

## ❖ Phase 3: Data Modeling & Relationships

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### 1. Standard & Custom Objects

#### Standard Objects (already in Salesforce)

- **User** → Represents each app user (doctor or internal staff).
- **Contact** → Represents each patient.
- **Report/Dashboard** → For analytics and KPIs.

#### Custom Objects (create in Object Manager)

1. **Appointment\_\_c** → Central table for patient–doctor visits
  - Tracks visit details, timing, and status
2. **Prescription\_\_c** → Stores prescribed medicines and dosage information
  - Links to the related appointment
3. **Medical\_Record\_\_c** → Holds patient history, lab reports, and diagnoses
  - Can reference appointments for context
4. **Pharmacy\_Order\_\_c** → Tracks pharmacy fulfillment of prescriptions
  - Captures delivery and payment details

#### ⌚ Setup → Object Manager → Create → Custom Object

- Fill Label, Plural Label, and enable Reports, Activities, and Notes.
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### 2. Fields

#### i. Appointment\_\_c Fields

- **Appointment\_Date\_\_c** (Date/Time) – Scheduled visit date/time
- **Status\_\_c** (Picklist: Scheduled, Checked-In, Completed, Cancelled)
- **Doctor\_\_c** (Lookup → User) – Attending doctor
- **Patient\_\_c** (Lookup → Contact) – Linked patient
- **Reason\_For\_Visit\_\_c** (Long Text Area)

| Fields & Relationships       |                  |                     |                    |                   |         |
|------------------------------|------------------|---------------------|--------------------|-------------------|---------|
|                              | FIELD LABEL      | FIELD NAME          | DATA TYPE          | CONTROLLING FIELD | INDEXED |
| Details                      | Appointment Date | Appointment_Date__c | Date/Time          |                   |         |
| Fields & Relationships       | Appointment Name | Name                | Text(50)           |                   |         |
| Page Layouts                 | Created By       | CreatedById         | Lookup(User)       |                   |         |
| Lightning Record Pages       | Doctor           | Doctor__c           | Lookup(User)       |                   |         |
| Buttons, Links, and Actions  | Last Modified By | LastModifiedById    | Lookup(User)       |                   |         |
| Compact Layouts              | Owner            | OwnerId             | Lookup(User/Group) |                   |         |
| Field Sets                   | Patient          | Patient__c          | Lookup(Contact)    |                   |         |
| Object Limits                | Reason for Visit | Reason_for_Visit__c | Text Area(255)     |                   |         |
| Record Types                 | Status           | Status__c           | Picklist           |                   |         |
| Related Lookup Filters       |                  |                     |                    |                   |         |
| Restriction Rules            |                  |                     |                    |                   |         |
| Scoping Rules                |                  |                     |                    |                   |         |
| Object Access                |                  |                     |                    |                   |         |
| Triggers                     |                  |                     |                    |                   |         |
| Flow Triggers                |                  |                     |                    |                   |         |
| Validation Rules             |                  |                     |                    |                   |         |
| Conditional Field Formatting |                  |                     |                    |                   |         |

## ii. Prescription\_\_c Fields

- **Medication\_Name\_\_c** (Text)
- **Dosage\_\_c** (Text)
- **Frequency\_\_c** (Picklist: Once Daily, Twice Daily, etc.)
- **Start\_Date\_\_c** (Date)
- **End\_Date\_\_c** (Date)
- **Appointment\_\_c** (Lookup → Appointment\_\_c) – Parent appointment

| Fields & Relationships       |                   |                    |                    |                   |         |
|------------------------------|-------------------|--------------------|--------------------|-------------------|---------|
|                              | FIELD LABEL       | FIELD NAME         | DATA TYPE          | CONTROLLING FIELD | INDEXED |
| Details                      | Created By        | CreatedById        | Lookup(User)       |                   |         |
| Fields & Relationships       | Dosage            | Dosage__c          | Text(10)           |                   |         |
| Page Layouts                 | End Date          | End_Date__c        | Date               |                   |         |
| Lightning Record Pages       | Frequency         | Frequency__c       | Picklist           |                   |         |
| Buttons, Links, and Actions  | Last Modified By  | LastModifiedById   | Lookup(User)       |                   |         |
| Compact Layouts              | Medication Name   | Medication_Name__c | Text(18)           |                   |         |
| Field Sets                   | Owner             | OwnerId            | Lookup(User/Group) |                   |         |
| Object Limits                | Prescription Name | Name               | Text(50)           |                   |         |
| Record Types                 | Start Date        | Start_Date__c      | Date               |                   |         |
| Related Lookup Filters       |                   |                    |                    |                   |         |
| Restriction Rules            |                   |                    |                    |                   |         |
| Scoping Rules                |                   |                    |                    |                   |         |
| Object Access                |                   |                    |                    |                   |         |
| Triggers                     |                   |                    |                    |                   |         |
| Flow Triggers                |                   |                    |                    |                   |         |
| Validation Rules             |                   |                    |                    |                   |         |
| Conditional Field Formatting |                   |                    |                    |                   |         |

