TITLE: CycleCare-A period tracker

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Purpose: Collect detailed requirements from potential users.

Steps:

1. Identify target users:
   - o Patients (tracking cycle & appointments)
   - o Gynecologists/doctors (appointment management, patient history)
   - o Admins (monitoring overall app usage)
2. Gather functional needs:
   - o Track cycle dates (start, end, irregularities)
   - o Predict ovulation & fertile windows
   - o Book doctor appointments & send reminders
   - o Locate gynecologists nearby (integration with maps/doctor APIs)
   - o Notifications for irregular cycles → suggest medical visits
3. Gather non-functional needs:
   - o Mobile-first design
   - o Secure handling of sensitive medical data
   - o Simple and intuitive UI
   - o Scalable for large user base

2. Stakeholder Analysis

Purpose: Understand **who benefits from the app** and what they need.

Stakeholder	Needs	Pain Points
Patients	Cycle tracking, reminders, ovulation prediction	Forgetting cycles, lack of medical awareness
Doctors	Appointment scheduling, patient history access	Time management, lack of patient info
Admins	Manage app usage, reports, compliance	Ensuring data security & accurate insights

3. Business Process Mapping

Purpose: Visualize workflows inside the app.

Example Processes for Cycle Care:

- **Cycle Tracking Flow:**
  User logs cycle → System predicts ovulation → Sends reminders → Flags irregular cycles
- **Appointment Booking Flow:**
  User searches doctor → Finds nearby gynecologist → Books slot → Doctor confirms → Reminder sent
- **Doctor Interaction Flow:**
  Doctor logs in → Views appointments → Accesses patient cycle data → Suggests treatment

(Best represented in a flowchart or BPMN diagram – I can create one if you'd like 👀).

4. Industry -Specific Use Case Analysis

Purpose: See what's already in the **FemTech (female health tech)** industry and tailor accordingly.

Common Features in Similar Apps:

- **Period Tracking Apps (Clue, Flo, Ovia):** AI-based predictions, symptom logging
- **Doctor Appointment Apps (Practo, Zocdoc):** Location-based search, teleconsultations
- **Wellness Apps (Fitbit, Apple Health):** Integration with wearables, lifestyle tracking

Insights for Cycle Care:

- Start simple (cycle tracking + doctor appointments).
- Later enhancements → wearable integration, AI predictions, telemedicine.

5. AppExchange Exploration

Purpose: Research what Salesforce already offers.

Steps:

1. Go to **AppExchange** → Search terms: *"Healthcare", "Patient Management", "Appointments", "FemTech"*
2. Analyze existing apps:
   - Health Cloud (by Salesforce) → for patient records & care plans
   - Doctor Appointment Scheduler apps
   - Maps & Location services
3. Learn from them:
   - What features do they already provide?
   - What gaps can Cycle Care fill? (e.g., personalized female health focus)
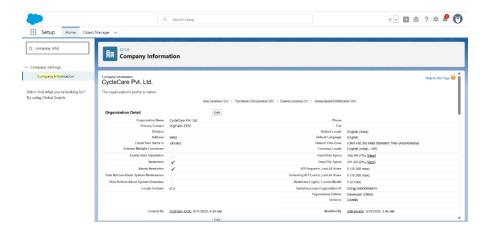
Phase 2: Org Setup & Configuration

1. Salesforce Edition

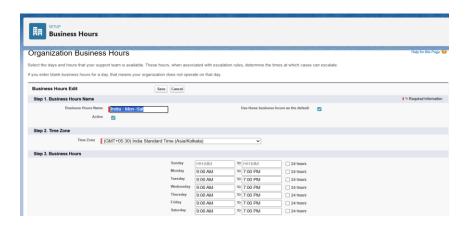- Used **Developer Edition**: free, full features, can test apps before bigger editions.

2. Company Profile

- **Settings:** India, currency INR, English.
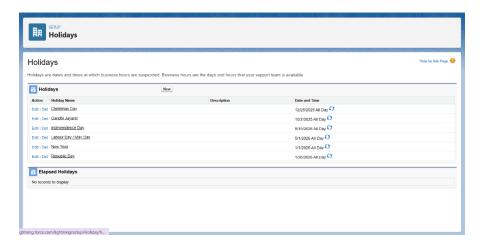- **Why:** Correct money calculations, accurate dates, compliance.

