

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

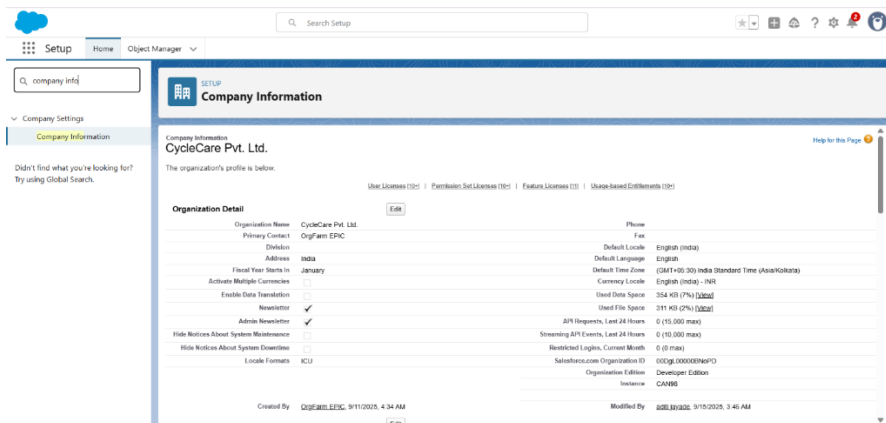
Phase 2: Org Setup & Configuration

1. Salesforce Edition

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

2. Company Profile

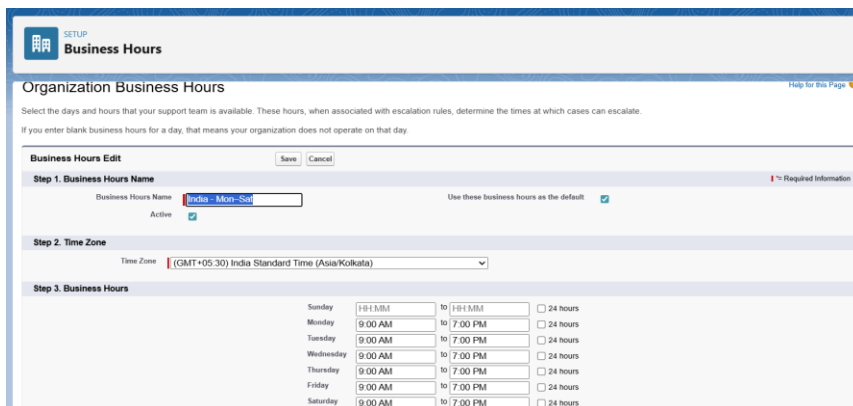
- **Settings**: India, currency INR, English.
- **Why**: Correct money calculations, accurate dates, compliance.



The screenshot shows the 'Company Information' page in Salesforce Setup. The organization name is 'CycleCare Pvt. Ltd.'. The page is divided into two main sections: 'Organization Detail' and 'System Information'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Address, Division, Fiscal Year, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'System Information' section includes fields for Phone, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Limits, Streaming API Limits, Scheduled Logins, Organization ID, Organization Edition, and Instance. The page also shows a 'Created By' and 'Modified By' section at the bottom.

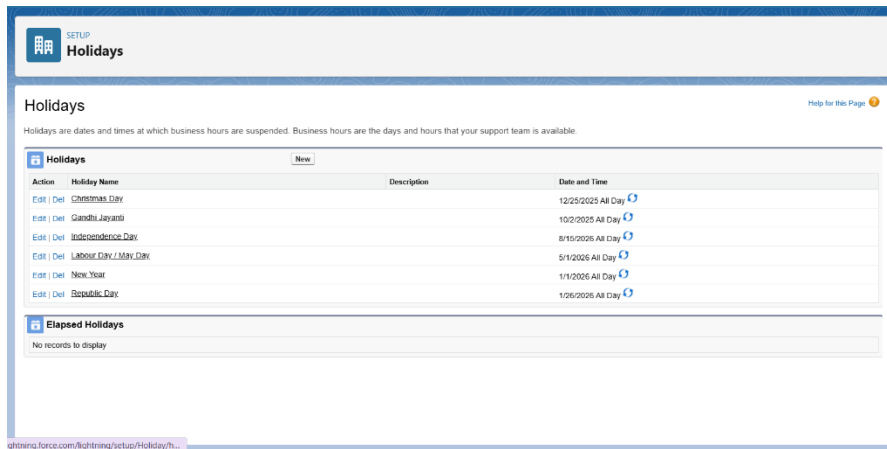
3. Business Hours & Holidays

- **Work hours**: Mon–Sat, 9 AM – 7 PM



The screenshot shows the 'Business Hours' page in Salesforce Setup. The page is titled 'Organization Business Hours'. It includes a 'Business Hours Edit' section with a 'Save' button and a 'Cancel' button. The 'Step 1. Business Hours Name' section shows the name 'India - Mon-Sat' and a checkbox 'Active'. The 'Step 2. Time Zone' section shows the time zone '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Step 3. Business Hours' section shows a table with columns for Day, Start Time, End Time, and 24 hours. The table is populated with data for Sunday through Saturday, with start times at 9:00 AM and end times at 7:00 PM. The '24 hours' checkbox is checked for all days.

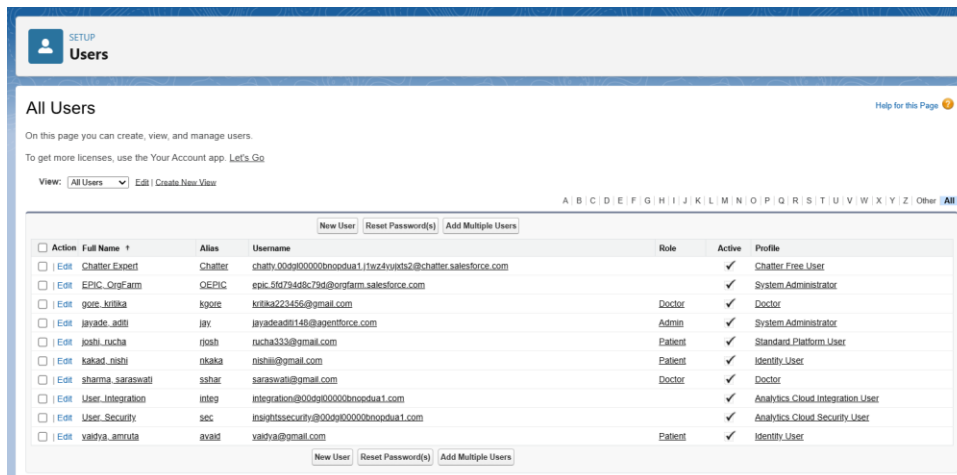
- **Holidays**: National holidays.



