},
      {"value": "cholesterol_ldl", "label": "Cholesterol (LDL)"},
      {"value": "cholesterol_hdl", "label": "Cholesterol (HDL)"},
      {"value": "triglycerides", "label": "Triglycerides"},
      {"value": "vitamin_d", "label": "Vitamin D"},
      {"value": "crp", "label": "CRP (C-Reactive Protein)"},
      {"value": "other_lab_value", "label": "Other Lab Value"}
    ],
    "source_field": "omaggregation.MeasurementType"
  },
  "measurement_value": {
    "type": "number",
    "label": "Measurement Value",
    "description": "Numerical value of the measurement",
    "required": true,
    "decimal_places": 2,
    "sync_priority": "critical",

```



```

    "source_field": "omaggregation.MeasurementValue"
  },
  "measurement_unit": {
    "type": "dropdown",
    "label": "Measurement Unit",
    "description": "Unit of measurement",
    "sync_priority": "high",
    "options": [
      {"value": "lbs", "label": "lbs (Pounds)"},
      {"value": "kg", "label": "kg (Kilograms)"},
      {"value": "percentage", "label": "% (Percentage)"},
      {"value": "inches", "label": "inches"},
      {"value": "cm", "label": "cm (Centimeters)"},
      {"value": "mmhg", "label": "mmHg (Millimeters of Mercury)"},
      {"value": "bpm", "label": "bpm (Beats Per Minute)"},
      {"value": "ng_dl", "label": "ng/dL"},
      {"value": "pg_ml", "label": "pg/mL"},
      {"value": "nmol_l", "label": "nmol/L"},
      {"value": "miu_l", "label": "mIU/L"},
      {"value": "mg_dl", "label": "mg/dL"},
      {"value": "mmol_l", "label": "mmol/L"},
      {"value": "ng_ml", "label": "ng/mL"},
      {"value": "iu_l", "label": "IU/L"},
      {"value": "other", "label": "Other"}
    ],
    "source_field": "omaggregation.MeasurementUnit"
  },
  "reference_range_low": {
    "type": "number",
    "label": "Reference Range (Low)",
    "description": "Lower limit of normal reference range",
    "decimal_places": 2,
    "sync_priority": "medium",
    "source_field": "omaggregation.RefRangeLow"
  },
  "reference_range_high": {
    "type": "number",
    "label": "Reference Range (High)",
    "description": "Upper limit of normal reference range",
    "decimal_places": 2,
    "sync_priority": "medium",
    "source_field": "omaggregation.RefRangeHigh"
  },
  "lab_name": {
    "type": "single_line_text",
    "label": "Lab Name",
    "description": "Name of laboratory if applicable",

```

```

    "max_length": 100,
    "sync_priority": "medium",
    "source_field": "omaggregation.LabName"
  },
  "accession_number": {
    "type": "single_line_text",
    "label": "Accession Number",
    "description": "Lab accession number",
    "max_length": 50,
    "sync_priority": "medium",
    "source_field": "omaggregation.AccessionNumber"
  },
  "measurement_source": {
    "type": "dropdown",
    "label": "Measurement Source",
    "description": "How measurement was obtained",
    "sync_priority": "high",
    "options": [
      {"value": "in_clinic", "label": "In-Clinic"},
      {"value": "telehealth", "label": "Telehealth (Patient Reported)"},
      {"value": "lab_result", "label": "Lab Result (External)"},
      {"value": "wearable_device", "label": "Wearable Device Sync"},
      {"value": "patient_portal_entry", "label": "Patient Portal Entry"}
    ],
    "source_field": "omaggregation.MeasurementSource"
  },
  "notes": {
    "type": "multi_line_text",
    "label": "Notes",
    "description": "Additional notes about the measurement",
    "max_length": 500,
    "sync_priority": "medium",
    "source_field": "omaggregation.MeasurementNotes"
  },
  "provider_review_status": {
    "type": "dropdown",
    "label": "Provider Review Status",
    "description": "Status of provider review for this measurement",
    "sync_priority": "high",
    "options": [
      {"value": "pending_review", "label": "Pending Review"},
      {"value": "reviewed_normal", "label": "Reviewed - Normal"},
      {"value": "reviewed_abnormal_action_needed", "label": "Reviewed - Abnormal, Action Needed"},
      {"value": "reviewed_abnormal_no_action", "label": "Reviewed - Abnormal, No Action"},
      {"value": "patient_notified", "label": "Patient Notified"}
    ]
  }
}

```

