

Healthcare Optimization Solution

Introduction:

Healthcare Optimization Solution is a comprehensive solution designed to enhance the patient experience and streamline administrative tasks within a healthcare facility. The app aims to provide admin and patients with easy access to information about doctor availability, bed availability, and use for appointment booking, improving overall patient care and track all the operational efficiency.

Creating Developer Account

Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup>

On the sign up form, enter the following details :

First name & Last name

Email

Role : Developer

Company : College Name

Country : India

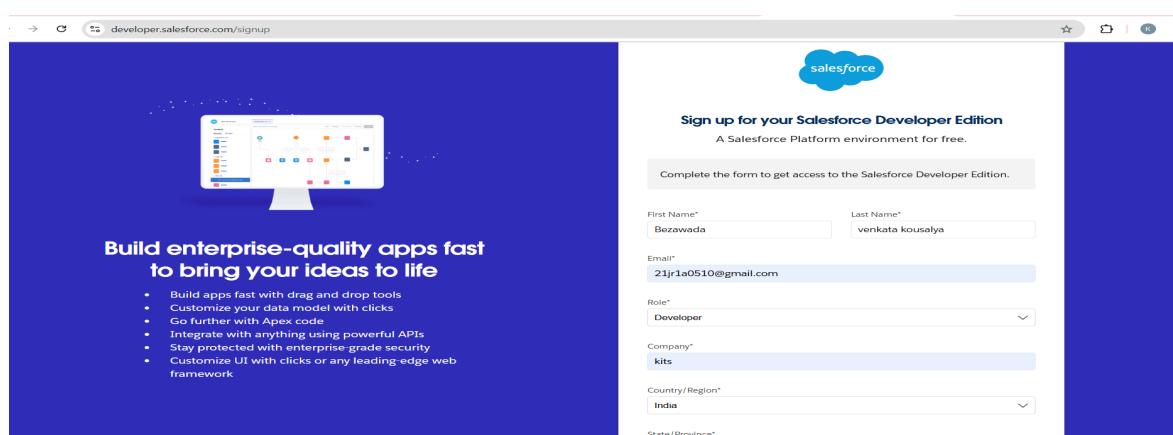
Postal Code : pin code

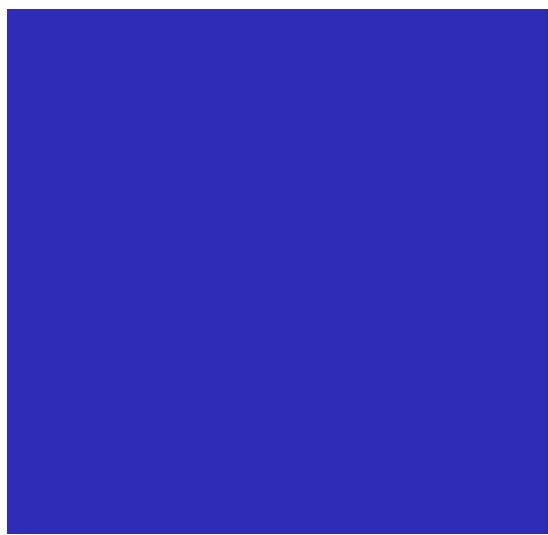
Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.





Postal Code*
522003

Username*
kousalya088@KITS.COM

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

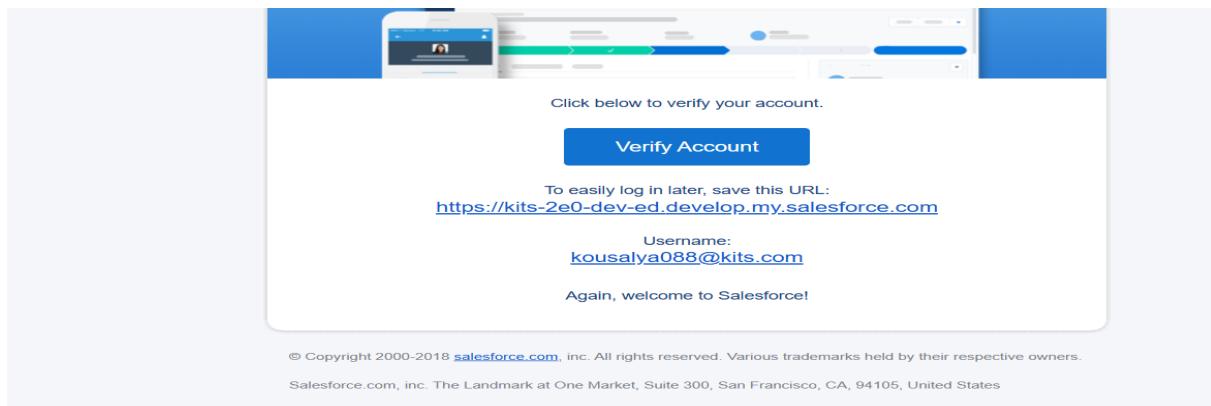
I'm not a robot 
reCAPTCHA
Privacy • Terms

Sign me Up

Already have a Salesforce Developer Environment? [Log In](#)

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account



3. Give a password and answer a security question and click on change password.

The screenshot shows the Salesforce Setup Home page. The left sidebar contains links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), and Platform Tools. The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Join the Trailblazer Community' (Get help, learn and collaborate with fellow customers). Below these cards is a section titled 'Most Recently Used' showing 10 items, with 'Home' listed as a Visualforce Page.

Object

To Navigate to Setup page:

1. Click on gear icon >> click setup.

The screenshot shows the Salesforce Setup page. The left sidebar has 'Setup' selected. A dropdown menu on the right shows 'Setup' as the current selection, along with 'Service Setup' and 'Developer Console'. The main content area displays the same three cards as the previous screenshot: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Join the Trailblazer Community'.

To create an object:

Create Patient Object:

The purpose of creating a Patient custom object is to store and manage information about Doctors.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Object Manager

52+ Items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment	Appointment_c	Custom Object	26/02/2025	▼

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Patient	Example: Account
Plural Label	Patients	Example: Accounts

Starts with vowel sound

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Patient Name	Example: Account Name
Data Type	Text	Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [i](#)

1. Enter the label name >> Patient
2. Plural label name>>Patients
3. Enter Record Name Label and Format
 - Record Name >>Patient name
 - Data Type >> Text
3. Click on Allow reports.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing (i)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

4. Allow search >> Save.

Create Doctor Object:

The purpose of creating a Doctor object is to store and manage information about Patients.

To create an object: From the setup page >> Click on Object Manager >> Click on Create

1. Enter the label name >>Doctor
2. Plural label name >> Doctor

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	<input type="text" value="Doctor"/>	Example: Account
Plural Label	<input type="text" value="Doctor"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Doctor"/>	Example: Account
-------------	-------------------------------------	------------------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

1. Enter Record Name Label and Format
- Record Name >> Doctor name
- Data Type >>Text

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Doctor Name"/>	Example: Account Name
-------------	--	-----------------------

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing (i)

4. Click on Allow reports

In Development
Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

5. Allow search >> Save

Create 2 more object with label name as Appointment, Bed Reservation.

(Use "Auto Number" as a data type for Appointment,BedReservation where Display Format :A-{00} and B-{00} ,Starting Number :1).

Appointment:

New Custom Object

Help for this

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name
Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Display Format Example: A-{0000} [What Is This?](#)
Starting Number

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

- In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- Allow Search

Object Creation Options (Available only when custom object is first created)

click save

BedReservation:

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account
Plural Label: Example: Accounts
Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Enter Record Name Label and Format

Record Name: Example: Account Name

Data Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Display Format: Example: A-(0000) [What Is This?](#)
Starting Number:

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [?](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard object.

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

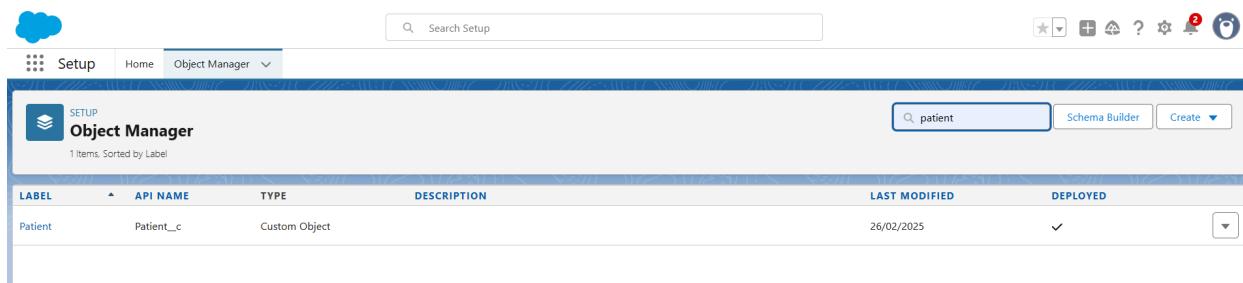
click save

Fields & Relationships

Creating Text Area Field in Patient Object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar>> click on the object.



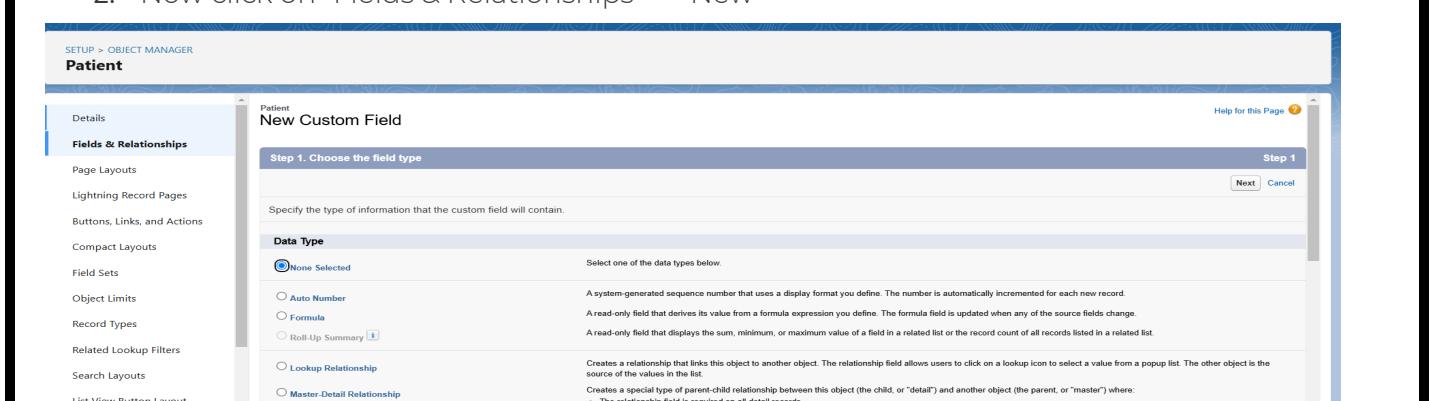
The screenshot shows the Salesforce Object Manager. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. A search bar contains the text "patient". Below the header, the title "Object Manager" is displayed above a table. The table has columns labeled LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. There is one row for the "Patient" object, which is of type "Custom Object". The "LAST MODIFIED" column shows the date "26/02/2025". The "DEPLOYED" column has a dropdown menu with a downward arrow. The table also includes a header row with sorting arrows for each column.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Patient	Patient__c	Custom Object		26/02/2025	<input type="button" value="▼"/>

