

## Health & Wellness Tracking Portal - Phase 1

The Health & Wellness Tracking Portal is an application designed to help patients monitor their health metrics and enable healthcare providers to track wellness trends. The system allows patients to log vital information such as blood pressure, sugar levels, and other health indicators, while doctors and health coaches can analyze these inputs through dashboards and reports.

Beyond simple record keeping, the portal identifies at-risk patients, highlights common health issues, and promotes proactive healthcare management. It integrates health tracking, analytics, and patient-doctor engagement into a single platform—an innovative solution for lifestyle and wellness management.

### Requirement Gathering

- ➤ Allow patients to log vitals such as blood pressure, sugar levels, weight, and heart rate.
- ➤ Enable healthcare providers (doctors/coaches) to view patient trends over time.
- ➤ Generate dashboards that highlight at-risk patients based on abnormal readings.
- ➤ Send automated alerts/notifications when a patient logs critical values.
- ➤ Optionally, track lifestyle details like exercise, sleep, and diet for holistic wellness management.

### Stakeholder Analysis

- ➤ Primary User: Patients who log their vitals and wellness information.
- ➤ Admin Role: Configures the system, manages patient data structure, and sets automation rules.
- ➤ Healthcare Providers: Doctors and wellness coaches who monitor trends and provide advice.
- ➤ Secondary Users: Family members or caregivers with shared access to patient data.

### Business Process Mapping

- ➤ Log Health Data: Patients enter their daily vitals (e.g., BP, sugar levels).
- ➤ Monitor & Track: Data is stored and linked to patient profiles for ongoing monitoring.
- ➤ Alerts & Notifications: Automated alerts are triggered when abnormal values are recorded.
- ➤ Review Trends: Healthcare providers use dashboards and reports to analyze wellness patterns.
- ➤ Intervention: Doctors/coaches take preventive action for at-risk patients based on trends.

### Industry-specific Use Case Analysis


- ➤ Healthcare: Supports preventive care by monitoring health indicators in real time.

- ➤ Patient Engagement: Encourages active participation from patients in tracking their wellness.
- ➤ Analytics & Insights: Dashboards help healthcare providers identify trends and risks early.
- ➤ Lifestyle Management: Goes beyond treatment by including exercise, diet, and overall wellness tracking.

### **AppExchange Exploration**

- ➤ Explored Salesforce Health Cloud and wellness-related apps for patient data tracking and engagement.
- ➤ Studied apps that automate alerts and integrate wearable data for best practices.
- ➤ The solution will be implemented using Salesforce tools like custom objects, flows, and dashboards, making it simple, scalable, and effective.

- **Phase-2: Org Setup & Configuration**
- **Step 1 — Company Profile**
- Configured the Salesforce org company profile to set basic organizational information.
  - Organization Name: Health & Wellness Tracking Portal
  - Default Time Zone: *(our timezone)*
  - Default Locale: English (India)
  - Default Currency: INR
  - Primary Contact: tejas/ [health.@admin.com](mailto:health.@admin.com)



**SETUP**  
**Company Information**

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**Organization Detail**
Edit
Deactivate Org

Organization Name	Health & Wellness Tracking Portal	Phone	
Primary Contact	Tejaswi Kiranagi	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	378 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	23 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DWU00000W5rFo
		Organization Edition	Developer Edition
		Instance	SWE106

- **Step 2 — Business Hours & Holidays**
- Defined business hours and public holidays for proper case escalation.
- **Business Hours:**
  - Name: Default Business Hours
  - Days Open: Monday–Saturday
  - Hours: 09:00 AM – 06:00 PM
- **Holidays:**
  - New Year’s Day → Jan 1, 2025
  - Independence Day → Aug 15, 2025


**SETUP**  
**Business Hours**

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**Organization Business Hours**
Help for this Page

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.

