

# MediTrack-Salesforce-App

## **Capstone Project Report**

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Under the Guidance of: Mir Abdul sir

## Abstract

The **MediTrack Sales force App** is a Sales force-based solution designed to simplify patient-doctor interactions, manage appointments, and streamline prescription tracking. Healthcare organizations often struggle with manual appointment scheduling, missing patient records, communication gaps, and inefficient prescription management.

This project leverages Sales force CRM capabilities (Admin + Developer) to build a centralized, role-based system where:

Patients can be registered with demographic details.

Doctors manage their availability, appointments, and prescriptions.

Appointments link Patients and Doctors with date, time, and status tracking.

Prescriptions are tied to appointments with medicine details and dosage.

Email/flow automation sends appointment reminders and ensures proper follow-up.

Dashboards and reports provide hospital admins visibility into patient volume, doctor workload, and prescription history.

Automation, Apex triggers, Lightning Web Components (LWC), and integrations ensure smooth workflows and secure role-based access. The solution is lightweight, scalable, and customizable—making it ideal for clinics, hospitals, and telehealth providers.

## Phase 1: Problem Understanding & Industry Analysis

### Challenges in Healthcare:

Manual appointment booking → missed/double bookings.

Doctors lack a unified view of patient history.

Patients forget appointments → high no-show rates.

Prescription mismanagement → confusion in dosage & follow-up.

### Solution with MediTrack:

A Salesforce Healthcare app to manage:

Patients (demographics, medical history).

Doctors (specializations, availability).

Appointments (with reminders & validation rules).

Prescriptions (linked to appointments).

### Stakeholders (Roles):

**Admin:** Sets up org, configures security, monitors reports.

**Doctor:** Manages availability, appointments, and prescriptions.

**Patient:** Receives reminders, attends appointments, receives prescriptions.


**Receptionist (optional):** Books appointments, assists patients.

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## Phase 2: Org Setup & Configuration

← → ↻ salesforce.com/form/developer-signup?d=pb ☆ 📄 🌐 ⋮


🔍 Learnings 🔑 Login Access Policies



### Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

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Steps

1 Select type

#### Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Last name

Job title

Work email

Company

Country/Region

India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

**Salesforce Developer Org Created** → [developer.salesforce.com/signup](https://developer.salesforce.com/signup)

Company Profile

- Setup → Company Information:

Company Name: MediTrack Healthcare Pvt. Ltd.

Business Hours: 9 AM – 9 PM (Mon–Sat).

Fiscal Year: Standard Gregorian.

Company Information

MediTrackSalesforceApp

The organization's profile is below.

User Licenses (102)

Permission Set Licenses (102)

Feature Licenses (11)

User-based Entitlements (102)

Organization Detail

Edit

Deactivate Org

Organization Name	MediTrackSalesforceApp	Phone	
Primary Contact	Mallipreddi Nageshwari	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	364 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 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	00DNS00000UJUM8
		Organization Edition	Developer Edition
		Instance	IND56
Created By	Mallipreddi Nageshwari, 29/07/2025, 6:07 pm	Modified By	Mallipreddi Nageshwari, 17/09/2025, 10:31 am

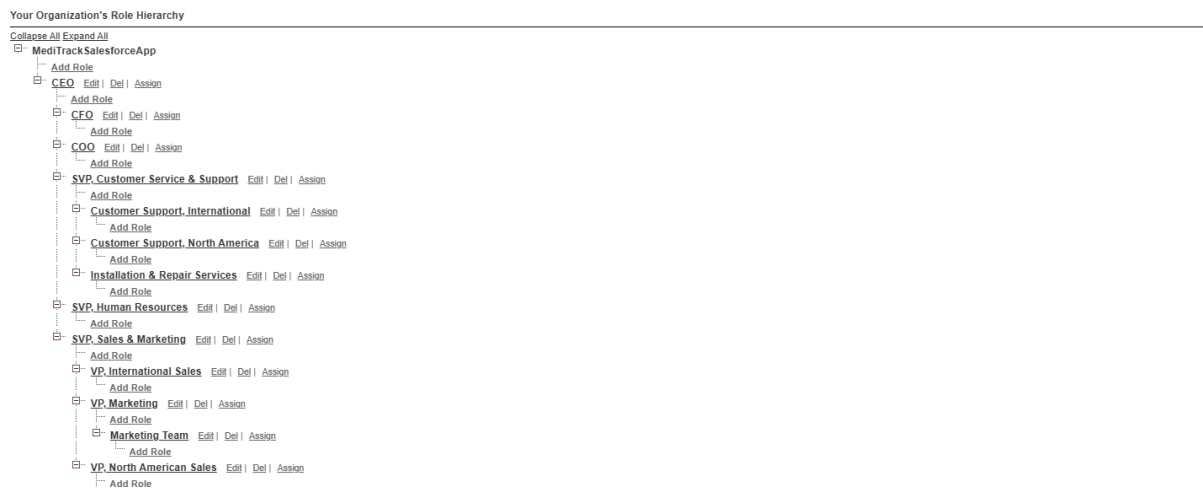
Edit

Deactivate Org

1. Users & Roles

Role Hierarchy:

Admin , Doctor , Receptionist



Receptionist → Limited access (read patients, book appointments)

Permission Sets:

“Prescription Manager” → allows doctors to create prescriptions

“Appointment Viewer” → allows patients/receptionists to view appointments

Permission Set Licenses								Permission Set Licenses Help ?
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations	Custom Permission Set License	
Analytics Cloud Builder	Disabled	0	0	0		<input type="checkbox"/>		<input type="checkbox"/>
Analytics Cloud Explorer	Disabled	0	0	0		<input type="checkbox"/>		<input type="checkbox"/>
Analytics View Only Embedded App	Active	3	0	3		<input type="checkbox"/>		<input type="checkbox"/>
B2B Buyer Manager Permission Set One Seat	Active	20	0	20		<input type="checkbox"/>		<input type="checkbox"/>
B2B Buyer Permission Set One Seat	Active	20	0	20		<input type="checkbox"/>		<input type="checkbox"/>
B2B Commerce	Active	50	0	50		<input type="checkbox"/>		<input type="checkbox"/>
Commerce Admin Permission Set License Seat	Active	1,020	0	1,020		<input type="checkbox"/>		<input type="checkbox"/>
Commerce Business User	Disabled	0	0	0		<input type="checkbox"/>		<input type="checkbox"/>
Commerce Merchant User Permission Set License Seat	Active	1,020	0	1,020		<input type="checkbox"/>		<input type="checkbox"/>
Commerce Partner Community Permission Set License Seats	Active	10,000	0	10,000		<input type="checkbox"/>		<input type="checkbox"/>
Show 10 more »   Go to list (53) »								

## 2. Security Settings

OWD:

Patients: Private

Doctors: Public Read Only

Appointments: Private

Prescriptions: Private

Sharing Rules:

Doctors can view their Appointments

Patients can see their own records (optional: via Experience Cloud).

The screenshot displays the 'Sharing Settings' page in Salesforce. It includes sections for 'Organization-Wide Defaults' and 'Profiles That Override Lead Sharing'. The 'Lead' object is set to 'Private' under 'Default Internal Access'. The 'Profiles That Override Lead Sharing' table lists profiles and their permissions for 'Lead' objects.

Profile	Organization-Wide Permissions	Lead Permissions
Analytics Cloud Integration User	✓	✓
Analytics Cloud Admin User	✓	✓
Profile Administrator	✓	✓

## Phase 3: Data Modeling & Relationships

Custom Objects Created:

### 1. Patient\_\_c

Fields: Name, Age, Gender, Contact Number.

2. **Doctor\_\_c**

Fields: Name, Specialization, Contact Number, Availability.

### 3. Appointment\_c

Fields: Patient (Lookup), Doctor (Lookup), Appointment Date (Date), Appointment Time (Time), Status (Picklist: Scheduled/Completed/Cancelled/No-Show), Notes.

#### 4. Prescription\_\_c

Fields: Appointment (Lookup), Patient (Lookup), Doctor (Lookup), Medicine Name, Dosage, Instructions, Date Prescribed.

**Relationships:**

Patient  $\leftrightarrow$  Appointment (Lookup).

Doctor  $\leftrightarrow$  Appointment (Lookup).

Appointment  $\leftrightarrow$  Prescription (Lookup).

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Page Layouts	Appointment Date	Appointment_Date__c	Date		<div></div>
Lightning Record Pages	Appointment Number	Name	Auto-Number	✓	<div></div>
Buttons, Links, and Actions	Appointment Time	Appointment_Time__c	Time		<div></div>
Compact Layouts	Created By	CreatedById	Lookup(User)		<div></div>
Field Sets	Doctor	Doctor__c	Lookup(Doctor)	✓	<div></div>
Object Limits	Doctor Name	Doctor_Name__c	Formula (Text)		<div></div>
Record Types	Last Modified By	LastModifiedById	Lookup(User)		<div></div>
Related Lookup Filters	Notes	Notes__c	Long Text Area(\$768)		<div></div>
Search Layouts	Owner	OwnerId	Lookup(Owner Group)	✓	<div></div>
Unit View Button Layout	Patient	Patient__c	Lookup(Patient)	✓	<div></div>
Restriction Rules	Patient Email	Patient_Email__c	Email		<div></div>
Scoping Rules	Patient Name	Patient_Name__c	Formula (Text)		<div></div>
Object Access	Reminder Sent	Reminder_Sent__c	Checkbox		<div></div>
Triggers					
Flow Triggers					
Validation Rules					

**Setup** | Home | Object Manager | Search Setup

### DOCTOR > OBJECT MANAGER

## Doctor

Details

Fields & Relationships  
7 items, sorted by First Last

Quick Find New Defined Fields Field Dependencies Set History Tracking

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Availability Time	Availability_Time_c	Date/Time		
Lightning Record Pages	Contact Number	Contact_Number_c	Phone		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(API Name)		
Component Layouts	Doctor Name	Name	Text(30)		✓
Field Sets	Last Modified By	LastModifiedById	Lookup(API Name)		
Object Limits	Owner	OwnerId	Lookup(API Name Group)		✓
Record Types	Specialization	Specialization__c	Picklist		

Related Lookup Filters

<b>Patient</b>			
Details			
Fields & Relationships			
<div> <span>Fields Sorted by Field Label</span> <input type="button" value="Clear"/> <input type="button" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/> </div>			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
			CONTROLLING FIELD
			INDEXED
Page Layouts	Age	Age_c	Number(0)
Lightning Record Pages	Contact Number	Contact_Number__c	Phone
Buttons, Links, and Actions	Created By	CreatedById	LookupUser
Compact Layouts	Gender	Gender_c	Picklist
Field Sets	Last Modified By	LastModifiedDate	LookupUser
Object Limits	Owner	OwnerId	LookupUser Group
Record Types	Patient Name	Name	Text(255)
Related Lookup Filters			
Restriction Rules			

Prescription					
Fields & Relationships					
11 Items, Sorted by Field Label					
<div>Quick Find</div> <div>New Deleted Fields Field Dependencies Set History Tracking</div>					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Appointment	Appointment_c	Lookup(Appointment)		✓	
Created By	CreatedById	Lookup(User)			
Date Prescribed	Date_Prescribed_c	Date			
Doctor	Doctor_c	Lookup(Doctor)		✓	
Dosage	Dosage_c	Text(50)			
Instructions	Instructions_c	Long Text Area(20768)			
Last Modified By	LastModifiedById	Lookup(User)			
Medicine Name	Medicine_Name_c	Text(100)			
Order	OrderId	Lookup(Order Group)		✓	
Patient	Patient_c	Lookup(Patient)		✓	
Prescription Name	Name	Text(50)		✓	

## Page Layouts & Compact Layouts:

Appointment Compact Layout → Patient, Doctor, Date, Time, Status.