## iii. Medical\_Record\_\_c Fields

- **Record\_Type\_\_c** (Picklist: Lab Result, Diagnosis, Allergy, Immunization)
- **Record\_Date\_\_c** (Date)
- **Details\_\_c** (Long Text Area)
- **Appointment\_\_c** (Lookup → Appointment\_\_c) – Related appointment

- **Report\_Notes\_\_c** (Rich Text Area) – Notes or file description

| FIELD LABEL         | FIELD NAME          | DATA TYPE             | CONTROLLING FIELD | INDEXED |
|---------------------|---------------------|-----------------------|-------------------|---------|
| Attached Reports    | Attached_Reports__c | Rich Text Area(32768) |                   |         |
| Created By          | CreatedById         | Lookup(User)          |                   |         |
| Details             | Details__c          | Long Text Area(32768) |                   |         |
| Last Modified By    | LastModifiedById    | Lookup(User)          |                   |         |
| Medical Record Name | Name                | Text(80)              |                   | ✓       |
| Owner               | OwnerId             | Lookup(User,Group)    |                   | ✓       |
| Record Date         | Record_Date__c      | Date                  |                   |         |
| Record Type         | Record_Type__c      | Picklist              |                   |         |

#### iv. Pharmacy\_Order\_\_c Fields

- **Order\_Date\_\_c** (Date)
- **Status\_\_c** (Picklist: Pending, Dispensed, Delivered)
- **Total\_Amount\_\_c** (Currency)
- **Delivery\_Address\_\_c** (Text)
- **Prescription\_\_c** (Lookup → Prescription\_\_c)

⌚ Setup:

- **Object Manager → [Object] → Fields & Relationships → New Field.**

| FIELD LABEL             | FIELD NAME          | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------------|---------------------|--------------------|-------------------|---------|
| Created By              | CreatedById         | Lookup(User)       |                   |         |
| Delivery Address        | Delivery_Address__c | Text(80)           |                   |         |
| Last Modified By        | LastModifiedById    | Lookup(User)       |                   |         |
| Order Date              | Order_Date__c       | Date               |                   |         |
| Owner                   | OwnerId             | Lookup(User,Group) |                   | ✓       |
| Prescription Order Name | Name                | Text(80)           |                   | ✓       |
| Status                  | Status__c           | Picklist           |                   |         |
| Total Amount            | Total_Amount__c     | Currency(18, 0)    |                   |         |

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### 3. Create Record Types

**Object Manager → [Object] → Record Types → New Record**

## Appointment\_\_c Record Types

- **Regular Check-up** – Routine visits
- **Emergency Visit** – Urgent care appointments

The screenshot shows the 'Object Manager' interface for the 'Appointment' object. The left sidebar has 'Recent Types' selected. The main area displays a table titled 'Record Types' with two items:

| RECORD TYPE LABEL | DESCRIPTION | ACTIVE | MODIFIED BY                        |
|-------------------|-------------|--------|------------------------------------|
| Emergency Visit   |             |        | Vishwan Sardoe, 9/24/2023, 1:50 AM |
| Regular Check-up  |             |        | Vishwan Sardoe, 9/24/2023, 1:49 AM |

## Prescription\_\_c Record Types

- **Short-Term Medication** – e.g., antibiotics
- **Long-Term Medication** – chronic care prescriptions

The screenshot shows the 'Object Manager' interface for the 'Prescription' object. The left sidebar has 'Recent Types' selected. The main area displays a table titled 'Record Types' with two items:

| RECORD TYPE LABEL     | DESCRIPTION                | ACTIVE | MODIFIED BY                        |
|-----------------------|----------------------------|--------|------------------------------------|
| Long-Term Medication  | chronic care prescriptions |        | Vishwan Sardoe, 9/24/2023, 1:54 AM |
| Short-Term Medication | antibiotics                |        | Vishwan Sardoe, 9/24/2023, 1:53 AM |

## 4. Page Layouts

Object Manager → [Object] → Page Layouts → New

### Doctor Layout (Appointment\_\_c)

- Section 1: Basic Info (Patient, Date, Status)
- Section 2: Notes & Diagnosis
- Related Lists: Prescriptions, Medical Records

| PAGE LAYOUT NAME   | CREATED BY                        | MODIFIED BY                       |
|--------------------|-----------------------------------|-----------------------------------|
| Appointment Layout | Vishnu Suresh, 9/24/2025, 1:13 AM | Vishnu Suresh, 9/24/2025, 1:24 AM |
| Doctor Layout      | Vishnu Suresh, 9/24/2025, 1:17 AM | Vishnu Suresh, 9/24/2025, 1:27 AM |

## Pharmacist Layout (Pharmacy\_Order\_\_c)

- Section 1: Order Details (Status, Date, Total Amount)
- Section 2: Delivery Details
- Related Lists: Prescription

| PAGE LAYOUT NAME      | CREATED BY                        | MODIFIED BY                       |
|-----------------------|-----------------------------------|-----------------------------------|
| Pharmacist Layout     | Vishnu Suresh, 9/24/2025, 1:09 AM | Vishnu Suresh, 9/24/2025, 1:09 AM |
| Pharmacy Order Layout | Vishnu Suresh, 9/24/2025, 1:09 AM | Vishnu Suresh, 9/24/2025, 1:09 AM |