3. Business Hours & Holidays
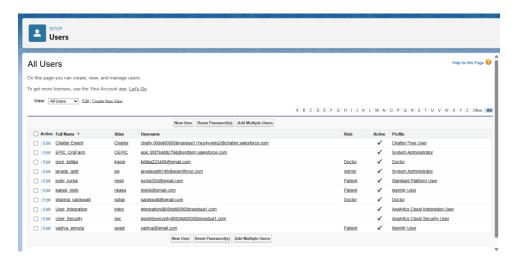
- **Work hours:** Mon–Sat, 9 AM – 7 PM

- **Holidays:** National holidays.

- **Why:** Service booking, case escalation, and SLAs depend on working hours.

4. User Setup

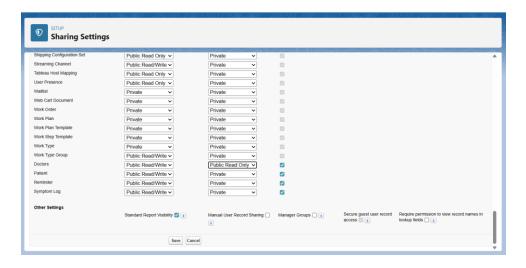- Users: Admin,Doctor,Patient.
- Assign proper licenses for access.

5. Profiles & Roles

- **Profiles:** Control what each user can do.
  - I have basically made three profiles and they are: Admin ,Doctor and Patient
- **Roles:** Show hierarchy (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

Show in tree view

Collapse All Expand All

CycleCare Pvt. Ltd.
Add Role
CEO Edit | Del | Assign
Add Role
Admin Edit | Del | Assign
Add Role
Doctor 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

6. OWD & Sharing Rules

- **OWD:** Private for service records.
- **Sharing:** Doctor sees all, customer sees own records.

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	
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	
Doctors	Public Read/Write	Public Read Only	☑
Patient	Public Read/Write	Private	☑
Reminder	Public Read/Write	Private	☑
Symptom Log	Public Read/Write	Private	☑

Other Settings

Standard Report Visibility ☑ ℹ   Manual User Record Sharing ☐ ℹ   Manager Groups ☐ ℹ   Secure guest user record access ☐ ℹ   Require permission to view record names in lookup fields ☐ ℹ
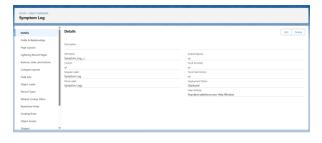
Save Cancel

Phase 3: Data Modeling & Relationships

1. Custom Objects

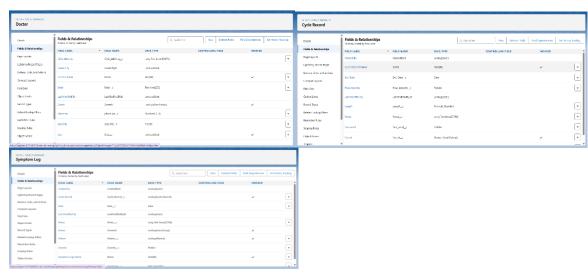- Doctor, Patient, Appointment, Cycle Record, Symptom logs
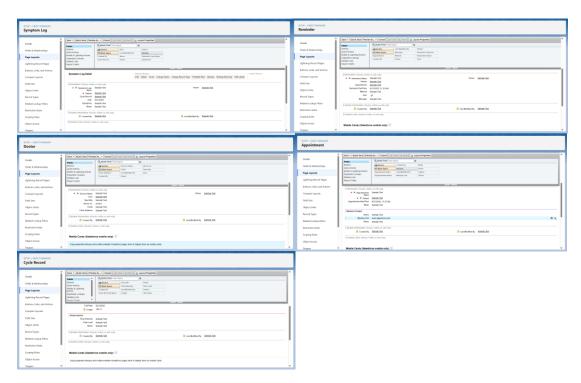

2. Fields

- **Doctor:** Clinic Address, Doctors Name, Email, Number of Patients, phone no, Specialty, User.
- **Patient:** age,avg cycle length,consent accepted, Concent date, Cycle count, DOB, Email, Full Name, Gender, Medical Notes, Paitents ID, Phone, Primary Doctor, Total Cycle Days.
- **Appointment:** Appointment Date/Time, Appointments Name, Doctors, Meeting Link, Mode, Notes, Patient, Status.
- **Cycle_record:** Cycle Records Name, End Date, Flow Intensity, Length, Notes, Pain Level, Paitent, Start Date.
- **Symptom logs:** Cycle Record, Date, Notes, Paitent, Severity, Symptom Logs Name, Symptoms.

