

# SALESFORCE PROJECT IMPLEMENTATION PHASES

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## 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**

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

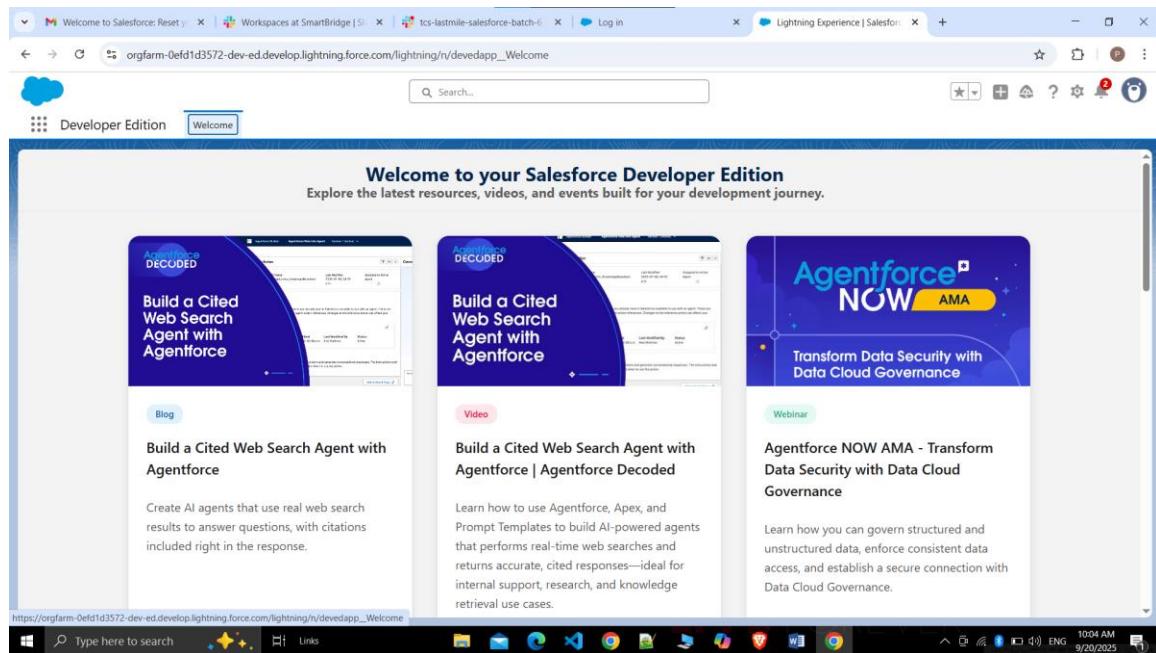
## Phase 2: Org Setup & Configuration

### 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 with the 'Company Information' page selected. The organization profile for 'JeevanRakshak' is displayed, including details like Organization Name, Primary Contact, Division, Address, and various system configurations such as currency and file space usage.

### 3. Business Hours & Holidays

Setup → Business Hours → New

Label: Emergency Support Hours

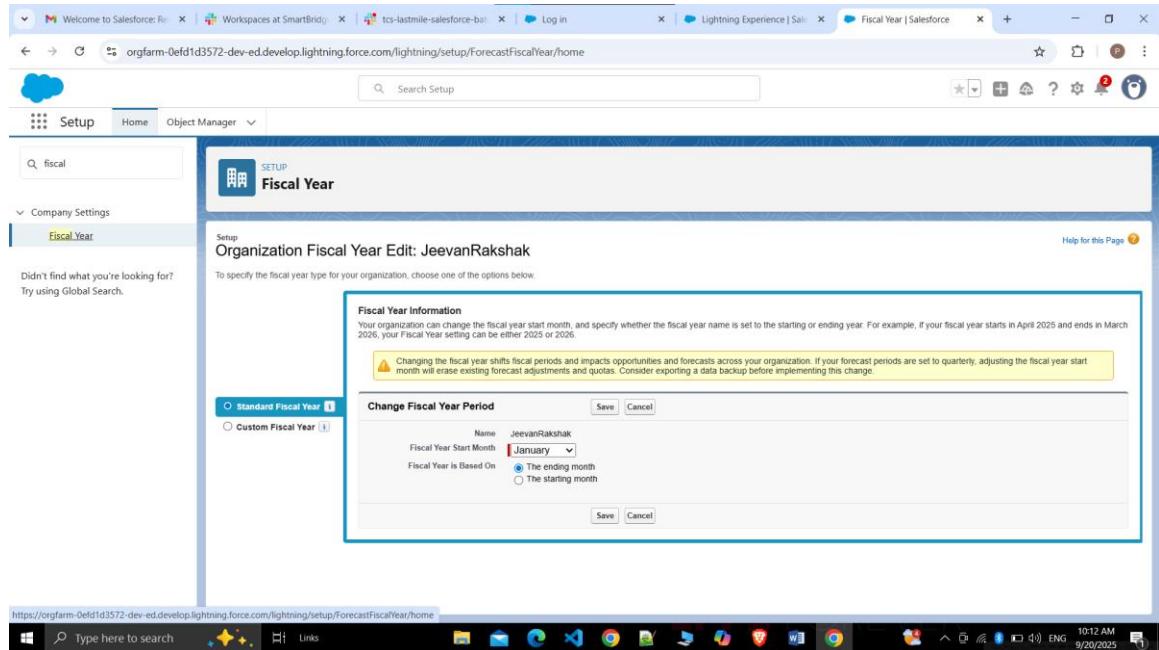
Hours: 24x7 (Start: 00:00, End: 23:59)

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

The screenshot shows the Salesforce Setup interface with the 'Business Hours' page selected. It displays the 'Organization Business Hours' section, which defines the days and hours of operation for the organization. Below this, there is a 'Holidays' section which currently shows '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.

**All Users**

| Action               | Full Name         | Alias   | Username  | Role                   | Active                              | Profile                          |
|----------------------|-------------------|---------|---|------------------------|-------------------------------------|----------------------------------|
| <a href="#">Edit</a> | Admin_Project     | padmin  | jeetvanrakshak@gmail.com                          | Admin                  | <input checked="" type="checkbox"/> | System Administrator             |
| <a href="#">Edit</a> | Chatter_Expert    | Chatter | chatty00900000000000000000000000000000            | Chatter                | <input checked="" type="checkbox"/> | Chatter Free User                |
| <a href="#">Edit</a> | EPIC_OrgAdmin     | OEPIG   | epic_te2coba@29@corptam.salesforce.com            | System Administrator   | <input checked="" type="checkbox"/> | System Administrator             |
| <a href="#">Edit</a> | Rajesh_Pranav     | raj     | rajputranav996455@agentforce.com                  | System Administrator   | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <a href="#">Edit</a> | User_Integration  | integ   | integration@00900000000000000000000000000000      | Standard Platform User | <input checked="" type="checkbox"/> | Standard Platform User           |
| <a href="#">Edit</a> | User_Patient      | user    | patientuserrajputranav@gmail.com                  | Patient                | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |
| <a href="#">Edit</a> | User_Security     | sec     | insightssecurity@00900000000000000000000000000000 | Healthcare Worker      | <input checked="" type="checkbox"/> | Standard User                    |
| <a href="#">Edit</a> | Worker_Healthcare | hwork   | hworker@gmail.com                                 |                        |                                     |                                  |

## 6. Profiles

Profiles define base-level access:

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

**User Detail**

| Name          | Alias  | Email                             | Username                 | Nickname                 | Title | Company | Department | Division | Address | Time Zone   | Locale                  | Language | Delegated Approver | Manager | Receive Approval Request Emails |
|---------------|--------|-----------------------------------|--------------------------|--------------------------|-------|---------|------------|----------|---------|---|-------------------------|----------|--------------------|---------|---------------------------------|
| Project Admin | padmin | rajputranav996@gmail.com [Verify] | jeetvanrakshak@gmail.com | User17582001580018594792 |       |         |            |          |         | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) | English (United States) | English  |                    |         | Only if I am an approver        |

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top has 'Search Setup' entered. Below it, a sidebar shows 'Users' and 'Profiles'. The main content area displays a user record for 'Healthcare Worker'. The 'User Detail' section includes fields for Name (Healthcare Worker), Alias (hwork), Email (rajutpranav95@gmail.com), Username (hworker@gmail.com), Nickname (User1758200504451436943), Title, Company, Department, Division, Address (S.B.I colony, shegaon, Shegaon 442003, Maharashtra, India), Time Zone (GMT+07:00 Pacific Daylight Time (America/Los\_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, and Manager. On the right, the 'Role' is set to 'Healthcare Worker' and 'User License' is 'Salesforce'. Other roles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registration, Data.com User Type (View), and Accessibility Mode (Classic Only). The status bar at the bottom shows '10:21 AM 9/20/2025'.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top has 'Search Setup' entered. Below it, a sidebar shows 'Users' and 'Profiles'. The main content area displays a user record for 'Patient User'. The 'User Detail' section includes fields for Name (Patient User), Alias (puser), Email (rajutpranav95@gmail.com), Username (patientuserrajutpranav@gmail.com), Nickname (User17582005011775745301), Title, Company, Department, Division, Address (S.B.I colony, shegaon, Shegaon 442003, Maharashtra, India), Time Zone (GMT+07:00 Pacific Daylight Time (America/Los\_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, and Manager. On the right, the 'Role' is set to 'Patient' and 'User License' is 'Salesforce Platform'. Other roles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registration, Data.com User Type (View), and Accessibility Mode (Classic Only). The status bar at the bottom shows '10:22 AM 9/20/2025'.

## 7. Roles & Hierarchy

Role Hierarchy:

Admin → Healthcare Worker → Patient

Ensures record visibility rolls up correctly.

**Creating the Role Hierarchy**

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

**Your Organization's Role Hierarchy**

- Collapse All Expand All
- JeevanRakshak
  - Add Role
  - CEO** Edit | Del | Assign
    - Add Role
    - Admin** Edit | Del | Assign
      - Add Role
      - Healthcare Worker** Edit | Del | Assign
        - Add Role
        - Patient** Edit | Del | Assign
          - Add Role
    - CFO** Edit | Del | Assign
      - Add Role
    - COO** Edit | Del | Assign
      - Add Role
    - SVP.Customer.Service & Support** Edit | Del | Assign
      - Add Role
      - Customer.Support.International** Edit | Del | Assign
        - Add Role
      - Customer.Support.North America** Edit | Del | Assign
        - Add Role
    - Installation & Repair Services** Edit | Del | Assign
      - Add Role

## 8. Permission Sets

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

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

**Permission Set**  
**HealthcareWorkerAccess**

[Find Settings...](#) [Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

Permission Set Overview > Object Settings Emergency Cases

**Emergency Cases** [Edit](#)

**Tab Settings**

| Available                | Visible                             |
|--------------------------|-------------------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> |

**Object Permissions**

| Permission Name    | Enabled                             |
|--------------------|-------------------------------------|
| Read               | <input checked="" type="checkbox"/> |
| Create             | <input checked="" type="checkbox"/> |
| Edit               | <input checked="" type="checkbox"/> |
| Delete             | <input type="checkbox"/>            |
| View All Records   | <input type="checkbox"/>            |
| Modify All Records | <input type="checkbox"/>            |
| View All Fields    | <input type="checkbox"/>            |

**Field Permissions**

| Field Name | Field API Name | Read Access | Edit Access |
|------------|----------------|-------------|-------------|
|------------|----------------|-------------|-------------|

## 9. Org-Wide Defaults (OWD)

Emergency Case = Private

Patient = Private

First Aid = Public Read Only

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and sections for Security, Guest User Rule Access, Report, and Sharing Settings, which is currently selected. The main area displays a table of sharing rules:

| Object                     | Sharing Rule Type | Access Level | Shareable |
|----------------------------|-------------------|--------------|-----------|
| 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      | ✓         |

At the bottom of the page, there are "Other Settings" and "Other Settings Help" links.

## 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**

**Sharing Rules**

| Action     | Criteria            | Shared With             | Access Level |
|------------|---------------------|-------------------------|--------------|
| Edit   Del | Owner in Role Admin | Role: Healthcare Worker | ReadWrite    |

**Sharing Overrides**

| Profile                          | Custom Profile | Organization-Wide Permissions | Emergency Case Permissions |
|----------------------------------|----------------|-------------------------------|----------------------------|
| Analytics Cloud Integration User |                | View All Data ✓               | View All Records ✓         |
| System Administrator             |                | Modify All Data ✓             | Modify All Records ✓       |

## 11. Login Access Policies

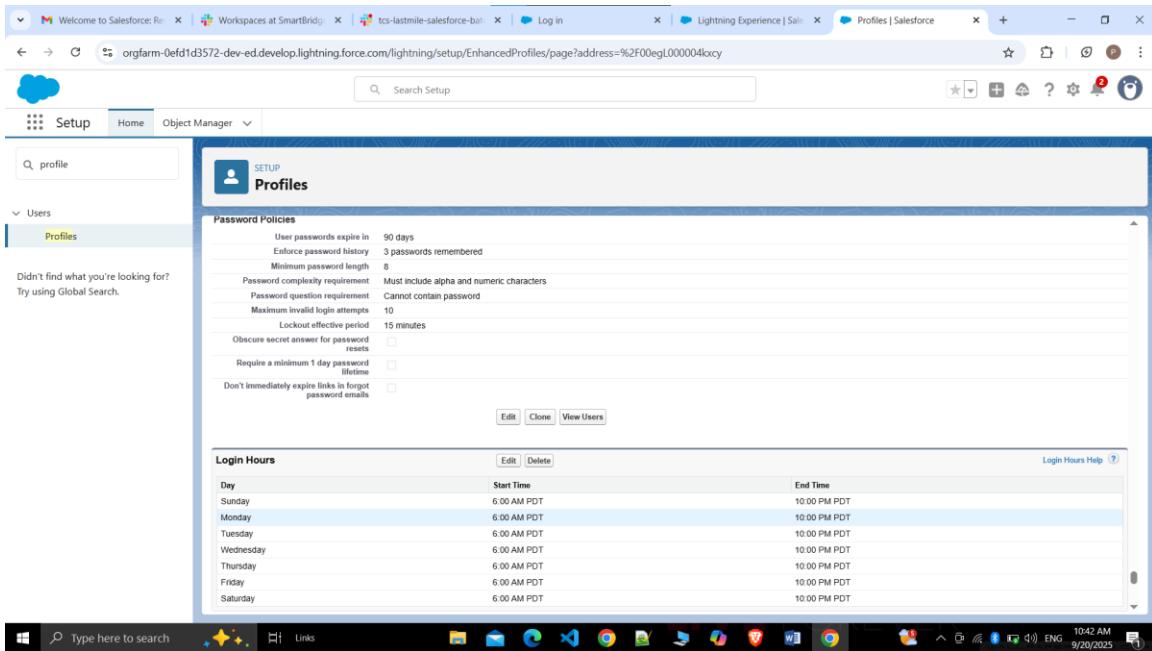
Restrict login hours:

- Admin: 24x7
- Healthcare Worker: 6am–10pm

**Profiles**

**Login Hours**

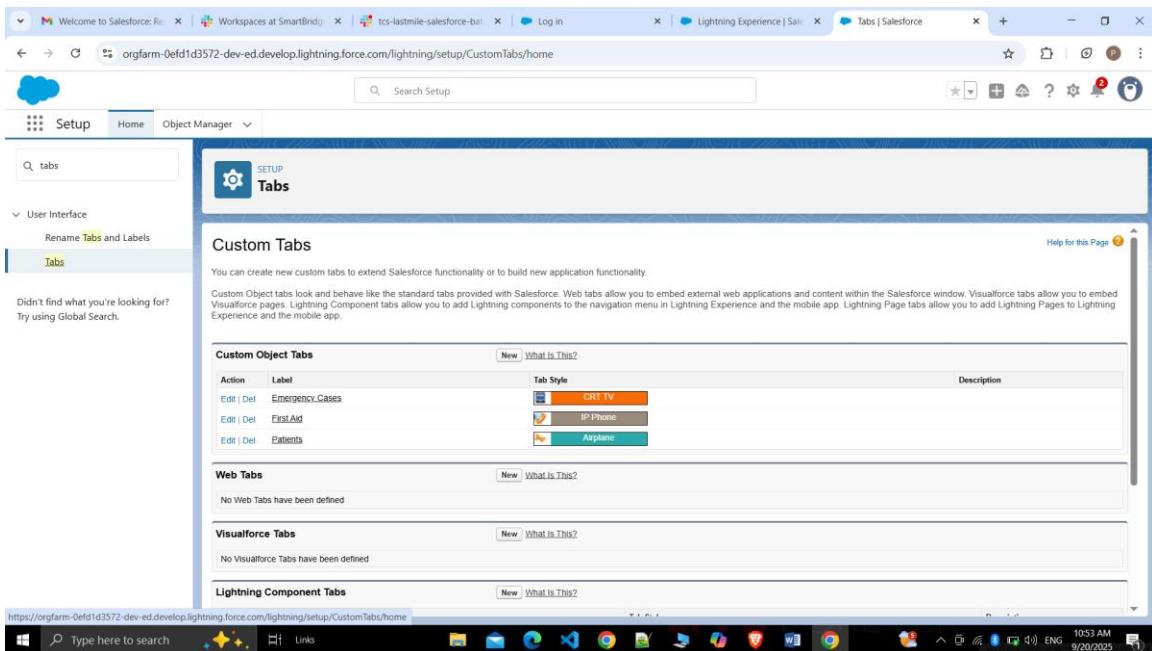
| Day       | Start Time   | End Time   |
|-----------|--------------|------------|
| Sunday    | 12:00 AM PDT | End of Day |
| Monday    | 12:00 AM PDT | End of Day |
| Tuesday   | 12:00 AM PDT | End of Day |
| Wednesday | 12:00 AM PDT | End of Day |
| Thursday  | 12:00 AM PDT | End of Day |
| Friday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



## 12. Tab Layout

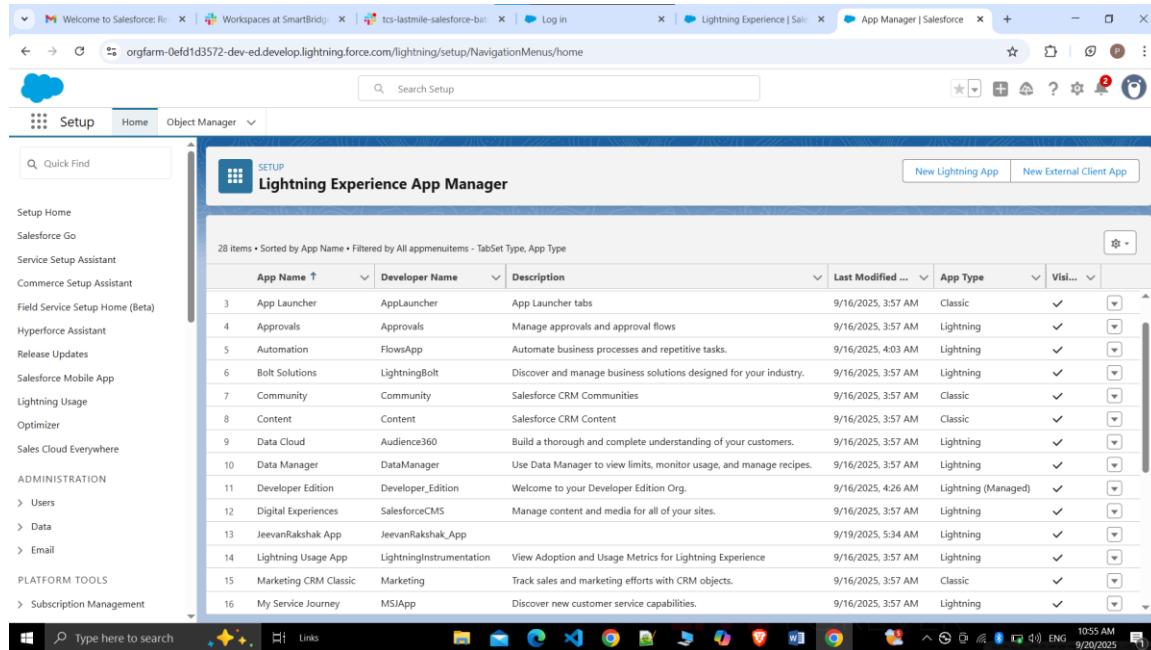
Application includes following tabs:

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



## 13. App Manager

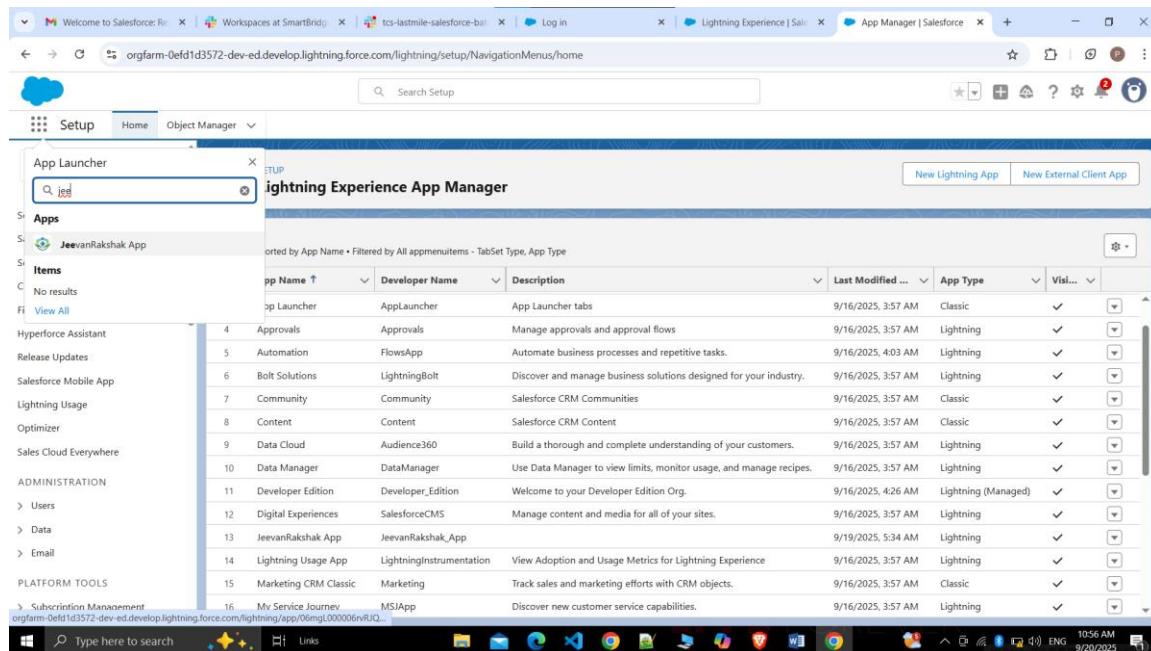
JeevanRakshak Lightning App created and listed in App Manager with status active. All required tabs included for Emergency Case management, First Aid, and Patient tracking.



The screenshot shows the Salesforce App Manager interface. The left sidebar has 'Setup' selected. The main area is titled 'Lightning Experience App Manager' and displays a list of 28 items. The JeevanRakshak app is listed at item 13, with the name 'JeevanRakshak App' and developer name 'JeevanRakshak\_App'. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The JeevanRakshak app is marked as 'Active' in the Visibility column. The system status bar at the bottom right shows '10:55 AM 9/20/2025'.

## 14. App Launcher Icon

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

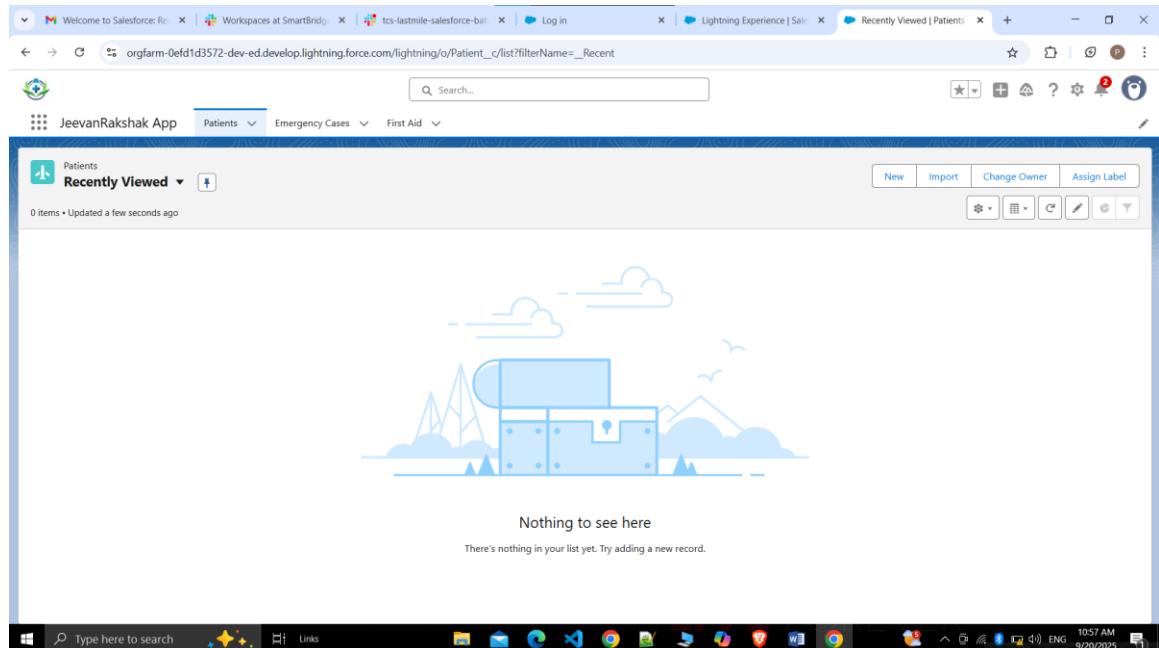


The screenshot shows the Salesforce App Launcher interface. The left sidebar has 'Setup' selected. The main area is titled 'Lightning Experience App Manager' and displays a list of 28 items. The JeevanRakshak app is listed at item 13, with the name 'JeevanRakshak App' and developer name 'JeevanRakshak\_App'. The system status bar at the bottom right shows '10:56 AM 9/20/2025'.

## 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.



## Phase 3: Data Modeling and Relationships

### Goal :

Design the Salesforce data structure to handle all emergency and patient-related information efficiently. Objects, fields, and relationships are configured to ensure smooth logging, tracking, and retrieval of emergency cases.

### 1. Custom Objects

- Create four custom objects: **Patient**, **Emergency Case**, **First Aid**, and **AI Log**.
- These objects store all essential information for emergency management and allow linking of related records.

The screenshot shows the Salesforce Object Manager page. At the top, there's a search bar labeled "Search Setup" and a "Quick Find" button. Below the header, the title "Object Manager" is displayed with the subtitle "108+ items, Sorted by Label". A table lists various objects with their names, labels, types, and creation dates. The objects listed include Emergency Case, Engagement Channel Type, Engagement Channel Work Type, Entitlement, Entitlement Contact, Event, Finance Balance Snapshot, Finance Transaction, First Aid, Flow\_Error\_Log, Fulfillment Order, Fulfillment Order Item Adjustment, and Fulfillment Order Item Tax. The "First Aid" object is highlighted.

| Object                            | Label                          | Type            | Created   |
|-----------------------------------|--------------------------------|-----------------|-----------|
| Emergency Case                    | Emergency_Case__c              | Custom Object   | 9/27/2025 |
| Engagement Channel Type           | EngagementChannelType          | Standard Object |           |
| Engagement Channel Work Type      | EngagementChannelWorkType      | Standard Object |           |
| Entitlement                       | Entitlement                    | Standard Object |           |
| Entitlement Contact               | EntitlementContact             | Standard Object |           |
| Event                             | Event                          | Standard Object |           |
| Finance Balance Snapshot          | FinanceBalanceSnapshot         | Standard Object |           |
| Finance Transaction               | FinanceTransaction             | Standard Object |           |
| First Aid                         | First_Aid__c                   | Custom Object   | 9/27/2025 |
| Flow_Error_Log                    | Flow_Error_Log__c              | Custom Object   | 9/27/2025 |
| Fulfillment Order                 | FulfillmentOrder               | Standard Object |           |
| Fulfillment Order Item Adjustment | FulfillmentOrderItemAdjustment | Standard Object |           |
| Fulfillment Order Item Tax        | FulfillmentOrderItemTax        | Standard Object |           |

## 2. Fields

- Add required fields to capture critical details: Patient → Name, Contact Number, Age; Emergency Case → Type, Severity, Location; First Aid → Steps; AI Log → AI Suggestion.
- Fields must be properly defined with correct data types to ensure accurate data capture and reporting.

The screenshot shows the "Fields & Relationships" page for the "Patient" object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions. The main area displays a table titled "Fields & Relationships" with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists several fields: Address (Address\_\_c, Text Area(255)), Age (Age\_\_c, Number(18, 0)), Contact Number (Contact\_Number\_\_c, Phone), Created By (CreatedBy, Lookup(User)), Email (Email\_\_c, Email), Gender (Gender\_\_c, Picklist), Last Modified By (LastModifiedBy, Lookup(User)), Linked User (Linked\_User\_\_c, Lookup(User)), Medical History (Medical\_History\_\_c, Text Area(255)), and Owner (OwnerId, Lookup(User Group)).

