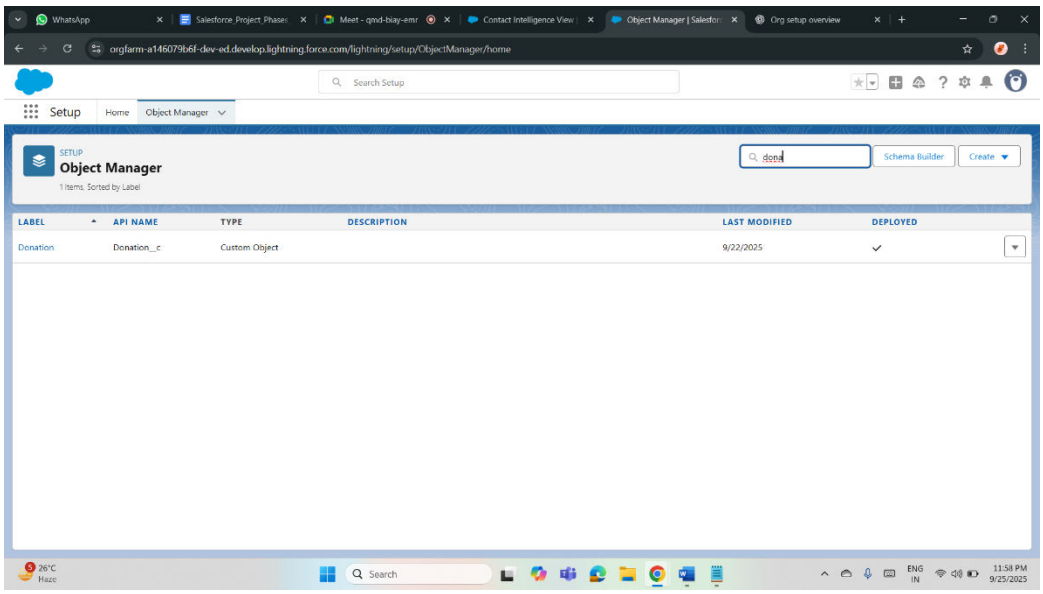
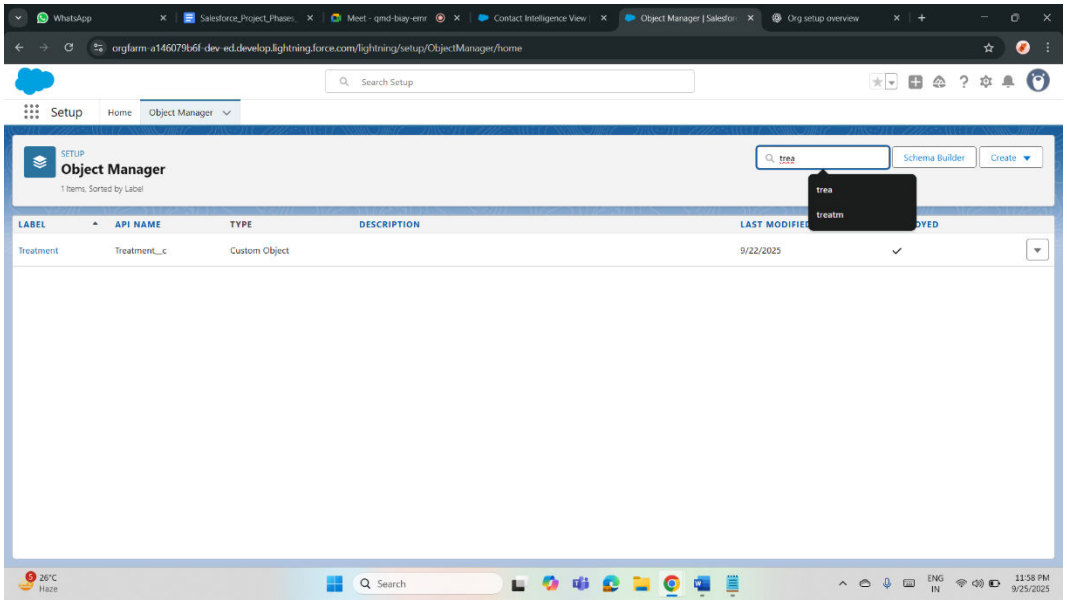
Phase 3: Data Modeling & Relationships