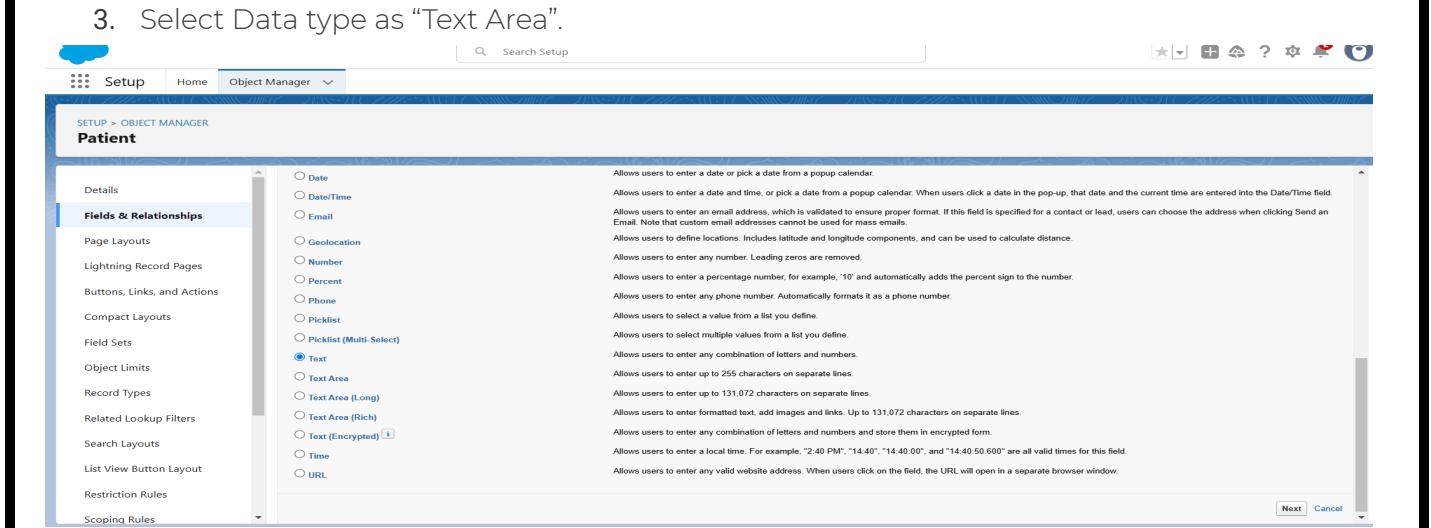
2. Now click on “Fields & Relationships” >> New



3. Select Data type as “Text Area”.



4. Click on Next



SETUP > OBJECT MANAGER
Patient

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Field Label: Address

Length: 255

Field Name: Address

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

5. Fill the above as following:

- Field Label: Address
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

Creating the Date field in object Patient:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Date” and click Next.
4. Given the Field Label as “DOB”.

SETUP > OBJECT MANAGER
Patient

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Patient
New Custom Field

Step 2. Enter the details

Field Label: DOB

Field Name: DOB

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

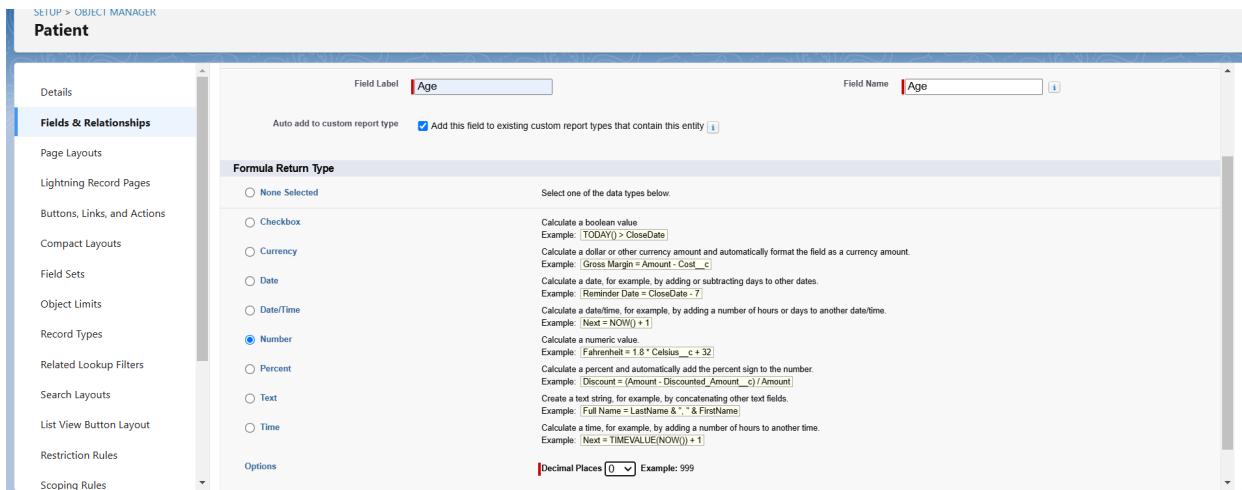
5.Field Name will be auto populated, and click on Next >> Next >> Save

Creating Formula Field in Patient Object:

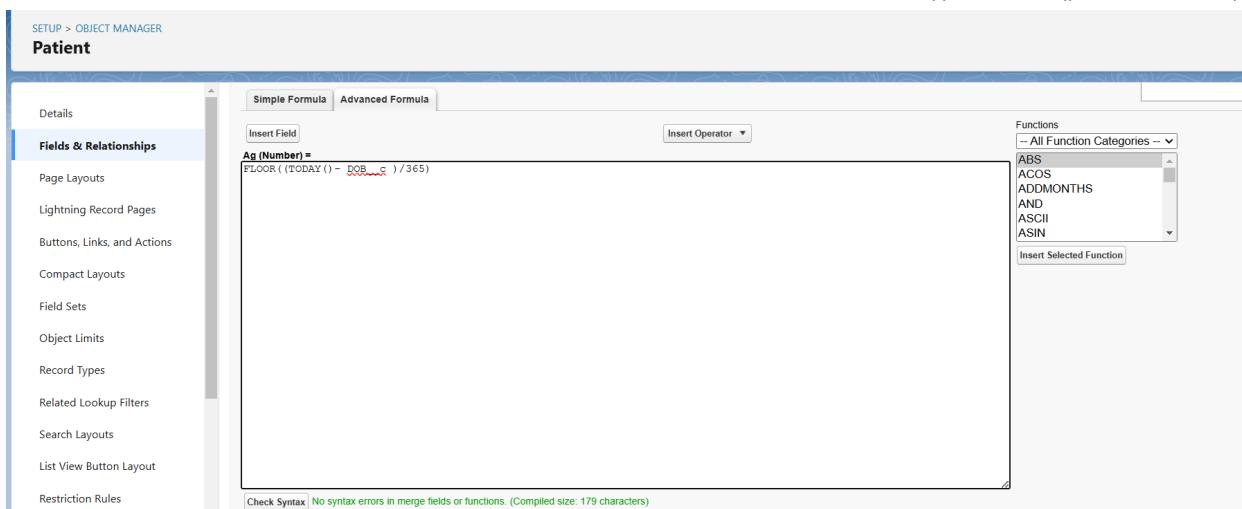
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar>> click on the object.

1. Now click on “Fields & Relationships” >> New.
2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and change the decimal values to zero and click next.



Under Advanced Formula write down the formula :FLOOR((TODAY()- DOB_c)/365



5. click “Check Syntax” and Next >> Next>> Save & New.

Creating Picklist Field in Patient Object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(patient) in quick find bar>> click on the object.

2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Blood Group”.
5. In values select “Enter values(A+,A-,B+,B-,AB+,AB-,O+,O-), with each value separated by a new line” and enter values as shown below.

SETUP > OBJECT MANAGER
Patient

Fields & Relationships

Field Label: Blood Group

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

A-
B+
B-
AB+
AB-
O+
O-

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name: Blood_Group

Description:

6. Click Next>> Next >> Next >> Save

Creating the Email field in object Patient:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar >>click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “Email”.
5. Click Next>> Next >> Next >> Save .

SETUP > OBJECT MANAGER
Patient

Patient
New Custom Field

Step 2. Enter the details

Field Label: Email

Field Name: Email

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Creating the Phone field in object Patient:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar>>click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Mobile”.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Patient'. On the left, there's a sidebar with options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Deleted Types'. The main content area is titled 'Patient New Custom Field' and 'Step 2. Enter the details'. It has fields for 'Field Label' (set to 'Mobile'), 'Field Name' (also set to 'Mobile'), 'Description' (empty), and 'Help Text' (empty). There are also 'Next Step' and 'Cancel' buttons at the bottom.

Creating Lookup Relationship:

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship between Appointment & Patient Objects.

Go to the setup page >> click on object manager >> type object name(Appointment) in the quick find bar >>click on the object.

Click on fields & relationship >> click on New.

Select “Lookup relationship” as data type and click Next.

Select the related object “ Patient”.

Give Field Label as “Patient Name” and click Next.

Next >> Next >> Save.

The screenshot shows the 'Data Type' section of the relationship creation wizard. The sidebar on the left is identical to the previous screenshot. The main panel shows 'Data Type' with several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (selected), and 'Master-Detail Relationship'. A detailed description for 'Lookup Relationship' is provided: "Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list." It also notes that it creates a special type of parent-child relationship where ownership and sharing are determined by the master record. There are 'Next Step' and 'Cancel' buttons at the bottom.

Creating Remaining Fields in Objects:

1. Patient Object

Field Name	Data Type	Details
Gender	Picklist	Values: Male, Female, Other
Patient ID	Auto Number	Display Format: p-{000}, Starting Number: 1

Gender

SETUP > OBJECT MANAGER
Patient

Patient New Custom Field

Step 2. Enter the details

Field Label: Gender

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

```
Male
Female
Other
```

Display values alphabetically, not in the order entered
 Use first value as default value

Help for this Page

Click Next>>Next>>save.

Patient Id

SETUP > OBJECT MANAGER
Patient

Patient New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where

This relationship field is required on all detail records

Help for this Page

Step 2. Enter the details

Field Label: Patient ID

Display Format: p-{0000} Example: A-{0000} What Is This?

Starting Number: 1

Generate Auto Number for existing records

Field Name: Patient_ID

Description:

Help Text:

Patient New Custom Field

Step 2. Enter the details

Field Label: Patient ID

Display Format: p-{0000} Example: A-{0000} What Is This?

Starting Number: 1

Generate Auto Number for existing records

Field Name: Patient_ID

Description:

Help Text:

Help for this Page

Click next>>next>>save.

2. Doctor Object

Field Name	Data Type	Details
DOB	Date	
Age	Formula (Number)	<code>FLOOR((TODAY() - DOB__c) / 365) (Decimal: 0)</code>
Blood Group	Picklist	Values: A+, A-, B+, B-, AB+, AB-, O+, O-
Doctor ID	Auto Number	
Email	Email	
Gender	Picklist	Values: Male, Female, Other
Mobile	Phone	
Specialization	Multi-Select Picklist	Options: Cardiologist, Dermatologist, Endocrinologist, Gastroenterologist, Hematologist, Neurologist, OB/GYN, Oncologist, Orthopaedic Surgeon, Paediatrician, Psychiatrist, Radiologist, General Surgeon, Urologist

DOB

The screenshot shows the Salesforce Setup interface for the 'Doctor' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various customization options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The main content area displays the 'Custom Field Definition Detail' for the 'DOB' field. Key details shown include:

- Field Information:** Field Label: DOB, Field Name: DOB, API Name: DOB__c, Object Name: Doctor, Data Type: Date.
- Description:** Help Text: Doctor Custom Field: DOB ~ Salesforce - Developer Edition.
- General Options:** Required: (unchecked).