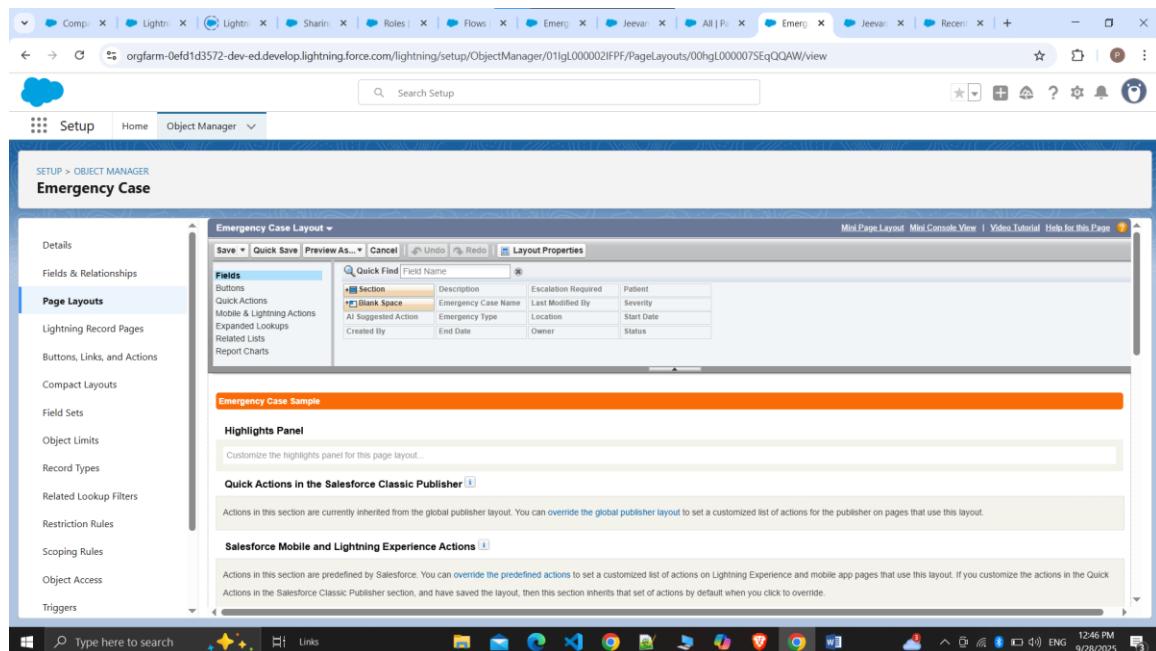
| FIELD LABEL      | FIELD NAME         | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|--------------------|--------------------|-------------------|---------|
| Address          | Address__c         | Text Area(255)     |                   |         |
| Age              | Age__c             | Number(18, 0)      |                   |         |
| Contact Number   | Contact_Number__c  | Phone              |                   |         |
| Created By       | CreatedBy          | Lookup(User)       |                   |         |
| Email            | Email__c           | Email              |                   |         |
| Gender           | Gender__c          | Picklist           |                   |         |
| Last Modified By | LastModifiedBy     | Lookup(User)       |                   |         |
| Linked User      | Linked_User__c     | Lookup(User)       |                   |         |
| Medical History  | Medical_History__c | Text Area(255)     |                   |         |
| Owner            | OwnerId            | Lookup(User Group) |                   |         |

### 3. Record Types

- Configure record types for **Emergency Case** to differentiate severity levels: Critical, Moderate, Low.
- Assign these record types to relevant profiles so healthcare workers and admins see appropriate options.

### 4. Page Layouts & Compact Layouts

- Customize page layouts to display key fields and related lists, making it easy to view patient history and emergency case details.
- Compact layouts show critical information in record highlights for quick access.



Screenshot of the Salesforce Setup interface showing the Object Manager for the Patient object.

The left sidebar shows the following navigation:

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

The main content area displays the "Patient Layout" configuration. It includes:

- A toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties.
- A "Fields" section containing:

| Section                    | Contact Number | Last Modified By | Patient Name |
|----------------------------|----------------|------------------|--------------|
| Buttons                    | Created By     | Linked User      |              |
| Quick Actions              | Email          | Medical History  |              |
| Mobile & Lightning Actions | Address        | Gender           |              |
| Expanded Lookups           | Age            | Owner            |              |
| Related Lists              |                |                  |              |
| Report Charts              |                |                  |              |
- A "Patient Sample" section with "Highlights Panel" and "Quick Actions in the Salesforce Classic Publisher".
- A "Salesforce Mobile and Lightning Experience Actions" section.

The status bar at the bottom shows the date and time: 12:47 PM 9/28/2025.

Screenshot of the Salesforce Setup interface showing the Object Manager for the First Aid object.

The left sidebar shows the following navigation:

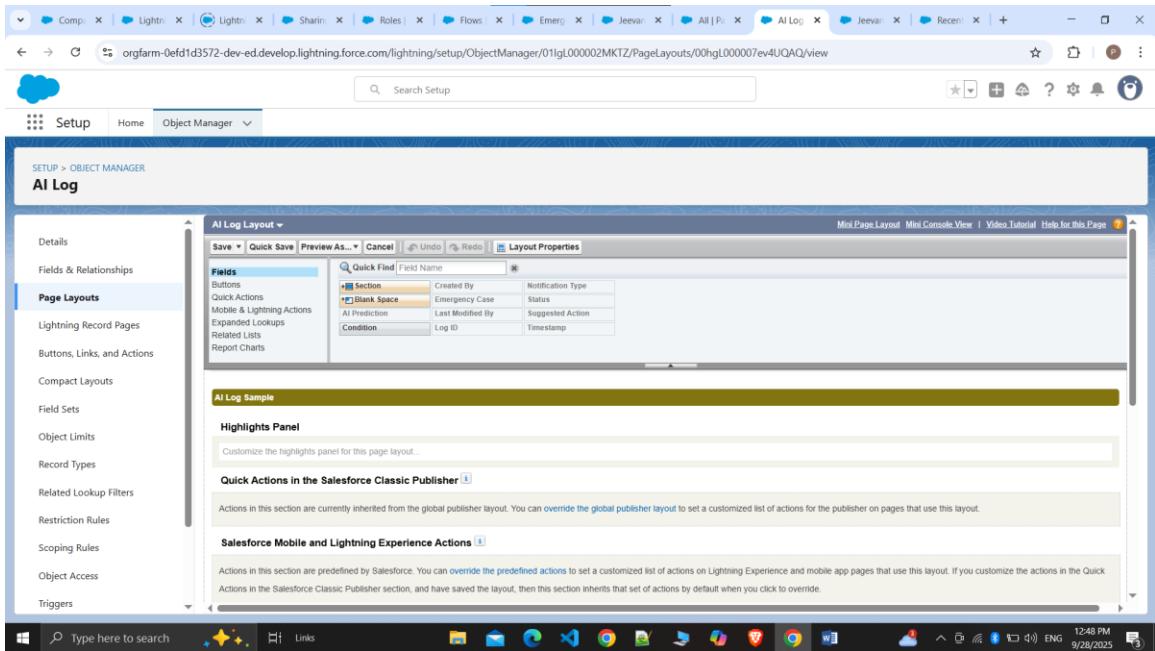
- Details
- Fields & Relationships
- Page Layouts** (selected)
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

The main content area displays the "First Aid Layout" configuration. It includes:

- A toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties.
- A "Fields" section containing:

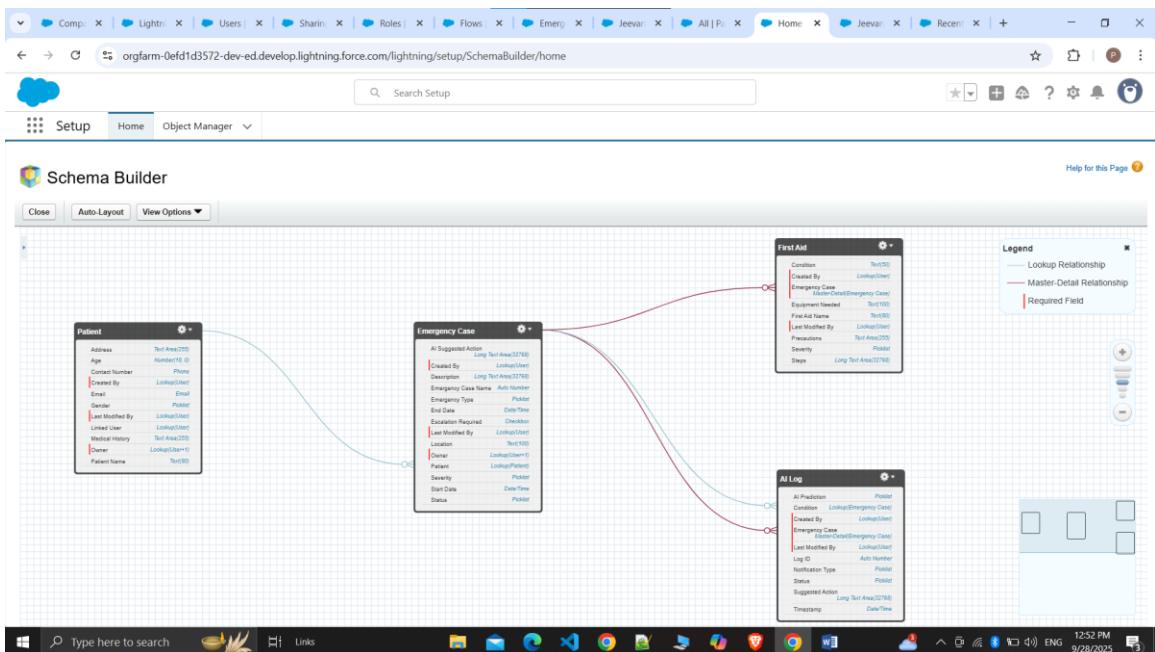
| Section                    | Emergency Case   | Precautions |
|----------------------------|------------------|-------------|
| Buttons                    | Equipment Needed | Severity    |
| Quick Actions              | First Aid Name   | Steps       |
| Mobile & Lightning Actions |                  |             |
| Expanded Lookups           |                  |             |
| Related Lists              |                  |             |
| Report Charts              |                  |             |
- A "First Aid Sample" section with "Highlights Panel" and "Quick Actions in the Salesforce Classic Publisher".
- A "Salesforce Mobile and Lightning Experience Actions" section.

The status bar at the bottom shows the date and time: 12:48 PM 9/28/2025.



## 5. Schema Builder

- Visualize all relationships between objects in Schema Builder for better understanding of data flow.
- Relationships include Patient → Emergency Case, Emergency Case → First Aid, and Emergency Case → AI Log.