## 5. Compact Layouts

Object Manager → [Object] → Compact Layouts → New

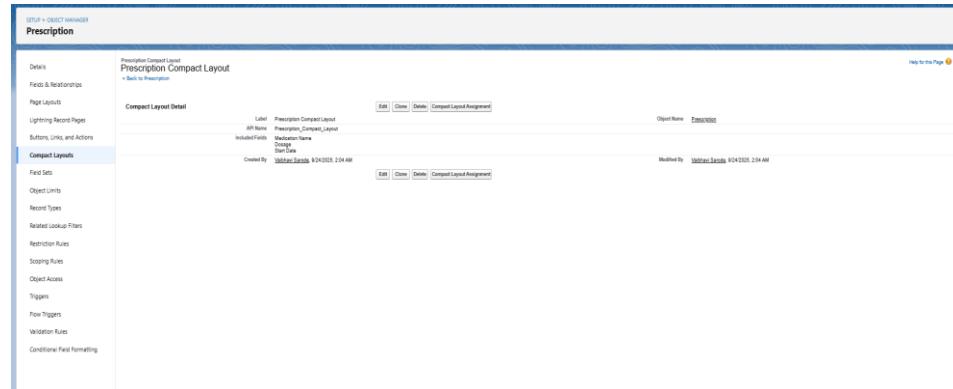
### Appointment\_\_c Compact Layout

- Fields: Appointment Date, Status, Patient

| Label           | App Compact Layout | Object Name |
|-----------------|--------------------|-------------|
| All Fields      | Appointment Date   | Appointment |
| Included Fields | Patient            |             |

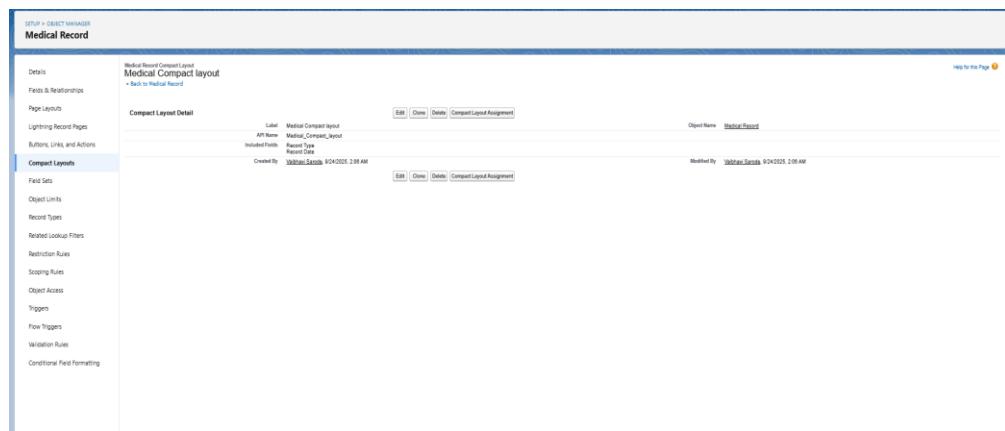
## Prescription\_\_c Compact Layout

- Fields: Medication Name, Dosage, Start Date



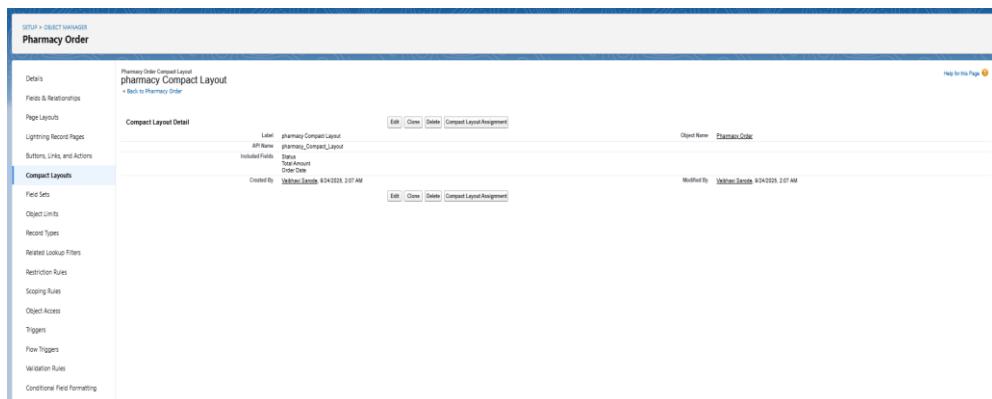
## Medical\_Record\_\_c Compact Layout

- Fields: Record Type, Record Date



## Pharmacy\_Order\_\_c Compact Layout

- Fields: Status, Total Amount, Order Date



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## 6. Use Schema Builder to Visualize

Setup → Quick Find → Schema Builder

1. **Add Objects:** Check all custom objects + Account + Contact

2. **Arrange:** Drag to create a logical flow:

