

Phase 2: Org Setup & Configuration – Smart BioTech Lab

1. Preliminaries

1. Sign up / log into Salesforce Developer Edition (<https://developer.salesforce.com>).

2. Company Profile (Company Information)

1. Setup → Quick Find: Company Information → Open.

Edit → set Organization Name = Smart BioTech Lab

Set Default Time Zone = Asia/Kolkata, Default Currency = INR. → Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'compan' and a list of settings categories: Company Settings (Business Hours, Calendar Settings, Public Calendars and Resources), Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and shows the organization's profile for 'Smart BioTech Lab'. The profile includes an 'Edit' button and a table of organization details. The table is divided into two columns. The left column contains fields like Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The right column contains fields like Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The bottom of the page shows 'Created By' and 'Modified By' information.

Organization Detail	
Organization Name	Smart BioTech Lab
Primary Contact	OrgFarm EPIC
Division	
Address	Amravati India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	(957) 907-0732
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (United States) - USD
Used Data Space	392 KB (6%) View
Used File Space	948 KB (5%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000007ZGCM
Organization Edition	Developer Edition
Instance	CAN96

Created By: OrgFarm EPIC, 7/17/2025, 6:06 AM
Modified By: Atharv Raut, 9/23/2025, 5:02 AM

Figure 1: Company info with org name, time zone, currency.

3. Business Hours & Holidays

1. Setup → Quick Find: Business Hours → New Business Hours.

o Label: Lab Hours → Set Mon–Sat 07:00 AM–10:00 PM

Sun – 9:00 AM–6:00 PM

→ Save.

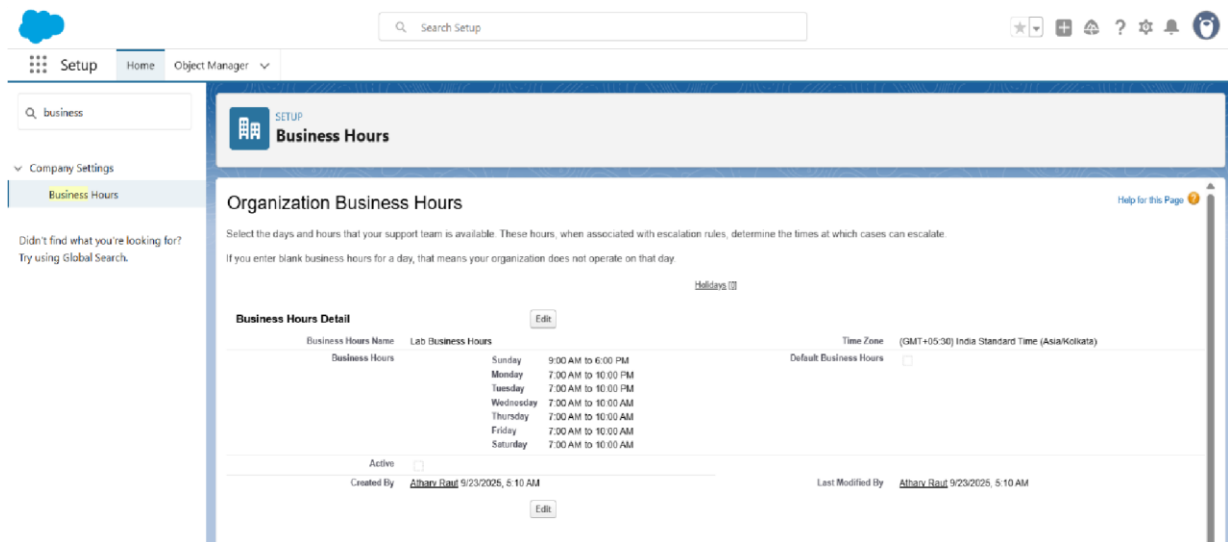


Figure 2: Business Hours

Setup → Quick Find: Holidays → New Holiday.

