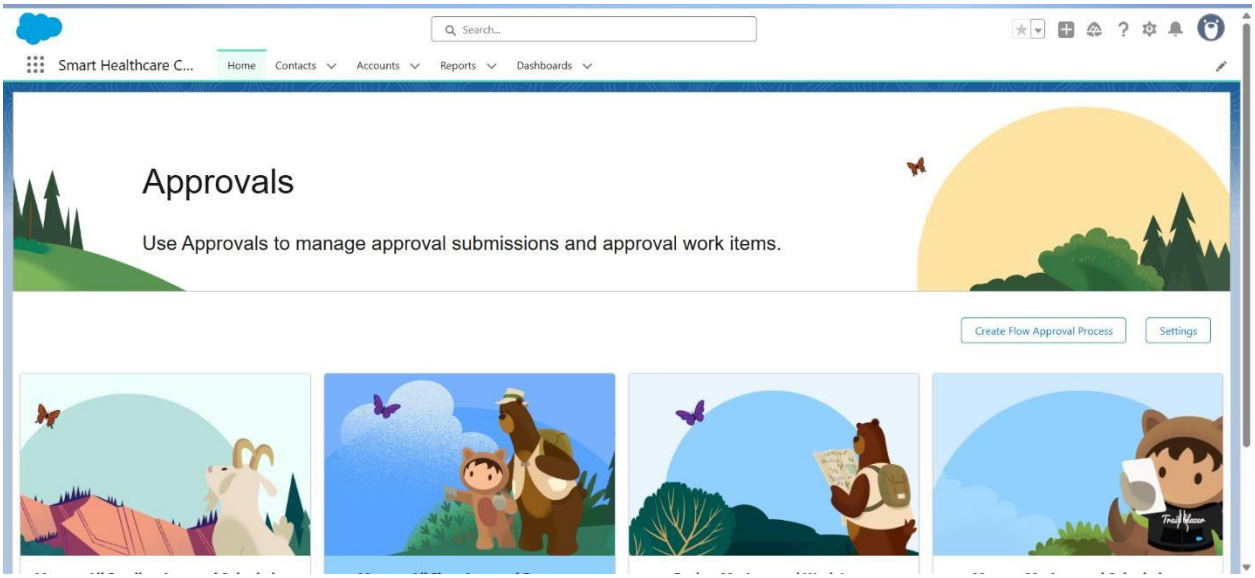
Phase 2: Org Setup & Configuration (Healthcare Project)

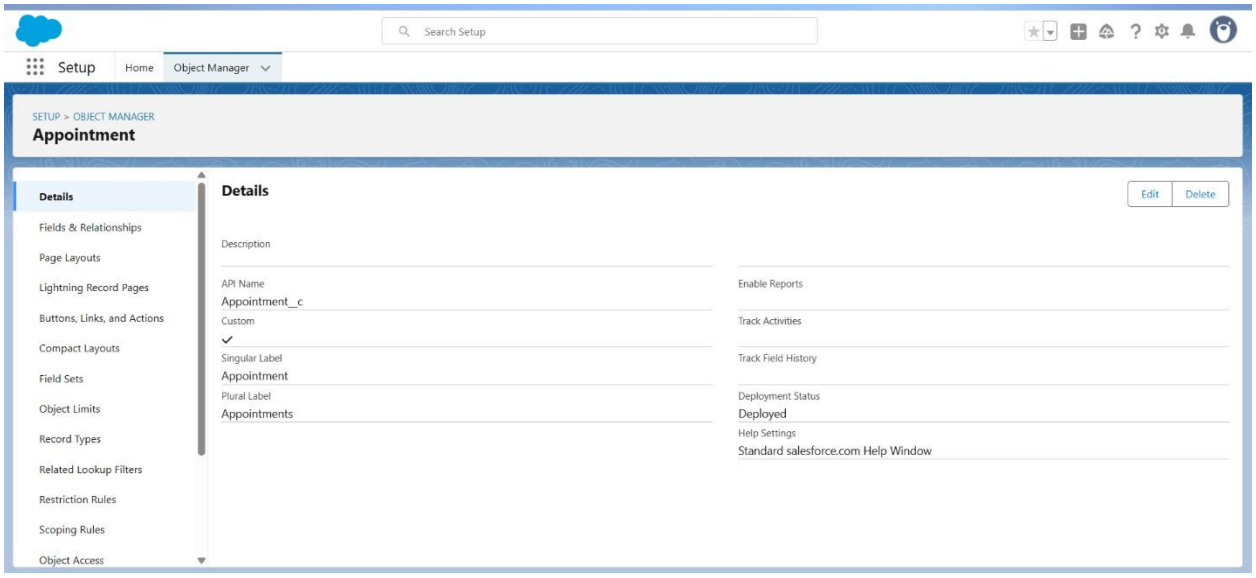
Create a New Lightning App

- **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