Holidays [\[0\]](#)


**Business Hours Detail**
Edit

Business Hours Name	Default Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday No Hours Monday 9:00 am to 6:00 pm Tuesday 9:00 am to 6:00 pm Wednesday 9:00 am to 6:00 pm Thursday 9:00 am to 6:00 pm Friday 9:00 am to 6:00 pm Saturday 9:00 am to 6:00 pm	Default Business Hours	<input type="checkbox"/>
Active	<input type="checkbox"/>		
Created By	Tejaswi Kiranagi 23/09/2025, 8:12 pm	Last Modified By	Tejaswi Kiranagi 23/09/2025, 8:12 pm

- **Step 3 — Fiscal Year**
- Configured standard fiscal year for reporting alignment.
  - Fiscal Year: Jan-Dec



SETUP  
**Holidays**



**Holiday Detail**

Help for this Page ?

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours (0)

**Holiday Detail**

EditDelete

Holiday Name	New Year Day		
Description			
Date and Time	01/01/2025 All Day		
Created By	Tejaswi Kiranagi 23/09/2025, 8:14 pm	Last Modified By	Tejaswi Kiranagi 23/09/2025, 8:14 pm


EditDelete

**Business Hours**

Add/Remove

Business Hours Help ?

- **Step 4 — Users & Licenses**
  - Created test users to simulate real-world roles:
- |                |                        |                |                  |
|----------------|------------------------|----------------|------------------|
| • <b>User</b>  | • <b>Profile</b>       | • <b>Role</b>  | • <b>License</b> |
| • Admin User   | • System Administrator | • System Admin | • Salesforce     |
| • Dr. Smith    | • Standard User        | • Doctor       | • Salesforce     |
| • John Patient | • Standard User        | • Patient      | • Salesforce     |



SETUP  
**Fiscal Year**


To specify the fiscal year type for your organization, choose one of the options below.

☒ Standard Fiscal Year ?

☐ Custom Fiscal Year ?

**Fiscal Year Information**

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.



Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

**Change Fiscal Year Period**


SaveCancel

Name	Health & Wellness Tracking Portal
Fiscal Year Start Month	April
Fiscal Year is Based On	<div><input type="radio"/> The ending month</div> <div><input checked="" type="radio"/> The starting month</div>

SaveCancel

- **Step 5 — Profiles**

- Created custom profiles by cloning Standard User to define role-specific permissions.
  - **Doctor Profile:** Access to Patients & Health Metrics, Reports & Dashboards.
  - **Patient Profile:** Limited access to Health Metrics (create/view own records).


SETUP  
Users

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New User Reset Password(s) Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	admin_Admin User	admin	health@admin.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dww0000w5rfo2aj_bctcdulc3jjo@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   <a href="#">Edit</a>	health_Dr. Smith	drsmith	health@doctor.com		✓	Standard Platform User
<input type="checkbox"/>   <a href="#">Edit</a>	health_John Patient	patient	health@patient.com		✓	Standard Platform User
<input type="checkbox"/>   <a href="#">Edit</a>	Kiranagi, Tejaswi	TKira	tejaswibk@salesforce.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	User_Integration	integ	integration@00dww0000w5rfo2aj.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   <a href="#">Edit</a>	User_Security	sec	insightssecurity@00dww0000w5rfo2aj.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

- **Step 6 — Roles & Role Hierarchy**

- Defined role hierarchy for record-level access control.
- **Hierarchy:**
- System Admin
  - └ Doctor
  - └ Patient

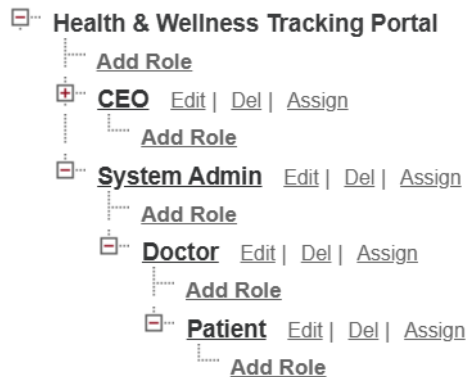


## Creating the Role Hierarchy

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](#)



- **Step 7 — Permission Sets**
- Created additional access beyond profiles.
  - **Doctor Report Access:** Run/Create Reports & Dashboards → assigned to Doctor User
  - **Patient Data Entry:** Create & Read Health Metrics → assigned to Patient User



## Permission Sets

[Help for this Page](#) 

On this page you can create, view, and manage permission sets.