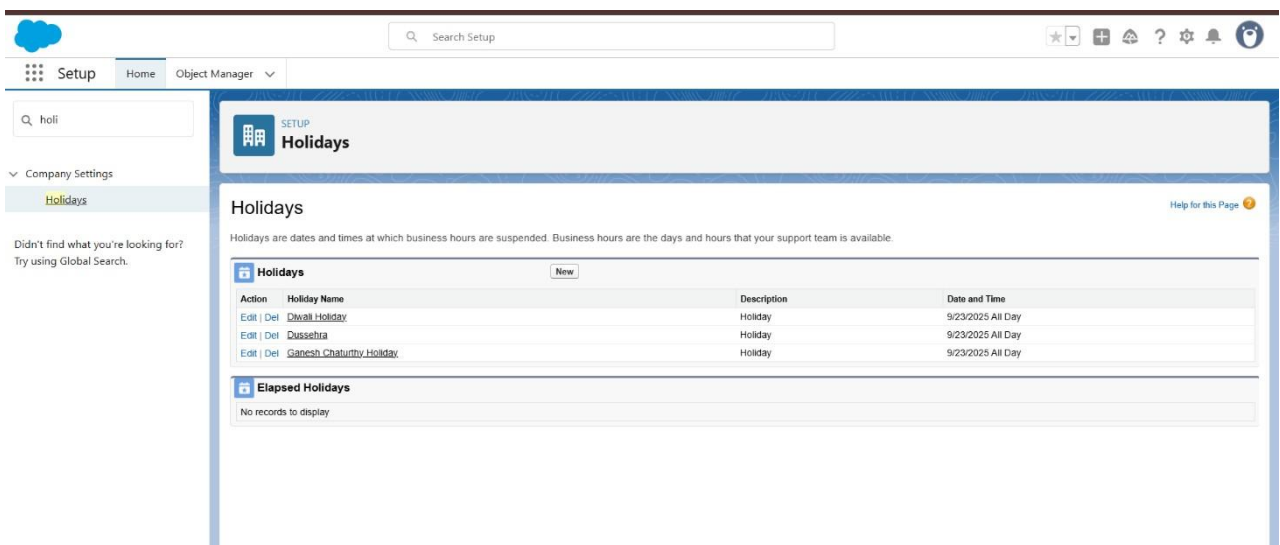


Figure 3: Holidays

4. Fiscal Year

1. Setup → Quick Find: Fiscal Year → Verified default fiscal year (Standard). set April-March.

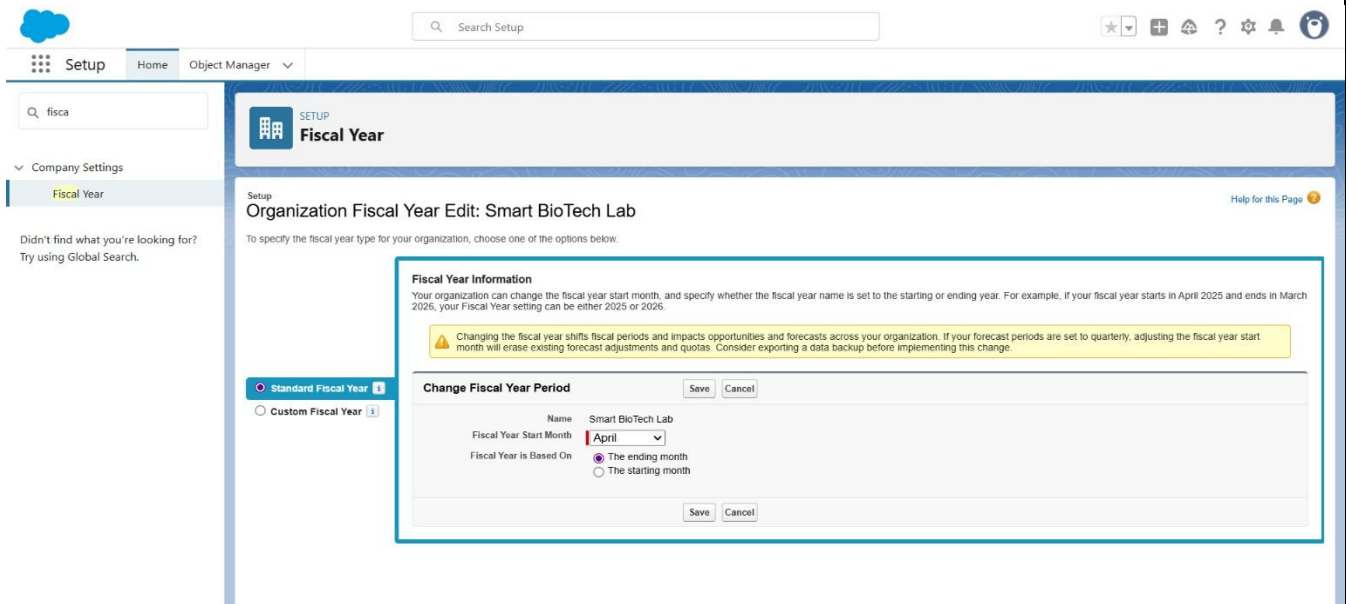


Figure 4: Fiscal Year

5. Create Sample Users & Assign Licenses

1. Setup → Quick Find:

Users → Users → New User. Create three users:

Admin — admin.sb@smartbiotech.test — Profile: System Administrator

Lab Manager — labmanager@biotech.test — Profile: LabManager_Profile

Doctor Profile — dr.atharv@smartbiotech.test — Profile: Standard Platform User

Hospital Partner — partner1@hospital.test — Profile: Standard Platform User

Fill First/Last name, Username (unique), Email, License = Salesforce or Platform if available. Save