Age

SETUP > OBJECT MANAGER

Doctor

Age

Custom Field Definition Detail

Field Information		Object Name	
Field Label	Age	Object Name	
Field Name	Age	Object Name	
API Name	Age_c	Object Name	
Description		Object Name	
Help Text		Object Name	
Data Owner		Object Name	
Field Usage		Object Name	
Data Sensitivity Level		Object Name	
Compliance Categorization		Object Name	
Created By	Bezawada venkata kousalya, 26/02/2025, 1:37 pm	Modified By	Bezawada venkata kousalya, 26/02/2025, 1:37 pm

Formula Options

Data Type	Formula
Decimal Places	0
FLOOR((TODAY() - DOB_c)/365)	

Blood Group

SETUP > OBJECT MANAGER

Doctor

Blood Group

Custom Field Definition Detail

Field Information		Object Name	
Field Label	Blood Group	Object Name	
Field Name	Blood_Group	Object Name	
API Name	Blood_Group_c	Object Name	
Description		Object Name	
Help Text		Object Name	
Data Owner		Object Name	
Field Usage		Object Name	
Data Sensitivity Level		Object Name	
Compliance Categorization		Object Name	
Created By	Bezawada venkata kousalya, 26/02/2025, 1:38 pm	Modified By	Bezawada venkata kousalya, 26/02/2025, 1:38 pm

General Options

Required	
<input type="checkbox"/>	
Default Value	1

Picklist Options

Restrict picklist to the values defined in the value set	
<input checked="" type="checkbox"/>	
Controlling Field	(None)

SETUP > OBJECT MANAGER

Doctor

Field Dependencies

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	A+	A+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	A-	A-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	B+	B+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	B-	B-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	AB+	AB+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	AB-	AB-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	O+	O+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	O-	O-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm

Validation Rules

New	Validation Rules Help
No validation rules defined.	

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	A+	A+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	A-	A-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	B+	B+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	B-	B-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	AB+	AB+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	AB-	AB-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	O+	O+	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm
<input type="checkbox"/> Edit Del Deactivate	O-	O-	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:38 pm

Inactive Values

Delete Unused Values	Inactive Values Help

Doctor Id

Doctor

SETUP > OBJECT MANAGER Doctor

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Custom Field Definition Detail

Field Information

Field Label	Doctor ID	Object Name	Doctor
Field Name	Doctor_ID	Data Type	Auto Number
API Name	Doctor_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			

Created By: Bezwada venkata kousalya, 26/02/2025, 1:39 pm Modified By: Bezwada venkata kousalya, 26/02/2025, 1:39 pm

General Options

External ID:

Auto Number Options

Display Format: D-(000)

Email

SETUP > OBJECT MANAGER Doctor

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Custom Field Definition Detail

Field Information

Field Label	Email	Object Name	Doctor
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya, 26/02/2025, 1:41 pm Modified By: Bezwada venkata kousalya, 26/02/2025, 1:41 pm

General Options

Required:
Unique:
External ID:
Default Value:

Validation Rules

Gender

SETUP > OBJECT MANAGER Doctor

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Custom Field Definition Detail

Field Information

Field Label	Gender	Object Name	Doctor
Field Name	Gender	Data Type	Picklist
API Name	Gender__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya, 26/02/2025, 1:41 pm Modified By: Bezwada venkata kousalya, 26/02/2025, 1:41 pm

General Options

Required:
Default Value:

Picklist Options

Restrict picklist to the values defined in the value set:
Controlling Field:

SETUP > OBJECT MANAGER

Doctor

Controlling Field [New]

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Picklist Values Used
Active and inactive picklist values 3 (1,000 max)

Field Dependencies [New] Field Dependencies Help [?]

No dependencies defined.

Validation Rules [New] Validation Rules Help [?]

No validation rules defined.

Values [New] Reorder [Reorder] Printable View [Printable View] Chart Colors [Chart Colors] Values Help [?]

Action	Values	API Name	Default	Chart Colors	Modified By
[Edit Del Deactivate]	Male	Male	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:41 pm
[Edit Del Deactivate]	Female	Female	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:41 pm
[Edit Del Deactivate]	Other	Other	<input type="checkbox"/>	Assigned dynamically	Bezawada venkata kousalya, 26/02/2025, 1:41 pm

Inactive Values [Delete Unused Values] Inactive Values Help [?]

No Inactive Values values defined.

Back To Top Always show me ▾ more records per related list

Mobile No

IP > OBJECT MANAGER

Doctor

Mobile

Back to Doctor

Validation Rules [?]

Custom Field Definition Detail [Edit] Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Mobile	Object Name	Doctor
Field Name	Mobile	Data Type	Phone
API Name	Mobile__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Bezawada venkata kousalya, 26/02/2025, 1:42 pm Modified By Bezawada venkata kousalya, 26/02/2025, 1:42 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Doctor Custom Field: Mobile ~ Salesforce - Developer Edition

Validation Rules [New] Validation Rules Help [?]

No validation rules defined.

Specialization

Setup Home Object Manager

SETUP > OBJECT MANAGER

Doctor

Specialization

Back to Doctor

Validation Rules [?]

Custom Field Definition Detail [Edit] Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Specialization	Object Name	Doctor
Field Name	Specialization	Data Type	Picklist (Multi-Select)
API Name	Specialization__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Bezawada venkata kousalya, 26/02/2025, 1:44 pm Modified By Bezawada venkata kousalya, 26/02/2025, 1:44 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Picklist (Multi-Select) Options

Restrict picklist to the values defined in the value set ✓

Controlling Field [New] # Visible Lines 4

Doctor

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Values		New	Reorder	Replace	Printable View	Values Help ?
Action	Values	API Name	Default	Modified By		
Edit Del Deactivate	Cardiologist	Cardiologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Dermatologist	Dermatologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Endocrinologist	Endocrinologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Gastroenterologist	Gastroenterologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Hematologist	Hematologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Neurologist	Neurologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Obstetrician and Gynecologist (OB/GYN)	Obstetrician and Gynecologist (OB/GYN)	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Oncologist	Oncologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Orthopaedic Surgeon	Orthopaedic Surgeon	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Paediatrician	Paediatrician	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Psychiatrist	Psychiatrist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Radiologist	Radiologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	General Surgeon	General Surgeon	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		
Edit Del Deactivate	Urologist	Urologist	<input type="checkbox"/>	Bezawada venkata kousalya, 26/02/2025, 1:44 pm		

Inactive Values

Inactive Values Help ?

3. Appointment Object

Field Name	Data Type	Details
Appointment Date	Date	
Doctor Name	Lookup (Doctor)	
Start Time	Time	
End Time	Time	

Appointment Date

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Appointment Date

Back to Appointment

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information		Object Name	Appointment
Field Label	Appointment Date	Object Name	Appointment
Field Name	Appointment_Date	Data Type	Date
API Name	Appointment_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Bezawada venkata kousalya, 26/02/2025, 5:55 pm	Modified By	Bezawada venkata kousalya, 26/02/2025, 5:55 pm

General Options

Required

Default Value

Validation Rules New Validation Rules Help ?

Doctor Name

SETUP > OBJECT MANAGER

Appointment

Doctor Name

Back to Appointment

Validation Rules (0)

Custom Field Definition Detail

[Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)

Field Information

Field Label	Doctor Name	Object Name	Appointment
Field Name	Doctor_Name	Data Type	Lookup
API Name	Doctor_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya, 26/02/2025, 5:57 pm Modified By: Bezwada venkata kousalya, 26/02/2025, 5:57 pm

Lookup Options

Related To	Doctor	Child Relationship Name	Appointment
Related List Label	Appointment		
Required	<input type="checkbox"/>		

What to do if the lookup record is deleted? [Clear the value of this field.](#)

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

[New](#)

[Back To Top](#)

Start Time

SETUP > OBJECT MANAGER

Appointment

Start Time

Back to Appointment

Validation Rules (0)

Custom Field Definition Detail

[Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)

Field Information

Field Label	Start Time	Object Name	Appointment
Field Name	Start_Time	Data Type	Time
API Name	Start_Time__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya, 26/02/2025, 5:57 pm Modified By: Bezwada venkata kousalya, 26/02/2025, 5:57 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

No validation rules defined.

[New](#)

[Validation Rules Help](#)

End Time

Appointment

Appointment Custom Field
End Time
[Back to Appointment](#)

[Validation Rules \[0\]](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information		Object Name Appointment	Data Type Time
Field Label	End Time	Object Name	Appointment
Field Name	<code>End_Time</code>	Data Type	Time
API Name	<code>End_Time__c</code>		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Bezawada venkata kousalya , 26/02/2025, 5:58 pm	Modified By	Bezawada venkata kousalya , 26/02/2025, 5:58 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules [New](#) [Validation Rules Help ?](#)

No validation rules defined.

4. Bed Reservation Object

Field Name	Data Type	Details
Bed Type	Picklist	Values: Regular, Healing, Paediatric, Maternity, Surgical
Bed Number	Picklist	Values: R1, R2, H1, H2, P1, P2, M1, M2, S1, S2
Reservation Date	Date	
Start Time	Time	
End Time	Time	
Patient	Lookup (Patient)	
Booking Status	Picklist	Values: Available, Booked

Bed Type

Bed Type
[Back to Bed Reservation](#)

[Validation Rules \[0\]](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information		Object Name Bed Reservation	Data Type Picklist
Field Label	Bed Type	Object Name	Bed Reservation
Field Name	<code>Bed_Type</code>	Data Type	Picklist
API Name	<code>Bed_Type__c</code>		
Description	Bed Reservation Custom Field: Bed Type ~ Salesforce - Developer Edition		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Bezawada venkata kousalya , 26/02/2025, 6:00 pm	Modified By	Bezawada venkata kousalya , 26/02/2025, 6:00 pm

General Options

Required	<input type="checkbox"/>
Default Value	<input type="text"/>

Picklist Options

Restrict picklist to the values defined in the value set
Controlling Field [\[New\]](#)

Bed Reservation

Picklist Values Used
Active and inactive picklist values 5 (1,000 max)

Field Dependencies
Action: Dependent Field Data Type: Modified By
Edit | Del Bed Number Picklist Bezwada venkata kousalya, 26/02/2025, 6:25 pm

Validation Rules
No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Regular	Regular	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:00 pm
<input type="checkbox"/> Edit Del Deactivate	Healing	Healing	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:00 pm
<input type="checkbox"/> Edit Del Deactivate	Paediatric	Paediatric	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:00 pm
<input type="checkbox"/> Edit Del Deactivate	Maternity	Maternity	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:00 pm
<input type="checkbox"/> Edit Del Deactivate	Surgical	Surgical	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:00 pm

Inactive Values
Delete Unused Values

Bed Number

Bed Reservation Custom Field
Bed Number
Back to Bed Reservation

Custom Field Definition Detail
Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label: Bed Number	Object Name: Bed Reservation
Field Name: Bed_Number	Data Type: Picklist
API Name: Bed_Number_c	
Description:	
Help Text:	
Data Owner:	
Field Usage:	
Data Sensitivity Level:	
Compliance Categorization:	
Created By: Bezwada venkata kousalya, 26/02/2025, 6:01 pm	Modified By: Bezwada venkata kousalya, 26/02/2025, 6:01 pm

General Options
Required:
Default Value:

Picklist Options
Restrict picklist to the values defined in the value set

Validation Rules
No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	R1	R1	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	R2	R2	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	H1	H1	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	H2	H2	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	P1	P1	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	P2	P2	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	M1	M1	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	M2	M2	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	S1	S1	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm
<input type="checkbox"/> Edit Del Deactivate	S2	S2	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:01 pm

Inactive Values
Delete Unused Values

Reservation Date

Reservation Date

Custom Field Definition Detail

Field Information

Field Label	Reservation Date	Object Name	Bed Reservation
Field Name	Reservation_Date	Data Type	Date
API Name	Reservation_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya 26/02/2025, 6:02 pm Modified By: Bezwada venkata kousalya 26/02/2025, 6:02 pm

General Options

- Required:
- Default Value:

Validation Rules

No validation rules defined.

Start time

Custom Field Definition Detail

Field Information

Field Label	Start Time	Object Name	Bed Reservation
Field Name	Start_Time	Data Type	Time
API Name	Start_Time__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya 26/02/2025, 6:02 pm Modified By: Bezwada venkata kousalya 26/02/2025, 6:02 pm

General Options

- Required:
- Default Value:

Validation Rules

No validation rules defined.