```

    ],
    "source_field": "omaggregation.ReviewStatus"
  },
  "reviewed_by_provider_id": {
    "type": "single_line_text",
    "label": "Reviewed by Provider ID",
    "description": "ID of provider who reviewed measurement",
    "max_length": 20,
    "sync_priority": "medium",
    "source_field": "omaggregation.ReviewedByProvider"
  },
  "review_date": {
    "type": "date",
    "label": "Review Date",
    "description": "Date measurement was reviewed",
    "sync_priority": "medium",
    "source_field": "omaggregation.ReviewDate"
  },
  "flagged_as_critical": {
    "type": "checkbox",
    "label": "Flagged as Critical",
    "description": "Measurement flagged as critical value",
    "default_value": false,
    "sync_priority": "critical",
    "source_field": "omaggregation.FlaggedCritical"
  },
  "related_program_id": {
    "type": "single_line_text",
    "label": "Related Program ID",
    "description": "ID of program this measurement relates to",
    "max_length": 20,
    "sync_priority": "medium",
    "source_field": "omaggregation.RelatedProgram"
  }
}

```

Object Associations for Measurement History

```

Unset
{
  "measurement_history_associations": {
    "to_contacts": {
      "relationship": "many_to_one",
      "required": true,
      "description": "Each measurement must be associated with a patient",

```