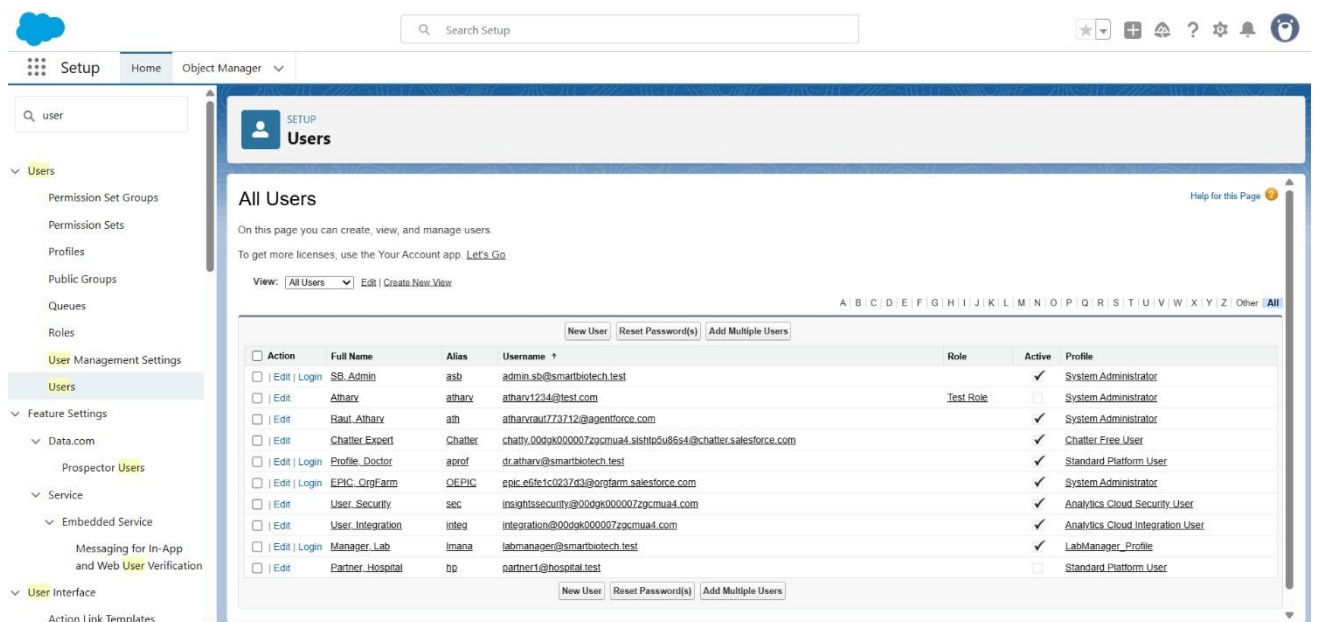


Figure 6: Sample Users

6. Role Hierarchy

1. Setup → Quick Find: Roles → Click Set Up Roles → Expand and Add Role:

- Admin
 - Lab Manager
- Doctor
 - Lab Technicians
- Hospital Partner

2. Save.

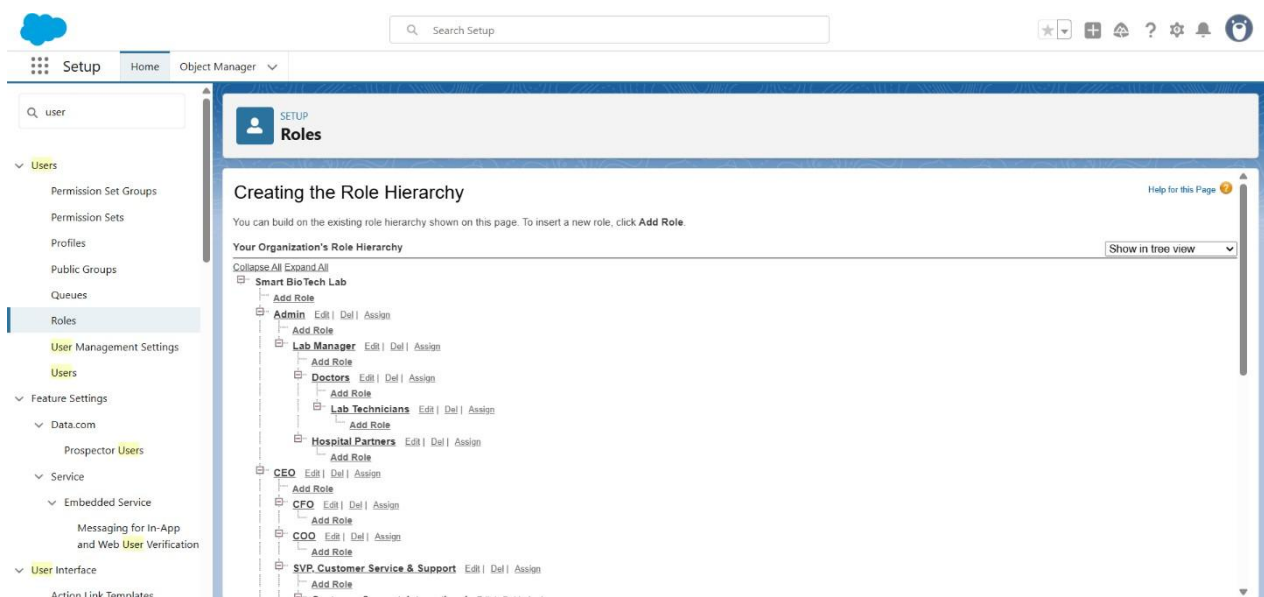


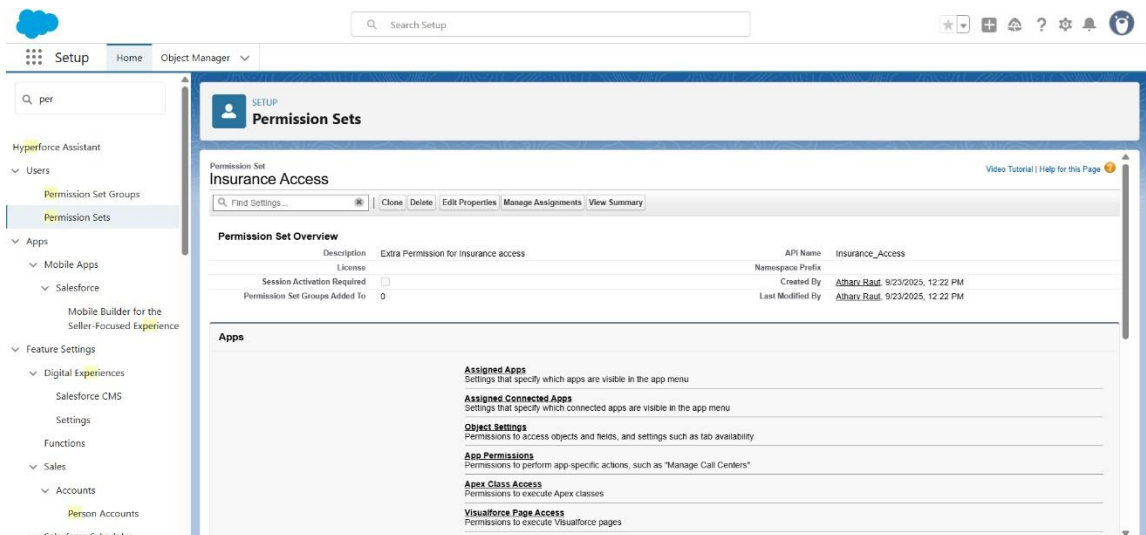
Figure 7: Role hierarchy tree (Lab Manager > Doctors > Lab Technicians).

