

# SALESFORCE PROJECT IMPLEMENTATION PHASES

---

## Phase 1: Problem Understanding & Industry Analysis

### Goal :

In remote and rural areas, emergencies like accidents, burns, animal bites, and sudden health conditions often go untreated due to lack of immediate medical facilities. Delays in receiving first-aid or connecting with healthcare professionals frequently result in severe complications or preventable deaths.

### Key Challenges Identified:

- Delayed Medical Support: Lack of hospitals or trained doctors in remote areas.
- Connectivity Issues: Limited internet and mobile network availability.
- Absence of First-aid Awareness: People don't know how to act in critical situations.
- High Risk of Mortality: Life-threatening outcomes due to delayed action.
- No Centralized Data: Emergency cases are not recorded for future analysis and policy-making.

### Why JeevanRakshak?

- Provides instant digital first-aid guidance when professional help isn't immediately available.
- Uses Salesforce Org to log cases, send alerts, and connect patients with healthcare workers.
- Ensures that even in remote regions, every emergency is documented, tracked, and acted upon quickly.

## 1. Requirement Gathering

Requirement	Description	Priority
First-aid Guidance	Step-by-step emergency instructions for accidents, burns, and animal bites.	High
Emergency Case Logging	Record emergency details inside Salesforce Org.	High
Real-time Alerts	Send SMS/Email alerts to healthcare workers.	High
Nearest Healthcare Support	Provide hospital/doctor contact details.	Medium
Offline Accessibility	Access instructions without internet.	Medium

## 2. Stakeholder Analysis

Stakeholder	Role	Expectations
Patient/User	Emergency victim	Quick, easy guidance and fast alerts.
Healthcare Worker	Responder	Receive case details instantly.
Admin (Salesforce)	System manager	Maintain data and monitor incidents.
Govt/NGO Partner	Policy maker	Access reports for rural healthcare planning.

### 3. Business Process Mapping

The following flow illustrates the process of handling an emergency case through JeevanRakshak:

1. User faces an emergency.
2. User selects the emergency type in JeevanRakshak.
3. System provides relevant first-aid steps.
4. Emergency case is logged into Salesforce.
5. Alerts are sent to healthcare workers.
6. Nearest hospital/doctor details are provided.

### 4. Industry-specific Use Case Analysis

- Healthcare (Rural): Minimal medical access, people depend on local remedies until help arrives.
- Digital Health: First-aid guidance apps are emerging but lack Salesforce-level case tracking.
- Salesforce Fit: Health Cloud and Case Management can directly map to patient incidents.

### 5. AppExchange Exploration

App/Tool	Purpose
Health Cloud	Manage patient records and healthcare workflows.
Emergency Response Apps	Handle urgent alerts and responses.
Twilio SMS Integration	Enable instant emergency notifications.