SETUP › OBJECT MANAGER
Appointment

SETUP › OBJECT MANAGER
Doctor

SETUP › OBJECT MANAGER
Cycle Record

SETUP › OBJECT MANAGER
Symptom Log

3. Page Layouts & Compact Layouts

- Arrangement of fields, sections, related lists.

SETUP › OBJECT MANAGER
Symptom Log

SETUP › OBJECT MANAGER
Reminder

SETUP › OBJECT MANAGER
Doctor

SETUP › OBJECT MANAGER
Appointment

SETUP › OBJECT MANAGER
Cycle Record

4. Schema Builder (ERD)

- Visual representation of objects and their relationships.
    - Appointment → Lookup → Doctor
    - Appointment → MDR→ Patient
    - Patient → Lookup → Doctor
    - Reminder→ Lookup → Patient
    - Reminder→ Lookup → Appointment
    - Cycle_Record → MDR→ Patient
    - Symptom Log→ Lookup → Patient
    - Symptom Log→ Lookup → Cycle_Record
- **Why:** Proper relationships help reporting and automation.

5.Junction Objects

- Handle **many-to-many relationships**.
    - Doctor Patient Assignment→ MDR→ Doctor
    - Doctor Patient Assignment→ MDR→ Patient

Phase 4: Process Automation (Admin)

1. Validation Rules

2. Workflow Rules

- AutolaunchedSubflow — Cycle Notifications

- Cycle_Auto_Predictions_Before_Save

- Automate simple tasks like sending reminders.

custom notification

Phase 5: User Interface Development

1. Lightning App Builder

- Assembles app pages with standard and custom components.
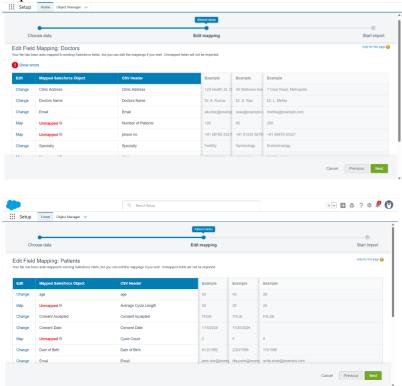- Provide structured navigation.

- App login page:

Username

Password

Log In

☐ Remember me

Forgot Your Password?

Phase 6: Data Management & Deployment

1. Data Import Wizard

- Import data of Doctor and Patient

2. Duplicate Rules

- Prevents duplicate patient or doctor records.
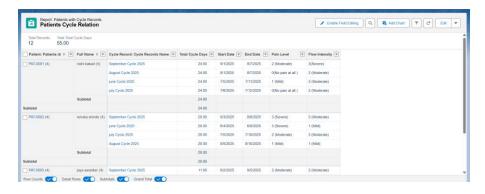- Doctor and patient duplicate rules

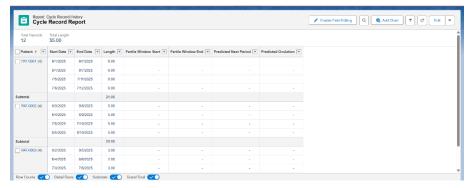# 3. Data Export & Backup

- Safeguards against data loss.

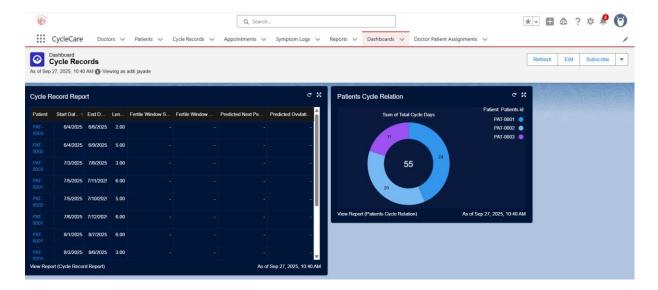# Phase 7: Reporting & Dashboards

1. Reports

- Generate tabular, summary, matrix, and joined reports for tracking cycles, appointments, and irregularities.
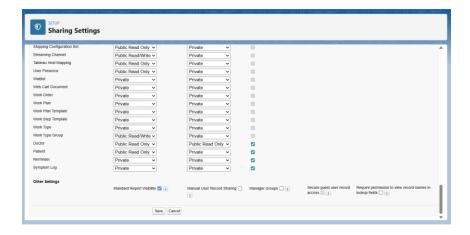

2. Dashboards

- Visualize key health metrics personalized for users and admins.

3. Sharing Settings

- . Define record-level access.

4. Field Level Security

- Protect sensitive medical details.

5. Session Settings & Login IP Ranges

- Strengthen login security.