**All Permission Sets**  [Edit](#) | [Delete](#) | [Create New View](#)



New

A

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X

Y


Z

Other

All

<input type="checkbox"/>	Action	Permission Set Name ↑	Description	License
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Authenticated Payer</a>	An authenticated external user with the ability to mak...	Salesforce Payments External
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Buyer</a>	Allows access to the store. Lets users see products a...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Buyer Manager</a>	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">C360 High Scale Flow Integration User</a>	Allows integration user to access features specific ...	Cloud Integration User
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">CRM User</a>	Denotes that the user is a Sales Cloud or Service ...	CRM User
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Commerce Admin</a>	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Commerce Session</a>	Allow access to session-based permissions.	Commerce Session Permission Set License Seats

- **Step 8 — OWD & Sharing Rules**
- Configured baseline record access and exceptions.
- **Organization-Wide Defaults:**
  - Patient → Private
  - Health Metric → Private
  - Doctor → Public Read Only
- **Sharing Rules:**
  - Doctors can view & edit assigned Patient records.
  - Doctors can view assigned Health Metrics.


**Sharing Settings**

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## Sharing Settings

Help for this Page ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects


[Disable External Sharing Model](#)

Default Sharing Settings

**Organization-Wide Defaults**
[Edit](#)
[Organization-Wide Defaults Help ?](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

- **Step 9 — Login Access Policies**
- Enabled administrator login access for testing & support.
  - Admins can log in as any user.
  - Salesforce Support access enabled (optional).



**Login Access Policies**

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## Login Access Policies

Help for this Page ?

Control which support organizations your users can grant login access to.


 Changes Saved

**Manage Support Options**
[Save](#)
[Cancel](#)

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only ?
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

[Save](#)
[Cancel](#)

- **Step 10 — Developer Org Setup**

- Set up a Salesforce **Developer Org** to serve as the main environment for the project.
  - Developer Org provides a permanent org for testing, building, and showcasing the project.
  - Recreated Phase-2 configurations (company profile, users, profiles, roles, OWD, permission sets) in this org.

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- **Step 11 — Sandbox Usage**

- Explored Salesforce **Sandbox usage**:
    - Sandboxes allow testing changes without affecting production data.
    - Developer Orgs do not have Sandboxes by default.
    - Used Playground environments as testing grounds before replicating configurations in the main Dev Org.
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- **Step 12 — Deployment Basics**

- Learned deployment methods in Salesforce:
  - **Change Sets**: Add components in source org → upload → deploy in target org.
  - Alternative options: Salesforce CLI, third-party CI/CD tools.

For this project, Change Sets are documented conceptually for future deployment.



- **Phase 3: Data Modeling & Relationships**
- 📌 **Objective**
- **The goal of this phase is to design the data model for the Health & Wellness Tracking Portal. It defines how different entities (objects) relate to each other, the fields they contain, and how information flows across the system.**