Prescription Compact Layout → Medicine, Dosage, Instructions, Date Prescribed.

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Appointment Compact Layout

Appointment Compact Layout

[Back to Appointment](#)

Compact Layout Detail

Edit

Clone

Delete

Compact Layout Assignment

Label

Appointment Compact Layout

Object Name

Appointment

API Name

Appointment\_Compact\_Layout

Included Fields

Appointment Date  
Appointment Time  
Patient  
Doctor  
Status

Created By

Mallikarjun Narasimhan 18/09/2025, 5:47 pm

Modified By

Mallikarjun Narasimhan 18/09/2025, 5:47 pm

Edit

Clone

Delete

Compact Layout Assignment

SETUP » OBJECT MANAGER

Prescription

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Fields Sets

Object's Layouts

Prescription Compact Layout

Prescription Compact Layout

Back to Prescription

Compact Layout Detail

Label

Prescription Compact Layout

API Name

Prescription\_Compact\_Layout

Included Fields

Medicine Name  
Dosage  
Date Prescribed  
Patient  
Doctor

Created By

Mallikarjun Narasimhan 18/09/2025, 6:15 pm

Object Name

Prescription

Modified By

Mallikarjun Narasimhan 18/09/2025, 6:20 pm

Edit

Close

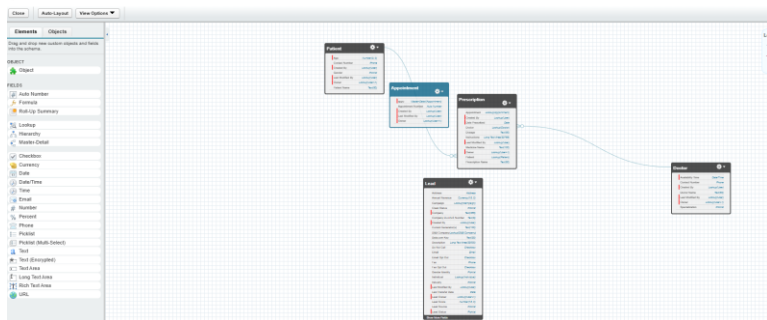
Delete

Compact Layout Assignment

## Schema Builder Visualization:

Patient → Appointment → Prescription , Doctor → Appointment → Prescription

Schema Builder



## Phase 4: Process Automation

### 1. Validation Rules

- Appointment must have both Patient and Doctor.
- Prescription requires linked Appointment.

## Appointment Validation Rule

[Back to Appointment](#)

[Help for this Page](#)

### Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name Doctor\_and\_Patient\_Required

Active



Error Condition Formula ISBLANK(Patient\_\_c) || ISBLANK(Doctor\_\_c)

Error Message Patient and Doctor must be selected before saving an appointment

Error Location Top of Page

Description Ensure both Patient and Doctor are selected before saving.

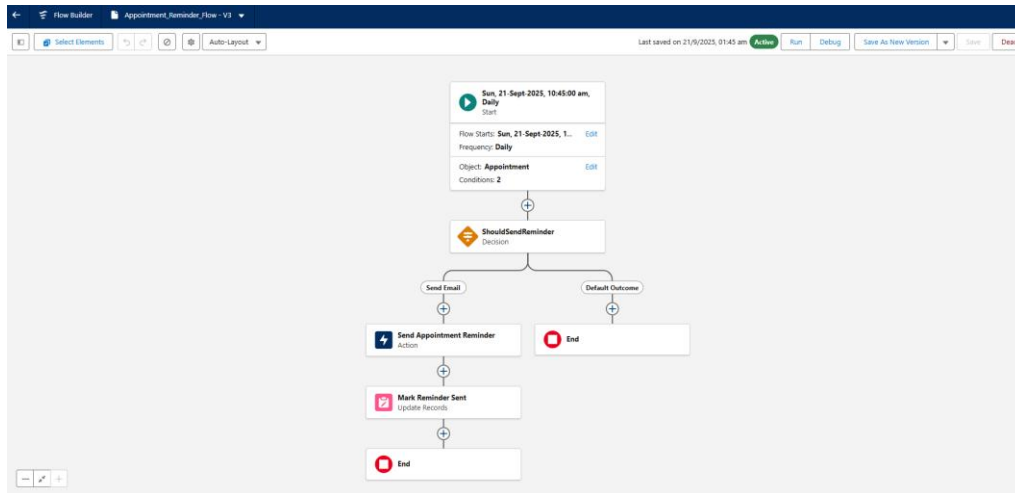
Created By Mallicetti, Nageshwar 18/09/2025, 6:34 pm

Modified By Mallicetti, Nageshwar 18/09/2025, 6:34 pm

[Edit](#) [Clone](#)

## 2. Flows

- **Reminder Flow:** Email reminder 1 day before appointment.
- **Status Update Flow:** When Prescription created → Appointment Status → Completed.



## 3. Workflow Rules

- Auto-email confirmation on Appointment booking.

