

Phase 2: Org Setup & Configuration

Goal: To prepare the Salesforce environment through setup and configuration to support the Hospital Appointment & Health Tracker System.

1. Platform & Editions

Edition Used: Salesforce Developer Org (free) – best for prototyping and testing before live deployment.

Reason: Provides a full set of tools to customize, experiment, and validate workflows without affecting real patient data.

2. Company Profile Setup

- **System Name:** Healthcare Management System
- **Default Locale:** English (India)
- **Currency:** Indian Rupee (INR) – primary; USD enabled for international patients.
- **Time Zone:** Asia/Kolkata (IST)
- **Business Address:** Hospital HQ (configurable).

This ensures appointments, billing, and insurance processes reflect local as well as international standards.

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Search Setup

Setup Home Object Manager

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Users

Profiles

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SETUP Profiles

Profile Detail

Name

Health care

User License

Analytics Cloud Integration User

Description

Created By

Roshni gaiti, 26/09/2025, 2:09 pm

Modified By

Roshni gaiti, 26/09/2025, 2:09 pm

Custom Profile

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Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Individual	Individual Layout [View Assignment]
	Email Application	Not Assigned [View Assignment]	Invoice	Invoice Layout [View Assignment]
	Home Page Layout	Home Page Default [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
	Access	Access Layout [View Assignment]	Lead	Lead Layout [View Assignment]
	Account	Account Layout [View Assignment]	Legal Entity	Legal Entity Layout [View Assignment]
	Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location	Location Layout [View Assignment]
	Asset	Asset Layout [View Assignment]	Macro	Macro Layout [View Assignment]
	Asset Action	Asset Action Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
	Asset Action Source	Asset Action Source Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
	Asset Relationship	Asset Relationship Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

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3. Business Hours & Holidays

- **Hours:** 9:00 AM – 8:00 PM IST (Monday–Saturday).
- **Holidays :** Republic Day (26 Jan), Independence Day (15 Aug), Gandhi Jayanti (2 Oct), Diwali, and local holidays.
- **Purpose:** Ensures appointment scheduling, escalations, and automated reminders respect working days and timings.

4. Fiscal Year Settings

- **Type:** Standard Fiscal Year (Jan–Dec).
- **Reason:** Aligns with hospital billing and insurance cycles.
- **Future:** Custom fiscal year can be enabled if required by hospital policy.

5. User Setup & Licenses

User Types Configured:

1. **Patient User** (Community/Experience Cloud License) → Register, book appointments, and view health records.
2. **Doctor User** (Salesforce Platform License) → Manage appointments, update health records, and prescriptions.
3. **Reception Staff User** (Salesforce Platform License) → Manage bookings, rescheduling, and patient inquiries.
4. **Hospital Admin User** (Salesforce License) → Manage hospital dashboards, billing, and reports.
5. **System Admin User** (Salesforce License) → Manage overall Salesforce Org.

6. Profiles

Patient Profile: Limited access (book appointments, view/update personal info, see their own health records).

- **Doctor Profile:** Can view their patients, update records, and manage appointments.
 - **Reception Staff Profile:** Manage bookings, cancellations, and patient records.
 - **Hospital Admin Profile:** Full reporting and monitoring rights.
 - **System Administrator:** Full org access.
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7. Roles

Hierarchy Setup:

- System Admin (Top)
- Hospital Admins
- Doctors
- Reception Staff ▫ Patients

This ensures doctors see their own patients, patients see only their records, and admins see everything.

8. Permission Sets

Additional access via permission sets:

- **Reports_Access:** For Admins to create/modify reports.
 - **Analytics_Access:** For Doctors to view patient analytics dashboards.
 - **Appointment_Access:** For Reception Staff to manage appointment records.
 - **Health_Record_Update:** For Doctors to edit patient vitals & prescriptions.
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9. Org-Wide Defaults (OWD)

- **Appointment Data:** Controlled by Parent (linked to Patient & Doctor).
 - **Patient Records:** Private – visible only to patient, their doctor, and admins.
 - **Doctor Records:** Public Read Only – visible to admins, restricted to doctors themselves.
 - **Billing Data:** Private – visible to patient and admins only.
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10. Sharing Rules

- **Patient Records:** Private (shared only with doctor & admin).
 - **Doctor Records:** Public read-only (admins can view, but editing limited).
 - **Appointments:** Controlled by patient–doctor relationship.
 - **Billing & Insurance Data:** Private (patient + admin only).
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11. Login Access Policies

- Restrict patient portal logins to 6 AM – 11 PM IST.
- Enforce IP restrictions for hospital staff and admins.

- Enable Two-Factor Authentication (2FA) for system admins and doctors.
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12. Dev Org Setup

- Created free Salesforce Developer Org as baseline.
 - Enabled **Experience Cloud** for patient portal.
 - Installed **VS Code** + **SFDX CLI** for implementation. ▫ Setup GitHub repository for version control.
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13. Sandbox Usage

- Developer Sandbox for testing.
 - For production scale: Partial Sandbox for demo data, Full Sandbox for UAT.
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14. Deployment Basics

- **Developer Org:** Base setup created.
 - **Experience Cloud:** Enabled for patient portal.
 - **Sandbox:** Developer Sandbox for testing, Partial/Full Sandboxes for UAT and demo data.
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Phase 2 Deliverable

By the end of Phase 2, we have:

- Configured company setup, users, profiles, roles, and OWDs.
- Enabled Experience Cloud portal for patients.
- Setup security, login policies, and sharing models.
- Prepared sandbox & deployment plan for upcoming phases.



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