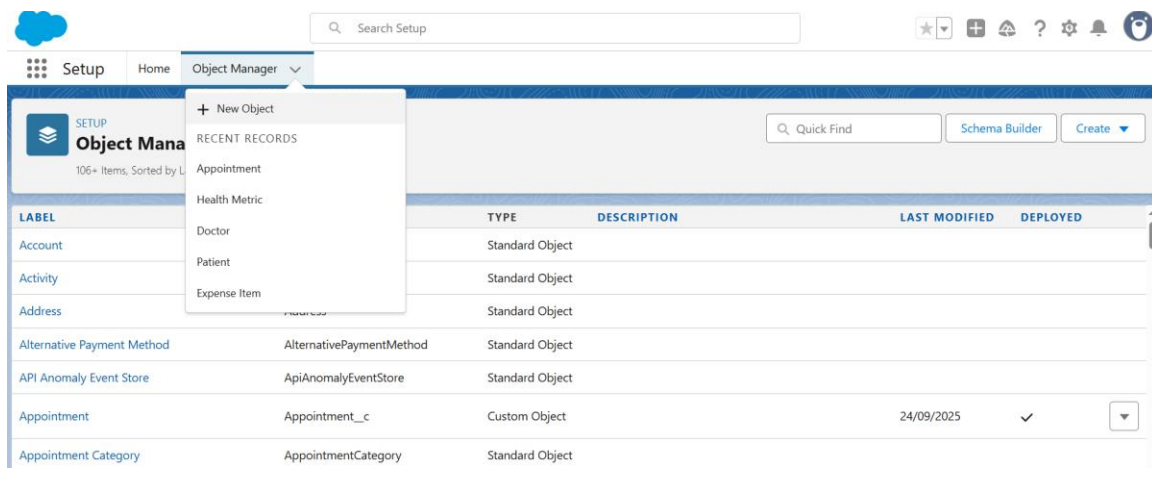
## 1. Standard & Custom Objects

- **Standard Objects Used:**

- **User** → represents doctors, patients, and admins.
- **Contact** → stores basic contact details.

- **Custom Objects Created:**

1. **Patient** → Stores patient-specific details.
2. **Doctor** → Maintains information about doctors.
3. **Appointment** → Tracks consultations between patients and doctors.
4. **Health Metric** → Logs details like blood pressure, sugar level, etc.



- **2. Fields**

- Each object is enhanced with custom fields to capture essential information:

- **Patient Object**

- Age (Number)
- Gender (Picklist: Male, Female, Other)
- Contact Number (Phone)
- Address (Text Area)

- **Doctor Object**

- Specialization (Picklist: General, Cardiologist, etc.)
- Experience (Number)
- Contact Email (Email)

- **Appointment Object**

- Appointment Date (Date/Time)
- Status (Picklist: Scheduled, Completed, Cancelled)
- Notes (Long Text Area)
- **Health Metric Object**
  - Metric Type (Picklist: BP, Sugar, Weight, etc.)
  - Value (Number)
  - Recorded Date (Date)

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Patient**

Details

**Fields & Relationships** 6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(10)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient ID	Name	Text(80)		✓

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Doctor**

Details

**Fields & Relationships** 6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Doctor ID	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(10)		
Owner	OwnerId	Lookup(User,Group)		✓
Specialization	Specialization__c	Text(15)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