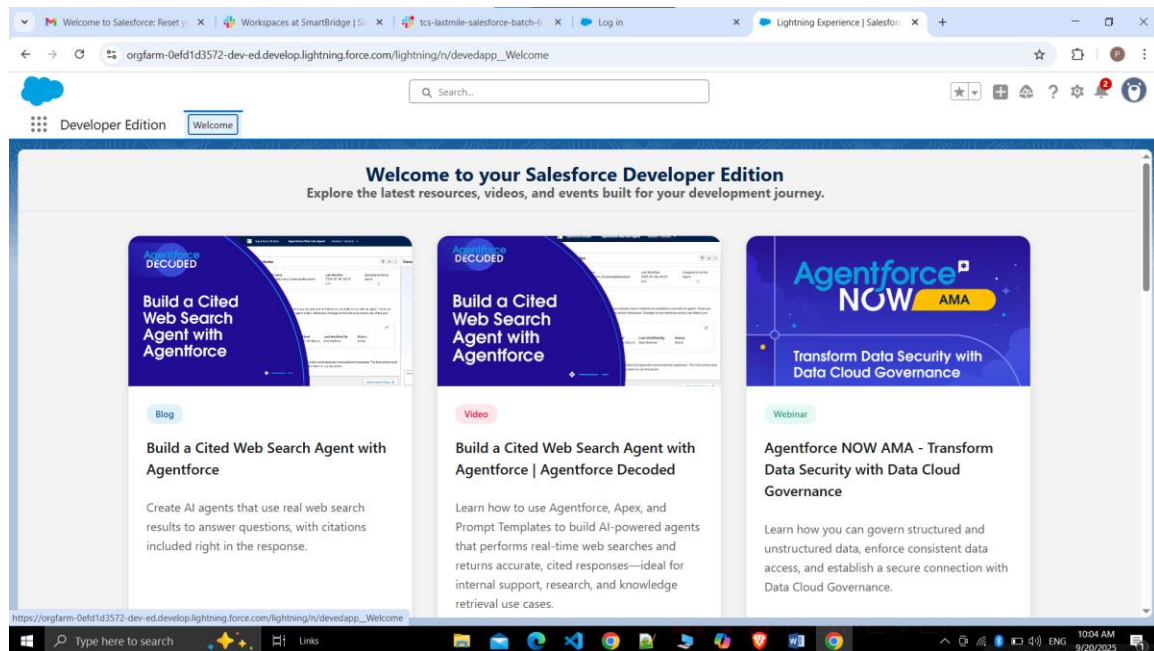
## Phase 2: Org Setup & Configuration

### Goal :

In this phase, we configure the Salesforce environment to support JeevanRakshak. We set up company details, business hours, and fiscal year for system consistency. Users (Admin, Healthcare Worker, Patient) are created and organized into roles and profiles with specific access. Permission sets are applied for extra rights, while org-wide defaults and sharing rules ensure secure data visibility. Login policies define working hours, and the entire structure (objects, roles, and security model) is aligned to manage emergency cases, patient data, and first-aid records effectively.

### 1. Salesforce Edition

Use Developer Edition (free Developer Org) to build and test JeevanRakshak functionalities.



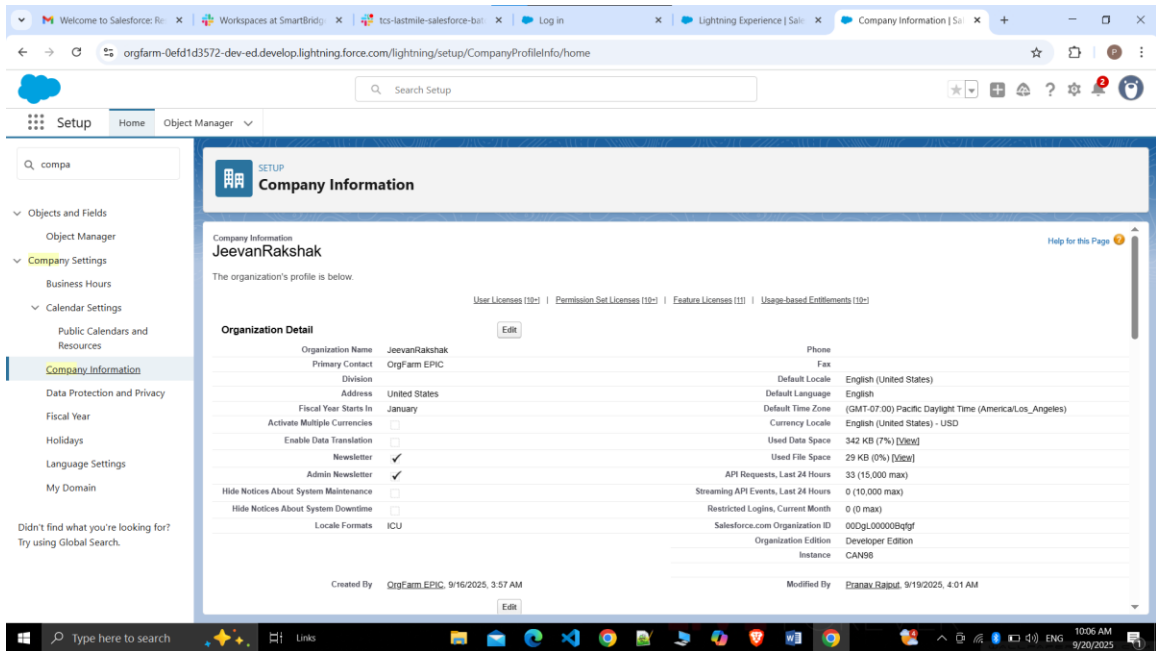
### 2. Company Profile Setup

Setup → Company Settings → Company Information

Company Name: JeevanRakshak

Time Zone: GMT+05:30 (India Standard Time)

Currency: INR



The screenshot shows the Salesforce Setup interface for the 'Company Information' page. The left sidebar contains a search bar and a navigation menu with categories like 'Objects and Fields', 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and displays the organization's profile for 'JeevanRakshak'. It includes a table of 'Organization Detail' with fields like Organization Name, Primary Contact, Division, Address, Fiscal Year, and various system settings. The page also shows 'User Licenses', 'Permission Set Licenses', 'Feature Licenses', and 'Usage-based Entitlements'. The bottom of the page indicates the page was created by 'OrgFarm EPIC' on 9/16/2025 and modified by 'Pranav Rajput' on 9/19/2025.

Company Information

The organization's profile is below.