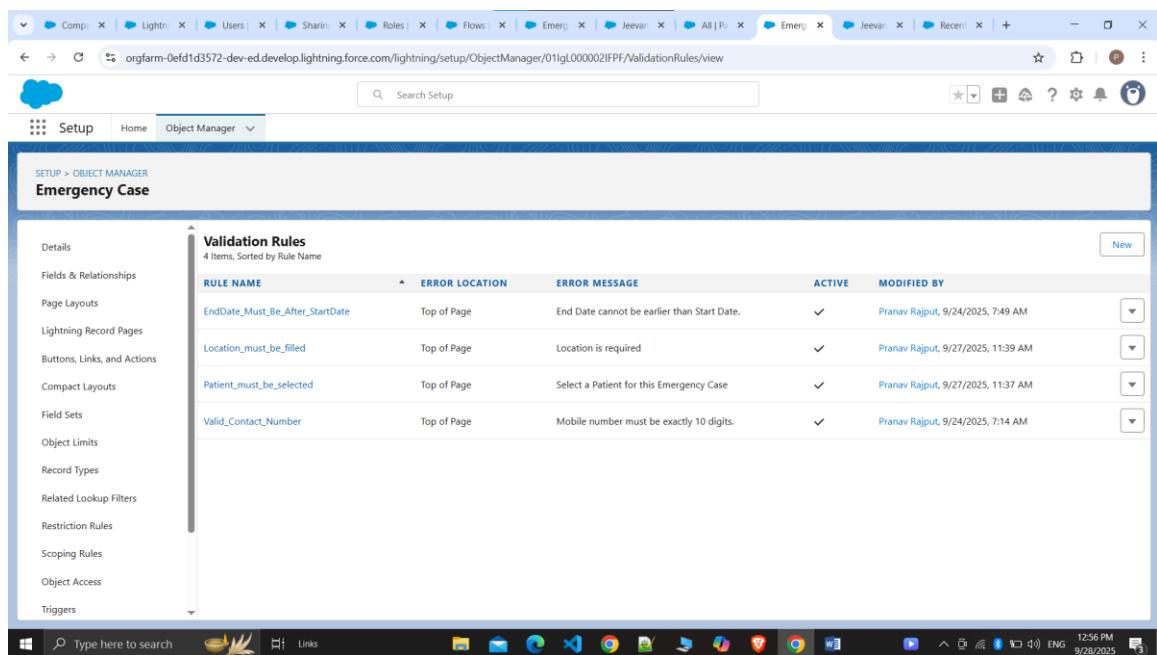
## Phase 4: Process Automation (Admin)

### Goal:

Automate validations, notifications, and approvals to ensure timely and accurate emergency case management. Automation reduces manual errors and improves response efficiency.

### 1. Validation Rules

- Implement rules to ensure **Severity** and **Patient Contact** are not blank when logging a case.
- Validation ensures that critical information is always captured for every emergency.



The screenshot shows the Salesforce Object Manager interface for the 'Emergency Case' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a table titled 'Validation Rules' with four items. The table columns are: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The data is as follows:

| RULE NAME                       | ERROR LOCATION | ERROR MESSAGE                               | ACTIVE | MODIFIED BY                        |
|---------------------------------|----------------|---|--------|------------------------------------|
| EndDate_Must_Be_After_StartDate | Top of Page    | End Date cannot be earlier than Start Date. | ✓      | Pranav Rajput, 9/24/2025, 7:49 AM  |
| Location_must_be_filled         | Top of Page    | Location is required                        | ✓      | Pranav Rajput, 9/27/2025, 11:39 AM |
| Patient_must_be_selected        | Top of Page    | Select a Patient for this Emergency Case    | ✓      | Pranav Rajput, 9/27/2025, 11:37 AM |
| Valid_Contact_Number            | Top of Page    | Mobile number must be exactly 10 digits.    | ✓      | Pranav Rajput, 9/24/2025, 7:14 AM  |

Screenshot of the Salesforce Setup interface showing Validation Rules for the Patient object.

The page title is "SETUP > OBJECT MANAGER Patient".

The left sidebar includes links for 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, and Triggers.

The main content area displays a table titled "Validation Rules" with 3 items, sorted by Rule Name:

| RULE NAME                        | ERROR LOCATION | ERROR MESSAGE                      | ACTIVE | MODIFIED BY                        |
|----------------------------------|----------------|------------------------------------|--------|------------------------------------|
| Contact_Number_must_not_be_blank | Top of Page    | Patient Contact Number is required | ✓      | Pranav Rajput, 9/27/2025, 11:33 AM |
| Email_format_validation          | Top of Page    | Enter a valid email address        | ✓      | Pranav Rajput, 9/27/2025, 11:34 AM |
| Patient_Name_must_not_be_blank   | Top of Page    | Patient Name is required           | ✓      | Pranav Rajput, 9/27/2025, 11:31 AM |

The bottom status bar shows the Windows taskbar with various pinned icons and the date/time as 12:56 PM 9/28/2025.

Screenshot of the Salesforce Setup interface showing Validation Rules for the First Aid object.

The page title is "SETUP > OBJECT MANAGER First Aid".

The left sidebar includes links for 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, and Triggers.

The main content area displays a table titled "Validation Rules" with 2 items, sorted by Rule Name:

| RULE NAME                         | ERROR LOCATION | ERROR MESSAGE                       | ACTIVE | MODIFIED BY                        |
|-----------------------------------|----------------|-------------------------------------|--------|------------------------------------|
| Emergency_Case_must_be_linked     | Top of Page    | Link First Aid to an Emergency Case | ✓      | Pranav Rajput, 9/27/2025, 11:42 AM |
| First_Aid_Steps_must_not_be_blank | Top of Page    | First Aid Steps cannot be empty     | ✓      | Pranav Rajput, 9/27/2025, 11:41 AM |

The bottom status bar shows the Windows taskbar with various pinned icons and the date/time as 12:57 PM 9/28/2025.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object categories like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main content area displays a table titled 'Validation Rules' with two items:

| Rule Name                       | Error Location | Error Message                    | Active | Modified By                        |
|---------------------------------|----------------|----------------------------------|--------|------------------------------------|
| AI_Suggestion_must_not_be_blank | Top of Page    | AI Suggestion cannot be empty    | ✓      | Pranav Rajput, 9/27/2025, 11:43 AM |
| Emergency_Case_must_be_linked   | Top of Page    | Link AI Log to an Emergency Case | ✓      | Pranav Rajput, 9/27/2025, 11:44 AM |

## 2. Workflow Rule + Email Alert

- Create workflow to automatically send email alerts to assigned healthcare workers when a new emergency case is created.
- This ensures instant notification and reduces response time for emergencies.

The screenshot shows the 'Workflow Rules' page in the Salesforce setup. The left sidebar has a search bar and navigation links for Process Automation, Workflow Actions, and Workflow Rules. The main content area shows a rule named 'Emergency\_Case\_Email\_Alert' with the following details:

**Workflow Rule Detail**

|               |                                       |                     |  |
|---------------|---------------------------------------|---------------------|--|
| Rule Name     | Emergency_Case_Email_Alert            | Object              | Emergency Case   |
| Active        | ✓                                     | Evaluation Criteria | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |
| Description   | NOT(ISBLANK(TEXT(Emergency_Type__c))) | Created By          | Pranav Rajput, 9/27/2025, 5:19 AM  |
| Rule Criteria |                                       | Modified By         | Pranav Rajput, 9/27/2025, 5:25 AM  |

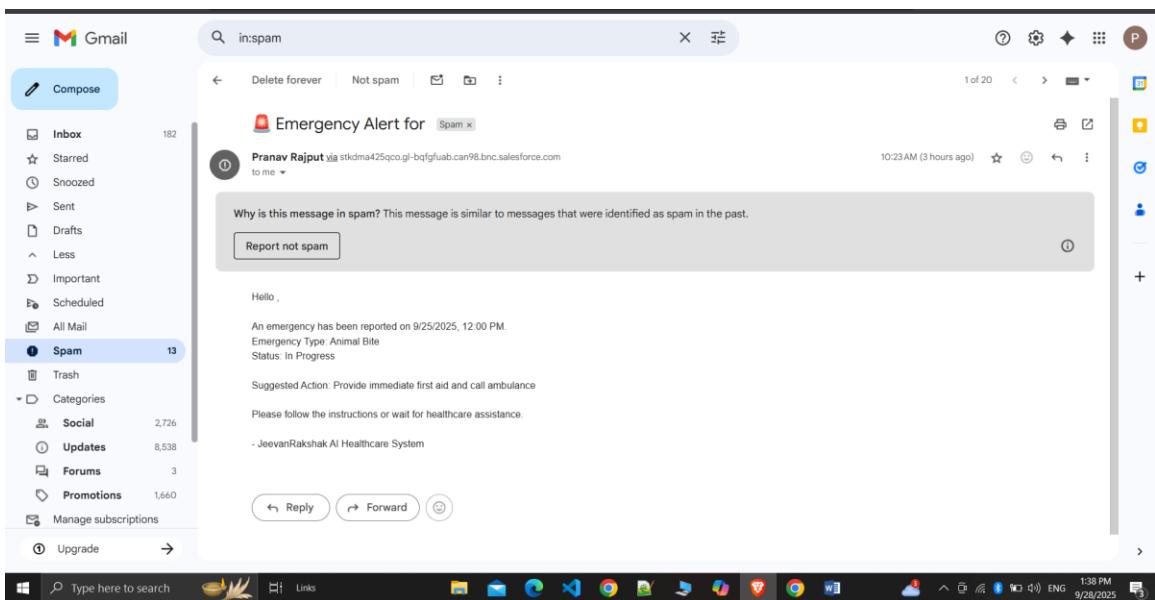
**Workflow Actions**

Immediate Workflow Actions:

|             |                            |
|-------------|----------------------------|
| Type        | Description                |
| Email Alert | Emergency Case Email Alert |

Time-Dependent Workflow Actions: See an example

A warning message at the bottom states: 'You cannot add new time triggers to an active rule. Deactivate This Rule.'



### 3. Process Builder

- Automate status updates of emergency cases based on severity, e.g., mark as Critical when severity = High.
- This ensures cases are correctly prioritized for immediate action.

The screenshot shows the Salesforce Lightning Experience with a browser tab for "Process Automation/home". The main content area is titled "My Processes" and lists one item: "Version 1: AI Log Flow". The table columns are PROCESS, DESCRIPTION, OBJECT, PROCESS TYPE, LAST MODIFIED, STATUS, and ACTIONS. The "AI Log Flow" row shows "Auto-create AI Log whenever a new Emergency Case ... Emergency Case" as the description, "Record Change" as the process type, and "9/27/2025" as the last modified date. The status is "Active". At the top of the page, there is a banner with the text: "Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder." There are links to "Try Flow Builder" and "Use Migrate to Flow Tool". The bottom of the page has a "New" button. The browser taskbar at the bottom shows various open tabs related to Salesforce components like Comp, Lightn, Users, Sharin, Roles, Flows, Emerg, Jeevan, All, Proces, Jeevan, Recen, and +.

## 4. Approval Process

- Set up approval process for critical cases to escalate automatically to Admin if severity = Critical.
- Ensures oversight and rapid decision-making for life-threatening emergencies.

## Phase 5: Apex Programming (Developer)

### Goal:

Apex is optional for the demo as declarative tools handle most functionality. It can be used for complex logic, but skipped in current project.

