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

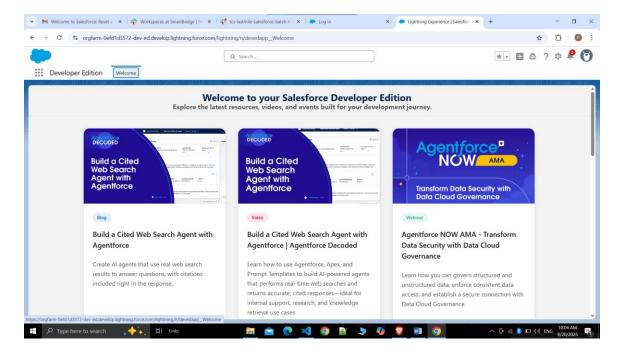| App/Tool	Purpose
Health Cloud	Manage patient records and healthcare workflows.
Emergency Response Apps	Handle urgent alerts and responses.
Twilio SMS Integration	Enable instant emergency notifications.

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

3. Business Hours & Holidays
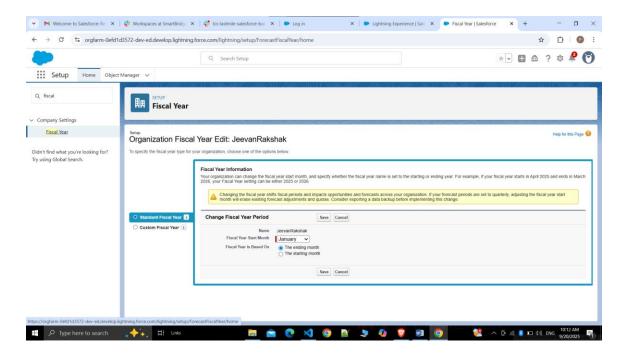
Setup → Business Hours → New
Label: Emergency Support Hours
Hours: 24x7 (Start: 00:00, End: 23:59)
(Optional) Setup → Holidays → Add public holidays like Independence Day.

4. Fiscal Year Settings

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

5. User Setup & Licenses

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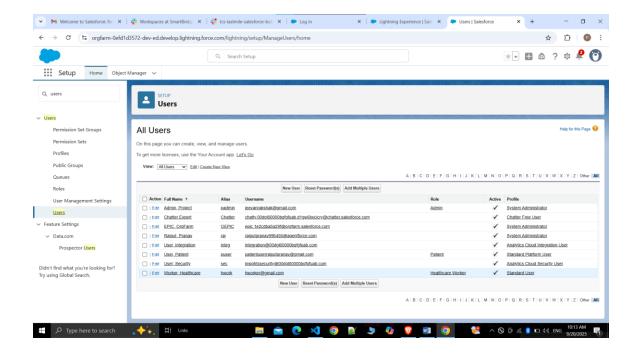1. Admin (Profile: System Administrator)
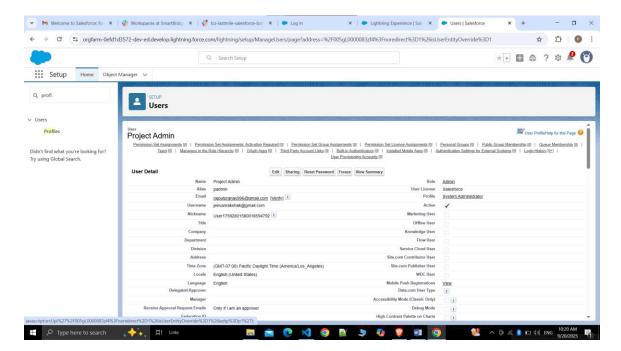2. Healthcare Worker (Profile: Standard User)
3. Patient (Profile: Standard User)

Assign appropriate Salesforce licenses to each user.

6. Profiles

Profiles define base-level access:

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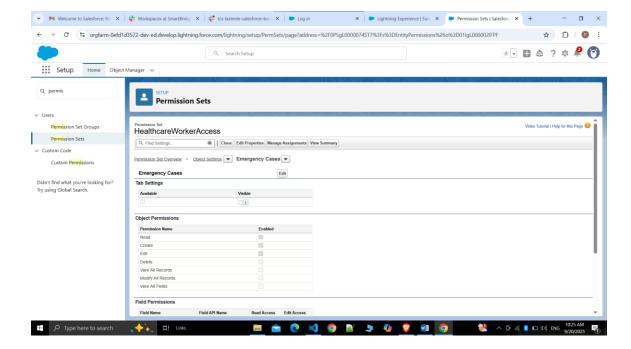- Patient: Limited access.

7. Roles & Hierarchy

Role Hierarchy:

Admin → Healthcare Worker → Patient

Ensures record visibility rolls up correctly.

8. Permission Sets

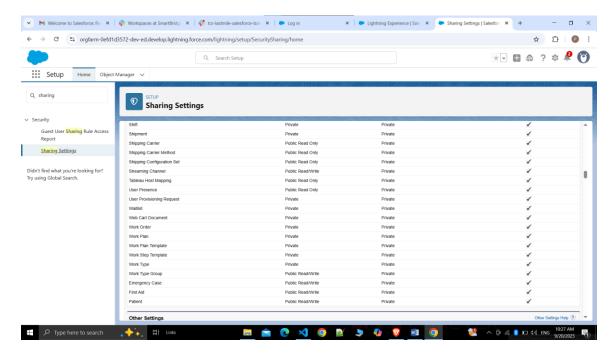Create HealthcareWorkerAccess Permission Set → Object Settings → Emergency Case → Read, Create, Edit.