Organization Detail

Field	Value
Organization Name	JeevanRakshak
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Created By: OrgFarm EPIC, 9/16/2025, 3:57 AM

Modified By: Pranav Rajput, 9/19/2025, 4:01 AM

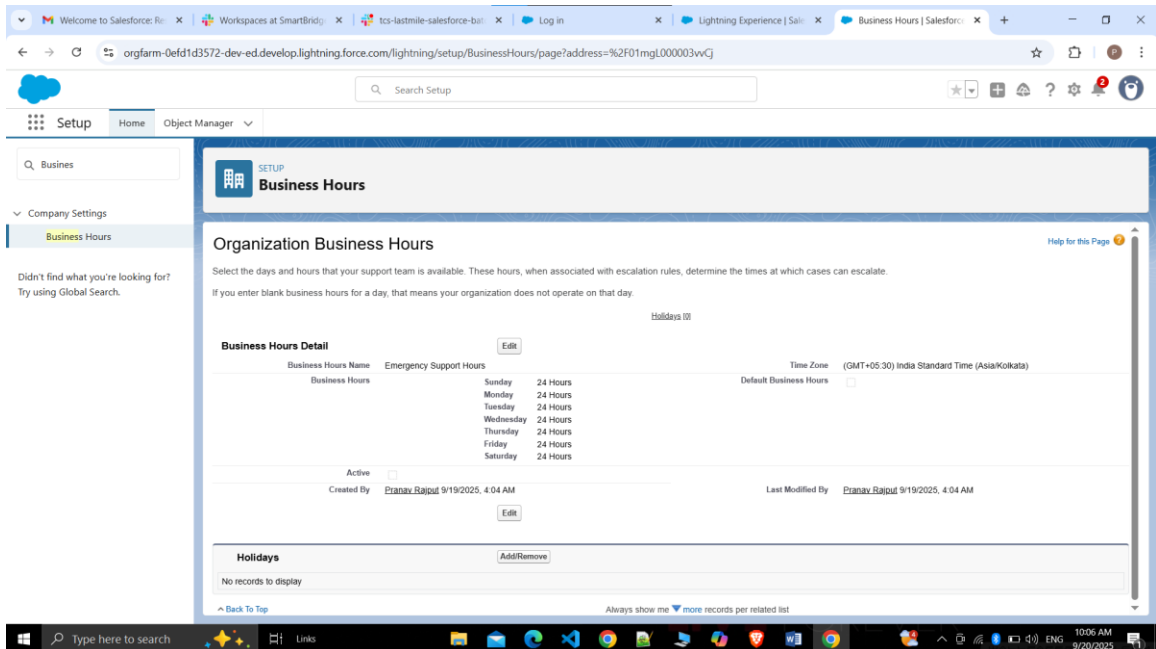
### 3. Business Hours & Holidays

Setup → Business Hours → New

Label: Emergency Support Hours

Hours: 24x7 (Start: 00:00, End: 23:59)

(Optional) Setup → Holidays → Add public holidays like Independence Day.



The screenshot shows the Salesforce Setup interface for the 'Business Hours' page. The left sidebar contains a search bar and a navigation menu with categories like 'Company Settings', 'Business Hours', and 'Holidays'. The main content area is titled 'Business Hours' and displays the 'Organization Business Hours' for 'JeevanRakshak'. It includes a table of 'Business Hours Detail' with columns for Business Hours Name, Emergency Support Hours, and Time Zone. The page also shows a 'Holidays' section with a table of holiday records. The bottom of the page indicates the page was created by 'Pranav Rajput' on 9/19/2025 and modified by 'Pranav Rajput' on 9/19/2025.

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Detail

Business Hours Name	Emergency Support Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Created By: Pranav Rajput, 9/19/2025, 4:04 AM