- Document Apex concepts (triggers, classes, SOQL) for future reference if advanced automation is needed.
- **Screenshot:** N/A

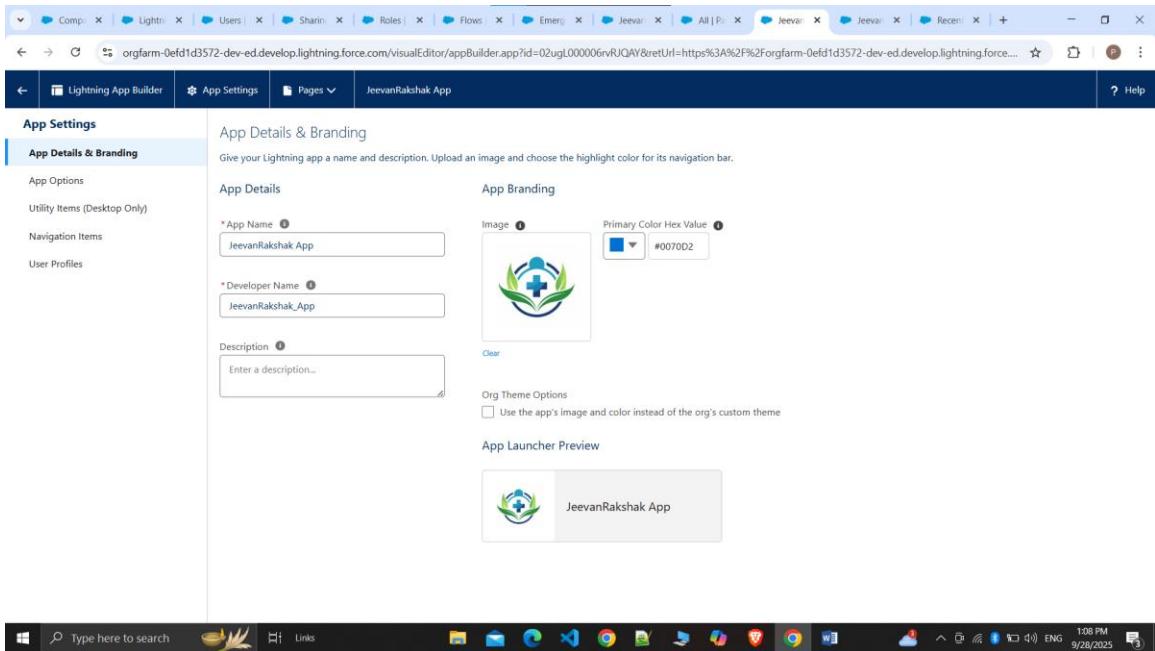
## Phase 6: User Interface Development

### Goal:

Build a clean, user-friendly interface with Lightning App Builder and custom tabs to streamline emergency management.

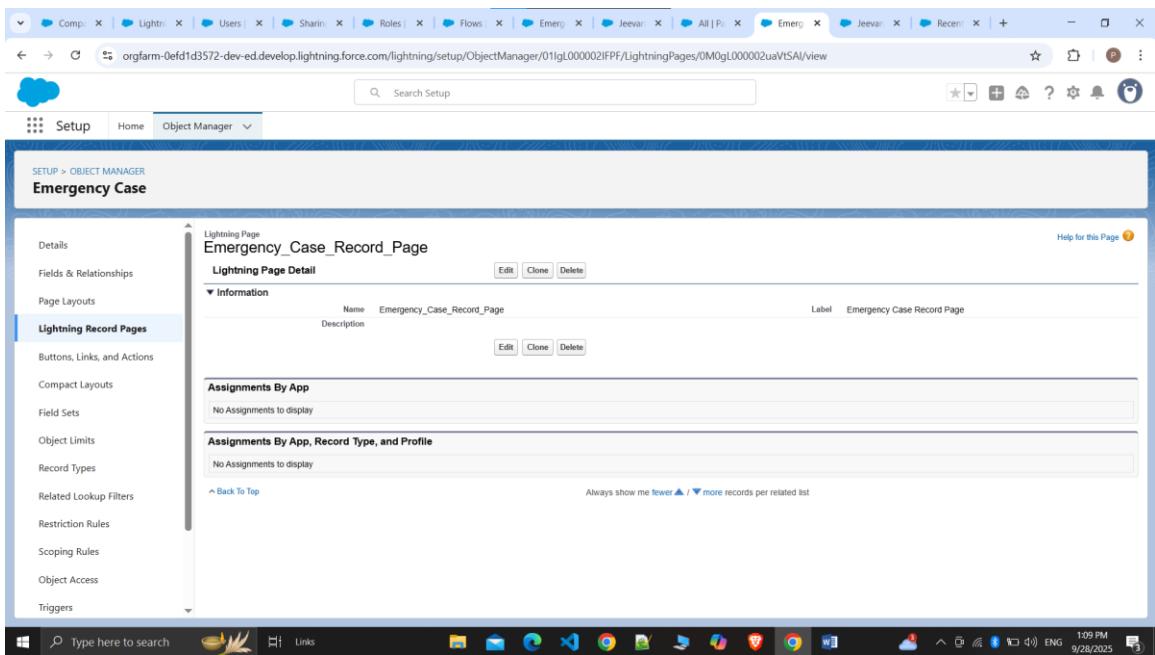
### 1. Lightning App Builder

- Create **JeevanRakshak Lightning App** including tabs for Emergency Case, Patient, First Aid, and AI Log.
- This centralizes all emergency management tools in a single application for easy access.



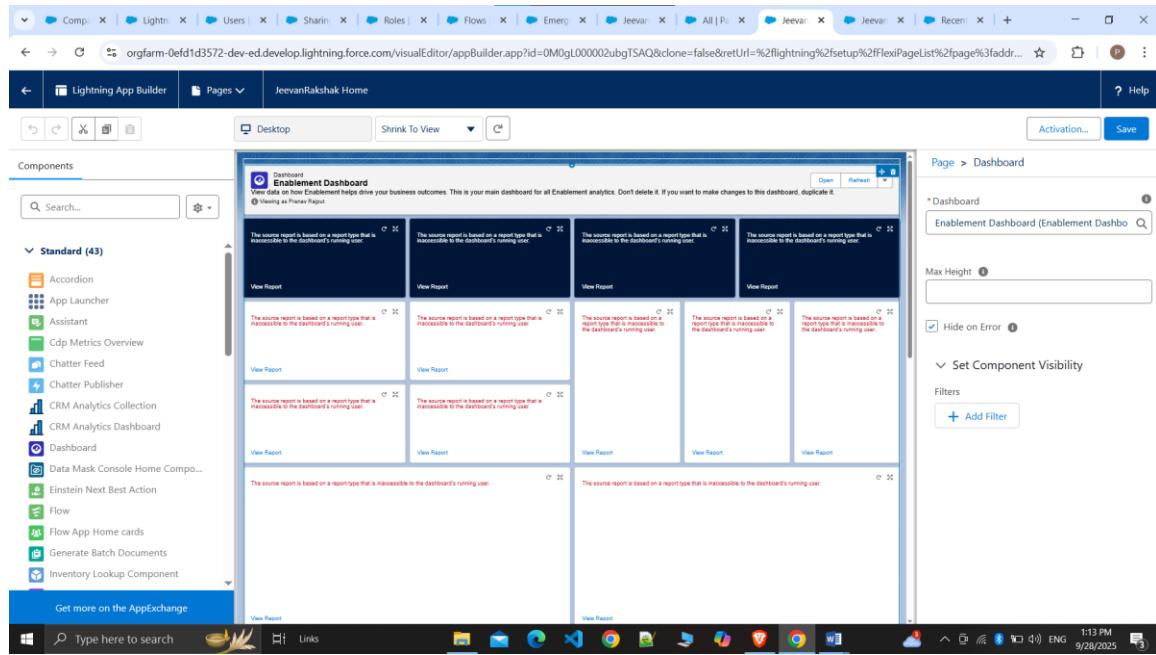
## 2. Record Pages & Tabs

- Customize record pages to display key fields, related lists, and provide quick navigation.
- Tabs allow users to switch between Patients, Emergency Cases, First Aid instructions, and AI logs seamlessly.



### 3. Home Page Layout & Utility Bar

- Add recent activities and quick links to Emergency Case creation for faster response.
- Ensures healthcare workers can access high-priority records instantly from the home page.



### Phase 7: Integration & External Access

- No external integration implemented for the demo.
- Document the plan for potential future integration with APIs or Twilio for SMS alerts.
- **Screenshot:** N/A

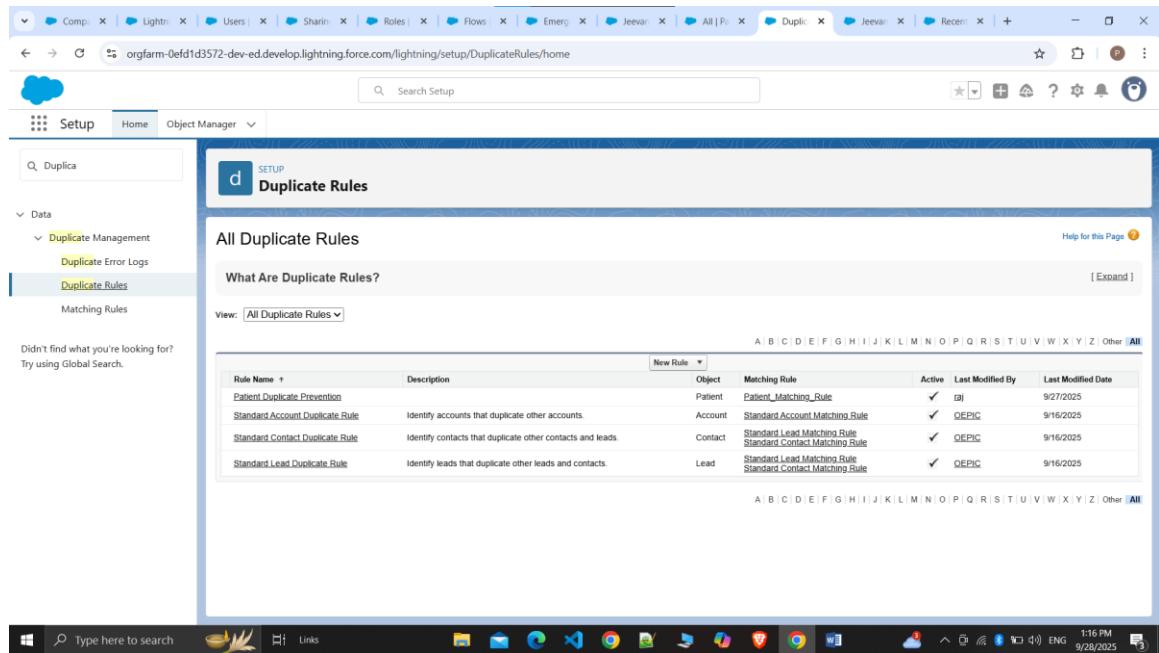
## Phase 8: Data Management & Deployment

### Goal:

Prevent duplicate records and maintain a backup of all data. Deploy metadata efficiently.