7. Permission Sets

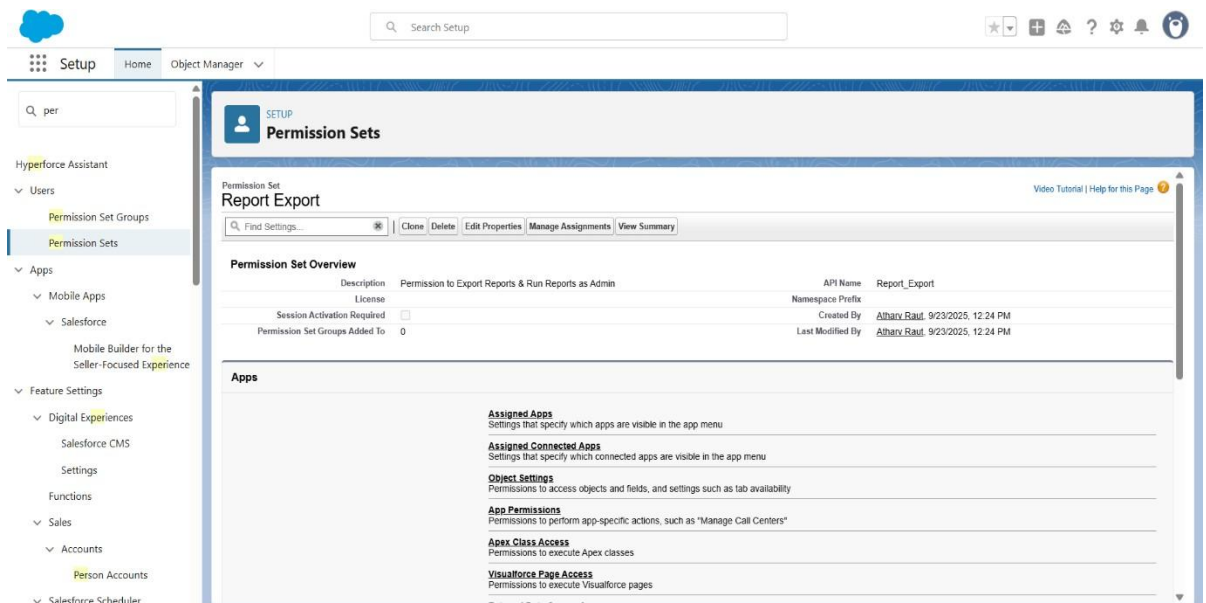
Setup → Permission Sets → New → Insurance_Access — grant object and field-level permissions not in profile (e.g., export data).

Again → Permission Sets → New → Report_Export — grant object and field-level permissions not in profile (e.g., export data).

- Insurance_Access Permission Set



- Report_Export Permission Set



8. Profiles (clone & edit)

Setup → Profiles → open Standard User → Clone → name LabManager_Profile ; repeat for Doctor_Profile, Hospital Partner.