```

    "auto_association_rules": [
      "Auto-associate to patient contact",
      "Track patient health trends over time"
    ]
  },
  "to_deals": {
    "relationship": "many_to_one",
    "required": false,
    "description": "Measurements can be related to program deals",
    "auto_association_rules": [
      "Associate lab results to specific programs",
      "Track program effectiveness"
    ]
  },
  "to_appointments": {
    "relationship": "many_to_one",
    "required": false,
    "description": "Measurements taken during specific appointments",
    "auto_association_rules": [
      "Associate in-clinic measurements to appointments"
    ]
  }
}

```

SECTION 9: COMPLETE OBJECT ASSOCIATION MATRIX

This section provides a comprehensive matrix detailing all object associations, relationship types, and cardinality. This ensures data integrity and enables powerful cross-object reporting and automation.

From Object	To Object	Relationship Type	Cardinality	Required	Key Purpose
Contacts	Companies	Many-to-One	N:1	No	Associate patient with clinic/corporate account

From Object	To Object	Relationship Type	Cardinality	Required	Key Purpose
Contacts	Deals	One-to-Many	1:N	No	Track patient program enrollments
Contacts	Appointments	One-to-Many	1:N	No	Track patient appointments
Contacts	Tickets	One-to-Many	1:N	No	Track patient support history
Contacts	Measurement History	One-to-Many	1:N	No	Track patient health metrics over time
Contacts	Listings	Many-to-Many	N:M	No	Associate patient with primary clinic
Companies	Contacts	One-to-Many	1:N	No	Track employees under corporate account
Companies	Deals	One-to-Many	1:N	No	Track corporate wellness program enrollments
Companies	Listings	One-to-One	1:1	No	Link company record to clinic listing
Deals	Contacts	Many-to-One	N:1	Yes	Each deal must have a primary patient

From Object	To Object	Relationship Type	Cardinality	Required	Key Purpose
Deals	Companies	Many-to-One	N:1	No	Associate corporate deals with company
Deals	Products	Many-to-Many	N:M	No	Link deal to services/products included
Deals	Appointments	One-to-Many	1:N	No	Track appointments related to deal progression
Deals	Measurement History	One-to-Many	1:N	No	Link lab results/measurements to program
Products	Deals	Many-to-Many	N:M	No	Products can be part of multiple deals
Products	Line Items	One-to-Many	1:N	Yes	Products generate line items in WooCommerce
Appointments	Contacts	Many-to-One	N:1	Yes	Each appointment must have a patient
Appointments	Deals	Many-to-One	N:1	No	Link appointment to related program/deal

From Object	To Object	Relationship Type	Cardinality	Required	Key Purpose
Appointments	Companies	Many-to-One	N:1	No	Associate appointment with clinic location
Appointments	Products	Many-to-Many	N:M	No	Services provided during appointment
Appointments	Measurement History	One-to-Many	1:N	No	Measurements taken during appointment
Listings	Contacts	Many-to-Many	N:M	No	Patients associated with primary clinic
Listings	Appointments	One-to-Many	1:N	No	Appointments occurring at this location
Listings	Companies	One-to-One	1:1	No	Link listing to company record (if applicable)
Tickets	Contacts	Many-to-One	N:1	Yes	Each ticket must have a patient
Tickets	Deals	Many-to-One	N:1	No	Link ticket to related program/deal
Tickets	Appointments	Many-to-One	N:1	No	Link ticket to related appointment

From Object	To Object	Relationship Type	Cardinality	Required	Key Purpose
Tickets	Companies	Many-to-One	N:1	No	Link ticket to corporate account
Measurement Hist.	Contacts	Many-to-One	N:1	Yes	Each measurement must have a patient
Measurement Hist.	Deals	Many-to-One	N:1	No	Link measurement to related program/deal
Measurement Hist.	Appointments	Many-to-One	N:1	No	Link measurement to appointment it was taken in

SECTION 10: COMPREHENSIVE DATA IMPORT STRATEGY

This section details the step-by-step process for migrating 16+ million records from the OM aggregation database and other sources into HubSpot with precision and minimal disruption.

Pre-Migration Preparation (Weeks 1-2)

1. HubSpot Setup & Configuration:

- Create all custom properties for standard objects as defined.
- Create the **Measurement History** custom object with all properties.
- Configure all dropdown options, picklists, and dependent fields.
- Set up user roles, permissions, and teams.
- Configure pipelines for Deals (New Patient, Existing Patient, Corporate).
- Configure ticket pipelines and categories.

2. Data Cleansing & Validation (OM Aggregation Database):

- Identify and merge duplicate patient records (based on Name, DOB, Email, Phone).

- Validate data types and formats (dates, numbers, emails).
 - Standardize inconsistent values (e.g., state abbreviations, gender).
 - Identify and flag records with missing critical data (e.g., missing patient ID, invalid email).
 - Archive or flag inactive patient records (e.g., no activity in 5+ years and not deceased).
3. **Source Data Extraction & Transformation:**
 - Extract data from OM aggregation database into staging CSV files (one per HubSpot object).
 - Map OM aggregation fields to corresponding HubSpot properties.
 - Transform data formats as needed (e.g., date formats, boolean conversions).
 - Generate unique HubSpot IDs for new records and map existing OM IDs for association.
 4. **WooCommerce & WP Fusion Setup:**
 - Install and configure WP Fusion plugin on WooCommerce site.
 - Map WooCommerce customer fields to HubSpot Contact properties.
 - Map WooCommerce product fields to HubSpot Product properties.
 - Configure order and subscription sync settings in WP Fusion.
 - Test basic customer and order sync to HubSpot.
 5. **Telehealth Platform Integration (Initial Setup):**
 - Identify primary telehealth platform (e.g., Zoom, Doxy.me).
 - Explore native HubSpot integration options or Zapier/Integromat connectors.
