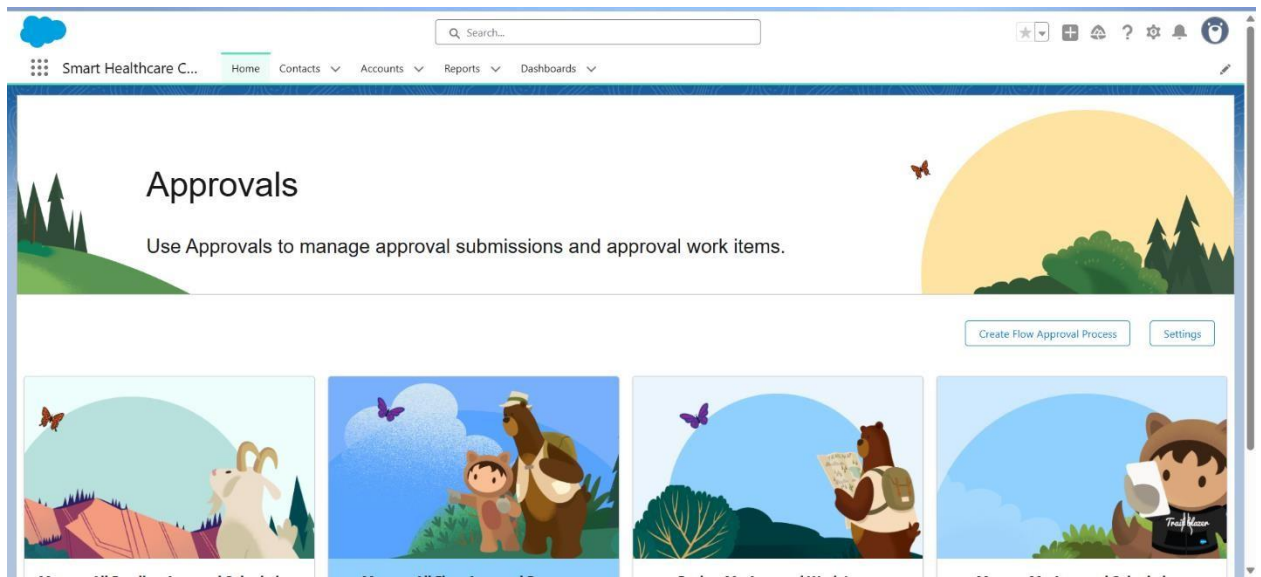


Phase 2: Org Setup & Configuration (Healthcare Project)

Create a New Lightning App

- App Manager → New Lightning App.
- Smart Healthcare CRM
- *“A Salesforce solution for Patient Engagement & Appointment Management.”*



Custom Objects

1. Patient__c
2. Appointment__c
3. Visit__c
4. Prescription__c
5. Provider__c (Doctors)
6. Notification_Log__c

Setup

Home

Object Manager

Search Setup

☆

+

🏠

?

⚙️

🔔

👤

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

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name
Appointment_c

Custom

✓

Singular Label
Appointment

Plural Label
Appointments

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

Setup

Home

Object Manager

Search Setup

☆

+

🏠

?

⚙️

🔔

👤

SETUP > OBJECT MANAGER

Provider

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name
Provider_c

Custom

✓

Singular Label
Provider

Plural Label
Providers

Enable Reports

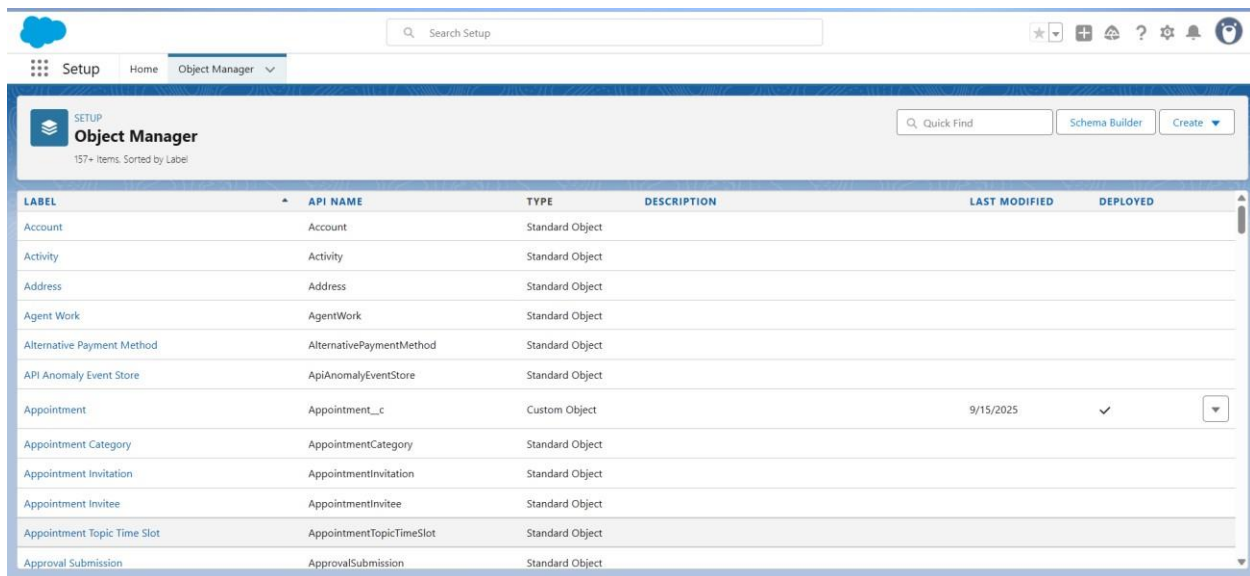
Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete



Object Manager
157+ Items, Sorted by Label

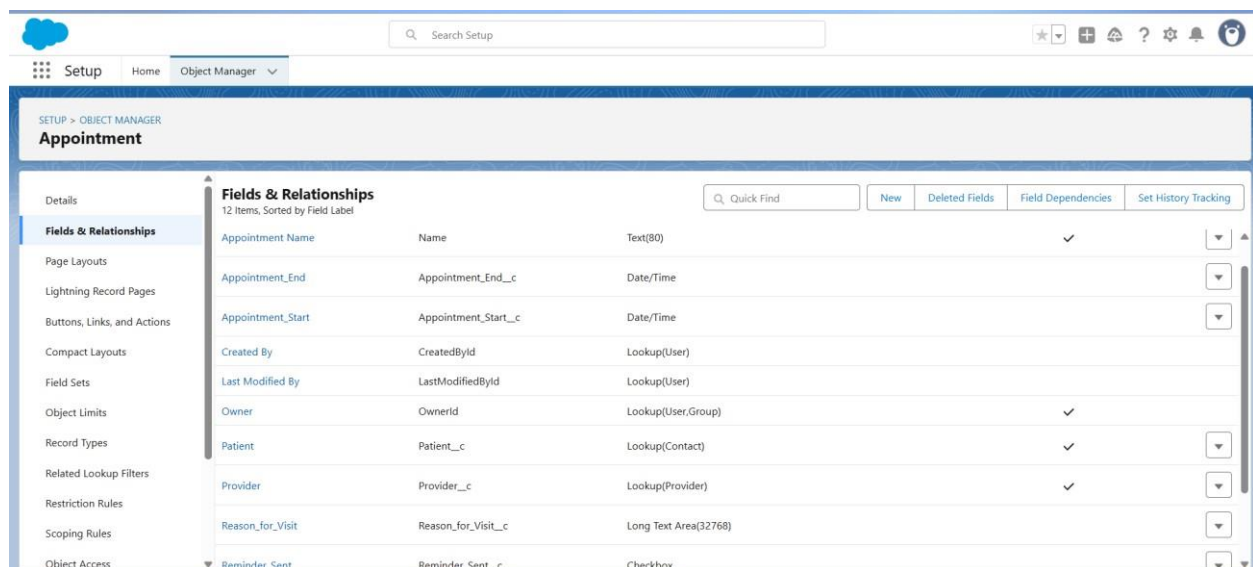
Quick Find Schema Builder Create

| Label | API Name | Type | Description | Last Modified | Deployed |
|-----------------------------|--------------------------|-----------------|-------------|---------------|----------|
| Account | Account | Standard Object | | | |
| Activity | Activity | Standard Object | | | |
| Address | Address | Standard Object | | | |
| Agent Work | AgentWork | Standard Object | | | |
| Alternative Payment Method | AlternativePaymentMethod | Standard Object | | | |
| API Anomaly Event Store | ApiAnomalyEventStore | Standard Object | | | |
| Appointment | Appointment__c | Custom Object | | 9/15/2025 | ✓ |
| Appointment Category | AppointmentCategory | Standard Object | | | |
| Appointment Invitation | AppointmentInvitation | Standard Object | | | |
| Appointment Invitee | AppointmentInvitee | Standard Object | | | |
| Appointment Topic Time Slot | AppointmentTopicTimeSlot | Standard Object | | | |
| Approval Submission | ApprovalSubmission | Standard Object | | | |

Custom Fields

Appointment__c

- Appointment_Start__c (Date/Time)
- Appointment_End__c (Date/Time)
- Status__c (Picklist: Scheduled, Completed, Cancelled)
- Patient__c (Lookup → Patient/Contact)
- Provider__c (Lookup → Provider__c)
- Reason_for_Visit__c (Text Area)



Appointment

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access

Fields & Relationships
12 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| | | | | |
|-------------------|----------------------|-----------------------|---|--|
| Appointment Name | Name | Text(80) | ✓ | |
| Appointment_End | Appointment_End__c | Date/Time | | |
| Appointment_Start | Appointment_Start__c | Date/Time | | |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | ✓ | |
| Patient | Patient__c | Lookup(Contact) | ✓ | |
| Provider | Provider__c | Lookup(Provider) | ✓ | |
| Reason_for_Visit | Reason_for_Visit__c | Long Text Area(32768) | | |
| Reminder_Sent | Reminder_Sent__c | Checkbox | | |

SetupHomeObject Manager

SEARCH SETUP

★+⚙️?🔔👤

SETUP > OBJECT MANAGER

Provider

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesObject Access

Fields & Relationships8 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Email | Email__c | Email | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |
| Provider Name | Name | Text(80) | | ✓ |
| Specialty | Specialty__c | Picklist | | |
| User | User__c | Lookup(User) | | ✓ |

Tabs for Custom Object

SetupHomeObject Manager

SEARCH SETUP

★+⚙️?🔔👤

Q tabs

User InterfaceRename Tabs and Labels

Tabstabs

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

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

NewWhat Is This?

| Action | Label | Tab Style | Description |
|------------|-------------------|-----------|-------------|
| Edit Del | Appointments | Pencil | |
| Edit Del | Mentors | Hexagon | |
| Edit Del | Notification_Logs | Globe | |
| Edit Del | Prescriptions | Box | |
| Edit Del | Providers | Computer | |
| Edit Del | Student | Desk | |
| Edit Del | Visits | Lightning | |

Web Tabs

NewWhat Is This?

No Web Tabs have been defined.

