Phase 2 Report
Org Setup & Configuration

Project: Smart Healthcare Appointment & Compliance Hub
Batch: 4
Program: TCS Last Mile SmartBridge
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1. Introduction

This phase covers the Salesforce Org setup and configuration for the Smart Healthcare Appointment & Compliance Hub. It establishes the foundational environment by creating roles, profiles, permissions, and security settings to ensure role-based access control.

2. Objectives

- Configure Salesforce Developer Org and company profile.
- Define roles, profiles, and permission sets.
- Establish business hours, fiscal year, and user accounts.
- Apply security measures: Org-Wide Defaults (OWD), sharing rules, and field-level security.
- Document sandbox and deployment strategies.

3. Steps Performed

3.1 Create Salesforce Developer Org

- Developer Org was created from developer.salesforce.com.
- Edition confirmed: **Salesforce Developer Edition**.
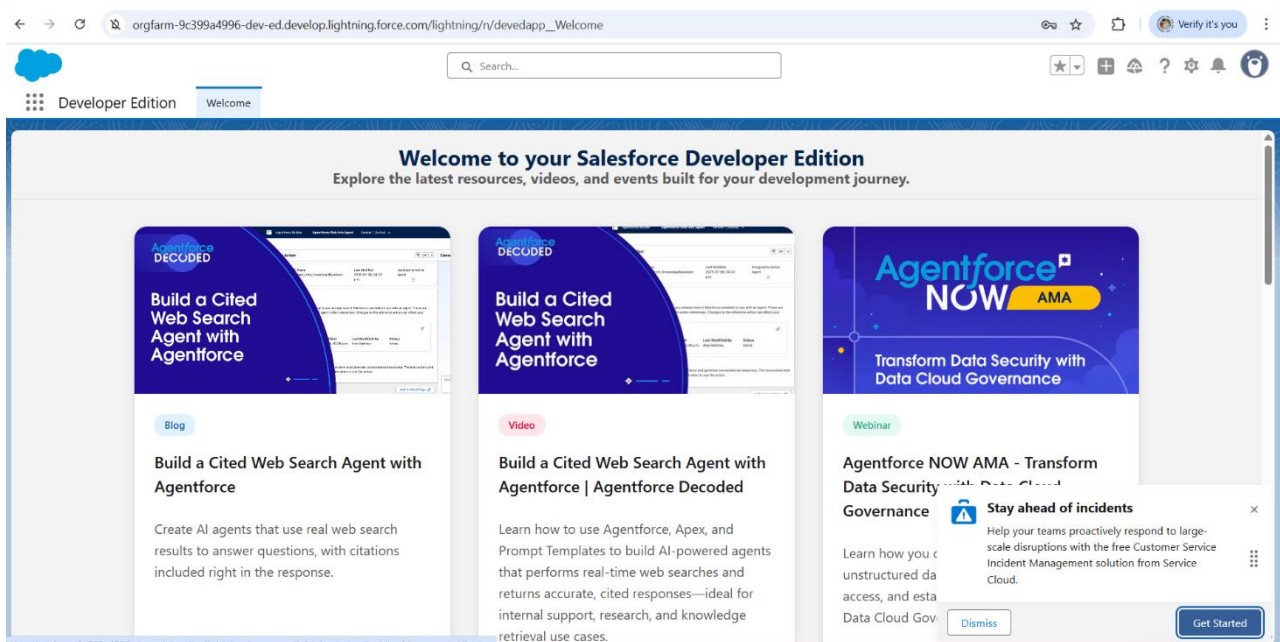
3.2 Company Profile Setup