End Time

Custom Field Definition Detail

Field Information

Field Label	End Time	Object Name	Bed Reservation
Field Name	End_Time	Data Type	Time
API Name	End_Time__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Bezwada venkata kousalya 26/02/2025, 6:03 pm Modified By: Bezwada venkata kousalya 26/02/2025, 6:03 pm

General Options

- Required:
- Default Value:

Validation Rules

No validation rules defined.

Patient

Bed Reservation

Patient

Back to Bed Reservation

Validation Rules ⓘ

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Patient	Object Name	Bed Reservation
Field Name	Patient	Data Type	Lookup
API Name	Patient_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Bezwada venkata kousalya, 26/02/2025, 6:04 pm	Modified By	Bezwada venkata kousalya, 26/02/2025, 6:04 pm

Lookup Options

Related To	Patient	Child Relationship Name	Bed_Reservation
Related List Label	Bed Reservation		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

No lookup filters defined.

Booking Status

SETUP > OBJECT MANAGER

Bed Reservation

Bed Reservation Custom Field

Booking Status

Back to Bed Reservation

Validation Rules ⓘ

Help for this Page ⓘ

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Booking Status	Object Name	Bed Reservation
Field Name	Booking_Status	Data Type	Picklist
API Name	Booking_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Bezwada venkata kousalya, 26/02/2025, 6:05 pm	Modified By	Bezwada venkata kousalya, 26/02/2025, 6:05 pm

General Options

Required	<input type="checkbox"/>
Default Value	<input type="button" value="New"/>

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field

SETUP > OBJECT MANAGER

Bed Reservation

Restrict picklist to the values defined in the value set

Controlling Field

Picklist Values Used

Active and inactive picklist values 2 (1,000 max)

Field Dependencies

New

No dependencies defined.

Validation Rules

New

No validation rules defined.

Values

New Reorder Replace Printable View Chart Colors Delete Selected Deactivate Selected Replace Selected

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Available	Available	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:05 pm
<input type="checkbox"/> Edit Del Deactivate	Booked	Booked	<input type="checkbox"/>	Assigned dynamically	Bezwada venkata kousalya, 26/02/2025, 6:05 pm

Inactive Values

Delete Unused Values

No Inactive Values values defined.

Always show me ▾ more records per related list

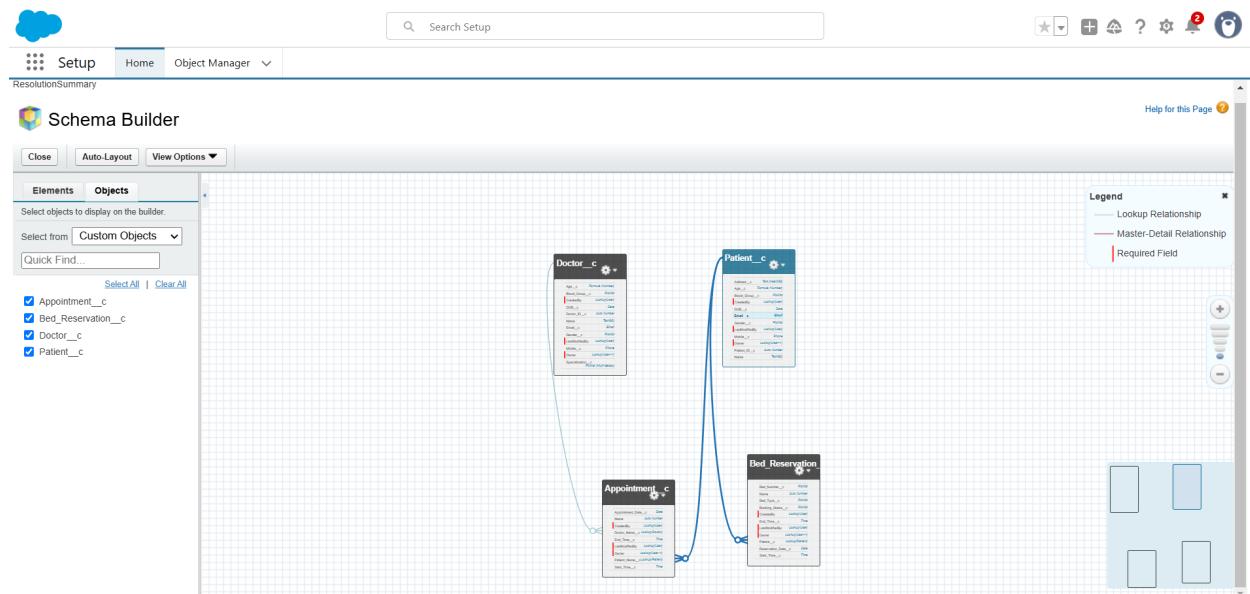
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Schema Builder

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

Creating Schema Builder

1. Go to setup >>click on Object Manager >> Schema Builder
2. Select objects >> Enter Objects as “Patient, Doctor, Appointment and Bed Reservation objects” in quick box and select them.



Creating the Field Dependencies

Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Bed Reservation) in quick find bar>> click on the object.
2. Click on Fields & Relationships and click on the Bed Type field.
3. Search for Field Dependencies and click on New.

SETUP > OBJECT MANAGER
Bed Reservation

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets

Bed Reservation Field Dependencies
« Back to Custom Object: Bed Reservation

This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Bed Type	Bed Number	Rezawada venkata kousalya, 26/02/2025, 6:25 pm

Field Dependencies New

4. Select Controlling Field as “Bed Type” and Depending field as “Bed Number”>> Continue.

5. Select the “Bed Number” values of related “Bed Type” values like for regular select R1,R2 and Click on Include Values >> Save.

Dependent Field – Bed Number

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- Select multiple cells at once, select multiple cells, and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells.
- Double click on a cell to include its value in the dependent picklist.
- Use the Preview button to test the results.

Legend

Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 5 (of 5) < Previous | Next > [View All](#) ▶ Go to

Bed Type:	Regular	Healing	Paediatric	Maternity	Surgical
Bed Number:	R1	R1	R1	R1	R1
	R2	R2	R2	R2	R2
	H1	H1	H1	H1	H1
	H2	H2	H2	H2	H2
	P1	P1	P1	P1	P1
	P2	P2	P2	P2	P2
	M1	M1	M1	M1	M1
	M2	M2	M2	M2	M2
	S1	S1	S1	S1	S1
	S2	S2	S2	S2	S2

Showing Columns: 1 - 5 (of 5) < Previous | Next > [View All](#)

Creating the validation rule

Creating the validation rule for DOB field in Patient object

Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 8 and create those fields mentioned in Jewel Customer object.

1. Go to setup >> click on Object Manager >> type object name(Patient) in quick find bar>> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ValidationForDOB”.
4. Insert the Error Condition Formula as : DOB__C >= TODAY().
5. Enter the Error Message as “Check DOB”, select the Error location as Field and select the field as “DOB”, and click Save.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the Patient object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Patient Validation Rule" and displays the "Validation Rule Detail" for a rule named "ValidationForDOB". The rule's details are as follows:

- Rule Name:** ValidationForDOB
- Error Condition Formula:** DOB__c >= TODAY()
- Error Message:** Check DOB
- Description:** (empty)
- Created By:** Bezwada venkata kousalya, 26/02/2025, 6:27 pm
- Active:** checked
- Error Location:** DOB
- Modified By:** Bezwada venkata kousalya, 26/02/2025, 6:27 pm

Buttons for "Edit" and "Clone" are located at the top right of the validation rule detail section.

NOTE: Do same for DOB in Doctor Object.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the Doctor object. The sidebar and validation rule detail section are identical to the Patient object setup, with the validation rule named "ValidationForDOB" having the same formula and active status.

Creating Apex Controller Class for Patient object:

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.

The screenshot shows the Salesforce Developer Console. The toolbar has "File", "Edit", "Debug", "Test", "Workspace", and "Help" menus. The "File" menu is open, and the "New" option is selected, displaying a dropdown menu with various options: Apex Class, Apex Trigger, Visualforce Page, Visualforce Component, Static Resource, Lightning Application, Lightning Component, Lightning Interface, Lightning Event, and Lightning Tokens. The "Apex Class" option is highlighted. Below the toolbar, tabs for "Logs", "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems" are visible. A status bar at the bottom shows "User", "Application", "Operation", "Time", "Status", "Read", and "Size".

2. Enter the name as " patientcontroller " for Apex Page to create a new Apex Page file.
3. Enter the code:

```

1 public class PatientController {
2     public String searchKey { get; set; }
3     public List<Patient__c> patientList { get; set; }
4     public Id selectedRecordId { get; set; }
5
6     public PatientController() {
7         searchKey = '';
8         patientList = [SELECT Id, Name, Mobile__c, Gender__c FROM Patient__c LIMIT 10];
9     }
10
11     // Search Patients
12     public void searchPatients() {
13         patientList = [SELECT Id, Name, Mobile__c, Gender__c
14                         FROM Patient__c
15                         WHERE Name LIKE :('%' + searchKey + '%')
16                         OR Mobile__c LIKE :('%' + searchKey + '%')
17                         LIMIT 10];
18     }
19

```

Creating Visualforce Page for patient object

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Visualforce page.
2. Enter the name as Patient for Apex Page to create a new Visualforce Page file
3. Enter the code.

```

1 <apex:page controller="PatientController">
2     <apex:form>
3         <apex:pageBlock title="Patient Search">
4
5             <!-- Search Box -->
6             <apex:inputText value="{!searchKey}" />
7             <apex:commandButton value="Search" action="{!searchPatients}" rerender="patientList"/>
8
9             <!-- New Patient Button -->
10            <apex:commandButton value="New Patient" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/o/Patient__c/new" />
11
12             <!-- Cancel Button (Redirects to Home Page) -->
13             <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/page/home" immediate="true" />
14
15             <!-- Patient Table -->
16             <apex:pageBlockTable value="{!patientList}" var="p" id="patientList">
17                 <apex:column value="{!p.Name}" headerValue="Name"/>
18                 <apex:column value="{!p.Mobile__c}" headerValue="Mobile Number"/>
19                 <apex:column value="{!p.Gender__c}" headerValue="Gender"/>
20             </apex:pageBlockTable>

```

Creating Apex Controller Class for Doctor object:

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
2. Enter the name as " Doctor " for Apex Page to create a new Apex Page file.
3. Enter the code:

```
1 public class DoctorController {  
2     // Declare the Doctor object  
3     public Doctor__c d { get; set; }  
4  
5     // Constructor initializes a new Doctor record  
6     public DoctorController() {  
7         d = new Doctor__c();  
8     }  
9  
10    // Save method to insert a new Doctor record  
11    public PageReference save() {  
12        try {  
13            insert d;  
14            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.CONFIRM, 'Doctor record saved successfully!'));  
15            return new PageReference('/' + d.Id);  
16        } catch (Exception e) {  
17            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERROR, e.getMessage()));  
18            return null;  
19        }  
20    }  
21}
```

Creating Visualforce Page for Doctor object

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Visualforce page.
2. Enter the name as Doctor for Apex Page to create a new Visualforce Page file
3. Enter the code.

