

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


SETUP
Company Information

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%) View |
| Newsletter | <input checked="" type="checkbox"/> | Used File Space | 23 KB (0%) View |
| 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

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 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 UserReset Password(s)Add Multiple Users

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

New UserReset Password(s)Add Multiple Users

- **Step 6 — Roles & Role Hierarchy**

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

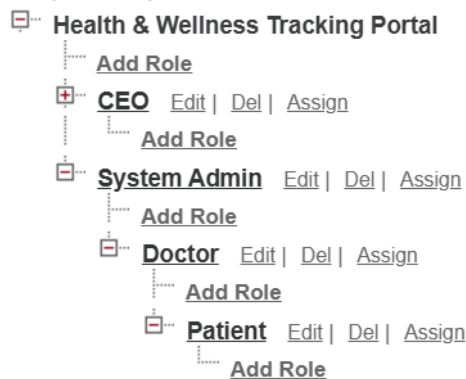


Creating the Role Hierarchy

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



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Z

Other

All

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

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

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 i |
|------------------------|----------|----------------------------------|--|
| 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.**

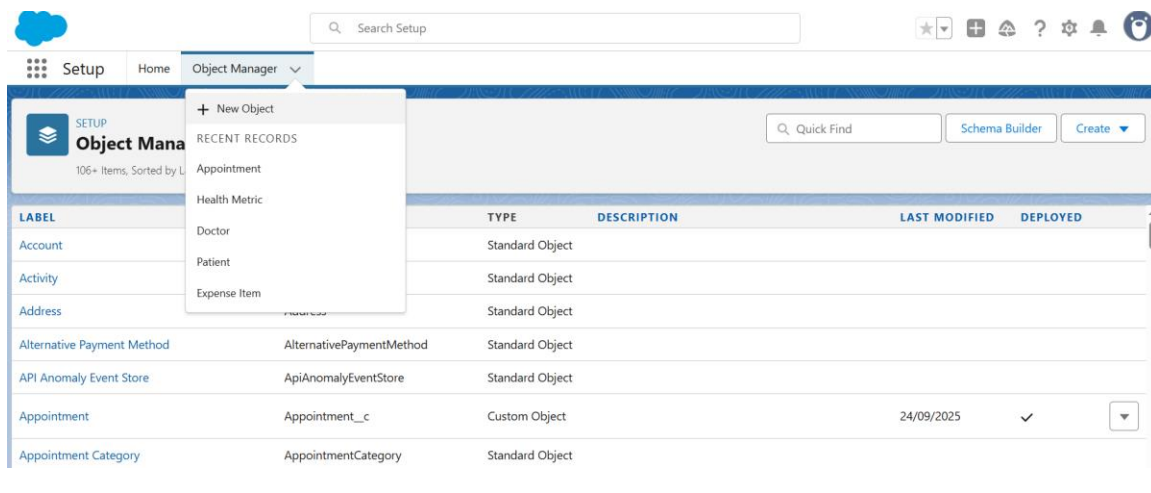
1. Standard & Custom Objects

- **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

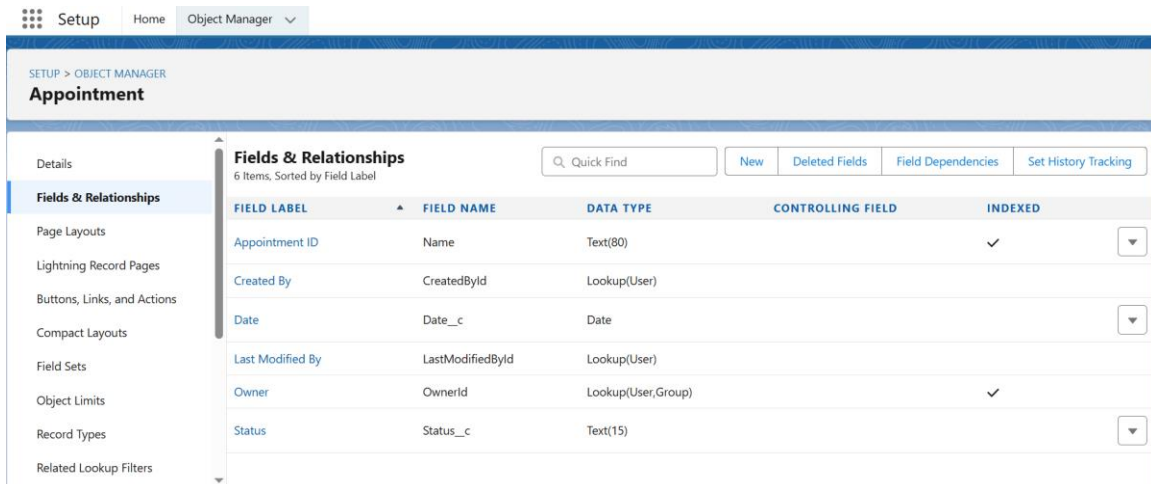
Field Sets

Object Limits

Record Types

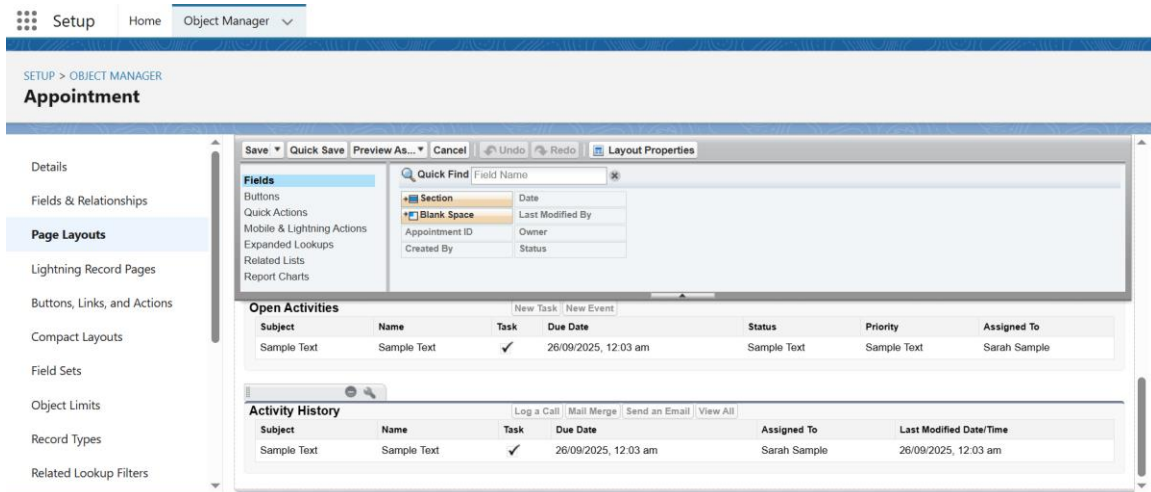
Related Lookup Filters

- **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.

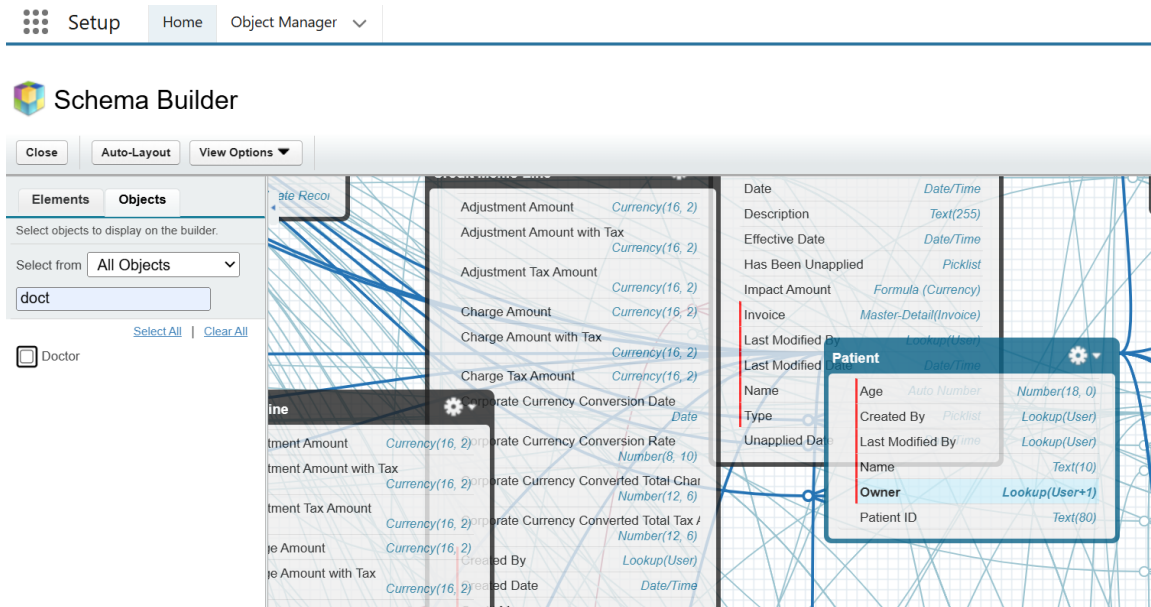


5. Compact Layouts

- 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) | | |
| Assigned Doctor | Assigned_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).