## 4. Approval Process (Optional)

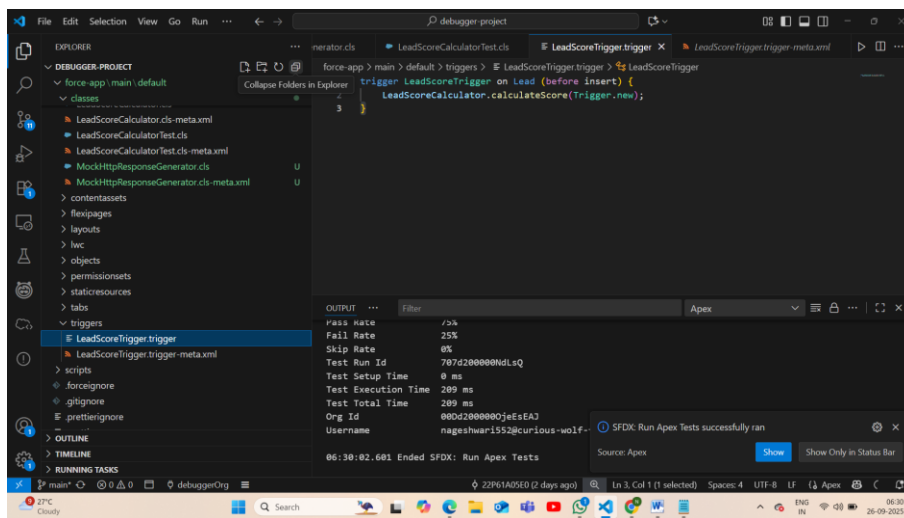
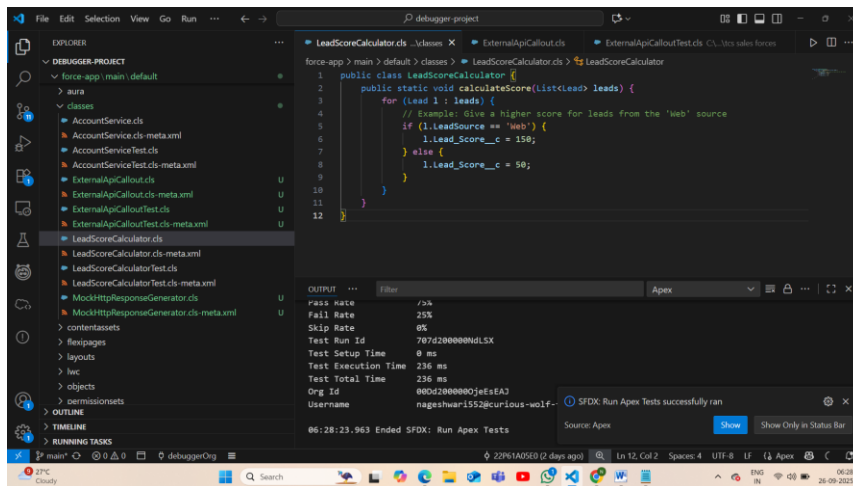
- If Appointment requires a Specialist, route approval to Admin.

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## Phase 5: Apex Programming

- **AppointmentTrigger.trigger** → Prevents appointments without Patient/Doctor.
- **PrescriptionTrigger.trigger** → Updates Appointment Status to Completed when Prescription is added.
- **LeadscoresCalculator.cls** → Batch Apex to send daily reminders.
- **EscalationJob.cls** → Scheduled Apex for overdue appointments.
- **Test Classes** → Ensure 75%+ code coverage.

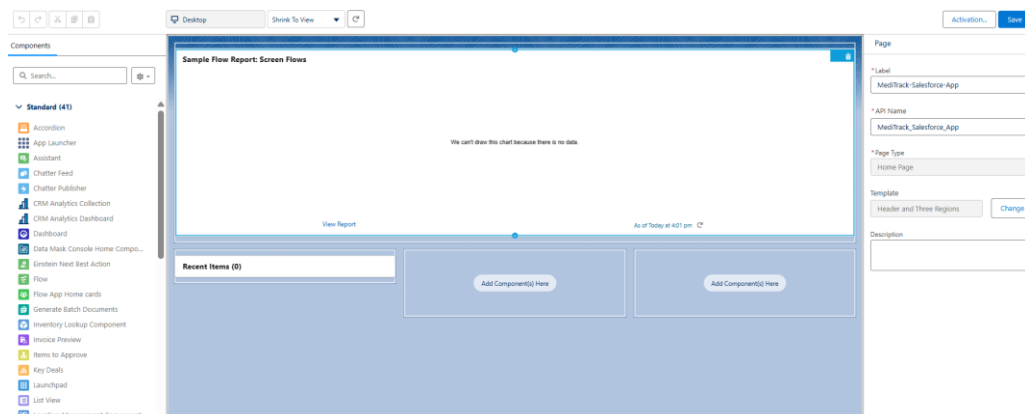




## Phase 6: User Interface Development

### Lightning App:

**MediTrack** with tabs: Patients, Doctors, Appointments, Prescriptions.



**Custom Record Pages:** Appointment → Highlights Panel with Patient, Doctor, Date, Time.

## LWC Components:

Doctor Dashboard → Shows doctor's daily appointments.