Assign Permission Set: Manage Assignments → Add Healthcare Worker User.
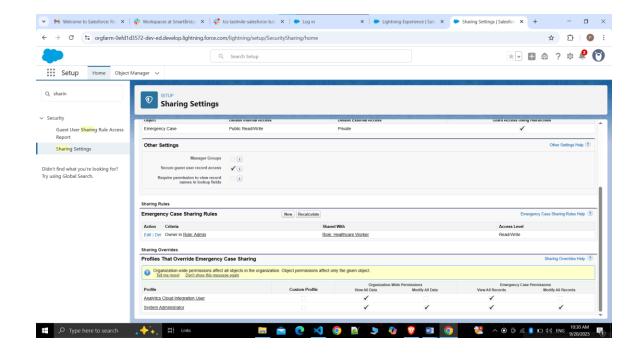
9. Org-Wide Defaults (OWD)

Emergency Case = Private
Patient = Private
First Aid = Public Read Only

10. Sharing Rules

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

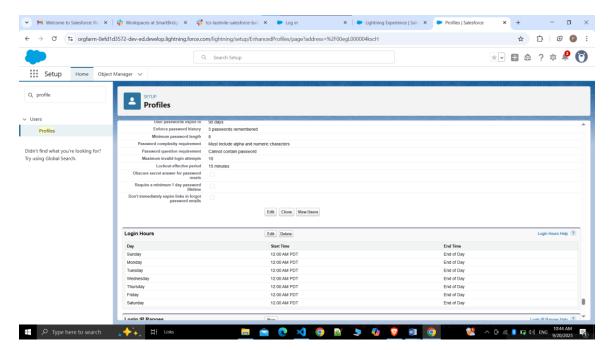Optional: Share high-priority emergencies with Admin automatically.
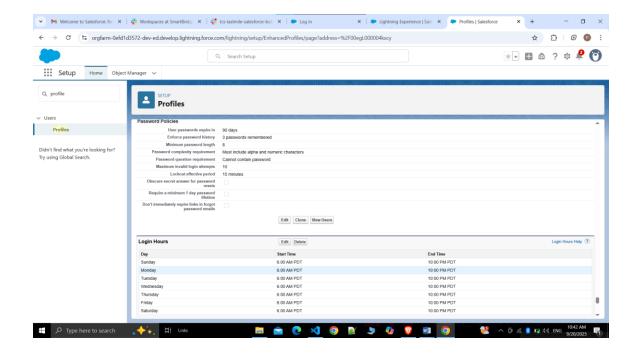
11. Login Access Policies

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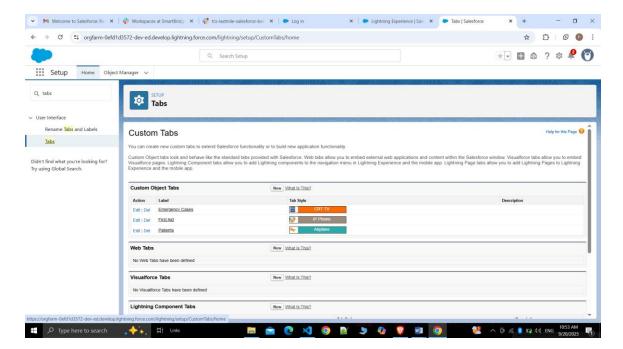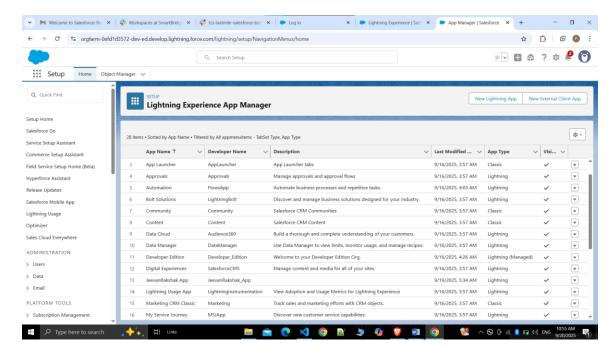- Healthcare Worker: 6am–10pm

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.
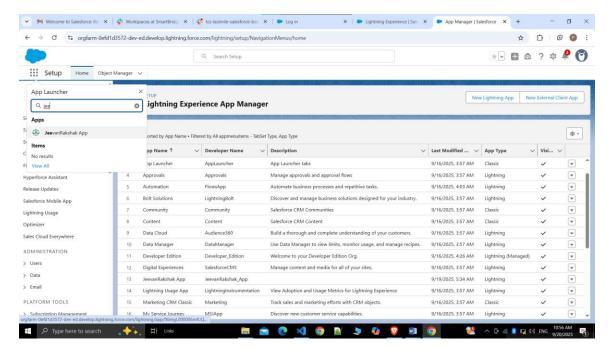
13. App Manager

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.

14. App Launcher Icon

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

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.