**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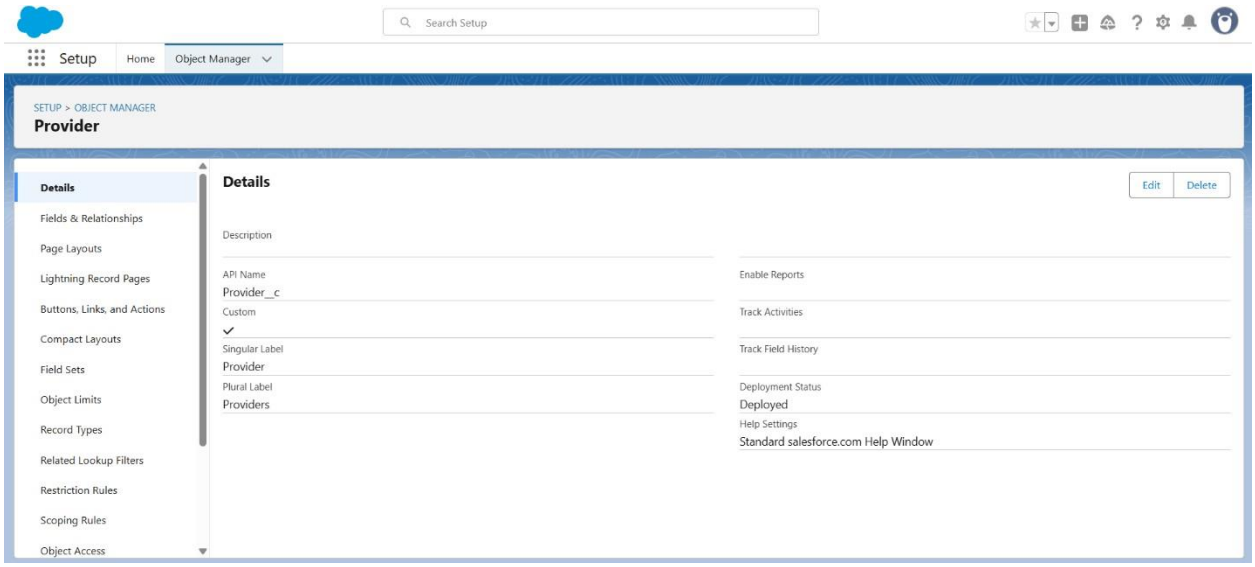
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Details
Edit
Delete