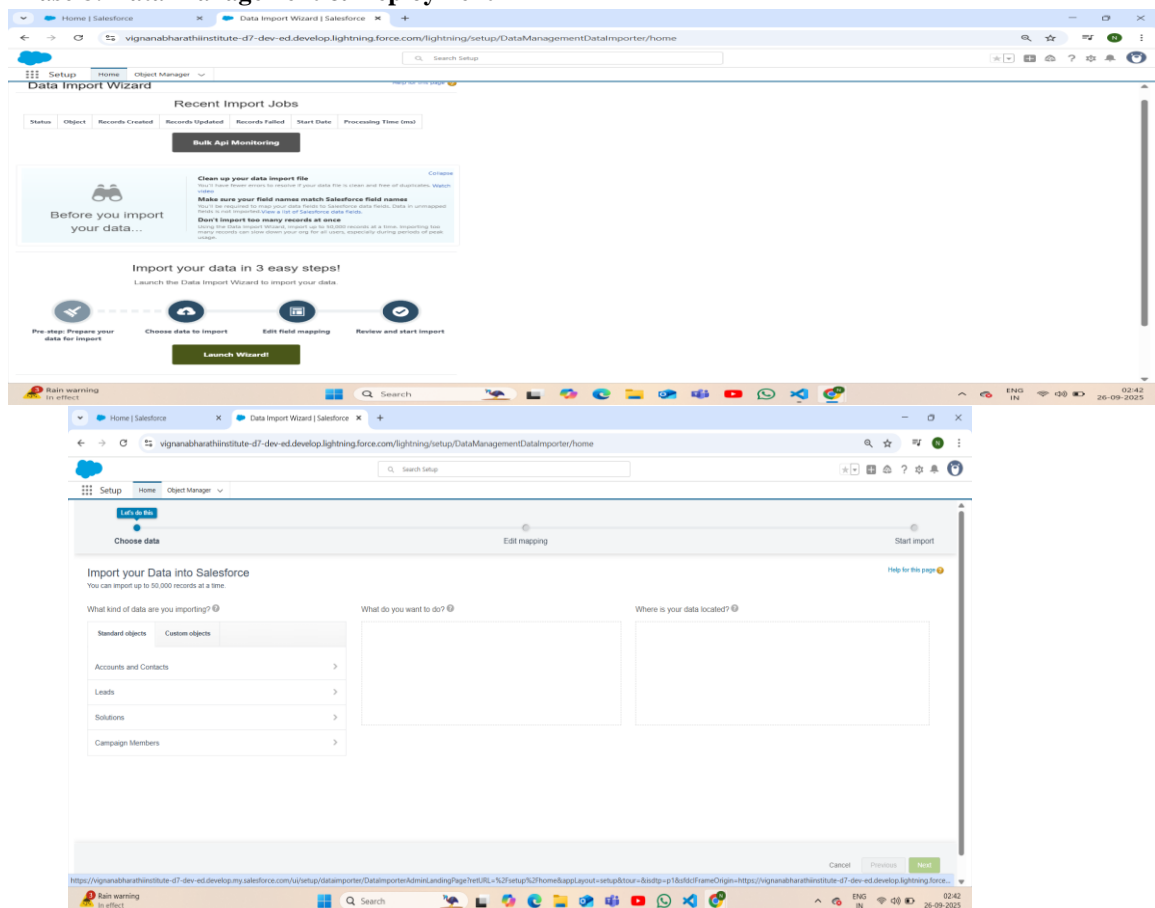
Patient History → Shows all past appointments + prescriptions.

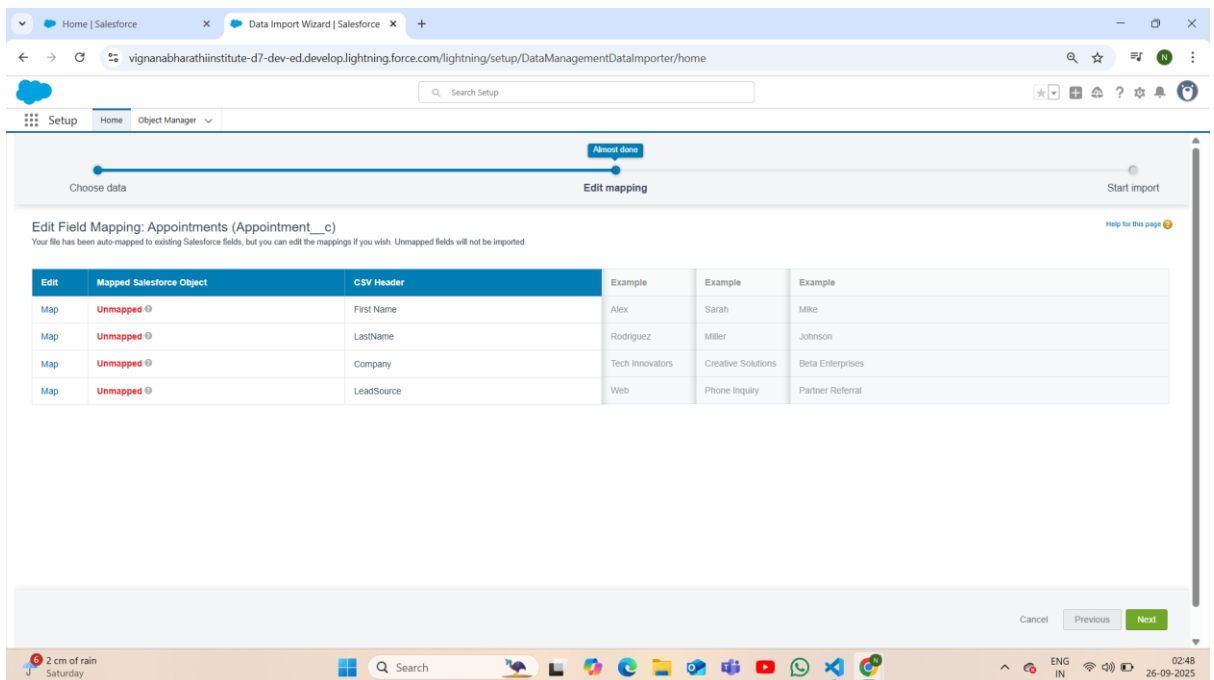
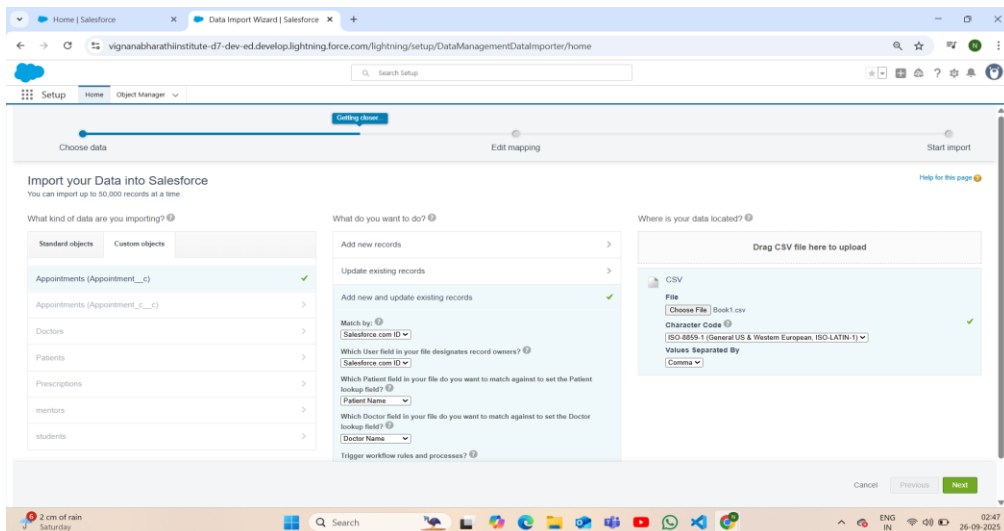
Appointment Reminder Component → Shows upcoming visits.