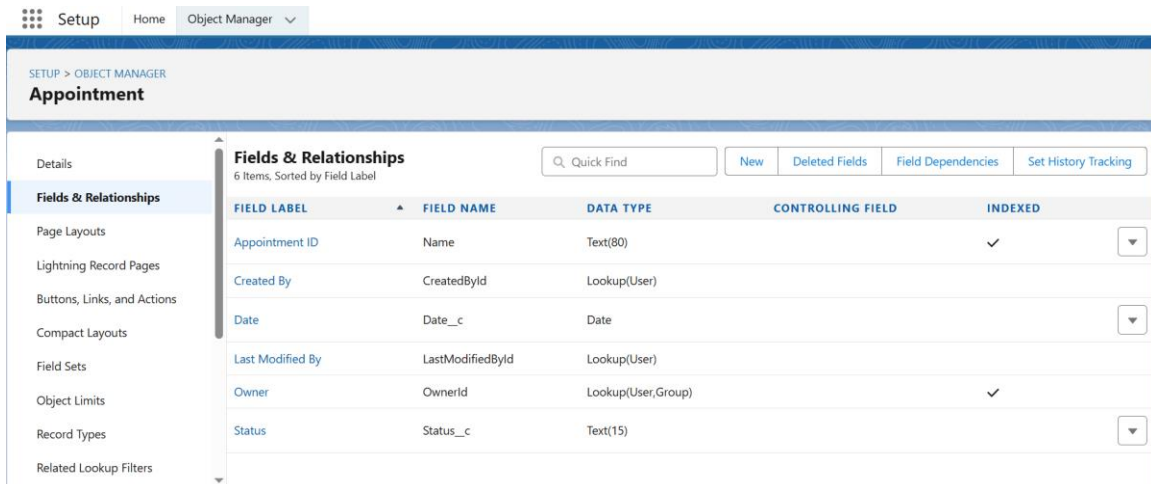
Field Sets

Object Limits

Record Types

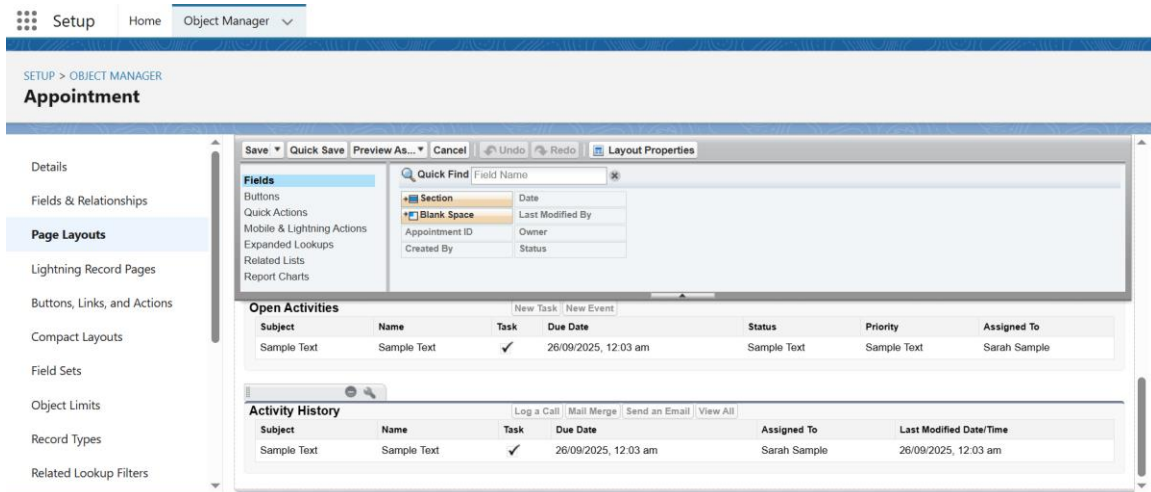
Related Lookup Filters

- **3. Record Types**
  - **Appointment Object** → Different record types created:
    - *General Checkup*
    - *Specialist Visit*
    - *Follow-up*



#### 4. Page Layouts

- Customized page layouts to display relevant fields.
  - Patient layout → shows demographics + health records.
  - Doctor layout → shows specialization + experience.
  - Appointment layout → shows patient, doctor, status, and notes.