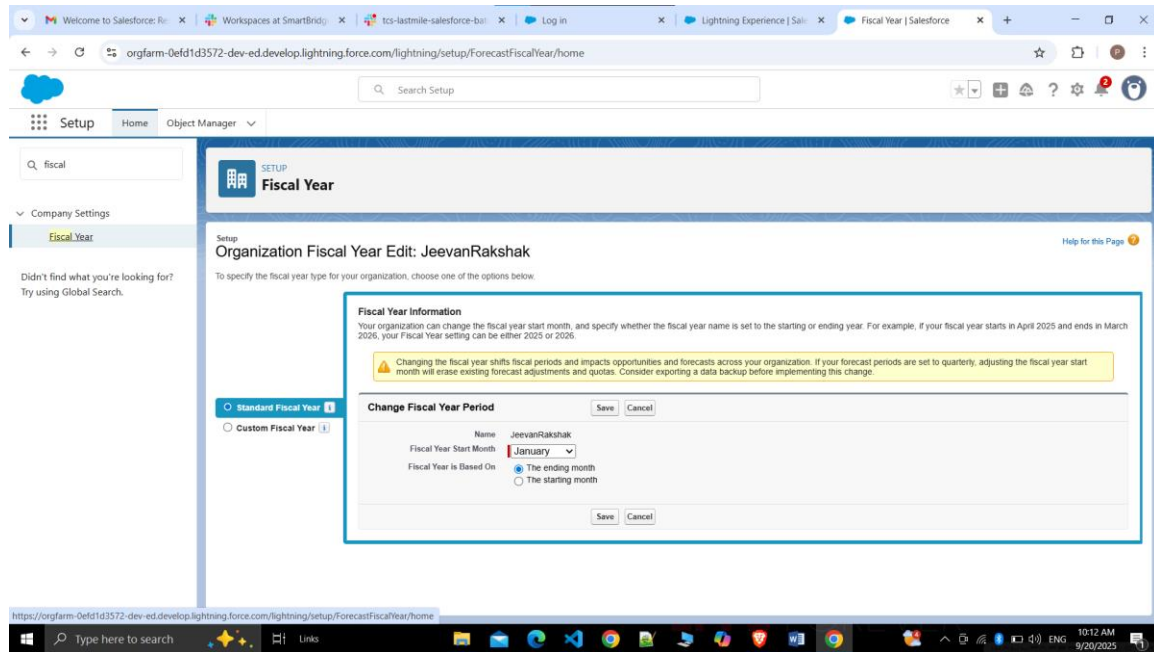
Last Modified By: Pranav Rajput, 9/19/2025, 4:04 AM

Holidays

No records to display

## 4. Fiscal Year Settings

Setup → Fiscal Year → Standard (Jan–Dec). Useful for reporting emergency cases and resource allocation.



## 5. User Setup & Licenses

Create Users:

1. Admin (Profile: System Administrator)
2. Healthcare Worker (Profile: Standard User)
3. Patient (Profile: Standard User)

Assign appropriate Salesforce licenses to each user.

**Setup** Home Object Manager

Search Setup

**Users**

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
**Users**  
Feature Settings  
Data.com  
Prospector  
Users

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

**SETUP Users**

All Users

On this page you can create, view, and manage users.  
To get more licenses, use the Your Account app. Let's Go

View: All Users Edit Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Admin Project	padmin	jeewanakshak@gmail.com	Admin	✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	chatter	chatty.009p000000000000@orgfarm.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_CorpFarm	OEPIC	epic.1e2c0ba2a29@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Rajou...Pranav	0R	rajoupranav996455@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@009p000000000000@orgfarm.salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Patient	patient	patientuser@rajoupranav@gmail.com	Patient	✓	Standard Platform User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@009p000000000000@orgfarm.salesforce.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Worker Healthcare	hworker	hworker@gmail.com	Healthcare Worker	✓	Standard User

New User Reset Password(s) Add Multiple Users

## 6. Profiles

Profiles define base-level access:

- Admin: Full access.
- Healthcare Worker: Create/Edit Emergency Cases, View Patients.
- Patient: Limited access.

**Setup** Home Object Manager

Search Setup

**Users**

Profiles

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

**SETUP Users**

User Profile Help for this Page

User: Project Admin

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | Chatter Apps (0) | Third-Party Account Links (0) | Built-In Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

**User Detail** Edit Sharing Reset Password Freeze View Summary

Name	Project Admin	Role	Admin
Alias	padmin	User License	Salesforce
Email	rajoupranav996@gmail.com (Verify)	Profile	System Administrator
Username	jeewanakshak@gmail.com	Active	✓
Nickname	User17582801580018594792	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

The screenshot shows the Salesforce Setup page for a user profile named 'Healthcare Worker'. The page is titled 'User: Healthcare Worker' and includes a navigation bar with links to various setup areas like Permission Set Assignments, Activation Required, and more. The 'User Detail' section is expanded, showing fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, and Active status. The 'Role' is set to 'Healthcare Worker' and the 'User License' is 'Salesforce'. The 'Profile' is 'Standard User' and the 'Active' checkbox is checked. The 'Marketing User' checkbox is also checked, while others like 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', and 'Accessibility Mode (Classic Only)' are unchecked.

The screenshot shows the Salesforce Setup page for a user profile named 'Patient User'. The page is titled 'User: Patient User' and includes a navigation bar with links to various setup areas. The 'User Detail' section is expanded, showing fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, and Active status. The 'Role' is set to 'Patient' and the 'User License' is 'Salesforce Platform'. The 'Profile' is 'Standard Platform User' and the 'Active' checkbox is checked. The 'Marketing User' checkbox is also checked, while others like 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', and 'Accessibility Mode (Classic Only)' are unchecked.