## Phase 7: Integration & External Access

- **Named Credentials:** For integration with external pharmacy system.
- **Platform Events:** "Appointment\_Notification\_\_e" → notify external apps.
- **REST Callouts:** Integration with SMS API for reminders.

## 1. Phase 8: Data Management & Deployment





- **Data Loader** → Bulk load Prescriptions

**Duplicate Rules** → Prevent duplicate Patients (same name + contact).

**SETUP Duplicate Rules**

Lead Duplicate Rule: **Standard Lead Duplicate Rule**

**Duplicate Rule Detail**

Rule Name	Standard Lead Duplicate Rule			Order	1 of 1 [Reorder]
Description	Identify leads that duplicate other leads and contacts				
Object	Lead				
Record-Level Security	Enforce sharing rules				
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input checked="" type="checkbox"/> Report	
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert	<input checked="" type="checkbox"/> Report	
Alert Text	Use one of these records?				
Active	<input checked="" type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Standard Contact Matching Rule	<input checked="" type="checkbox"/> Mapped	Matching Criteria: Matching rule for contact records. <a href="#">More info</a>		
Matching Rule	<input checked="" type="checkbox"/> Standard Lead Matching Rule	<input checked="" type="checkbox"/> Mapped	Matching Criteria: Matching rule for lead records. <a href="#">More info</a>		
Conditions					
Created By	Malloreddi Nageshwari, 29/07/2025, 6:07 pm			Modified By	Malloreddi Nageshwari, 29/07/2025, 6:07 pm

**Data Backup** → Weekly scheduled export.

**SETUP Data Export**

**Schedule Data Export**

**Schedule Data Export**

Export File Encoding: **ISO-8859-1 (General US & Western European, ISO-LATIN-1)**

Include images, documents, and attachments: ☐

Include Salesforce Files and Salesforce CRM Content document versions: ☐

Replace carriage returns with spaces: ☒

**Schedule Data Export**

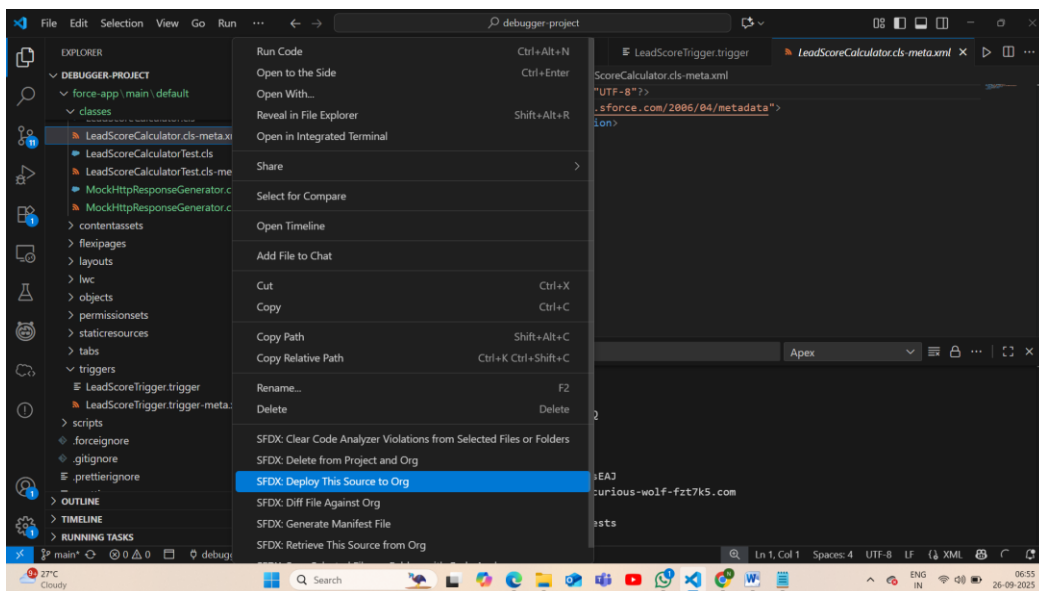
Frequency: ☒ On day **1** of every month ☐ On the **1st** Sunday of every month

Start: **26/09/2025** End: **26/10/2025**

Preferred Start Time: **--None--**

Exact start time will depend on job queue activity.

- **Change Sets** → Deployment between orgs.



- **VS Code + SFDX** → Git-based deployment pipeline.