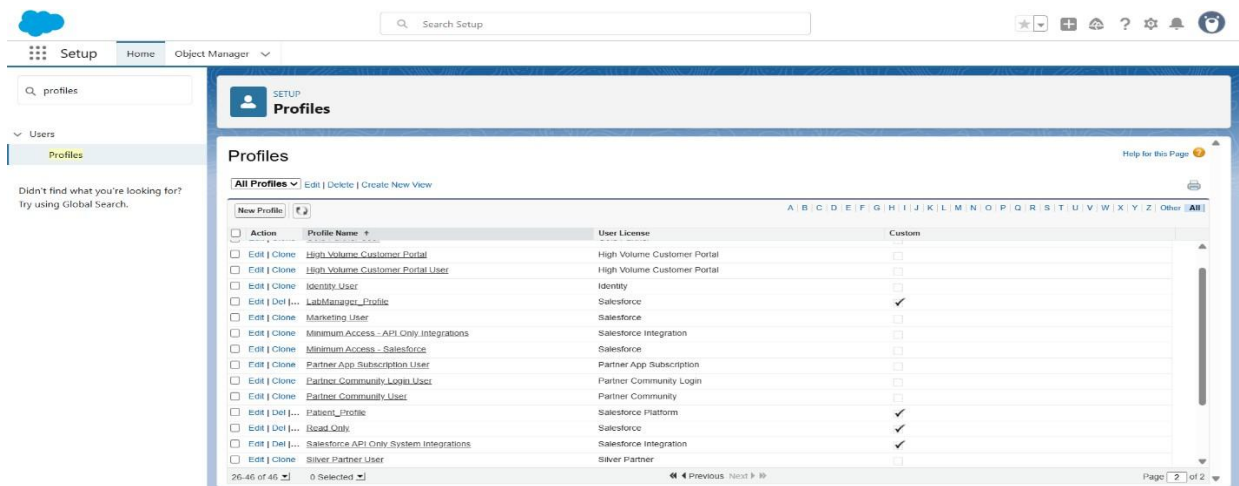


Figure 8: Coordinator Profile object permissions

8. Organization-Wide Defaults (OWD)

5. Setup → Quick Find: Sharing Settings → Edit.
6. Set defaults:
 - Genetic Test → Private
 - Hospital Partner → Public Read Only
 - Patient → Private
 - Report → Private
 - Sample → Private
 - Contact → Private
7. Save.

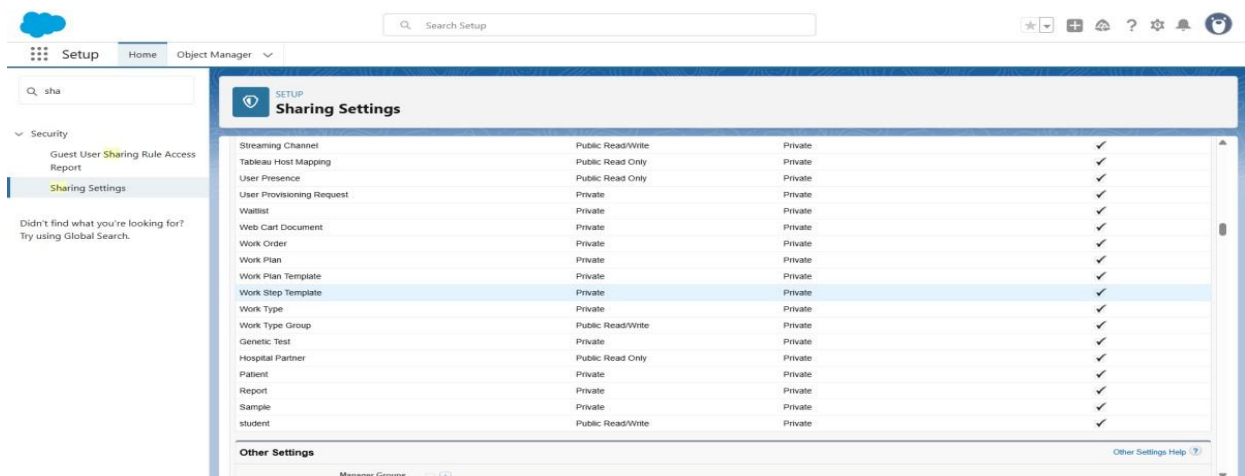


Figure 9: OWD table

9. Create Lightning App (Smart BioTech Lab)

8. Setup → Quick Find: App Manager → New Lightning App.

- o App Name: Smart BioTech Lab → Branding icon added → Next.
- o Add Nav Items: Home, Dashboards, Payments, Reports, Chatter → Save & Finish.

