

PHASE -3 Data Modelling & Relationships

1. Standard & Custom Objects

- Create and name objects that map to business entities.
- Setup → Object Manager → New Custom Object.
- For each object set Label, Plural Label, API Name, Record Name, Deployment Status = Deployed, Allow Reports = Yes, Allow Activities = Yes, Allow Sharing = Yes.

The screenshot shows the Salesforce Object Manager interface for the 'Appointment_Participant' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area is titled 'Appointment_Participant' and has a 'Details' tab selected. The details section includes a 'Description' field, an 'API Name' field with the value 'Appointment_Participant__c', a 'Custom' checkbox that is checked, a 'Singular Label' field with the value 'Appointment_Participant', a 'Plural Label' field with the value 'Appointment_Participants', an 'Enable Reports' checkbox that is checked, a 'Track Activities' checkbox that is checked, a 'Track Field History' checkbox, a 'Deployment Status' field with the value 'Deployed', and a 'Help Settings' field with the value 'Standard salesforce.com Help Window'.

2. Fields

- Setup → Object Manager → Fields & Relationships → New.
- **Patient __c:** Full_Name __c/use Contact, Date_of_Birth __c (Date), Gender __c (Picklist), Medical_Record_Number __c (AutoNumber/Text unique), Assigned_Doctor __c (Lookup(User) or Lookup(Doctor __c)), Contact __c (Lookup(Contact) if using Contact).
- **Doctor __c:** User_Lookup __c (Lookup(User)), Specialty __c (Picklist), Registration_No __c (Text), Active __c (Checkbox).
- **Appointment __c:** Appointment_Number __c (AutoNumber), Appointment_Start __c (DateTime), Appointment_End __c (DateTime), Patient __c (Lookup/Master-Detail), Doctor __c (Lookup or use junction), Status __c (Picklist), Type __c

3. Record Types

- Setup → Object Manager → [Object] → Record Types → New
- Name, Assign to Profiles, choose default record type per profile, and add picklist value subsets.

- Examples: **Appointment** → In-Person, Teleconsult; **Patient** → Outpatient, Inpatient.

4. Page Layouts

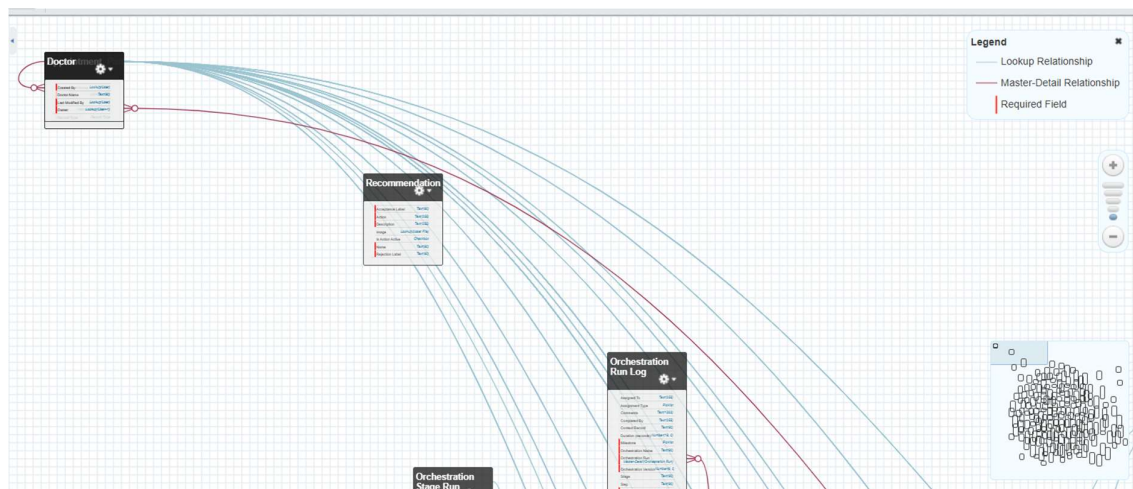
- Setup → Object Manager → [Object] → Page Layouts
- Arrange sections , make required fields visible, add Related, and set field-level read-only/editable per layout
- Then assign layouts to Record Types & Profiles (Page Layout Assignment).