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

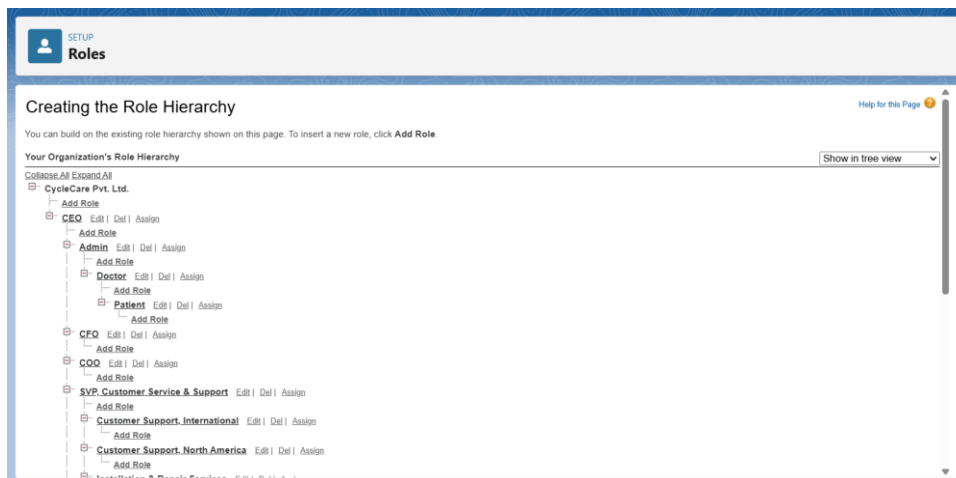
4. User Setup

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



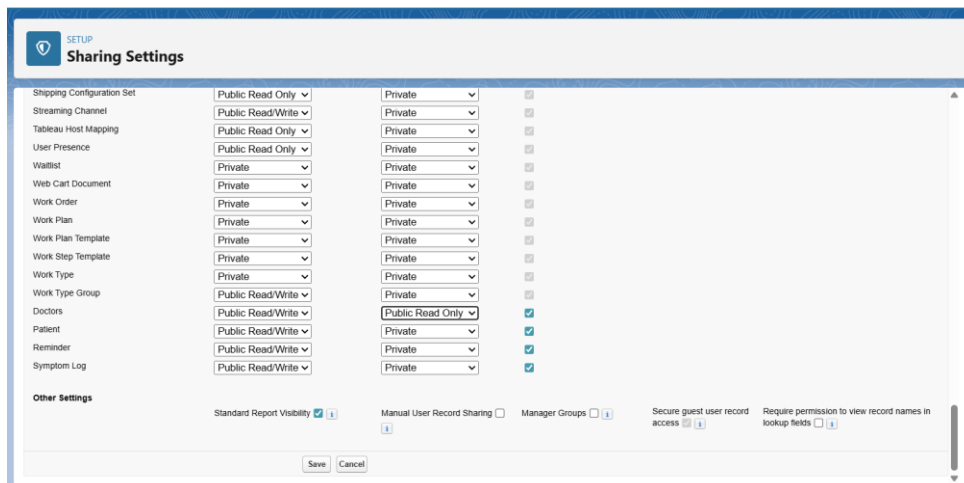
5. Profiles & Roles

- **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)



6. OWD & Sharing Rules

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



Phase 3: Data Modeling & Relationships

1. Custom Objects

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

The image displays four screenshots of the 'SETUP - OBJECT MANAGER' interface, showing the configuration for different custom objects: Doctor, Patient, Appointment, Cycle Record, and Symptom Log. Each screenshot shows a 'Details' tab with various fields and their associated values.

Doctor Object:

Field	Value
Description	
Page Layouts	
Lighting Record Pages	
Buttons, Links, and Actions	
Component Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Grouping Rules	
Object Access	
Triggers	

Patient Object:

Field	Value
Description	
Page Layouts	
Lighting Record Pages	
Buttons, Links, and Actions	
Component Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Grouping Rules	
Object Access	
Triggers	

Appointment Object:

Field	Value
Description	
Page Layouts	
Lighting Record Pages	
Buttons, Links, and Actions	
Component Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Grouping Rules	
Object Access	
Triggers	

Cycle Record Object:

Field	Value
Description	
Page Layouts	
Lighting Record Pages	
Buttons, Links, and Actions	
Component Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Grouping Rules	
Object Access	
Triggers	

Symptom Log Object:

Field	Value
Description	
Page Layouts	
Lighting Record Pages	
Buttons, Links, and Actions	
Component Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Grouping Rules	
Object Access	
Triggers	

2. Fields

- **Doctor:** Clinic Address, Doctors Name, Email, Number of Patients, phone no, Specialty, User.
- **Patient:** age, avg cycle length, consent accepted, Consent date, Cycle count, DOB, Email, Full Name, Gender, Medical Notes, Patients 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, Patient, Start Date.
- **Symptom logs:** Cycle Record, Date, Notes, Patient, Severity, Symptom Logs Name, Symptoms.

[illegible]

- Arrangement of fields, sections, related lists.