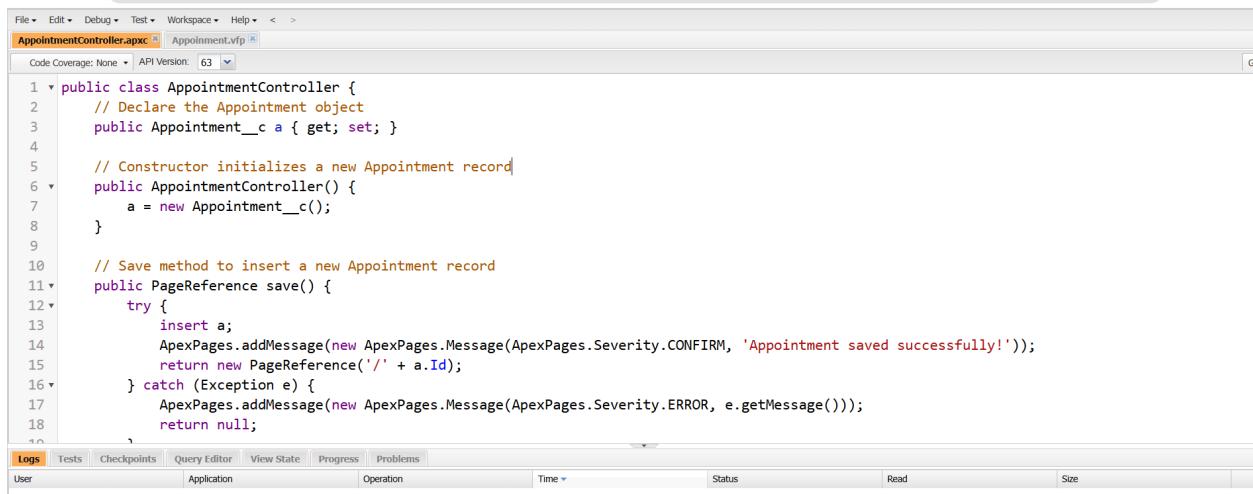
```
1 <apex:page sidebar="false" showHeader="false" controller="DoctorController">  
2     <apex:form>  
3         <apex:pageBlock title="NEW DOCTOR DETAILS">  
4             <apex:pageMessages />  
5  
6             <apex:pageBlockSection columns="2">  
7                 <apex:inputField value="{!!d.Doctor_ID_c}" />  
8                 <apex:inputField value="{!!d.Gender__c}" />  
9                 <apex:inputField value="{!!d.Name}" required="true"/>  
10                <apex:inputField value="{!!d.DOB__c}" />  
11                <apex:inputField value="{!!d.Email__c}" />  
12                <apex:inputField value="{!!d.Age__c}" />  
13                <apex:inputField value="{!!d.Mobile__c}" />  
14                <apex:inputField value="{!!d.Specialization__c}" />  
15            </apex:pageBlockSection>  
16  
17            <apex:pageBlockButtons >  
18        </apex:pageBlockButtons>
```

Creating

Apex Controller Class for Appointment object

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
2. Enter the name as " Appoinment " for Apex Page to create a new Apex Page file.

3. Enter the code:



```
AppointmentController.apxc [ Appointment.vfp ]  
File Edit Debug Test Workspace Help < >  
Code Coverage: None API Version: 63  
1 public class AppointmentController {  
2     // Declare the Appointment object  
3     public Appointment__c a { get; set; }  
4  
5     // Constructor initializes a new Appointment record  
6     public AppointmentController() {  
7         a = new Appointment__c();  
8     }  
9  
10    // Save method to insert a new Appointment record  
11    public PageReference save() {  
12        try {  
13            insert a;  
14            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.CONFIRM, 'Appointment saved successfully!'));  
15            return new PageReference('/' + a.Id);  
16        } catch (Exception e) {  
17            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERROR, e.getMessage()));  
18            return null;  
19        }  
20    }  
Logs Tests Checkpoints Query Editor View State Progress Problems  
User Application Operation Time Status Read Size
```

Creating Visualforce Page for Appointment object :

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Visualforce page.
2. Enter the name as Appointment for Apex Page to create a new Visualforce Page file
3. Enter the code.



```
AppointmentController.apxc [ Appointment.vfp ]  
review API Version: 63  
1 <apex:page sidebar="false" showHeader="false" controller="AppointmentController">  
2     <apex:form>  
3         <apex:pageBlock title="Appointment DETAILS">  
4             <apex:pageMessages />  
5  
6             <apex:pageBlockSection columns="2">  
7                 <apex:inputField value="{!a.Name}" required="true"/>  
8                 <apex:inputField value="{!a.Appointment_Date__c}" required="true"/>  
9                 <apex:inputField value="{!a.Doctor_Name__c}" required="true"/>  
10                <apex:inputField value="{!a.Patient_Name__c}" required="true"/>  
11                <apex:inputField value="{!a.Start_Time__c}" required="true"/>  
12                <apex:inputField value="{!a.End_Time__c}" required="true"/>  
13            </apex:pageBlockSection>  
14  
15            <apex:pageBlockButtons>  
16                <apex:commandButton value="Save" action="{!save}" />  
17                <apex:commandButton value="Save & New" action="{!saveandnew}" />  
18                <!--  Updated Cancel Button to Redirect to Home Page -->
```

Creating Apex Controller Class for Bed Reservation object

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
2. Enter the name as " BedReservation " for Apex Page to create a new Apex Page file.
3. Enter the code:

```

1 public class BedReservationController {
2     // Declare the Bed Reservation object
3     public Bed_Reservation__c r { get; set; }
4
5     // Constructor initializes a new Bed Reservation record
6     public BedReservationController() {
7         r = new Bed_Reservation__c();
8     }
9
10    // Method to insert a new Bed Reservation record
11    public PageReference reserveBed() {
12        try {
13            insert r;
14            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.CONFIRM, 'Bed reserved successfully!'));
15            return new PageReference('/' + r.Id);
16        } catch (Exception e) {
17            ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERROR, e.getMessage()));
18            return null;
19        }
20    }

```

Creating Visualforce Page for Bed Reservation object

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Visualforce page.
2. Enter the name as BedReservation for Apex Page to create a new Visualforce Page file
3. Enter the code.

```

1 <apex:page controller="BedReservationController">
2     <apex:form>
3         <apex:pageBlock >
4             <apex:pageBlockSection title="Bed Reservation">
5                 <apex:inputField value="{!r.Bed_Type__c}" required="true"/>
6                 <apex:inputField value="{!r.Bed_Number__c}" required="true"/>
7                 <apex:inputField value="{!r.Reservation_Date__c}" required="true"/>
8                 <apex:inputField value="{!r.Start_Time__c}" required="true"/>
9                 <apex:inputField value="{!r.End_Time__c}" required="true"/>
10                <apex:inputField value="{!r.Patient__c}" required="true"/>
11            </apex:pageBlockSection>
12
13            <apex:pageBlockButtons >
14                <apex:commandButton action="{!reserveBed}" value="Reserve Bed"/>
15                <apex:commandButton value="Reserve & New" action="{!reserveandnew}" />
16                <!--  Updated Cancel Button to Redirect to Home Page -->
17                <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/n/Home_Page" immediate="true"/>
18            </apex:pageBlockButtons>

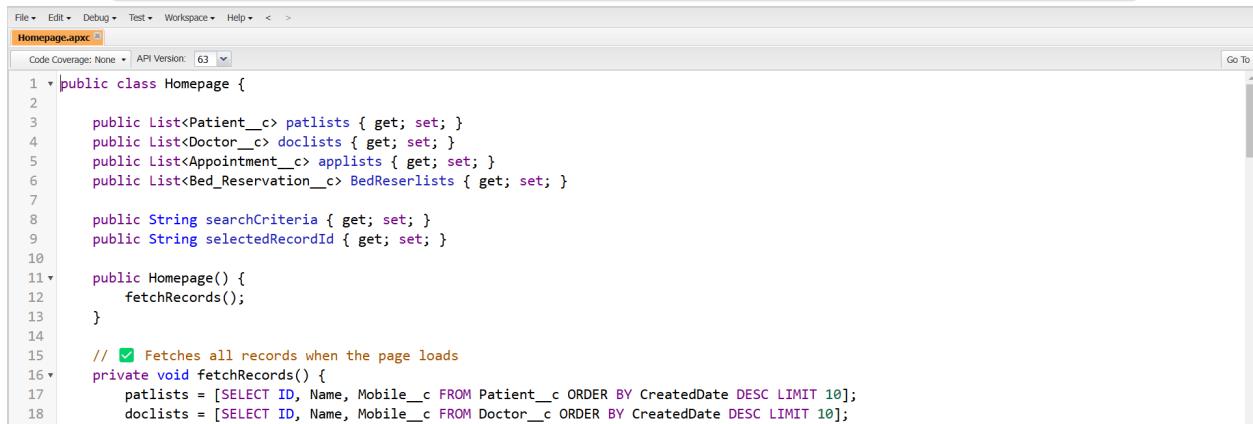
```

Creating Apex Controller Class for Home Page Tab

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.

2. Enter the name as " Home" for Apex Page to create a new Apex Page file.

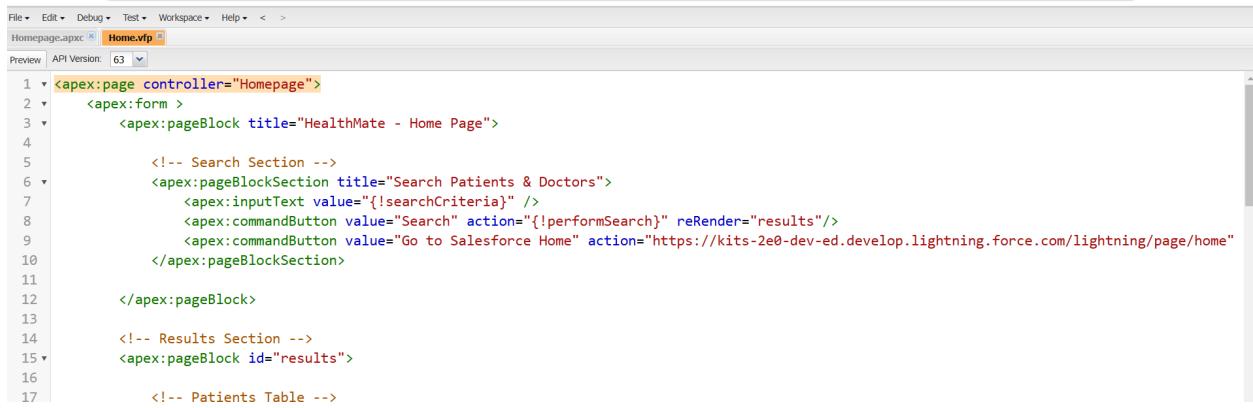
3. Enter the code:



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >
Homepage.apxc ▾ API Version: 63 ▾ Go To
Code Coverage: None ▾
1 public class Homepage {
2
3     public List<Patient__c> patlists { get; set; }
4     public List<Doctor__c> doclists { get; set; }
5     public List<Appointment__c> applists { get; set; }
6     public List<Bed_Reservation__c> BedReserlists { get; set; }
7
8     public String searchCriteria { get; set; }
9     public String selectedRecordId { get; set; }
10
11    public Homepage() {
12        fetchRecords();
13    }
14
15    // ✅ Fetches all records when the page loads
16    private void fetchRecords() {
17        patlists = [SELECT ID, Name, Mobile__c FROM Patient__c ORDER BY CreatedDate DESC LIMIT 10];
18        doclists = [SELECT ID, Name, Mobile__c FROM Doctor__c ORDER BY CreatedDate DESC LIMIT 10];
    }
```

Creating Visualforce Page for Home Tab

1. Go to setup >> click on gear symbol >> developer console >> there you can see many tools in the Toolbar of the new console window. Click on File, New and Visualforce page.
2. Enter the name as Home for Apex Page to create a new Visualforce Page file
3. Enter the code.



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >
Homepage.apxc ▾ Home.vfp ▾ API Version: 63 ▾ Preview Go To
Preview API Version: 63 ▾
1 <apex:page controller="Homepage">
2     <apex:form >
3         <apex:pageBlock title="HealthMate - Home Page">
4
5             <!-- Search Section -->
6             <apex:pageBlockSection title="Search Patients & Doctors">
7                 <apex:inputText value="{!searchCriteria}" />
8                 <apex:commandButton value="Search" action="{!performSearch}" reRender="results"/>
9                 <apex:commandButton value="Go to Salesforce Home" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/page/home"/>
10            </apex:pageBlockSection>
11
12        </apex:pageBlock>
13
14        <!-- Results Section -->
15        <apex:pageBlock id="results">
16
17            <!-- Patients Table -->
```

Creating a Visualforce Tab

To create a Tab:(Patient)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> click New (Visualforce tabs)
2. Select Visualforce Page as Patient>> Tab Label as Patient >>Tab Name (Auto Fill)>>Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Custom Object Tabs

No Custom Object Tabs have been defined

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

Action	Label	Tab Style
Edit Del	Appointment	Boat
Edit Del	BedReservation	Compass
Edit Del	Doctor	Building Block
Edit Del	Home_page	Car
Edit Del	Patiens	Box

Lightning Component Tabs

New What Is This?