Description
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


Search Setup
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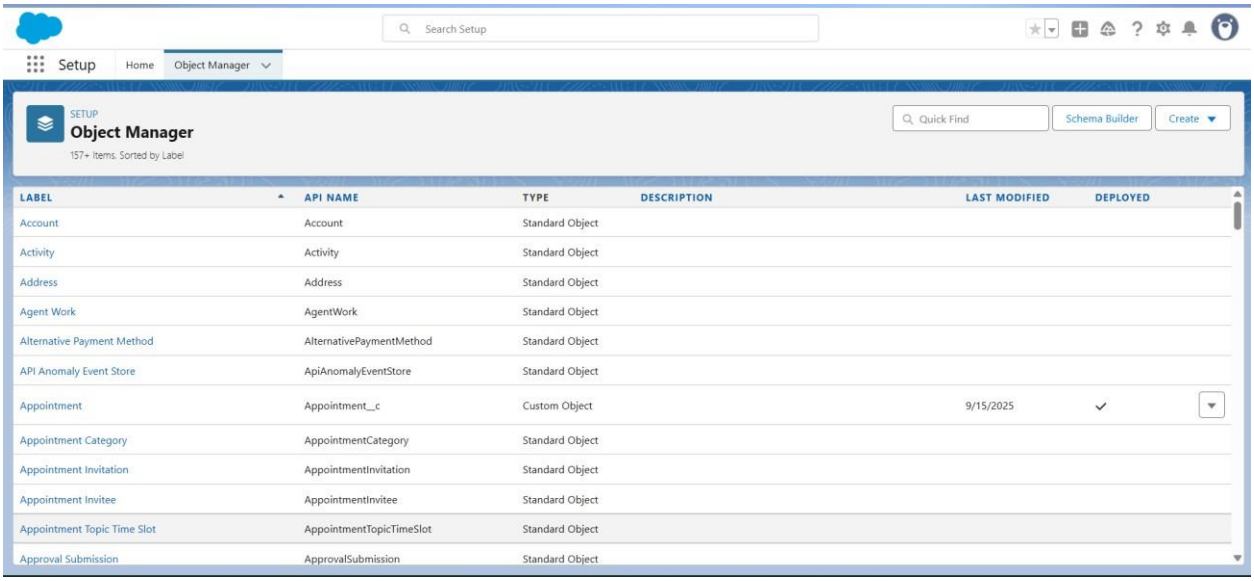
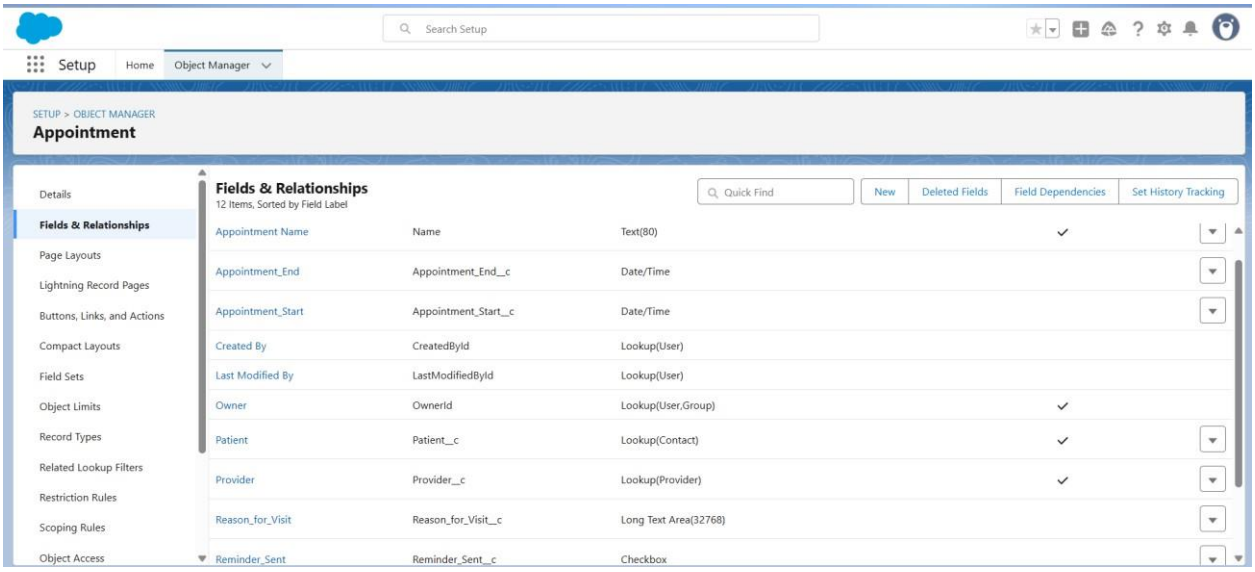