STEP 1 - OBJECT MANAGER

Symptom Log

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Sharing Rules

Object Access

Triggers

STEP 1 - OBJECT MANAGER

Symptom Log

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Sharing Rules

Object Access

Triggers

STEP 1 - OBJECT MANAGER

Reminder

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Sharing Rules

Object Access

Triggers

STEP 1 - OBJECT MANAGER

Doctor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Sharing Rules

Object Access

Triggers

STEP 1 - OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

Sharing Rules

Object Access

Triggers

STEP 1 - OBJECT MANAGER

Cycle Record

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Restriction Rules

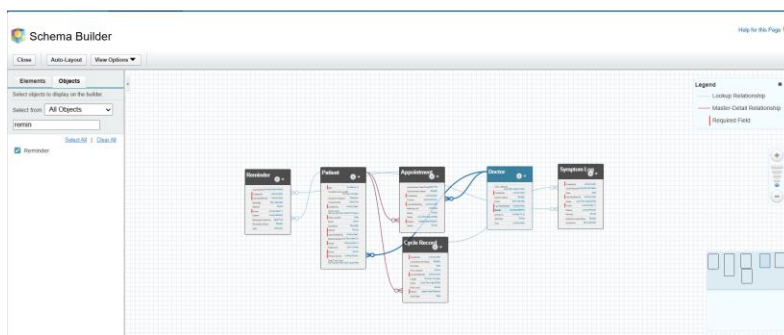
Sharing Rules

Object Access

Triggers

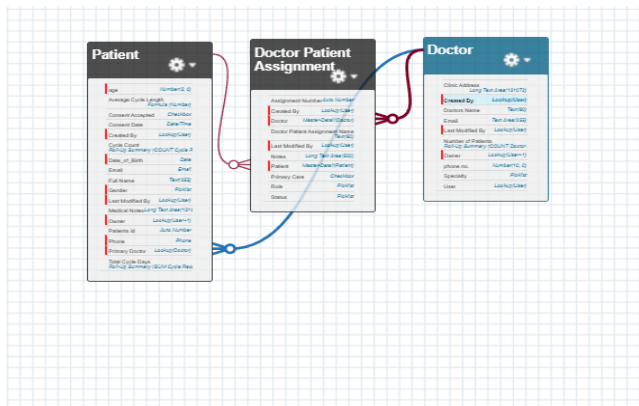
4. Schema Builder (ERD)

- 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.

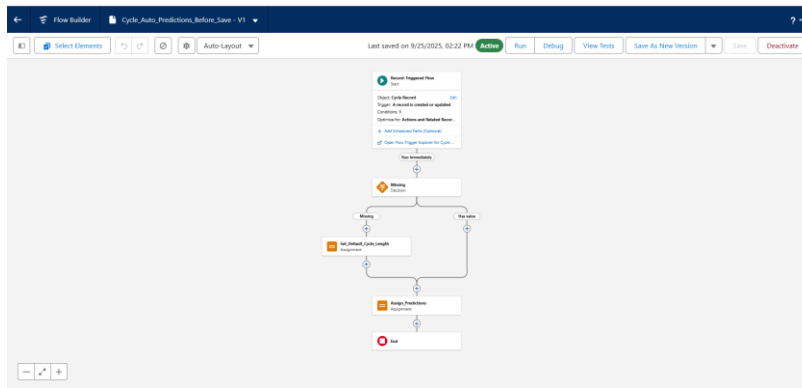


5. Junction Objects

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



- Cycle_Auto_Predictions_Before_Save



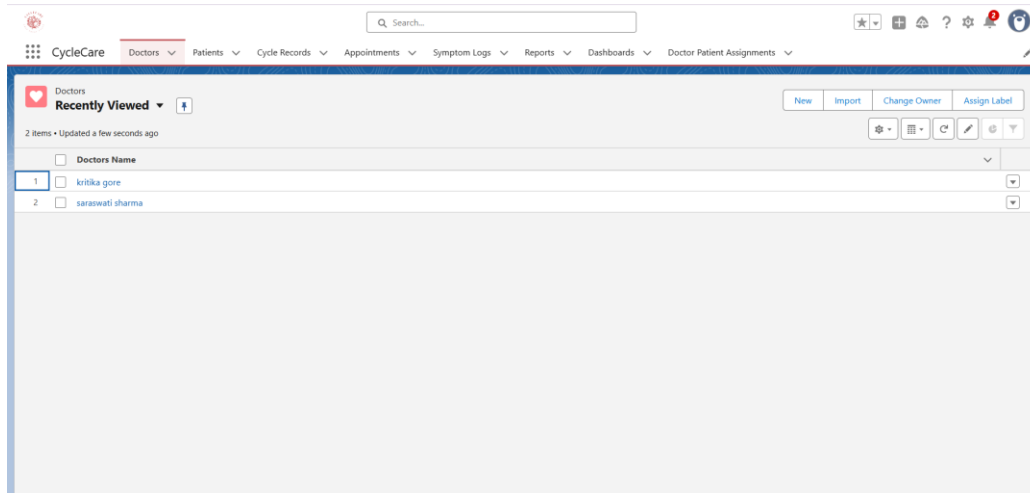
- Automate simple tasks like sending reminders.

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

Edit Field Mapping: Doctors

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Clinic Address	Clinic Address	123 Health St, G	45 Wellness Ave	7 Care Road, Metropolis
Change	Doctors Name	Doctors Name	Dr. A. Kumar	Dr. S. Rao	Dr. L. Mehra
Change	Email	Email	akumar@example.com	srao@example.com	lmehra@example.com
Map	Unmapped ⓪	Number of Patients	120	85	200
Map	Unmapped ⓪	phone.no	+91 98765 4321	+91 91234 5678	+91 9876 54321
Change	Specialty	Specialty	Fertility	Gynecology	Endocrinology