Patient Tab

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Visualforce Tab Patient

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Patient	Edit Delete	Tab Style	Box
Tab Name	Patient		Splash Page Custom Link	
Content	PatientPage			
Description				
Created By	Bezawada venkata kousalya, 27/02/2025, 6:11 pm		Modified By	Bezawada venkata kousalya, 28/02/2025, 12:56 pm

Appointment Tab

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Visualforce Tab Appointment

Help

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Appointment	Edit Delete	Tab Style	Boat
Tab Name	Appointment		Splash Page Custom Link	
Content	Appointment			
Description				
Created By	Bezawada venkata kousalya, 27/02/2025, 6:13 pm		Modified By	Bezawada venkata kousalya, 27/02/2025, 6:13 pm

Doctor Tab

Doctor Tab

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Visualforce Tab Doctor

Custom Tab Definition Detail

Tab Label	Doctor	Edit Delete	
Tab Name	Doctor	Tab Style	
Content	PageDoctor	Splash Page Custom Link	
Description			
Created By	Bezawada venkata kousalya, 27/02/2025, 6:16 pm	Modified By	Bezawada venkata kousalya, 27/02/2025, 6:16 pm

Help for this Page

BedReservation Tab

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Visualforce Tab BedReservation

Custom Tab Definition Detail

Tab Label	BedReservation	Edit Delete	
Tab Name	BedReservation	Tab Style	
Content	BedReservation	Splash Page Custom Link	
Description			
Created By	Bezawada venkata kousalya, 27/02/2025, 6:14 pm	Modified By	Bezawada venkata kousalya, 27/02/2025, 6:14 pm

Home Tab

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Visualforce Tab Home page

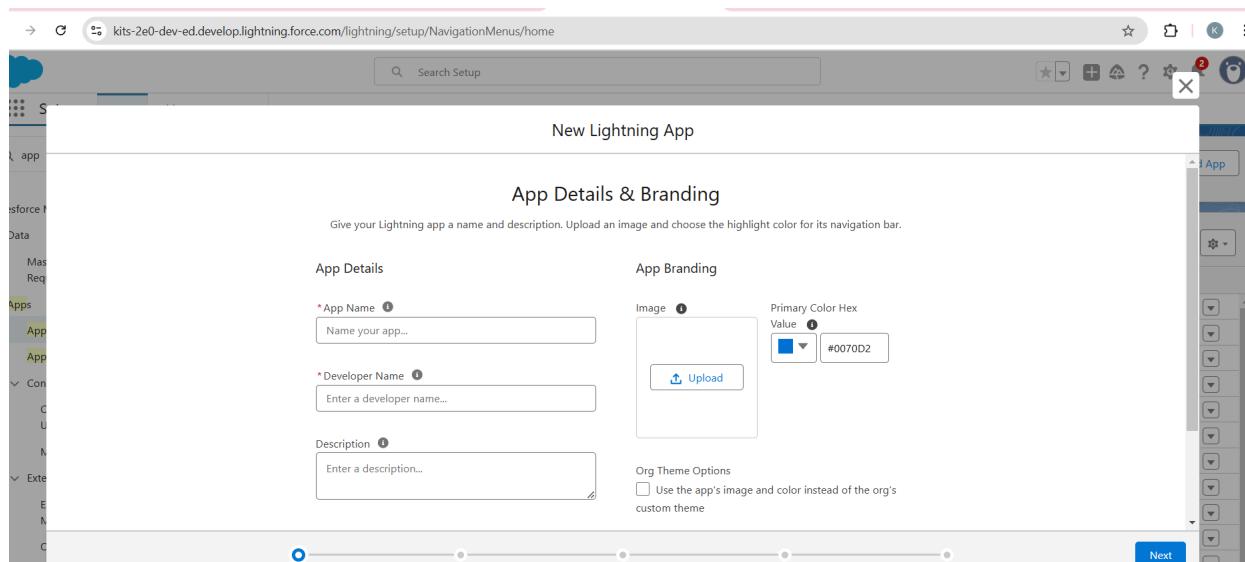
Custom Tab Definition Detail

Tab Label	Home page	Edit Delete	
Tab Name	Home_page	Tab Style	
Content	Home	Splash Page Custom Link	
Description			
Created By	Bezawada venkata kousalya, 27/02/2025, 6:14 pm	Modified By	Bezawada venkata kousalya, 27/02/2025, 6:14 pm

[Create a Lightning App](#)

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



2. Fill the app name in app details and branding as follow

App Name : Healthmate

Developer Name : This will auto populated

Description :Enriching patients care

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value : keep this default.

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview



3. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.

App Settings

App Options

Navigation and Form Factor

* Navigation Style Standard navigation Console navigation

* Supported Form Factors Desktop and phone Desktop Phone

Setup and Personalization

Setup Experience Setup (full set of Setup options) Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app
 Use Omni-Channel sidebar

3. (Utility Items) keep it as default >> Next.

4. To Add Navigation Items:

The screenshot shows the 'App Settings' interface with the 'Navigation Items' tab selected. On the left, there's a sidebar with options like 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', and 'User Profiles'. The main area is titled 'Navigation Items' and contains a descriptive text about personalizing navigation. Below this is a 'Available Items' list with a search bar and a 'Create' button. The list includes items such as 'Accounts', 'All Sites', 'Alternative Payment Methods', 'Analytics', 'App Launcher', 'Appointment Categories', 'Appointment Invitations', 'Approval Requests', 'Approval Submission Details', 'Approval Submissions', and '...'. To the right is a 'Selected Items' list with icons and names: 'Doctor', 'Patient', 'BedReservation', 'Appointment', 'Reports', 'Dashboards', and 'Home'. There are up and down arrow buttons between the two lists.

3.

Search for the item in the
(Patient, Doctor, BedReservation, Appointment, Reports, Dashboard) from the
search bar and move it using the arrow button >> Next >> Next.

4. To Add User Profiles:

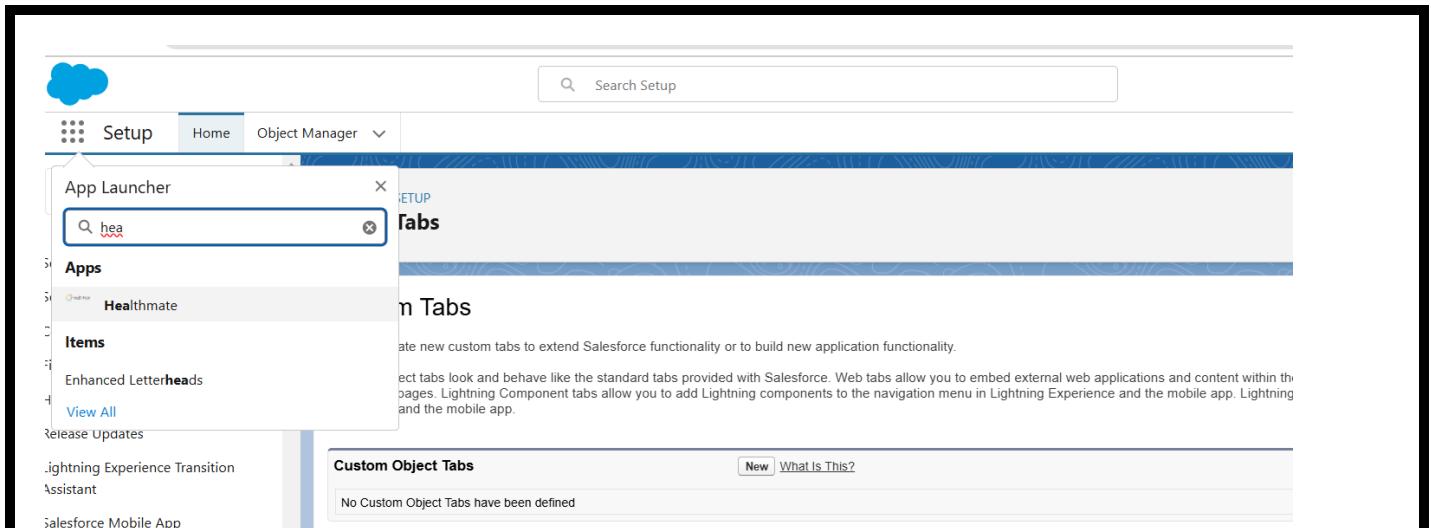
The screenshot shows the 'App Settings' interface with the 'User Profiles' tab selected. The sidebar includes 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', and 'Navigation Items'. The main area is titled 'User Profiles' and says 'Choose the user profiles that can access this app.' Below is a 'Available Profiles' list with a search bar, showing 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Anypoint Integration', and 'Authenticated Website'. To the right is a 'Selected Profiles' list containing 'System Administrator'.

Change Actions

Cancel Actions:

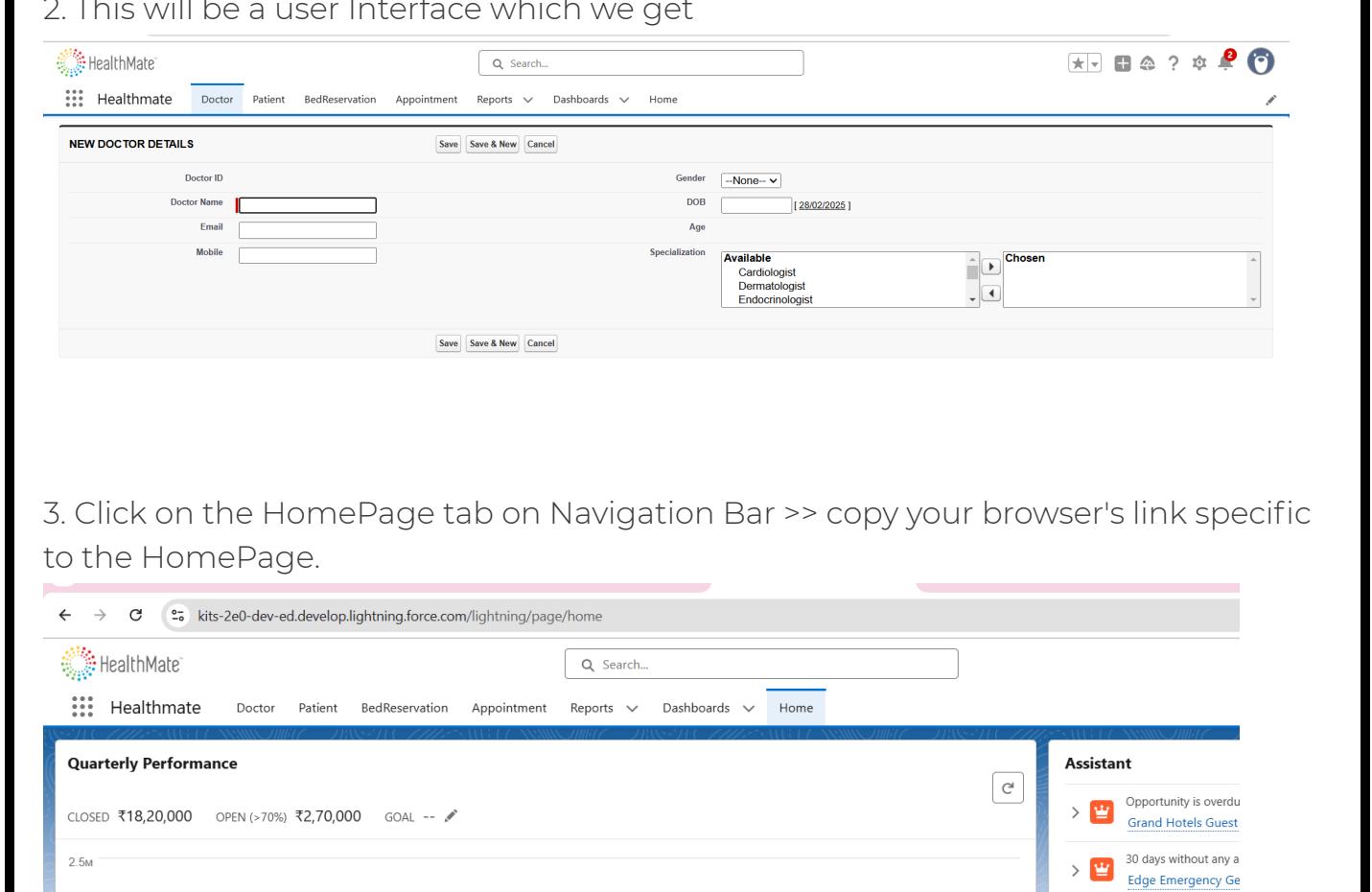
1. Go to the setup page >> click "app Launcher" >> search for HealthMate.