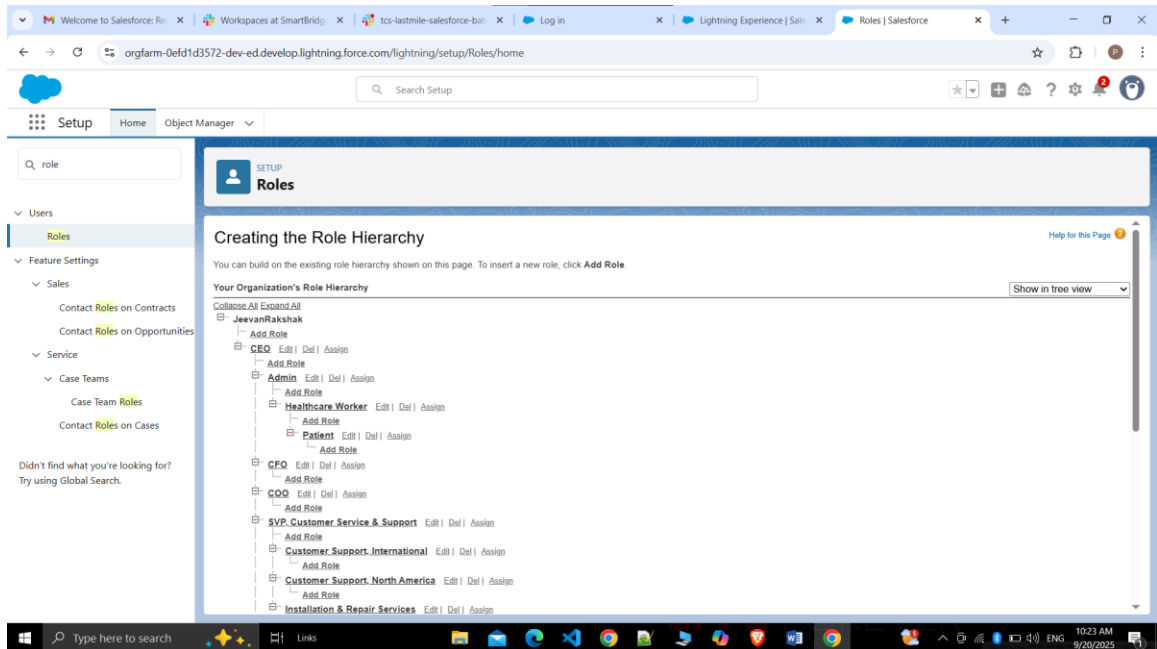
## 7. Roles & Hierarchy

Role Hierarchy:

Admin → Healthcare Worker → Patient

Ensures record visibility rolls up correctly.