 - Set up basic appointment type for telehealth in HubSpot Appointments.

Phased Data Migration (Weeks 3-6)

Migration Principles:

- **Prioritize Critical Data:** Import core patient and financial data first.
- **Iterative Approach:** Migrate data in manageable batches.
- **Validate Each Batch:** Perform data validation after each import.
- **Minimize Downtime:** Schedule imports during off-peak hours if possible.
- **Maintain Referential Integrity:** Import parent objects before child objects.

Phase 1: Core Patient & Company Data (Week 3)

1. **Import Companies (Clinic Locations):**
 - Import clinic location data into HubSpot Companies or Listings object (based on final decision).
 - Validate addresses and contact information.
2. **Import Contacts (Patients):**
 - Import core patient demographic data, contact information, and status fields.
 - Associate Contacts with their primary clinic Company/Listing.

- Perform initial deduplication in HubSpot based on email.
- **Batch Size:** 500,000 records per import.
- **Validation:** Spot check 1% of records for accuracy.

Phase 2: Program Enrollment & Financial Data (Week 4)

1. **Import Products (Services & Programs):**
 - Import service catalog into HubSpot Products object.
 - Manually create/verify WooCommerce product sync via WP Fusion.
2. **Import Deals (Program Enrollments):**
 - Import historical and active program enrollments into HubSpot Deals.
 - Associate Deals with Contacts and Products.
 - Import financial data related to deals (program fees, discounts).
 - **Batch Size:** 200,000 records per import.
 - **Validation:** Verify deal stages, amounts, and associations.

Phase 3: Appointments & Support History (Week 5)

1. **Import Appointments:**
 - Import historical and future appointments into HubSpot Appointments.
 - Associate Appointments with Contacts, Deals (if applicable), and Companies/Listings (location).
 - **Batch Size:** 1,000,000 records per import.
 - **Validation:** Check appointment dates, types, and associations.
2. **Import Tickets (Support History):**
 - Import historical support tickets into HubSpot Tickets.
 - Associate Tickets with Contacts.
 - **Batch Size:** 500,000 records per import.
 - **Validation:** Verify ticket status, categories, and patient association.

Phase 4: Measurement History & Remaining Data (Week 6)

1. **Import Measurement History (Custom Object):**
 - Import time-series health data into the **Measurement History** custom object.
 - Associate records with Contacts, Deals, and Appointments.
 - **Batch Size:** 2,000,000 records per import (this is the largest dataset).
 - **Validation:** Check measurement types, values, units, and dates.
2. **Import Remaining OM Aggregation Fields:**
 - Import any remaining fields into their respective objects (e.g., marketing attribution, detailed notes).
 - Perform final data integrity checks.

Post-Migration Validation & Go-Live (Week 7-8)

1. **Comprehensive Data Validation:**
 - Run reports to compare record counts between source and HubSpot.
 - Perform detailed spot checks on critical data fields across all objects.
 - Verify object associations and relationships.
 - Test search and filtering functionality.
 2. **User Acceptance Testing (UAT):**
 - Key users from each department test workflows and data accuracy.
 - Address any identified issues or discrepancies.
 3. **Configure Ongoing Sync Mechanisms:**
 - Activate and test WP Fusion for real-time WooCommerce sync.
 - Set up any custom API integrations or middleware for OM aggregation sync.
 - Configure telehealth platform integration.
 4. **Staff Training:**
 - Conduct comprehensive training for all HubSpot users.
 - Provide documentation and support resources.
 5. **Go-Live & Monitoring:**
 - Officially switch to HubSpot as the primary CRM and patient management system.
 - Closely monitor data sync, system performance, and user adoption.
 - Address any post-go-live issues promptly.
-

SECTION 11: ONGOING SYNCHRONIZATION MECHANISMS

This section details the strategy for maintaining flawless, accurate, and real-time (or near real-time) data synchronization between HubSpot, WooCommerce, OM aggregation, and other critical systems.

Core Sync Principles:

- **Single Source of Truth:** Define the authoritative source for each data point.
- **Bi-Directional vs. Uni-Directional:** Determine sync direction based on data ownership.
- **Real-Time for Critical Data:** Ensure immediate updates for essential information.
- **Batch Sync for Less Critical Data:** Optimize performance for large datasets.
- **Error Handling & Monitoring:** Implement robust error detection and alerting.
- **API Rate Limit Management:** Respect platform API limits to avoid disruptions.

System-Specific Sync Strategies:

1. WooCommerce & HubSpot (via WP Fusion):

- **Sync Trigger:** Real-time, event-driven (e.g., new order, customer update, subscription change).
- **Data Flow:** Primarily Uni-directional (WooCommerce to HubSpot) for orders, customers, subscriptions. Bi-directional for Product catalog sync.
- **Key Synced Data:**
 - **Customers:** New customers in WooCommerce create/update Contacts in HubSpot.
 - **Orders:** New orders in WooCommerce create Deals (or update existing) in HubSpot, including line items, amounts, and status.
 - **Subscriptions:** Subscription status changes (active, cancelled, on-hold) update Deal and Contact records.
 - **Products:** Product information (name, price, SKU, description, categories) synced bi-directionally between WooCommerce Products and HubSpot Products.
 - **Tags & Custom Fields:** WP Fusion allows flexible mapping of WooCommerce data to HubSpot custom fields and application of tags for segmentation and automation.
- **Conflict Resolution:** WP Fusion typically uses