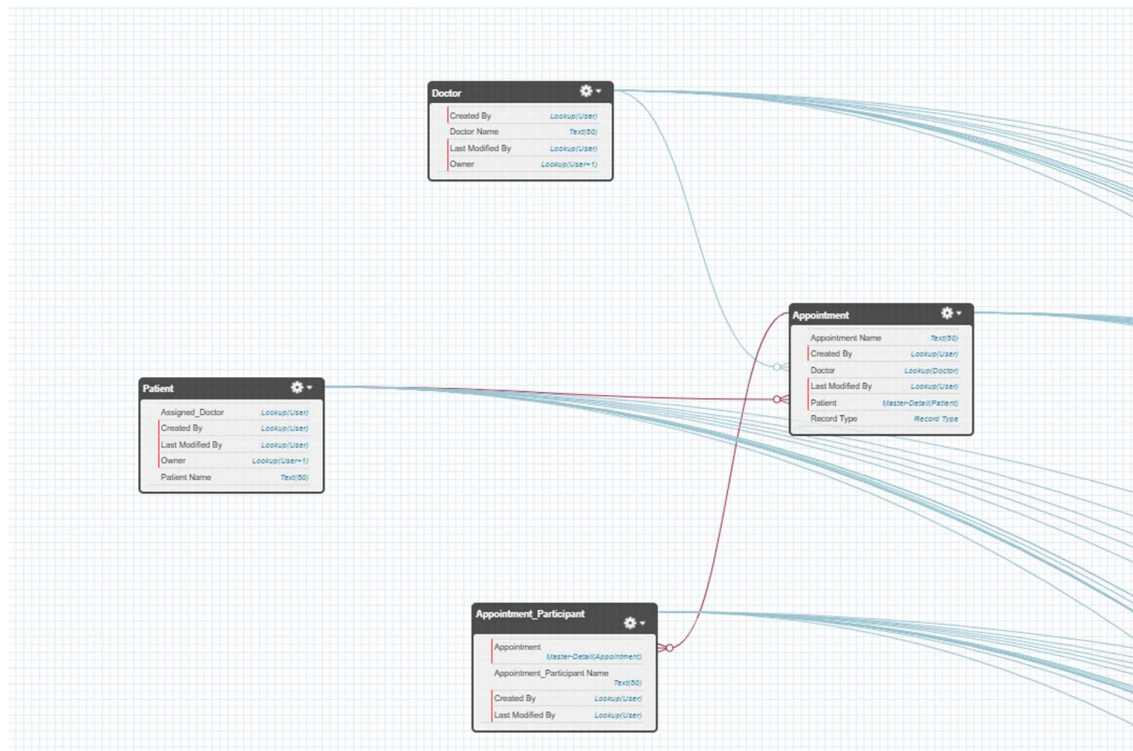
5. Compact Layouts

- Object Manager → [Object] → Compact Layouts
- Design compact layouts to show key fields in the highlights panel and mobile: choose 3–5 fields.
- Open record — check highlight panel shows chosen fields.

6. Schema Builder

- Setup → Schema Builder
- Drag objects to canvas, validate relationships, screenshot diagram. Export a field inventory (spreadsheet of Object, API Name, Type, Required, FLS).
- Ensure schema matches implementations and include screenshot in project deliverables.





7.Lookup vs Master-Detail vs Hierarchical Relationships

A Lookup Relationship is a loose connection where the child record can exist independently of the parent—for example, an Appointment looking up to a Doctor. A Master-Detail Relationship is a tighter link where the child record depends on the parent; the parent controls ownership, sharing, and deletion—like an Appointment that is a detail of a Patient. A Hierarchical Relationship is a special type available only on the User object, allowing one user to be related to another (such as a manager–employee structure). Choosing the right relationship type ensures proper data integrity, sharing, and reporting in the Smart Health Appointment & Patient Tracker application.