2. This will be a user Interface which we get



The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup". Below it, the "Setup" tab is selected in the navigation bar. A sidebar on the left has a "Search" input field containing "hea". Under "Custom Object Tabs", it says "No Custom Object Tabs have been defined".

3. Click on the HomePage tab on Navigation Bar >> copy your browser's link specific to the HomePage.



The screenshot shows the Healthmate application homepage. The navigation bar includes "Healthmate", "Doctor", "Patient", "BedReservation", "Appointment", "Reports", "Dashboards", and "Home". The "Home" tab is selected. The main area displays "Quarterly Performance" with metrics: CLOSED ₹18,20,000, OPEN (>70%) ₹2,70,000, and GOAL --. On the right, there's an "Assistant" sidebar with notifications: "Opportunity is overdu Grand Hotels Guest" and "30 days without any a Edge Emergency Ge".

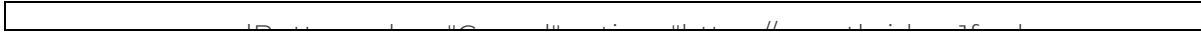
4. Go to setup >> click on gear symbol?developer console >> there you can see many tools in the Toolbar of the new console window >> Click on File>> Open >> Select Entity Type as Pages >> double click on Patient in Entities .

Patient

```

File Edit Debug Test Workspace Help < >
Homepage.apxc Home.vfp PatientPage.vfp
Preview API Version: 63
1 <apex:page controller="PatientController">
2   <apex:form>
3     <apex:pageBlock title="Patient Search">
4
5       <!-- ✓ Search Box -->
6       <apex:inputText value="{!searchKey}" />
7       <apex:commandButton value="Search" action="{!searchPatients}" rerender="patientList"/>
8
9       <!-- ✓ New Patient Button -->
10      <apex:commandButton value="New Patient" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/o/Patient__c/new" />
11
12      <!-- ✓ Cancel Button (Redirects to Home Page) -->
13      <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/page/home" immediate="true"/>
14
15      <!-- ✓ Patient Table -->
16      <apex:pageBlockTable value="{!patientList}" var="p" id="patientList">
17        <apex:column value="{!p.Name}" headerValue="Name"/>
18        <apex:column value="{!p.Mobile__c}" headerValue="Mobile"/>
19        <apex:column value="{!p.Gender__c}" headerValue="Gender"/>
20
21      <!-- ✓ Delete Button -->
22      <apex:column headerValue="Actions">
23        <apex:commandButton value="Delete" action="{!deletePatient}" rerender="patientList">
24          <apex:param name="selectedRecordId" value="{!p.Id}" assignTo="{!selectedRecordId}"/>
25        </apex:commandButton>
26      </apex:column>
27    </apex:pageBlockTable>
28
29  </apex:pageBlock>
30 </apex:form>
31 
```

4. In the code you find the below line for cancel button, you paste the copied link in action of cancel(link should be in apostrophe)|>>save.
5. Replace the action url with your url from Home Page as shown in fig.



Doctor

Homepage.apxc | Home.vfp | PageDoctor.vfp

Preview API Version: 63

```

1 <apex:page sidebar="false" showHeader="false" controller="DoctorController">
2   <apex:form >
3     <apex:pageBlock title="NEW DOCTOR DETAILS">
4
5       <apex:pageMessages />
6
7       <apex:pageBlockSection columns="2">
8         <apex:inputField value="{!!d.Doctor_ID__c}" />
9         <apex:inputField value="{!!d.Gender__c}" />
10        <apex:inputField value="{!!d.Name}" required="true" />
11        <apex:inputField value="{!!d.DOB__c}" />
12        <apex:inputField value="{!!d.Email__c}" />
13        <apex:inputField value="{!!d.Age__c}" />
14        <apex:inputField value="{!!d.Mobile__c}" />
15        <apex:inputField value="{!!d.Specialization__c}" />
16      </apex:pageBlockSection>
17
18      <apex:pageBlockButtons >
19
20
21
22
23
24
25   </apex:pageBlock>
26 </apex:form>
27 </apex:page>

```

Logs Tests Checkpoints Query Editor View State Progress Problems

File Edit Debug Test Workspace Help < >

Homepage.apxc | Home.vfp | PageDoctor.vfp

Preview API Version: 63

```

10   <apex:inputField value="{!!d.Name}" required="true" />
11   <apex:inputField value="{!!d.DOB__c}" />
12   <apex:inputField value="{!!d.Email__c}" />
13   <apex:inputField value="{!!d.Age__c}" />
14   <apex:inputField value="{!!d.Mobile__c}" />
15   <apex:inputField value="{!!d.Specialization__c}" />
16 </apex:pageBlockSection>
17
18 <apex:pageBlockButtons >
19   <apex:commandButton value="Save" action="{!!save}" />
20   <apex:commandButton value="Save & New" action="{!!saveandnew}" />
21   <!--  Updated Cancel Button to Redirect to Home Page -->
22   <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.lightning.force.com/lightning/n/Home_Page" immediate="true" />
23 </apex:pageBlockButtons>
24
25 </apex:pageBlock>
26 </apex:form>
27 </apex:page>

```

Logs Tests Checkpoints Query Editor View State Progress Problems

Appointment

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

Homepage.apxc Home.vfp Appointment.vfp

Preview API Version: 63

```

1 <apex:page sidebar="false" showHeader="false" controller="AppointmentController">
2   <apex:form>
3     <apex:pageBlock title="Appointment DETAILS">
4       <apex:pageMessages />
5
6       <apex:pageBlockSection columns="2">
7         <apex:inputField value="{!!a.Name}" required="true"/>
8         <apex:inputField value="{!!a.Appointment_Date__c}" required="true"/>
9         <apex:inputField value="{!!a.Doctor_Name__c}" required="true"/>
10        <apex:inputField value="{!!a.Patient_Name__c}" required="true"/>
11        <apex:inputField value="{!!a.Start_Time__c}" required="true"/>
12        <apex:inputField value="{!!a.End_Time__c}" required="true"/>
13      </apex:pageBlockSection>
14
15      <apex:pageBlockButtons>
16        <apex:commandButton value="Save" action=" {!save}" />
17        <apex:commandButton value="Save & New" action=" {!saveandnew}" />
18        <!--  Updated Cancel Button to Redirect to Home Page -->

```

BedReservation

```

1 <apex:page controller="BedReservationController">
2   <apex:form>
3     <apex:pageBlock>
4       <apex:pageBlockSection title="Bed Reservation">
5         <apex:inputField value="{!!r.Bed_Type__c}" required="true"/>
6         <apex:inputField value="{!!r.Bed_Number__c}" required="true"/>
7         <apex:inputField value="{!!r.Reservation_Date__c}" required="true"/>
8         <apex:inputField value="{!!r.Start_Time__c}" required="true"/>
9         <apex:inputField value="{!!r.End_Time__c}" required="true"/>
10        <apex:inputField value="{!!r.Patient__c}" required="true"/>
11      </apex:pageBlockSection>
12
13      <apex:pageBlockButtons>
14        <apex:commandButton action=" {!reserveBed}" value="Reserve Bed"/>
15        <apex:commandButton value="Reserve & New" action=" {!reserveandnew}" />
16        <!--  Updated Cancel Button to Redirect to Home Page -->
17        <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/n/Home_Page" immediate="true" />
18      </apex:pageBlockButtons>

```

Logs Tests Checkpoints Query Editor View State Progress Problems

review API Version: 63

```

6   <apex:inputField value="{!!r.Bed_Number__c}" required="true"/>
7   <apex:inputField value="{!!r.Reservation_Date__c}" required="true"/>
8   <apex:inputField value="{!!r.Start_Time__c}" required="true"/>
9   <apex:inputField value="{!!r.End_Time__c}" required="true"/>
10  <apex:inputField value="{!!r.Patient__c}" required="true"/>
11 </apex:pageBlockSection>
12
13 <apex:pageBlockButtons>
14   <apex:commandButton action=" {!reserveBed}" value="Reserve Bed"/>
15   <apex:commandButton value="Reserve & New" action=" {!reserveandnew}" />
16   <!--  Updated Cancel Button to Redirect to Home Page -->
17   <apex:commandButton value="Cancel" action="https://kits-2e0-dev-ed.develop.lightning.force.com/lightning/n/Home_Page" immediate="true" />
18 </apex:pageBlockButtons>
19 </apex:pageBlock>
20
21   <apex:pageMessages />
22 </apex:form>
23 </apex:page>

```

Home PageActions:

1. When you're in HealthMate App, Click on Patient tab on Navigation Bar >> copy your browser's url link specific to the Patient Page.
2. Go to setup >> click on gear symbol? developer console , there you can see many tools in the Toolbar of the new console window>> Click on File>> Open>> Select Entity Type as Pages ?double click on Home Visualforce Page as Entities

3. In the code you find the below line
4. Do Paste the copied Browser's link(Patient Page) in action where value="New Patient" >> Save .
5. Follow 1-4 steps for copy and paste(Doctor,Appointment,BedReservation) browser's link where values are "New Doctor","New Appointment","New

```

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
Homepage.apxc [ ] Home.vfp [x] BedReservation.vfp [ ]
Preview API Version: 63 ▾
14    <!-- Results Section -->
15    <apex:pageBlock id="results">
16
17        <!-- Patients Table -->
18        <apex:pageBlockSection title="Patients">
19            <apex:commandButton value="New Patient" action="https://kits-2e0-dev-ed.lightning.force.com/lightning/o/Patient__c/new" imm
20            <apex:pageBlockTable value="{!patlists}" var="p">
21                <apex:column value="{!p.Name}" headerValue="Name"/>
22                <apex:column value="{!p.Mobile__c}" headerValue="Mobile"/>
23            </apex:pageBlockTable>
24        </apex:pageBlockSection>
25
26        <!-- Doctors Table -->
27        <apex:pageBlockSection title="Doctors">
28            <apex:commandButton value="New Doctor" action="https://kits-2e0-dev-ed.lightning.force.com/lightning/o/Doctor__c/new" imm
29            <apex:pageBlockTable value="{!doclists}" var="d">
30                <apex:column value="{!d.Name}" headerValue="Name"/>
31            </apex:pageBlockTable>
32        </apex:pageBlockSection>
33
34

```

Create a Record (Patient)

1. Click on App Launcher on the left side of the screen.
2. Search HealthMate & click on it.
3. When you're in the HomePage click on the New Patient button which will open the Patient Page .