### 1. Duplicates Rules

- Prevent duplicate Patients or Emergency Cases using Salesforce Duplicate Rules.
- Ensures data integrity and avoids confusion in emergency handling.

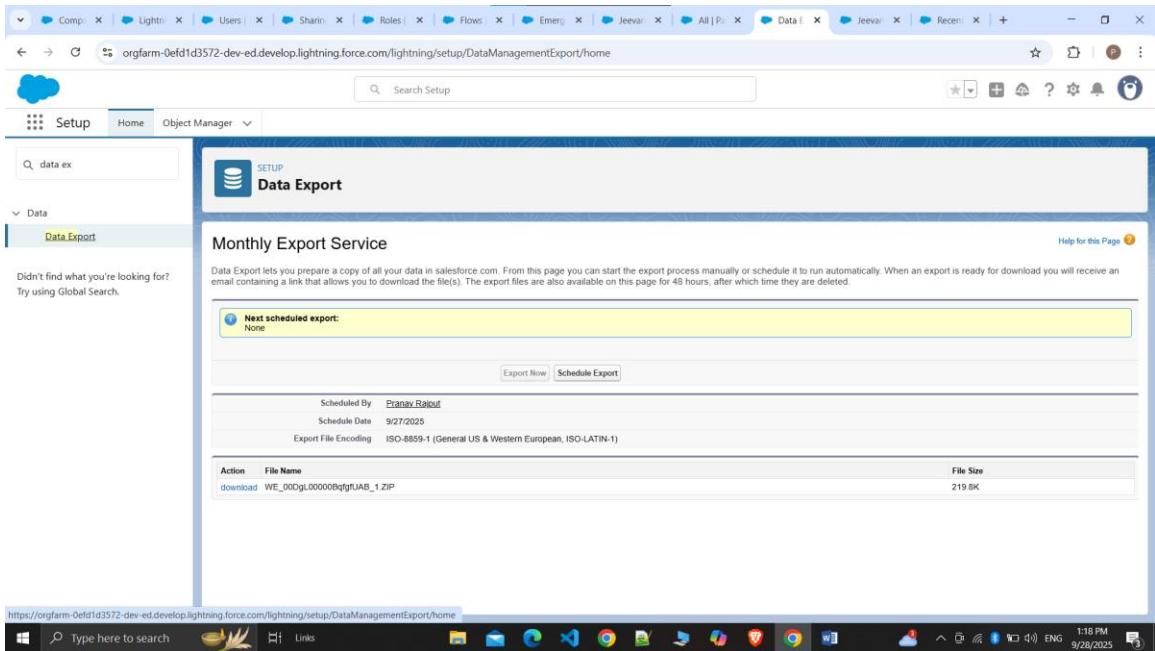


The screenshot shows the Salesforce Setup interface for Duplicate Rules. The left sidebar is collapsed, and the main content area displays a table of existing duplicate rules. The table has columns for Rule Name, Description, Object, Matching Rule, Active status, Last Modified By, and Last Modified Date. The rules listed are:

| Rule Name                       | Description  | Object  | Matching Rule                  | Active | Last Modified By | Last Modified Date |
|---------------------------------|--|---------|--------------------------------|--------|------------------|--------------------|
| Patient Duplicate Prevention    |  | Patient | Patent_Matching_Rule           | ✓      | OEPIC            | 9/27/2025          |
| Standard Account Duplicate Rule | Identify accounts that duplicate other accounts.           | Account | Standard Account Matching Rule | ✓      | OEPIC            | 9/16/2025          |
| Standard Contact Duplicate Rule | Identify contacts that duplicate other contacts and leads. | Contact | Standard Lead Matching Rule    | ✓      | OEPIC            | 9/16/2025          |
| Standard Lead Duplicate Rule    | Identify leads that duplicate other leads and contacts.    | Lead    | Standard Lead Matching Rule    | ✓      | OEPIC            | 9/16/2025          |

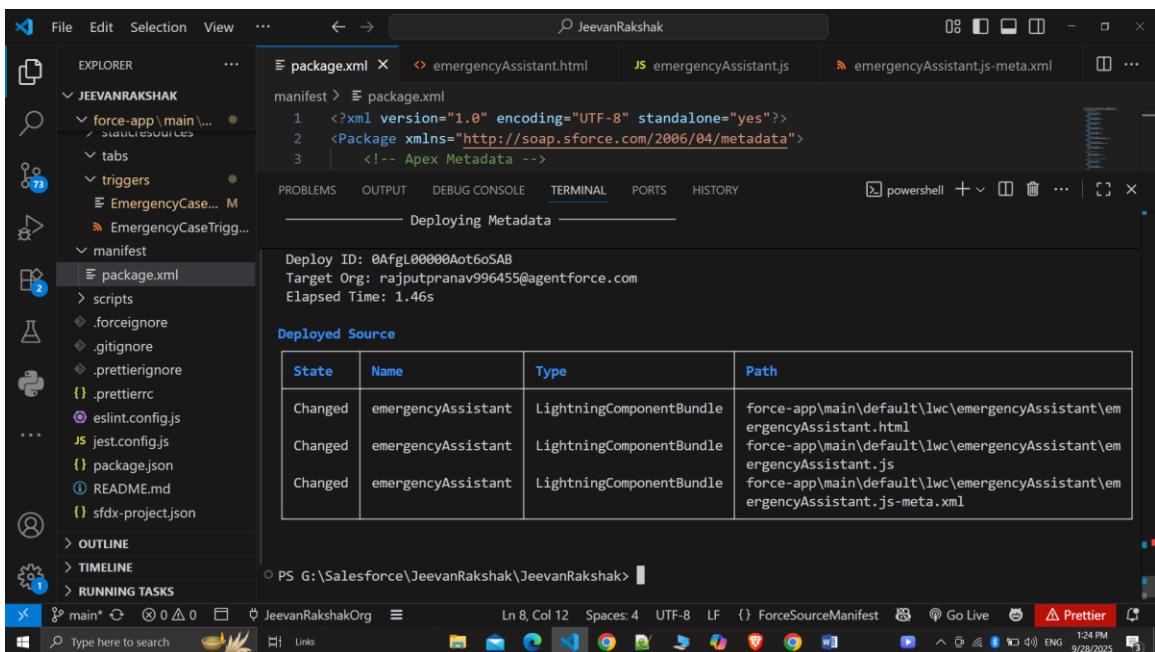
### 2. Data Export (Backup)

- Export data for Patient, Emergency Case, First Aid, and AI Log objects.
- Enables recovery and auditing in case of accidental deletion or system issues.



### 3. VS Code + SFDX Deployment

- Use VS Code + SFDX to deploy metadata, objects, and automation between orgs.
- Ensure all changes are properly deployed to test or production environments.



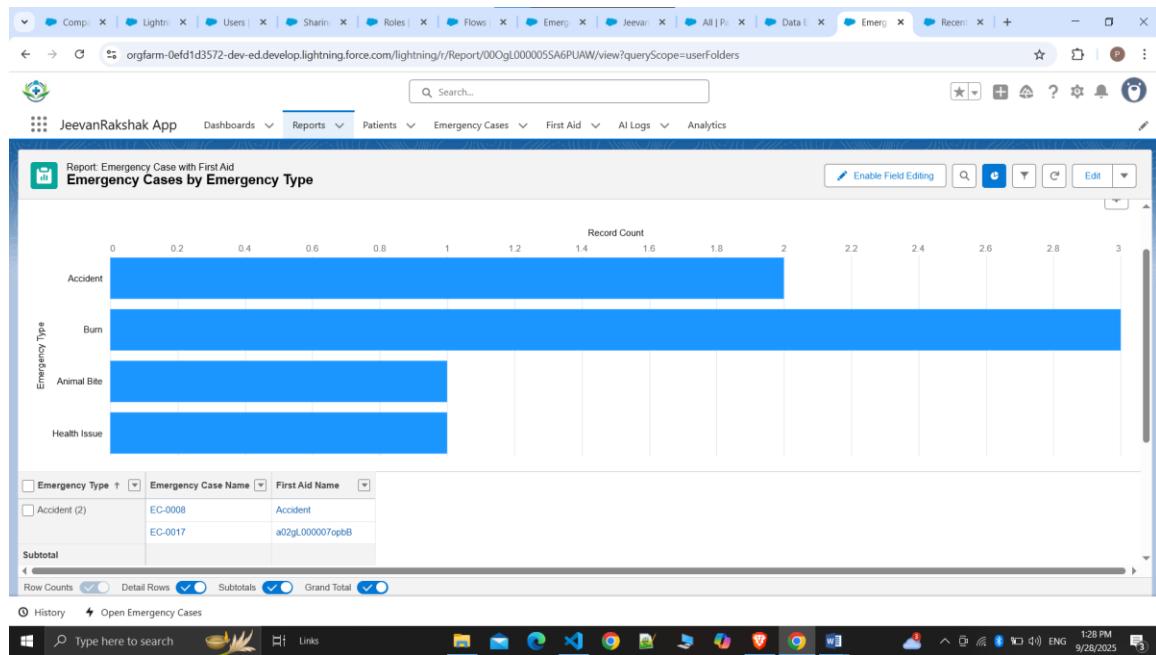
## Phase 9: Reporting, Dashboards & Security Review