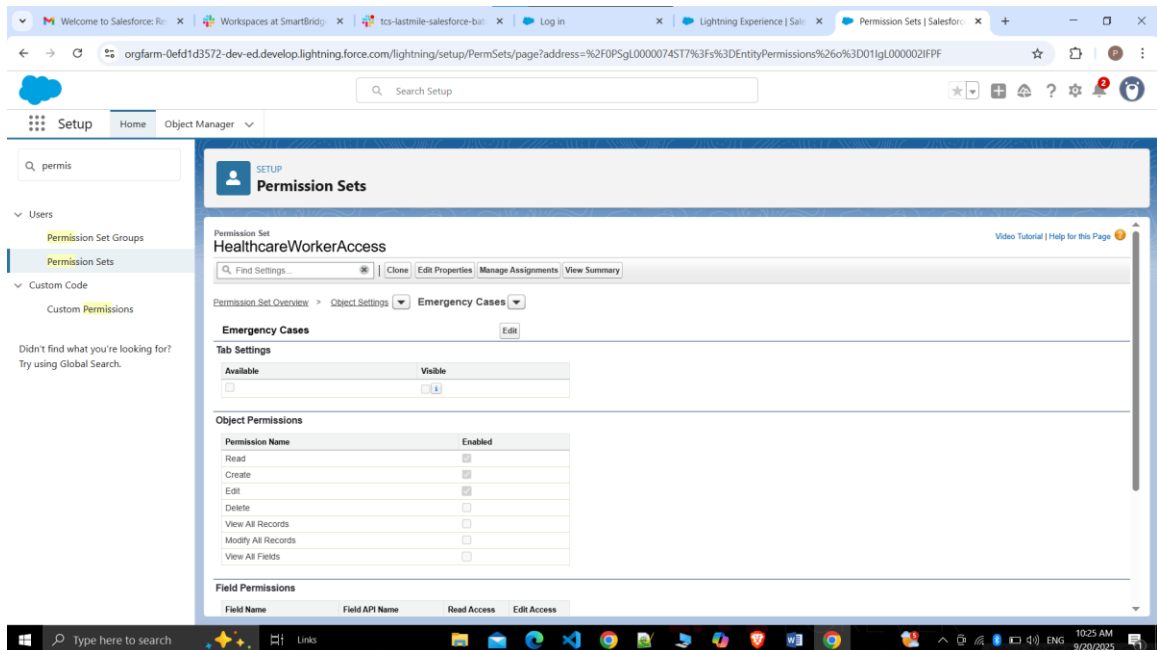




## 8. Permission Sets

Create HealthcareWorkerAccess Permission Set → Object Settings → Emergency Case → Read, Create, Edit.

Assign Permission Set: Manage Assignments → Add Healthcare Worker User.

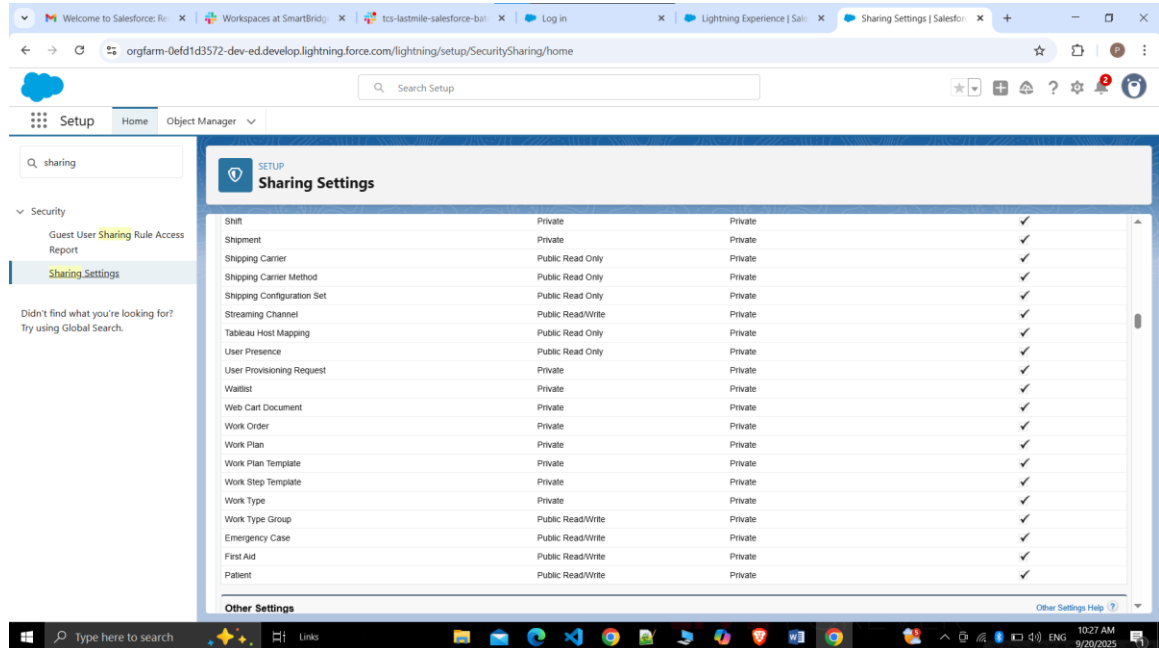


## 9. Org-Wide Defaults (OWD)

Emergency Case = Private

Patient = Private

First Aid = Public Read Only



The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar contains a search bar with 'sharing' and a list of security-related items, with 'Sharing Settings' selected. The main content area displays a table of sharing settings for various objects.

Object	Private	Public Read Only	Public Read/Write
Shift	Private	Private	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Emergency Case	Public Read/Write	Private	✓
First Aid	Public Read/Write	Private	✓
Patient	Public Read/Write	Private	✓

Other Settings: [Other Settings Help](#)

## 10. Sharing Rules

Create Sharing Rule: Share Emergency Cases with Healthcare Worker Role → Read/Write Access.

Optional: Share high-priority emergencies with Admin automatically.