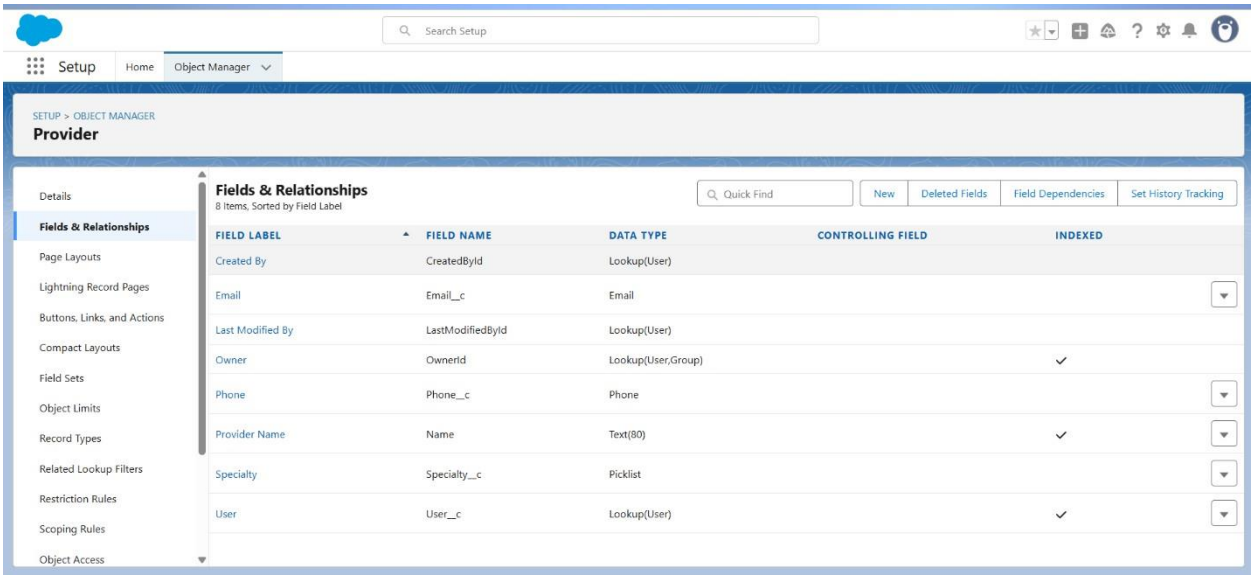
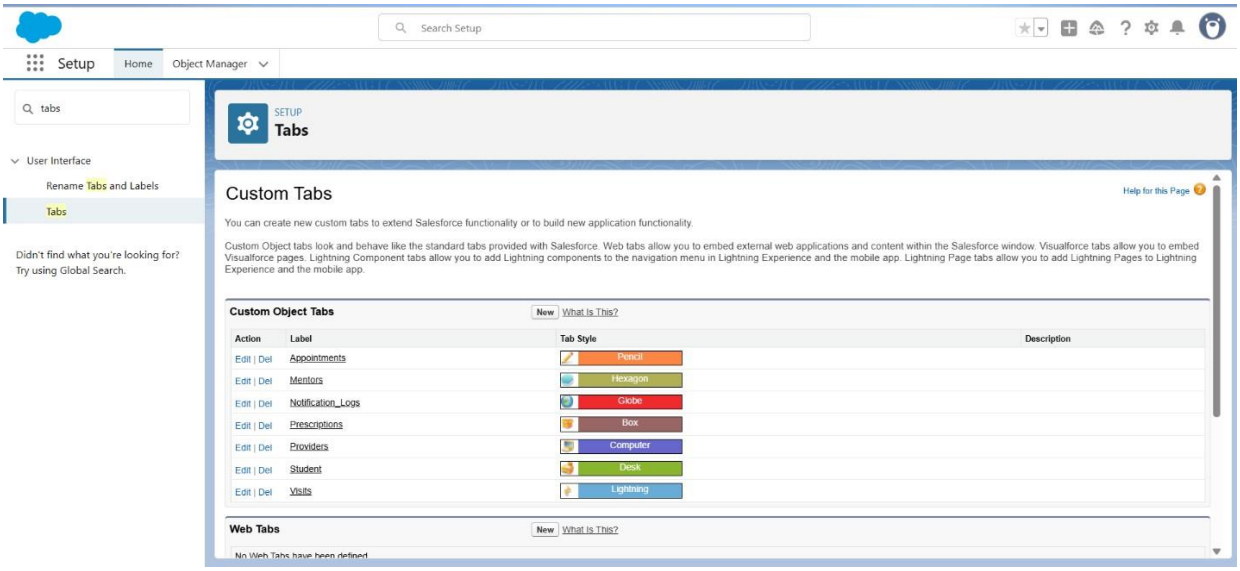


Custom Fields

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)





Tabs for Custom Object