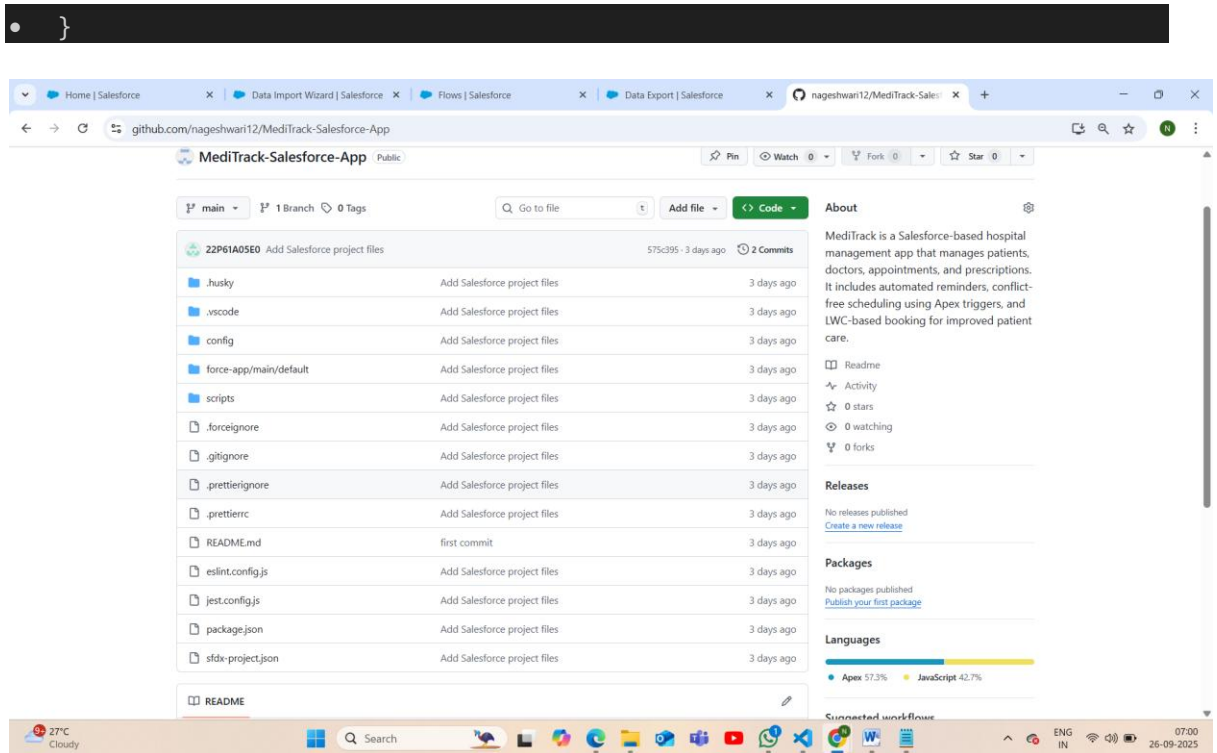
```

• @isTest
• global class MockHttpResponseGenerator implements HttpCalloutMock {
•     global HttpResponse respond(HttpRequest request) {
•         HttpResponse response = new HttpResponse();
•         response.setHeader('Content-Type', 'application/json');

```

```

•         response.setBody('{ "status": "success", "data": "test data" }');
•         response.setStatusCode(200);
•         return response;
•     }
• }
• @isTest
• private class LeadScoreCalculatorTest {
•     @isTest static void testCalculateScore() {
•         // Test data setup
•         List<Lead> testLeads = new List<Lead>();
•         testLeads.add(new Lead(LastName = 'TestLead1', Company = 'TestCo',
LeadSource = 'Web', Lead_Score__c = 0));
•         testLeads.add(new Lead(LastName = 'TestLead2', Company = 'TestCo',
LeadSource = 'Phone', Lead_Score__c = 0));
•         insert testLeads;
•
•         // Call the method to test
•         LeadScoreCalculator.calculateScore(testLeads);
•
•         // Verify the results
•         Lead lead1 = [SELECT Lead_Score__c FROM Lead WHERE LastName =
'TestLead1' LIMIT 1];
•         System.assertEquals(150, lead1.Lead_Score__c);
•
•         Lead lead2 = [SELECT Lead_Score__c FROM Lead WHERE LastName =
'TestLead2' LIMIT 1];
•         System.assertEquals(50, lead2.Lead_Score__c);
•     }
• }
• @isTest
• private class ExternalApiCalloutTest {
•     @isTest
•     static void testApiCallout() {
•         // This is a dummy response. We don't want to make an actual
callout
during testing.
•         Test.setMock(HttpCalloutMock.class, new
MockHttpResponseGenerator());
•
•         // Call the method to be tested
•         ExternalApiCallout.makeApiCallout();
•
•         // The assertion will check that the method runs without exceptions
•         // You can add more specific assertions here if you were testing
the response data
•         System.assert(true, 'The callout method executed without error.');
```



## Phase 9: Reporting & Dashboards

- Reports:
  - Appointments by Status.
  - Prescriptions by Doctor.
  - Patient Visit History.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases										
Report: Leads										
Lead Scores by Source										
Total Records 23										
	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner	
1	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net	Web	321 Westcott Building	Hot	Mallipeddi Nageshwari	
2	Phyllis	Cotton	CFO	Abbott Insurance	pcotton@abbottins.net	Web	-	-	Mallipeddi Nageshwari	
3	Jeff	Glimpse	SVP, Procurement	Jackson Controls	jeffp@jackson.com	Phone Inquiry	-	-	Mallipeddi Nageshwari	
4	Mike	Braund	VP, Technology	Metropolitan Health Services	lkab@metro.com	Purchased List	-	-	Mallipeddi Nageshwari	
5	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@is.com	Partner Referral	-	-	Mallipeddi Nageshwari	
6	Brenda	McClure	CFO	Cadinal Inc.	brenda@cardinal.net	Web	-	-	Mallipeddi Nageshwari	
7	Violet	Macleod	VP, Finance	Emerson Transport	violetm@emersontransport.com	Phone Inquiry	-	-	Mallipeddi Nageshwari	
8	Kathy	Snyder	Regional General Manager	TNR Corp.	ksnyder@tnr.net	Purchased List	-	-	Mallipeddi Nageshwari	
9	Tom	James	SVP, Production	Delphi Chemicals	tom.james@delphi.chemicals.com	Web	-	-	Mallipeddi Nageshwari	
10	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shellyb@westentelecom.com	Partner Referral	-	-	Mallipeddi Nageshwari	
11	Pamela	Owenby	SVP, Technology	Hendrickson Trading	pam_owenby@hendricksontrading.com	Partner Referral	-	-	Mallipeddi Nageshwari	
12	Norm	May	VP, Facilities	Greenwich Media	norm_may@greenwich.net	Web	-	-	Mallipeddi Nageshwari	
13	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	-	Mallipeddi Nageshwari	
14	Andy	Young	SVP, Operations	Dickenson plc	a_young@dickenson.com	Purchased List	-	-	Mallipeddi Nageshwari	
15	Kristen	Akin	Director, Warehouse Mgmt	Aethna Home Products	kakin@athenahome.com	Partner Referral	-	-	Mallipeddi Nageshwari	
16	David	Monsaco	CFO	Blues Entertainment Corp.	david@blues.com	Purchased List	-	-	Mallipeddi Nageshwari	
17	Carolyn	Crenshaw	VP, Technology	Ace Iron and Steel Inc.	carolync@aceis.com	Phone Inquiry	-	-	Mallipeddi Nageshwari	
18	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	jrogers@btca.com	Web	525 S. Lexington Ave	Warm	Mallipeddi Nageshwari	
19	Bill	Dadio Jr	CFO	Zenith Industrial Partners	bill_dadio@zenith.com	Web	-	-	Mallipeddi Nageshwari	
20	Betty	Bair	VP, Administration	American Banking Corp.	bbair@abankingco.com	Purchased List	-	-	Mallipeddi Nageshwari	