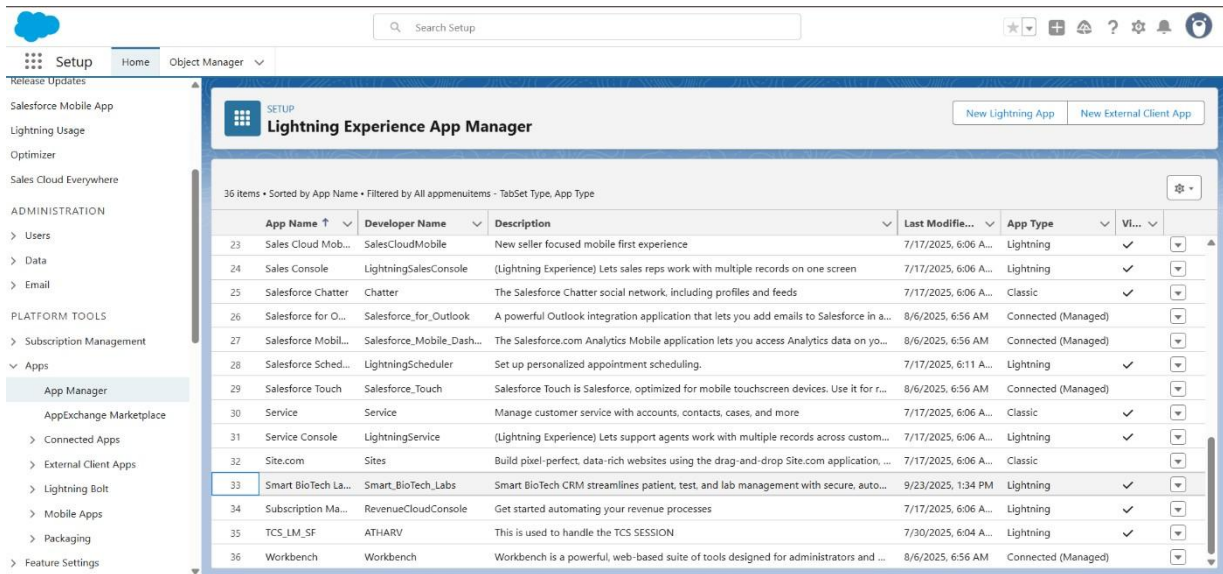


Figure 10: App Manager

App Launcher search → Smart BioTech Lab click → Smart BioTech Lab → App is opened.

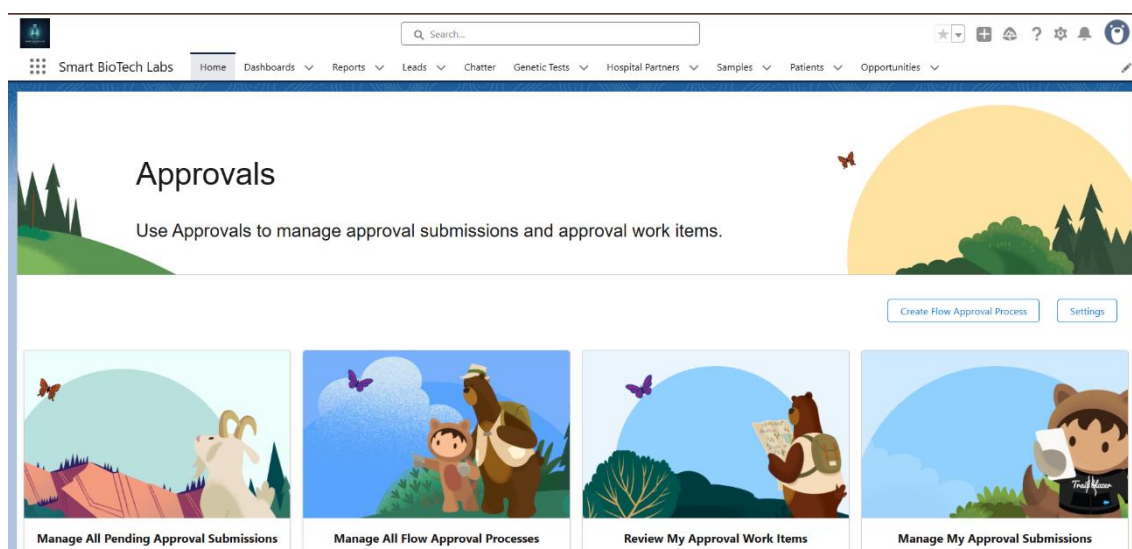


Figure 11: Smart BioTech Lab App