Standard & Custom Objects:

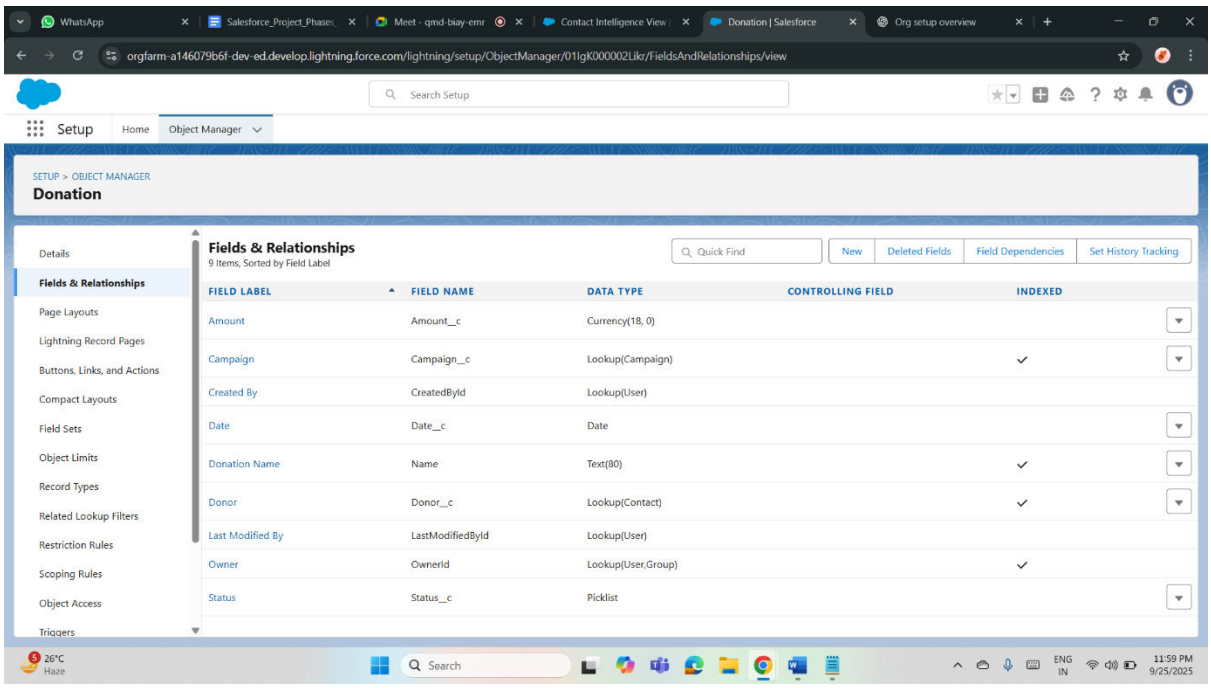
Healthcare uses standard objects like Contacts for patients and Accounts for hospitals, while custom objects manage appointments or medical records. Donation systems use Opportunities for donations, Contacts for donors, and custom objects for campaigns or events. Combining standard and custom objects supports specialized workflows.