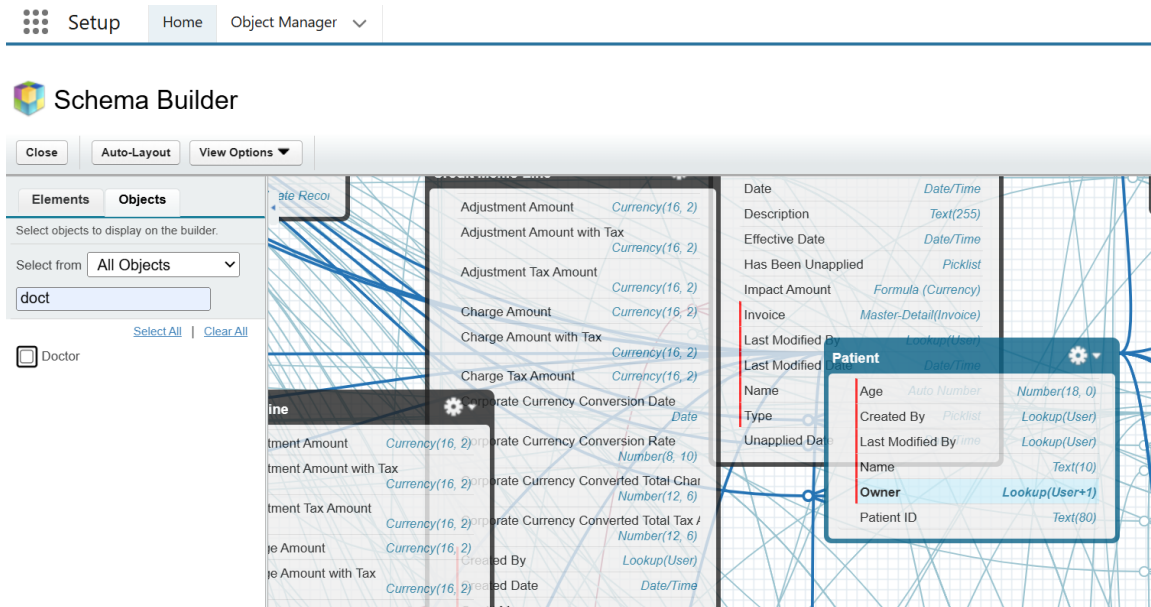


#### 5. Compact Layouts

- Designed compact layouts to display key fields in the record header.
  - Patient: Name, Age, Gender
  - Doctor: Name, Specialization, Experience
  - Appointment: Date, Status, Patient

#### 6. Schema Builder

- Used **Schema Builder** to visualize all relationships.
- Objects (Patient, Doctor, Appointment, Health Metric) are linked for a clear ERD-style view.



- **7. Relationships**
  - **Lookup Relationship**
    - Appointment → Doctor
    - Appointment → Patient
  - **Master-Detail Relationship**
    - Health Metric → Patient (metrics are deleted if patient is deleted).
  - **Hierarchical Relationship**
    - Used in User object (e.g., Doctor reporting to Senior Doctor).
- **8. Junction Objects**
  - Created **Patient\_Doctor\_Assignment** junction object to manage **many-to-many relationship** between Patients and Doctors.
    - Example: One patient can consult multiple doctors, and one doctor can treat multiple patients.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Patient

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

7 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Number(18, 0)		
Assinged Doctor	Assinged_Doctor__c	Lookup(Doctor)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(10)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient ID	Name	Text(80)		✓

- 9. External Objects
  - Configured an **External Object** (Health Reports) to integrate with external health device data (for simulation).

- **Phase 4: Process Automation (Admin)**

- In this phase, we enabled **automation in Salesforce** using tools like Flows, Validation Rules, and Email Alerts. The goal is to reduce manual work and ensure consistent processes.

- 

- **Step 1: Validation Rule**

- Validation Rules ensure data quality by preventing users from saving records with invalid data.

- **Example:**

- For the **Appointment** object, we added a rule that prevents saving an appointment without a scheduled date.

- 

- **Step 2: Workflow Rule**

- Workflow Rules allow simple automation based on record criteria.

- **Example:**

- A rule could automatically send an email when a patient record is created.
  - As Workflow Rules are being phased out in favor of Flows, we documented this but focused mainly on Flow Builder.

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- **Step 3: Record-Triggered Flow**

- We created a **Record-Triggered Flow** to automate email notifications when new Appointments are created.