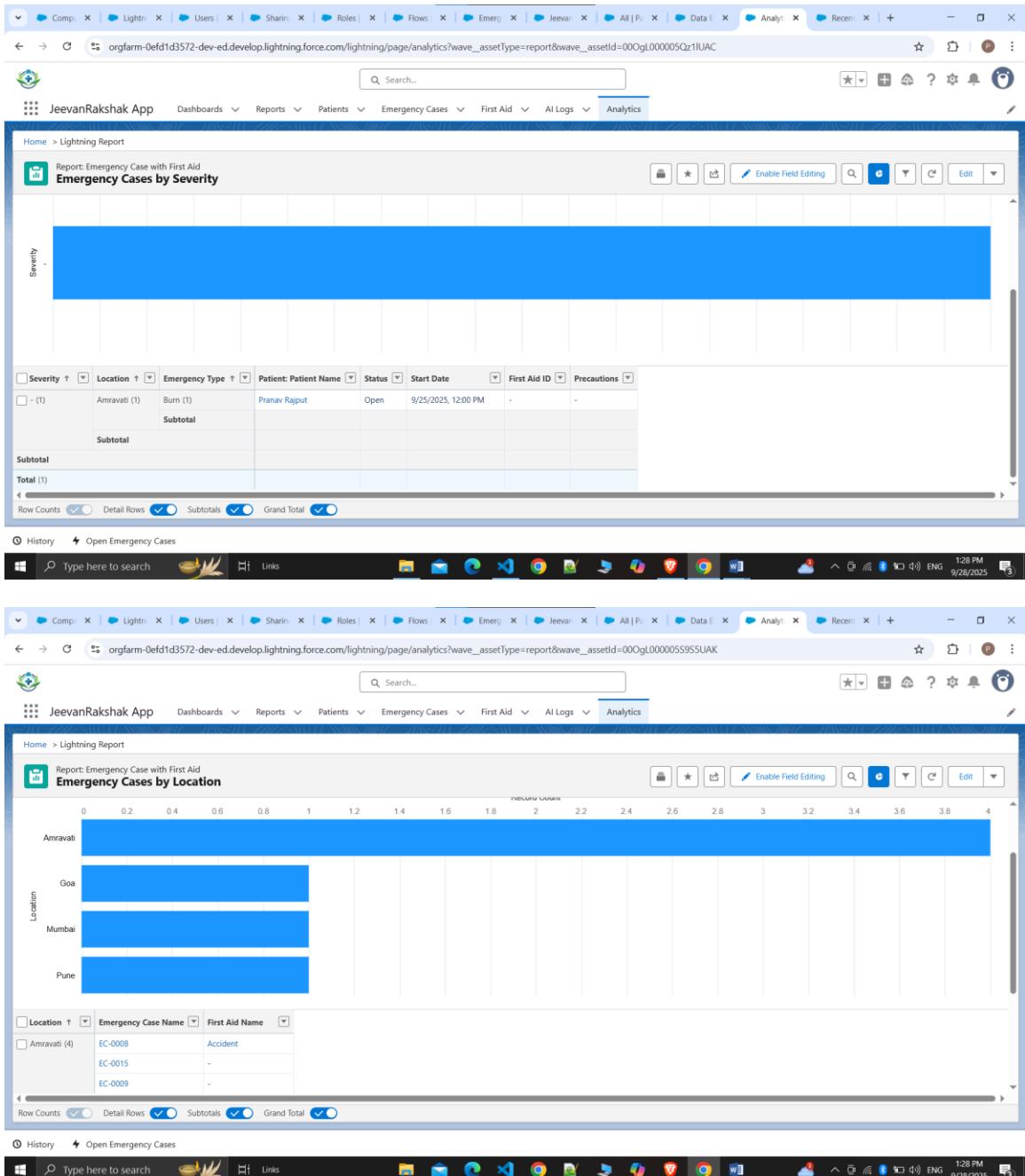
### Goal:

Monitor emergencies, analyze trends, and ensure secure access to sensitive patient data.

### 1. Reports

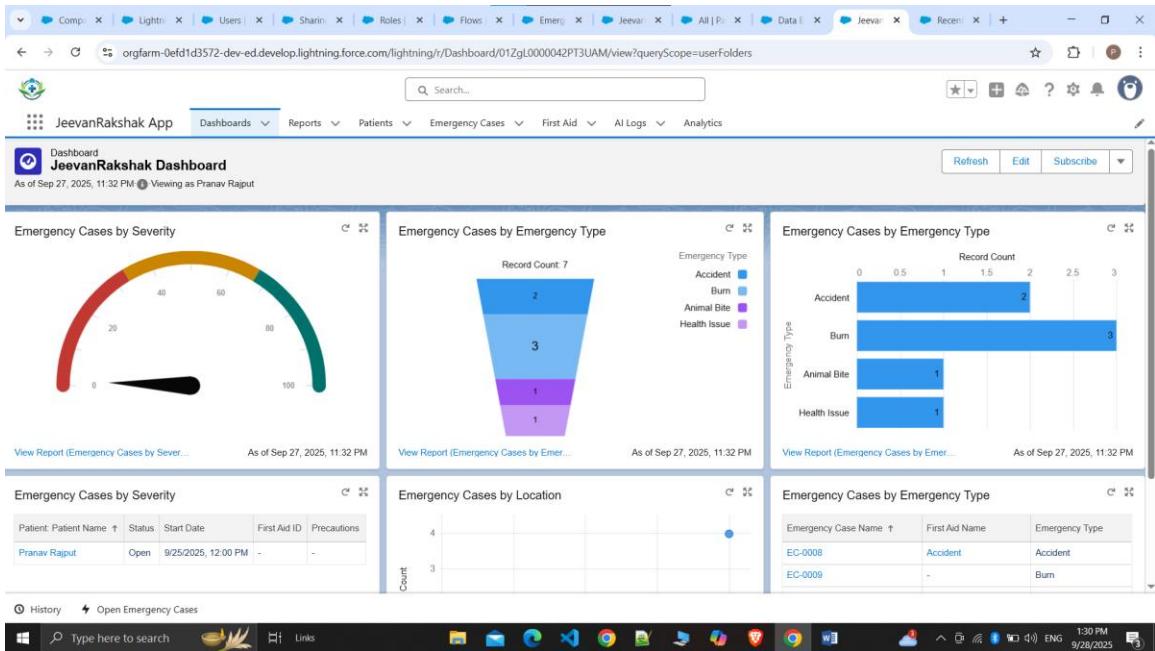
- Tabular: List all Patients for quick reference.
- Summary: Emergency Cases grouped by Severity.
- Matrix: Emergency Cases by Location vs Severity for decision-making.





## 2. Dashboards

- Visualize Emergency Case trends and Healthcare Worker workload.
- Use charts for priority cases, locations, and overall patient statistics.



### 3. Sharing Settings & Field-Level Security

- OWD = Private for Emergency Case and Patient objects.
- Field-level security restricts Patient Contact Info visibility to Admin and Healthcare Worker only.

The screenshot shows the Salesforce Setup page for 'Sharing Settings'. The left sidebar has a search bar and a 'Security' section with 'Sharing Settings' selected. The main area displays a table of objects and their sharing settings:

| Object                     | Sharing Rule Access | Sharing Rule Type    | Sharing Rule Status  |
|----------------------------|---------------------|----------------------|----------------------|
| Shipping Carrier Method    | Guest User          | Public Read Only     | Private              |
| Shipping Configuration Set | Guest User          | Public Read Only     | Private              |
| Streaming Channel          | Guest User          | Public Read/Write    | Private              |
| Tableau Host Mapping       | Guest User          | Public Read Only     | Private              |
| User Presence              | Guest User          | Public Read Only     | Private              |
| User Provisioning Request  | Guest User          | Private              | Private              |
| Waitlist                   | Guest User          | Private              | Private              |
| Web Cart Document          | Guest User          | Private              | Private              |
| Work Order                 | Guest User          | Private              | Private              |
| Work Plan                  | Guest User          | Private              | Private              |
| Work Plan Template         | Guest User          | Private              | Private              |
| Work Step Template         | Guest User          | Private              | Private              |
| Work Type                  | Guest User          | Private              | Private              |
| Work Type Group            | Guest User          | Public Read/Write    | Private              |
| AI Log                     | Guest User          | Controlled by Parent | Controlled by Parent |
| Emergency Case             | Guest User          | Private              | Private              |
| First Aid                  | Guest User          | Controlled by Parent | Controlled by Parent |
| Flow_Error_Log             | Guest User          | Public Read/Write    | Private              |
| Patient                    | Guest User          | Public Read/Write    | Private              |
| Suggested Action           | Guest User          | Public Read/Write    | Private              |

Screenshot of the Salesforce Setup interface showing the Field-Level Security configuration for the Contact Number field.

The page title is "Contact Number" under "Set Field-Level Security".

Field Label: Contact Number  
Data Type: Phone

Field-Level Security for Profile:

|                                   | Visible                             | Read-Only                |
|-----------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AnyPoint Integration              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Einstein Agent User               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - App Subscription User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Screenshot of the Salesforce Setup interface showing the Sharing Settings configuration for various user profiles.

The page title is "Sharing Settings" under "Setup".

Sharing Settings for:

| User Profile                            | Sharing                             | Access                   |
|---|-------------------------------------|--------------------------|
| Force.com - App Subscription User       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - Free User                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Gold Partner User                       | <input type="checkbox"/>            | <input type="checkbox"/> |
| Identity User                           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Marketing User                          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Minimum Access - API Only Integrations  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Minimum Access - Salesforce             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Partner App Subscription User           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Partner Community Login User            | <input type="checkbox"/>            | <input type="checkbox"/> |
| Partner Community User                  | <input type="checkbox"/>            | <input type="checkbox"/> |
| Read Only                               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Salesforce API Only System Integrations | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Silver Partner User                     | <input type="checkbox"/>            | <input type="checkbox"/> |
| Solution Manager                        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Standard Platform User                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Standard User                           | <input type="checkbox"/>            | <input type="checkbox"/> |
| System Administrator                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Work.com Only User                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

## **Conclusion:**

The JeevanRakshak project successfully implements a digital emergency life protector system for remote and rural areas. Using Salesforce, we have created a robust structure to log emergency cases, provide first-aid guidance, alert healthcare workers, and monitor responses through reports and dashboards.

Key accomplishments include creating four custom objects, configuring relationships, automating workflows and alerts, and designing a user-friendly Lightning App. Security measures like OWD, field-level security, and audit tracking ensure sensitive data is protected.

While Apex programming and external API integrations were optional for this demo, the project lays a strong foundation for future enhancements. Potential improvements include integrating real-time SMS alerts via Twilio, mobile offline access, and AI-powered predictive guidance for emergency cases.