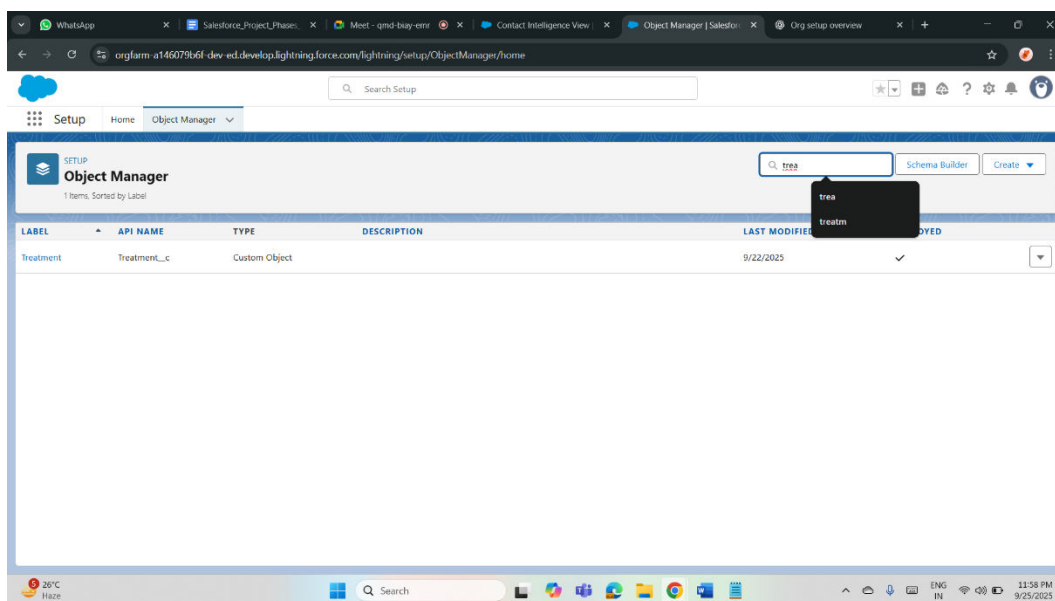
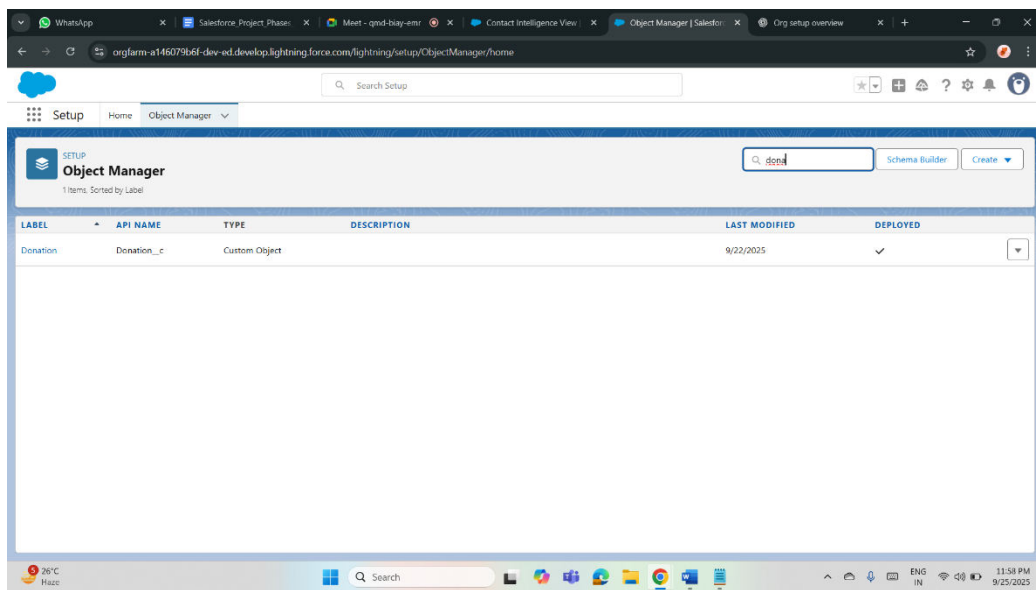


## Phase 3: Data Modeling & Relationships

### 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.

WhatsAppSalesforce\_Project\_PhaseMeet - qmd-buy-emrContact Intelligence ViewDonation | SalesforceOrg setup overview

orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gk000002Ltkr/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Donation

DetailsFields & Relationships9 Items, Sorted by Field Label

Fields & Relationships

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesObject AccessTriggers

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Campaign	Campaign__c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Donation Name	Name	Text(80)		✓
Donor	Donor__c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		

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WhatsAppSalesforce\_Project\_PhaseMeet - qmd-buy-emrContact Intelligence ViewPatient | SalesforceOrg setup overview

orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gk000002Ltkr/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Patient

DetailsFields & Relationships8 Items, Sorted by Field Label

Fields & Relationships

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesObject AccessTriggers

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Number(2, 0)		
Campaign	Campaign__c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient Name	Name	Text(80)		✓

https://orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/one/app#/setup/Objec...26°C HazeSearchENG IN11:59 PM 9/25/2025

### **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.

Screenshot of the Salesforce Setup page, specifically the 'Fields & Relationships' section for the 'Treatment' object. The page shows a list of fields with their names, data types, and whether they are indexed or controlled.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Funded By	Funded_By__c	Lookup(Donation)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient	Patient__c	Lookup(Patient)		✓
Treatment Name	Name	Text(80)		✓
Treatment Type	Treatment_Type__c	Picklist		

Screenshot of the Salesforce Setup page, specifically the 'Object Manager' section. The page shows a list of objects with their labels, API names, types, descriptions, last modified dates, and deployment status.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Patient	Patient__c	Custom Object		9/22/2025	✓