- **Steps:**

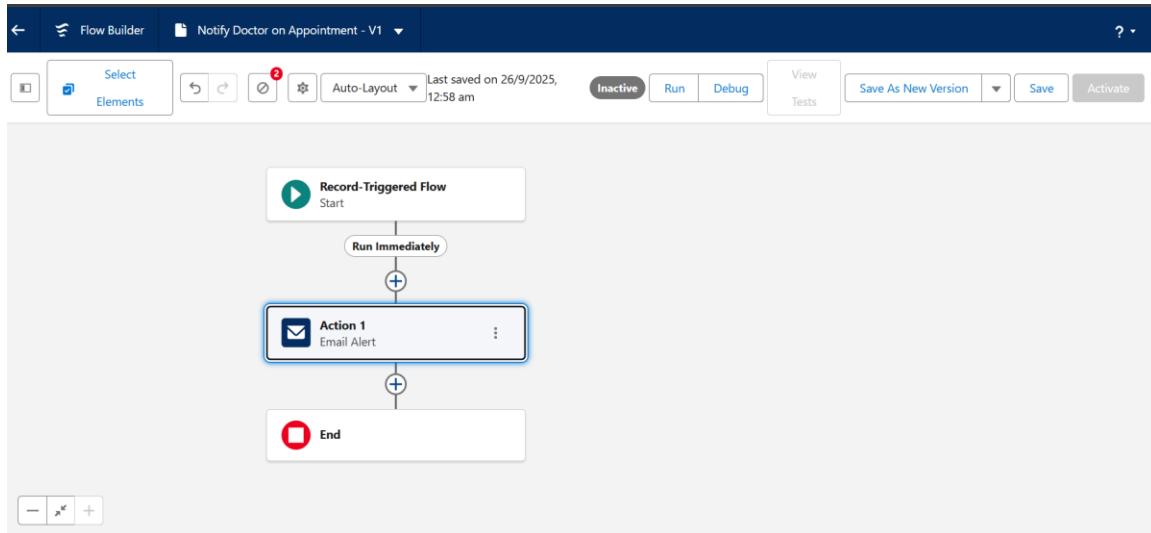
1. Setup → **Flows** → **New Flow** → select **Record-Triggered Flow**
2. Object: **Appointment**
3. Trigger: **When a record is created**
4. Optimize for **Actions and Related Records**

The screenshot displays the Salesforce Flow Builder interface. On the left, a canvas shows a 'Record-Triggered Flow' starting with a 'Start' node, followed by a connector, and ending with an 'End' node. The right-hand panel is titled 'Configure Start' and contains the following sections:

- Select Object:** A dropdown menu with the text 'Select the object whose records trigger the flow when they're created, updated, or deleted.' Below it is a search bar labeled '\* Object' with the placeholder text 'Search objects...'.
- Configure Trigger:** A section titled 'Trigger the Flow When:' with four radio button options: 'A record is created' (selected), 'A record is updated', 'A record is created or updated', and 'A record is deleted'.
- Set Entry Conditions:** A section with the text 'Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.' Below this is a 'Condition Requirements' section.

At the top of the interface, there is a navigation bar with 'Flow Builder' and a search icon. Below the navigation bar is a toolbar with icons for 'Select Elements', undo, redo, and 'Auto-Layout'. To the right of the toolbar are buttons for 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Activate'.

- **Step 4: Email Alert via Flow (With Screenshot)**
- Inside the flow, we added an **Email Alert action** to notify the assigned Doctor.
- **Steps:**
  1. Add Element → **Action** → **Email Alert**
  2. Subject: *New Appointment Scheduled*
  3. Body: Includes **Patient Name** and **Appointment Date**



- **Step 5: Approval Process**
- Approval Processes route records for authorization.
- **Example:**
  - An Appointment may need approval if it is scheduled outside business hours.
- ---
- **Step 6: Flow Builder Variants**
- We explored different Flow types:
  - **Screen Flow:** Takes user input
  - **Record-Triggered Flow:** Runs on record create/update (used in this project)
  - **Scheduled Flow:** Runs at defined intervals
  - **Autolaunched Flow:** Runs in the background without user input
- ---
- **Step 7: Field Updates, Tasks, and Custom Notifications**
- **Field Updates:** Can update fields like Appointment Status automatically.
- **Tasks:** Can assign a follow-up task to staff after an appointment is created.
- **Custom Notifications:** Can push notifications directly to users in Salesforce.