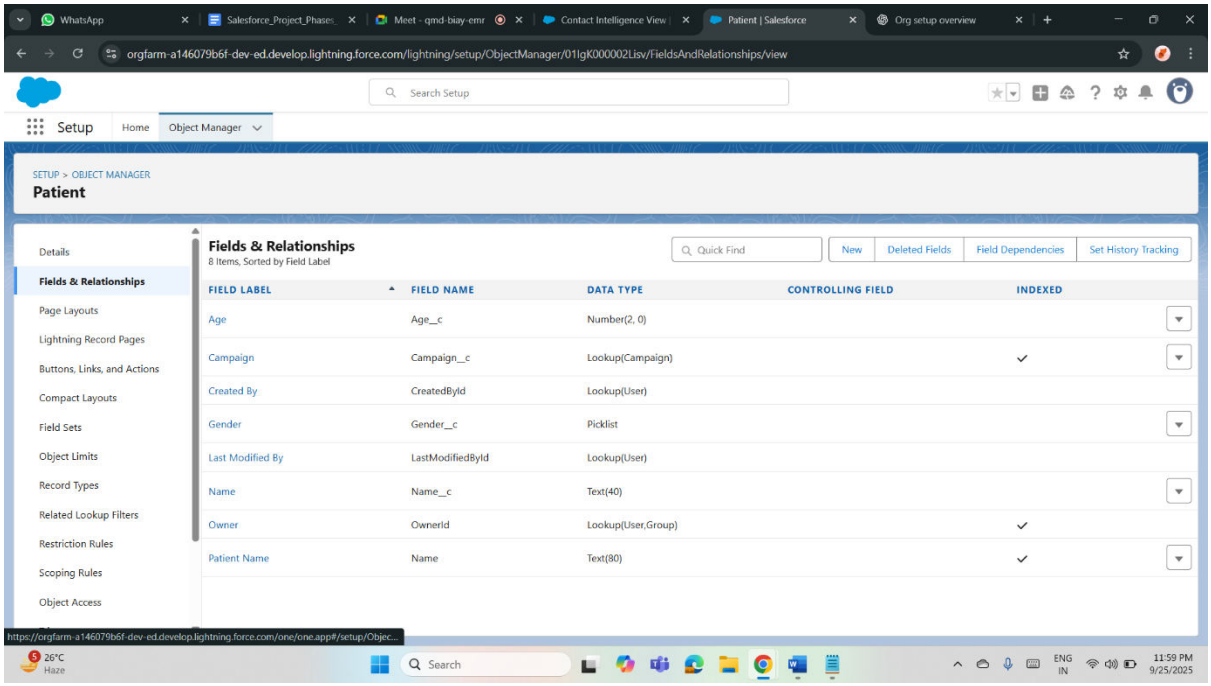




Fields:

Healthcare systems need fields for patient details (age, medical history, allergies). Donation systems need fields for donor preferences, contribution frequency, and pledge amount. Custom fields capture project-specific data, while validation rules ensure accuracy and compliance. Fields structure critical information and support reports and automation.





Record Types:

In healthcare, record types differentiate inpatient vs outpatient records or appointment types. In donation tracking, record types separate one-time donations from recurring pledges or corporate sponsorships. They allow customized processes, page layouts, and picklists to suit specific categories, improving usability and reporting.

Page Layouts:

Healthcare page layouts display vital signs, treatment plans, and contact information. Donation systems display donor history, pledge details, and related campaigns. Custom page layouts present role-based, relevant information to users, improving efficiency while ensuring sensitive or unnecessary details remain hidden.