**Sharing Settings**

**Objects**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Emergency Case	Public Read/Write	Private	<input checked="" type="checkbox"/>

**Other Settings**

- Manager Groups: ☐ [Help](#)
- Secure guest user record access: ☒ [Help](#)
- Require permission to view record names in lookup fields: ☐ [Help](#)

**Sharing Rules**

**Emergency Case Sharing Rules** [New](#) [Recalculate](#) [Emergency Case Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Admin	Role: Healthcare Worker	Read/Write

**Sharing Overrides** [Sharing Overrides Help](#)

**Profiles That Override Emergency Case Sharing**

Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

Profile	Custom Profile	Organization-Wide Permissions	Emergency Case Permissions
Analytics Cloud Integration User	<input type="checkbox"/>	<input checked="" type="checkbox"/> View All Data <input type="checkbox"/> Modify All Data	<input checked="" type="checkbox"/> View All Records <input type="checkbox"/> Modify All Records
System Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/> View All Data <input checked="" type="checkbox"/> Modify All Data	<input checked="" type="checkbox"/> View All Records <input checked="" type="checkbox"/> Modify All Records

## 11. Login Access Policies

Restrict login hours:

- Admin: 24x7

- Healthcare Worker: 6am-10pm

**Profiles**

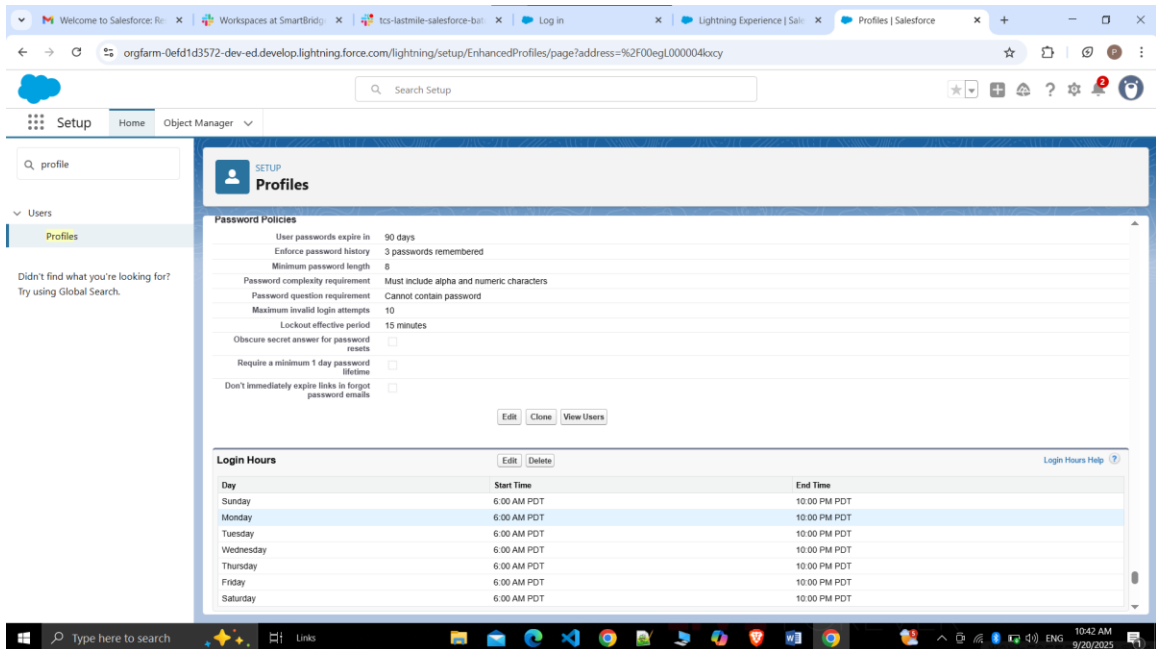
**Password Policy**

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets: ☐
- Require a minimum 1 day password lifetime: ☐
- Don't immediately expire links in forgot password emails: ☐

[Edit](#) [Clone](#) [View Users](#)