Edit Field Mapping: Patients

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Age	age	33	40	28
Map	Unmapped ⓪	Average Cycle Length	28	30	26
Change	Consent Accepted	Consent Accepted	TRUE	TRUE	FALSE
Change	Consent Date	Consent Date	11/15/2025	11/20/2024	
Map	Unmapped ⓪	Cycle Count	2	5	0
Change	Date of Birth	Date of Birth	5/12/1992	2/20/1985	7/3/1996
Change	Email	Email	prave.doe@example.com	rita.patel@example.com	anita.shah@example.com

2. Duplicate Rules

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

Duplicate Rule Detail

Rule Name: Patient_Duplicate_Rule

Description: Patient Duplicate Rule - Patient_Duplicate_Rule - Salesforce - Developer Edition

Object: Patient

Record-Level Security: Enforce sharing rules

Action On Create: Allow

Operations On Create: Alert (checked), Report (checked)

Action On Edit: Allow

Operations On Edit: Alert (checked), Report (checked)

Alert Text: Use one of these records?

Active: ☒

Matching Rule: Patient_Duplicate_Rule.matching.rule (checked) Mapped

Matching Criteria: (Fml.Lenst: Email EXACT MatchBlank = FALSE) AND (Fml.Lenst: Phone EXACT MatchBlank = FALSE)

Conditions: Created By: admin@pradeo 9/26/2025, 11:35 AM

Modified By: admin@pradeo 9/26/2025, 11:37 AM

SETUP

Duplicate Rules

Doctor Duplicate Rule

Doctor_Duplicate_Rule

Help for this Page

Duplicate Rule Detail

EditDeleteCloneDeactivate

Order1 of 1 (Records)1

Rule Name	Doctor_Duplicate_Rule
Description	Prevents duplicate doctor records based on email or phone.
Object	Doctor
Record Level Security	Entire sharing rules
Action On Create	Allow
Operations On Create	AlertReport
Action On Edit	Allow
Operations On Edit	AlertReport
Alert Text	Use one of these records?
Active	<input checked="" type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Doctor_Duplicate_Rule matching rule <input checked="" type="checkbox"/> Mapped
Matching Criteria	(Doctor: Email EXACT MatchBlank = FALSE) AND (Doctor: phone EXACT MatchBlank = FALSE)
Conditions	
Created By	adli ivade 9/26/2025, 11:30 AM
Modified By	adli ivade 9/26/2025, 11:37 AM

EditDeleteCloneDeactivate

3. Data Export & Backup

- Safeguards against data loss.

SETUP

Data Export

Monthly Export Service

Help for this Page

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export.

A data export is currently in progress for your organization.

Export NowSchedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By

adli ivade

Schedule Date

9/26/2025

Export File Encoding

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Phase 7: Reporting & Dashboards

1. Reports

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

Report: Patients with Cycle Records

Patients Cycle Relation

Enable Field Editing

Q

Add Chart

▼

⌂

Edit

Total Records: 12

Total Total Cycle Days: 55.00

<input type="checkbox"/> Patient: Patients Id	<input type="checkbox"/> Full Name	<input type="checkbox"/> Cycle Record: Cycle Records Name	<input type="checkbox"/> Total Cycle Days	<input type="checkbox"/> Start Date	<input type="checkbox"/> End Date	<input type="checkbox"/> Pain Level	<input type="checkbox"/> Flow Intensity
<input type="checkbox"/> PAT-0001 (4)	nishi kulkad (4)	September Cycle 2025	24.00	9/1/2025	9/7/2025	2 (Moderate)	3 (Severe)
		August Cycle 2025	24.00	8/1/2025	8/7/2025	0 (No pain at all)	2 (Moderate)
		June Cycle 2025	24.00	7/5/2025	7/11/2025	1 (Mild)	2 (Moderate)
		July Cycle 2025	24.00	7/5/2025	7/12/2025	0 (No pain at all)	2 (Moderate)
		Subtotal	24.00				
Subtotal		24.00					
<input type="checkbox"/> PAT-0002 (4)	renuka shinde (4)	September Cycle 2025	20.00	9/3/2025	9/9/2025	3 (Severe)	2 (Moderate)
		June Cycle 2025	20.00	6/4/2025	6/9/2025	3 (Severe)	1 (Mild)
		July Cycle 2025	20.00	7/5/2025	7/10/2025	2 (Moderate)	2 (Moderate)
		August Cycle 2025	20.00	8/5/2025	8/10/2025	1 (Mild)	1 (Mild)
		Subtotal	20.00				
Subtotal		20.00					
<input type="checkbox"/> PAT-0003 (4)	jaya awanbar (4)	September Cycle 2025	11.00	9/2/2025	9/5/2025	2 (Moderate)	2 (Moderate)
Row Counts			<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>
Grand Total			<input checked="" type="checkbox"/>				