- **Dashboards:**
  - Pie Chart → Appointment Status Distribution.
  - Bar Chart → Prescriptions by Doctor.
  - Metric → Upcoming Appointments Today.

**Dynamic Dashboards:** Role-based views (Admin sees all, Doctor sees own patients).

The screenshot shows the Salesforce Dashboards page. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, students, mentors, and More. The main content area shows a list of dashboards under the 'All Folders' filter. The dashboard 'Enablement Dashboard Spring '24' is highlighted. It is described as 'View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.' It was created by 'Automated Process' on 29/7/2025 at 6:07 pm.

DASHBOARDS	Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	29/7/2025, 6:07 pm	
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						

## 2. Security Review: OWD, Sharing, Field-Level Security (FLS)

Session settings

The screenshot shows the Salesforce Session Settings page. The top section is titled 'Session Settings' and includes a 'SETUP' button. Below this, there is a section for 'Control whether browser features can be accessed from the pages that Salesforce serves for this org.' with a checkbox for 'Include Permissions-Policy HTTP header'. The next section is 'Select when to allow access to these browser features.' with dropdowns for 'Camera' and 'Microphone', both set to 'Trusted URLs Only'. The 'Session Security Levels' section shows two columns: 'Standard' and 'High Assurance'. The 'Standard' column lists 'Username Password', 'Delegated Authentication', 'Activation', and 'Passwordless Login'. The 'High Assurance' column lists 'Multi-Factor Authentication' and 'Lightning Login'. There are 'Add' and 'Remove' buttons between the columns. The 'Logout Page Settings' section has a 'Logout URL' field and a checkbox for 'Store the redirect logout URL in your local browser'. The 'New User Welcome Email Settings' section has a 'Link expires in' dropdown set to '7 days' and a 'Welcome Email Template' field. At the bottom are 'Save' and 'Cancel' buttons.

Audit Trail.

SETUP

View Setup Audit Trail

View Setup Audit Trail

Help for this Page

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
26/09/2025, 4:24:02 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Requested an export	Data Export	
26/09/2025, 3:45:07 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created master-detail field: appo (Appointment) on Appointments	Custom Objects	
25/09/2025, 12:25:58 am IST	<a href="#">salesforce.com, inc.</a>		Max number of streaming topics		
24/09/2025, 9:43:15 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Set new password for user Mallipeddi Nageshwari	Manage Users	
24/09/2025, 9:41:32 pm IST	<a href="#">Automated Process</a>		For user nageshwari2005@apenforce.com, the User Verified Email status changed to verified	Manage Users	
24/09/2025, 9:36:46 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Reset password for user Mallipeddi Nageshwari	Manage Users	
24/09/2025, 9:29:54 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Set new password for user Mallipeddi Nageshwari	Manage Users	
23/09/2025, 5:58:00 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Remote Proxy insert Example_API_Callout: https://api.example.com	Security Controls	
23/09/2025, 5:47:17 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Reset standard button override: Tab	Standard Buttons and Links	
23/09/2025, 5:46:06 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Added standard button override: Tab (Lightning Page null)	Standard Buttons and Links	
23/09/2025, 5:45:55 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created Lightning Page: MediTrack-Salesforce-App	Lightning Pages	
23/09/2025, 5:10:37 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Changed Lightning Page: Home Page Default	Lightning Pages	
23/09/2025, 5:10:19 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created Lightning Page: Home Page Default	Lightning Pages	
22/09/2025, 12:38:20 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Deactivated flow version #1 "Lead_Scoring_and_Assignment" for flow with Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:38:20 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Activated flow version #2 "Lead_Scoring_and_Assignment" for flow with Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:38:16 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created flow version #2 "Lead_Scoring_and_Assignment" for flow with Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:21:01 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Activated flow with Name "Lead_Scoring_and_Assignment" and Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:20:50 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Deleted flow version #-1 "Lead_Scoring_and_Assignment" for flow with Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:20:49 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created flow version #1 "Lead_Scoring_and_Assignment" for flow with Unique Name "Lead_Scoring_and_Assignment"	Flows	
22/09/2025, 12:14:58 pm IST	<a href="#">nageshwari2005@apenforce.com</a>		Created flow with Name "Lead_Scoring_and_Assignment" and Unique Name "Lead_Scoring_and_Assignment"	Flows	

Download setup audit trail for last six months (Excel .csv file)

Phase 10: Final Presentation