**Login Hours** [Edit](#) [Delete](#) [Login Hours Help](#)

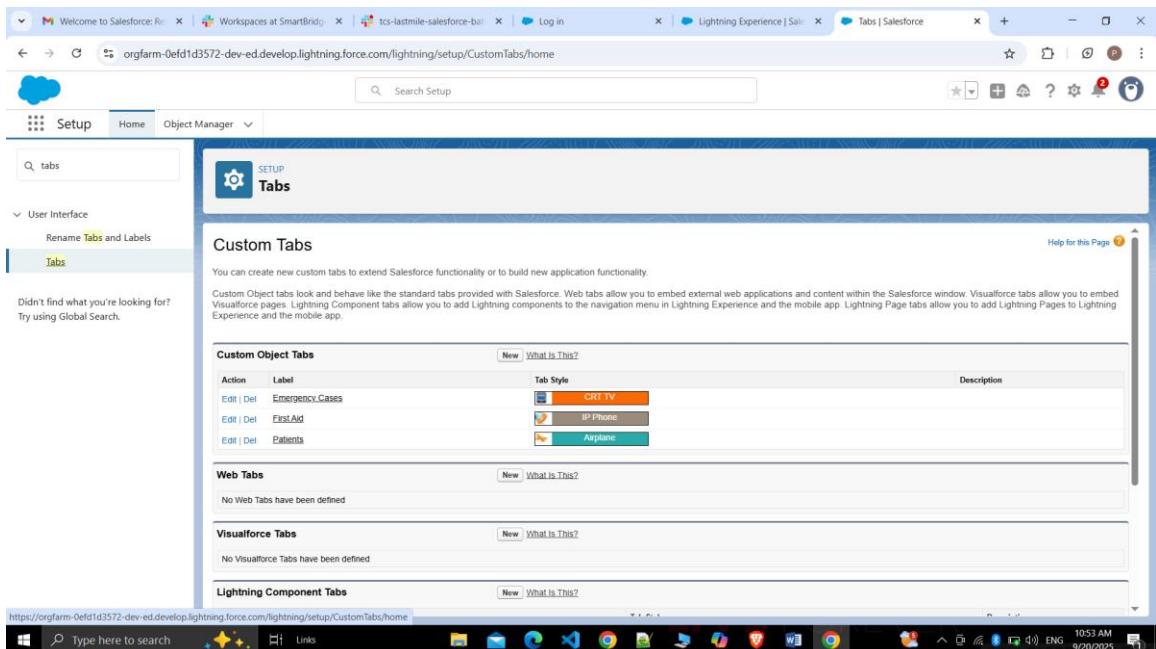
Day	Start Time	End Time
Sunday	12:00 AM PDT	End of Day
Monday	12:00 AM PDT	End of Day
Tuesday	12:00 AM PDT	End of Day
Wednesday	12:00 AM PDT	End of Day
Thursday	12:00 AM PDT	End of Day
Friday	12:00 AM PDT	End of Day
Saturday	12:00 AM PDT	End of Day



## 12. Tab Layout

Application includes following tabs:

- **Emergency Case** – All emergency requests.
- **Patient Info** – Patient records and history.
- **Healthcare Worker Info** – Assigned healthcare workers and activity logs.



### 13. App Manager

JeevanRakshak Lightning App created and listed in App Manager with status active. All required tabs included for Emergency Case management, First Aid, and Patient tracking.

The screenshot shows the Salesforce App Manager interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays a table of 16 apps, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The JeevanRakshak App is listed as item 13, created by JeevanRakshak\_App, with a description of 'Manage content and media for all of your sites.' and a status of 'Lightning'.

App Name	Developer Name	Description	Last Modified	App Type	Visi...
3 App Launcher	AppLauncher	App Launcher tabs	9/16/2025, 3:57 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/16/2025, 3:57 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/16/2025, 4:03 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/16/2025, 3:57 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/16/2025, 3:57 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	9/16/2025, 3:57 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/16/2025, 3:57 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/16/2025, 3:57 AM	Lightning	✓
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	9/16/2025, 4:26 AM	Lightning (Managed)	✓
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/16/2025, 3:57 AM	Lightning	✓
13 JeevanRakshak App	JeevanRakshak_App	Manage content and media for all of your sites.	9/19/2025, 5:34 AM	Lightning	✓
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/16/2025, 3:57 AM	Lightning	✓
15 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/16/2025, 3:57 AM	Classic	✓
16 My Service Journey	MSJApp	Discover new customer service capabilities.	9/16/2025, 3:57 AM	Lightning	✓

### 14. App Launcher Icon

JeevanRakshak application visible in App Launcher with custom icon and label. Accessible to Admin and Healthcare Worker profiles.

The screenshot shows the Salesforce App Launcher interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays a list of apps, including the JeevanRakshak App. The app is listed with a custom icon and label, and is accessible to Admin and Healthcare Worker profiles.

App Name	Developer Name	Description	Last Modified	App Type	Visi...
3 App Launcher	AppLauncher	App Launcher tabs	9/16/2025, 3:57 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/16/2025, 3:57 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/16/2025, 4:03 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/16/2025, 3:57 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/16/2025, 3:57 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	9/16/2025, 3:57 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/16/2025, 3:57 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/16/2025, 3:57 AM	Lightning	✓
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	9/16/2025, 4:26 AM	Lightning (Managed)	✓
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/16/2025, 3:57 AM	Lightning	✓
13 JeevanRakshak App	JeevanRakshak_App	Manage content and media for all of your sites.	9/19/2025, 5:34 AM	Lightning	✓
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/16/2025, 3:57 AM	Lightning	✓
15 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/16/2025, 3:57 AM	Classic	✓
16 My Service Journey	MSJApp	Discover new customer service capabilities.	9/16/2025, 3:57 AM	Lightning	✓

## 15. Application Dashboard

Custom dashboard created for JeevanRakshak app:

- Emergency Cases summary with priority status.
- First Aid requests overview.
- Patient count and recent activity metrics.