Report: Cycle Record History

Cycle Record Report

Enable Field Editing

Q

Add Chart

▼

⌂

Edit

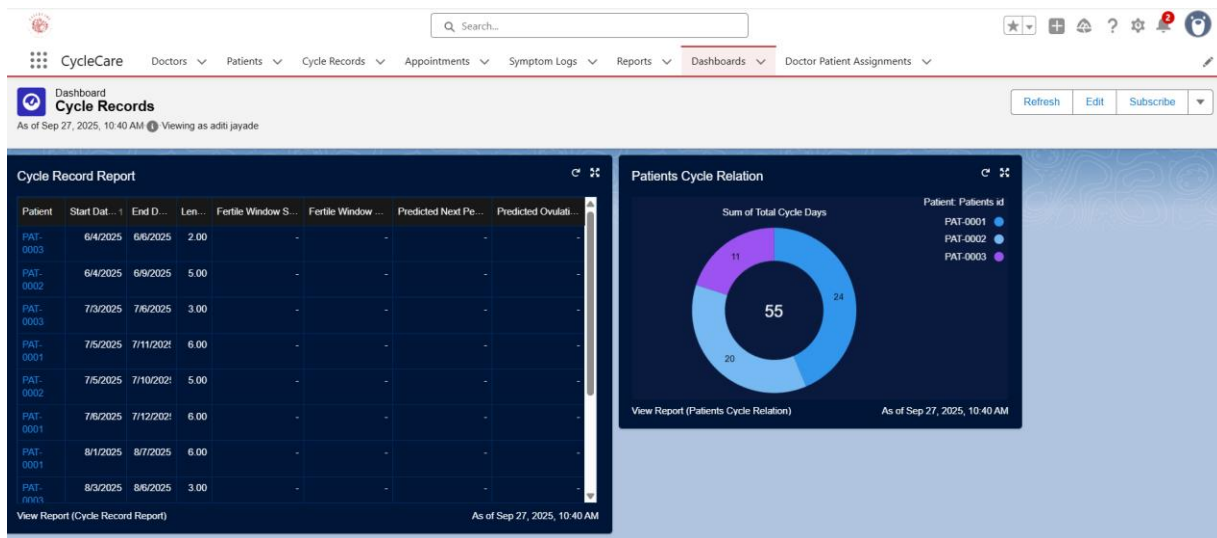
Total Records: 12

Total Length: 55.00

Patient	Start Date	End Date	Length	Fertile Window Start	Fertile Window End	Predicted Next Period	Predicted Ovulation
<input type="checkbox"/> PAT-0001 (4)	9/1/2025	9/7/2025	6.00	-	-	-	-
	8/1/2025	8/7/2025	6.00	-	-	-	-
	7/5/2025	7/11/2025	6.00	-	-	-	-
	7/5/2025	7/12/2025	6.00	-	-	-	-
	Subtotal		24.00				
<input type="checkbox"/> PAT-0002 (4)	9/3/2025	9/9/2025	5.00	-	-	-	-
	6/4/2025	6/9/2025	5.00	-	-	-	-
	7/5/2025	7/10/2025	5.00	-	-	-	-
	8/5/2025	8/10/2025	5.00	-	-	-	-
	Subtotal		20.00				
<input type="checkbox"/> PAT-0003 (4)	9/2/2025	9/5/2025	3.00	-	-	-	-
	6/4/2025	6/6/2025	3.00	-	-	-	-
	7/3/2025	7/6/2025	3.00	-	-	-	-
Row Counts			<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>
Grand Total			<input checked="" type="checkbox"/>				

2. Dashboards

- Visualize key health metrics personalized for users and admins.



3. Sharing Settings

- Define record-level access.

The screenshot shows the 'Sharing Settings' configuration page. It includes a table for setting permissions for various data sources and a section for other settings.

Configuration Set	Public Read Only	Private	Secure
Shipping Configuration Set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tableau Host Mapping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Presence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wattlet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web Cart Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Step Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doctor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Symptom Log	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Other Settings

- Standard Report Visibility ☒
- Manual User Record Sharing ☐
- Manager Groups ☐
- Secure guest user record access ☐
- Require permission to view record names in lookup fields ☐

Buttons: Save, Cancel

4. Field Level Security

- Protect sensitive medical details.

5. Session Settings & Login IP Ranges

- Strengthen login security.