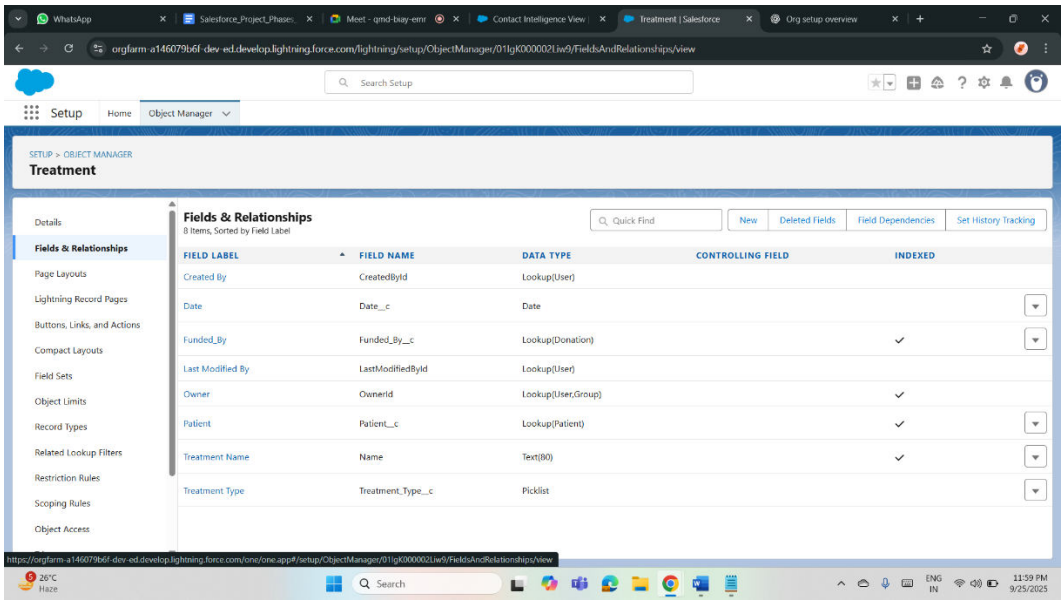
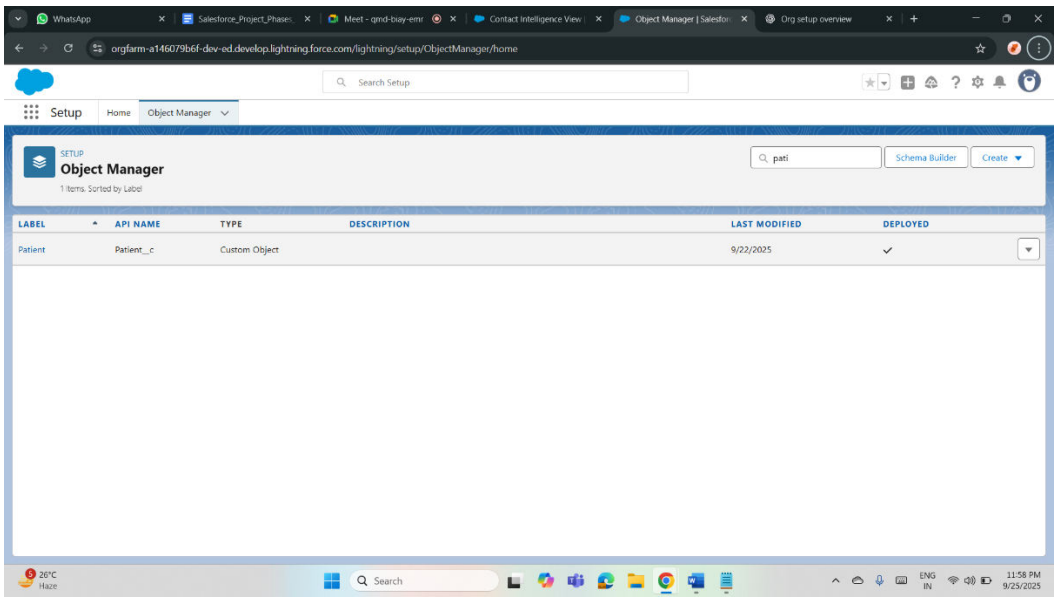
Compact Layouts:

Compact layouts in healthcare highlight patient name, age, and emergency contact on mobile or quick views. In donation systems, donor name, pledged amount, and donation status appear at the top. Compact layouts deliver essential information at a glance, enhancing productivity and mobile usability.

Schema Builder:

Healthcare projects use Schema Builder to visualize patient, doctor, and treatment relationships. Donation systems map donors, donations, campaigns, and volunteers. Schema Builder provides a drag-and-drop interface to design, understand, and maintain data models, making relationships and dependencies easy to manage.

Lookup vs Master-Detail vs Hierarchical Relationships:

Healthcare uses lookup for patient–insurance links, master-detail for prescription–medication records, and hierarchical for internal staff management. Donation systems use lookup for donor–event relations, master-detail for campaign–donation management, and hierarchical for organizing

fundraiser teams. Choosing the right relationship ensures proper dependency and reporting.