New Patient

* = Required Information

Information

Patient Name: Owner: Bezwada venkata kousalya

Address:

DOB:

Blood Group: --None--

Email:

Mobile:

Gender: --None--

- Fill the Details and click on Save.

Patient Search

Name	Mobile	Gender	Actions
alan	7569564883	Male	<input type="button" value="Delete"/>
park	956432160	Male	<input type="button" value="Delete"/>

View a Record(Patient)

- Click on App Launcher on the left side of the screen.
- Search HealthMate & click on it.
- When you're in HomePage ,under the Patient title we can view the created record of Patient.
- Click on any record name. you can see the details of the Patient Details.

Delete a Record(Patient)

1. Click on App Launcher on the left side of the screen.
2. Search HealthMate & click on it.
3. When you're in HomePage, under the Patient title >> we can view the created record of Patient >> Click the delete Button beside the created Record.

Note: Create at least 10 sample records for each of the objects: Patient, Doctor, Appointment and BedReservation.

The screenshot shows the HealthMate application interface. On the left, there's a navigation bar with icons for Healthmate, Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. The main area displays a patient record for 'anna'. The 'Details' tab is selected, showing fields for Patient Name (anna), Address, DOB, Age, Blood Group, Email, Mobile, Gender, and Patient ID (p-009). To the right of the record, a context menu is open, listing options like New Case, New Lead, Delete (which is highlighted in blue), Clone, Change Owner, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. The URL in the browser bar is kits-2e0-dev-ed.develop.lightning.force.com/lightning/r/Patient__c/a00NS00000ezo7QYAQ/view.

This screenshot shows the same HealthMate application interface as the previous one, but with a modal dialog box in the foreground. The dialog is titled 'Delete Patient' and contains the message 'Are you sure you want to delete this Patient?'. At the bottom of the dialog are two buttons: 'Cancel' (gray) and 'Delete' (blue). The rest of the application interface, including the patient record and the context menu, is dimmed or grayed out.

Patient Search

Name	Mobile	Gender	Actions
allan	7569564883	Male	Delete
park	956432160	Male	Delete
alex	0967853421	Female	Delete
ana	0897564809	Female	Delete
kall	8906573241	Male	Delete
genny	7865432902	Female	Delete
mark	7865432902	Male	Delete

Create Report

1. Go to the app >> click on the reports tab.
2. Click New Report.

Reports

Recent

2 items

Report Name	Description	Folder	Created By	Created On	Subscribed
New Bed Reservation with Patient Report		Public Reports	Bezawada venkata kousalya	27/2/2025, 9:27 pm	
Appointment details		Public Reports	Bezawada venkata kousalya	27/2/2025, 9:21 pm	

3. Select report type from category or from report type panel or from search panel >> click on start report.

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Select a Report Type

Showing results for patie

Report Type Name

Category

Patients

Appointment with Patient Name

Bed Reservation with Patient

Details

Patients Standard Report Type

Start Report

Details Fields (19)

Created By You

No Reports Yet

Created By Others

No Reports Yet

Objects Used in Report Type

Owner

Patient

4. Customise your report

- From top on the left side click on report dropdown and select Joined Report and apply

The screenshot shows the HealthMate software interface. At the top, there is a navigation bar with links for Healthmate, Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. Below the navigation bar is a search bar and a toolbar with various icons. The main area is titled "REPORT" and shows a preview of a report titled "New Patients Report". On the left, there is a sidebar titled "Fields" with sections for "Outline" and "Filters". The "Filters" section contains a table with columns: Patient: Patient Name, Patient: ID, Age, and Gender. The table lists 8 rows of patient data. The data is as follows:

	Patient: Patient Name	Patient: ID	Age	Gender
1	alian	a00NS0000ebT8r	15	Male
2	park	a00NS0000ebVKL	18	Male
3	alex	a00NS0000ebWLF	19	Female
4	ana	a00NS0000ebWLG	35	Female
5	kall	a00NS0000ebXvd	18	Male
6	genny	a00NS0000ebYN3	18	Female
7	mark	a00NS0000ebZnw1	0	Male
8			123	

At the bottom right of the report preview, there is a checkbox labeled "Update Preview Automatically" which is checked.

- Add fields from the left pane as shown below.

5. Save or run it and give the report name and save it.

The screenshot shows the HealthMate application interface. At the top, there is a navigation bar with links for Healthmate, Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. A search bar is located at the top right. A message box in the center says "Report 'Patients Report' was saved". Below the navigation bar, the title "Report: Patients Report" is displayed. Underneath, it shows "Total Records 7" and "Total Age 123". A table follows, listing patient information:

	Patient: Patient Name	Patient: ID	Age	Gender
1	alian	a00NS0000ebT8r	15	Male
2	park	a00NS0000ebVKL	18	Male
3	alex	a00NS0000ebWLF	19	Female
4	ana	a00NS0000ebWLG	35	Female
5	kall	a00NS0000ebXvd	18	Male
6	genny	a00NS0000ebYN3	18	Female
7	mark	a00NS0000ebznw1	0	Male
8			123	

Report

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel (BedReservation with Patient) >> click on start report.
4. Customise your report
 - Add fields from the left pane as shown below.
5. Save or run it and give the report name and save it.

The screenshot shows the HealthMate application interface, similar to the previous one but with a different report. At the top, there is a navigation bar with links for Healthmate, Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. A search bar is located at the top right. A toolbar with various icons is also present. A message box in the center says "Report 'New Bed Reservation with Patient Report' was saved". Below the navigation bar, the title "Report: Bed Reservation with Patient" and "New Bed Reservation with Patient Report" are displayed. Underneath, it shows "Total Records 5". A table follows, listing bed reservation details:

	Bed Reservation: Bed Reservation Name	Patient: Patient Name	Bed Number	Reservation Date	End Time	Booking Status
1	A-01 and B-01	alian	R1	01/02/2025	10:00 am	-
2	A-02 and B-02	ana	H1	07/03/2025	9:00 am	-
3	A-03 and B-03	genny	P2	08/03/2025	8:00 am	-
4	A-04 and B-04	kall	M1	14/03/2025	10:00 am	-
5	A-05 and B-05	park	S2	07/02/2025	9:00 am	-

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.

The screenshot shows the Healthmate application interface. At the top, there is a navigation bar with links for Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. Below the navigation bar, there is a search bar labeled "Search..." and a toolbar with various icons. On the left, there is a sidebar with sections for Dashboards (Recent, Private Dashboards, All Dashboards), Folders (All Folders, Created by Me, Shared with Me), and Favorites. The main area displays a table titled "DASHBOARDS" with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. A single row is visible: "Bedreservation" under "Private Dashboards" created by "Bezawada venkata kousalya" on "27/2/2025, 9:30 pm".

2. Give a Name and click on Create.

The screenshot shows the Healthmate application interface with a new dashboard creation dialog. The title bar says "patient". The main area is a grid for adding components. At the top right of the grid, there are buttons for "+ Widget", "+ Filter", and "Save".

3. Select add component.

The screenshot shows the Healthmate application interface with a "Select Report" dialog open. The dialog has a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (Created by Me, Shared with Me, All Folders). The main area is titled "Select Report" and contains a search bar "Search Reports and Folders..." and a list of reports. The list includes:

- New Bed Reservation with Patient Report
Bezawada venkata kousalya - 27-Feb-2025, 9:39 pm · Public Reports
- Patients Report
Bezawada venkata kousalya - 28-Feb-2025, 2:27 pm · Public Reports
- Appointment details
Bezawada venkata kousalya - 27-Feb-2025, 9:21 pm · Public Reports

At the bottom of the dialog are "Cancel" and "Select" buttons.

4. Select a Report and click on select.

The screenshot shows the Healthmate application interface. At the top, there is a navigation bar with links for Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. Below the navigation bar, a search bar contains the placeholder 'Search...'. On the left, a sidebar menu is open under the 'patient' section, showing categories like Reports (Recent, Created by Me, Private Reports, Public Reports), Folders (Created by Me, Shared with Me, All Folders), and a 'Select Report' section with a search bar and a 'Reports and Folders' dropdown.

Select Report

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Q Search Reports and Folders...

New Bed Reservation with Patient Report
Bezawada venkata kousalya - 27-Feb-2025, 9:29 pm - Public Reports

Patients Report
Bezawada venkata kousalya - 28-Feb-2025, 2:27 pm - Public Reports

Appointment details
Bezawada venkata kousalya - 27-Feb-2025, 9:21 pm - Public Reports

Reports and Folders

The screenshot shows the Healthmate application interface with the 'Add Widget' dialog open. The dialog has two main sections: 'Report' on the left and 'Preview' on the right. In the 'Report' section, the title is set to 'Patients Report'. Under 'Display As', there is a preview of a chart icon. Below that are sections for 'Groups' (with an 'Add group...' button) and 'Columns' (with a 'View Report (Patients Report)' link). In the 'Preview' section, a table titled 'Patients Report' is shown with columns for Patient Name, ID, Age, and Gender. The data includes entries for alex, alian, ana, genny, kall, and mark. At the bottom of the dialog, there are 'Cancel' and 'Add' buttons.

Healthmate

Doctor Patient BedReservation Appointment Reports Dashboards Home

patient

+ W X + Filter

Add Widget

Report

Patients Report

Use chart settings from report

Display As

Groups

Add group...

Columns

Patient: Patient Name ↑ Patient: ID Age Gender

Patient: Patient Name ↑	Patient: ID	Age	Gender
alex	a00NS0000ebWLF	19	Female
alian	a00NS0000ebT8r	15	Male
ana	a00NS0000ebWLG	35	Female
genny	a00NS0000ebYN3	18	Female
kall	a00NS0000ebXvd	18	Male
mark	a00NS0000eznw1	0	Male

View Report (Patients Report)

5. Select Legend position as bottom and component theme as dark .

The screenshot shows the Healthmate application interface with the 'Add Widget' dialog open. The dialog has two main sections: 'Report' on the left and 'Preview' on the right. In the 'Report' section, the title is set to 'Patients Report'. Under 'Display As', there is a preview of a chart icon. Below that are sections for 'Groups' (with an 'Add group...' button) and 'Columns' (with a 'View Report (Patients Report)' link). In the 'Preview' section, a table titled 'Patients Report' is shown with columns for Patient Name, ID, Age, and Gender. The data includes entries for alex, alian, ana, genny, kall, and mark. At the bottom of the dialog, there are 'Cancel' and 'Add' buttons. The 'Widget Theme' section at the bottom left shows a radio button for 'Dark' selected, with a preview of the dark-themed chart.

Healthmate

Doctor Patient BedReservation Appointment Reports Dashboards Home

patient

+ W X + Filter

Add Widget

Max Groups Displayed: 100

Title: Patients Report

Subtitle

Footer

Widget Theme: Light (Dashboard default) Dark

Patient: Patient Name ↑ Patient: ID Age Gender

Patient: Patient Name ↑	Patient: ID	Age	Gender
alex	a00NS0000ebWLF	19	Female
alian	a00NS0000ebT8r	15	Male
ana	a00NS0000ebWLG	35	Female
genny	a00NS0000ebYN3	18	Female
kall	a00NS0000ebXvd	18	Male
mark	a00NS0000eznw1	0	Male

View Report (Patients Report)

The screenshot shows the HealthMate web interface. At the top, there is a navigation bar with links for Doctor, Patient, BedReservation, Appointment, Reports, Dashboards, and Home. A search bar is located at the top center. On the right side of the header are various icons for filtering, saving, and more. Below the header, a modal window titled "Dashboard saved" with a checkmark icon is displayed. The main content area contains a table titled "Patients Report" with columns for Patient Name, Patient ID, Age, and Gender. The table lists several patients: alex (19, Female), alian (15, Male), ana (35, Female), genny (18, Female), kall (18, Male), mark (0, Male), and park (18, Male). Below the table is a button labeled "View Report (Patients Report)".

6. Click Add then click on Save and then click on Done.