- Organization Name updated to HealthCare Hub Name.
- Default Locale, Timezone, Currency configured.
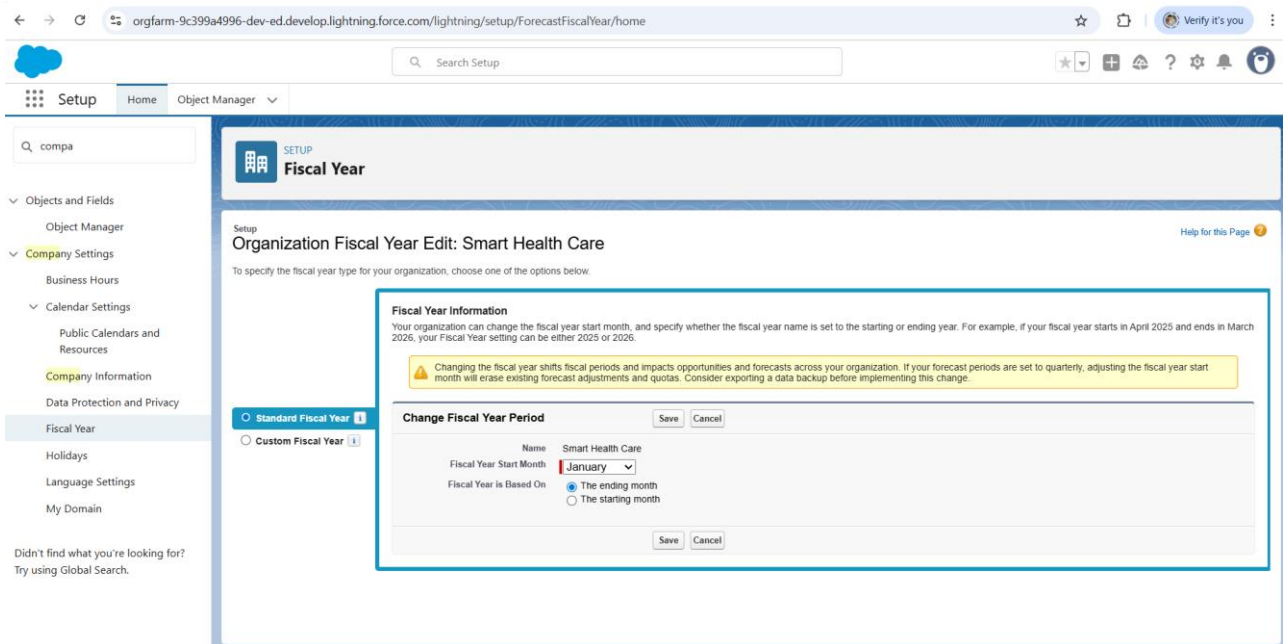- Primary Contact details filled.

3.3 Business Hours & Holidays

- Defined business hours: Mon–Fri, 9:00 AM–6:00 PM.
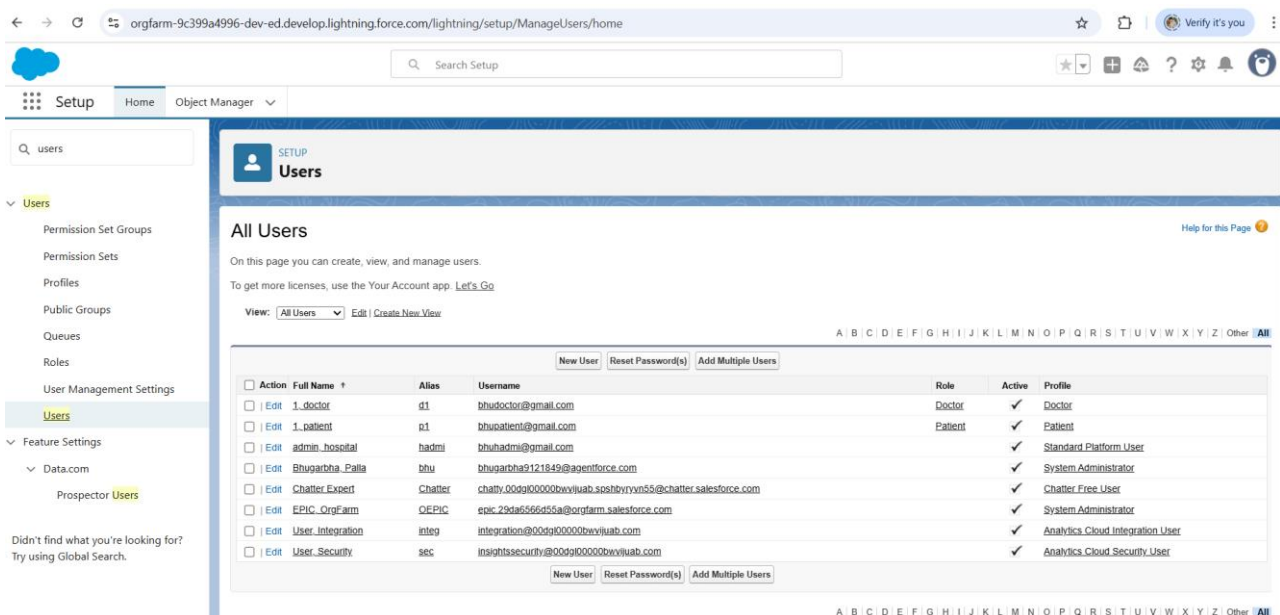- Added public/clinic holidays for automation and approvals.

3.4 Fiscal Year

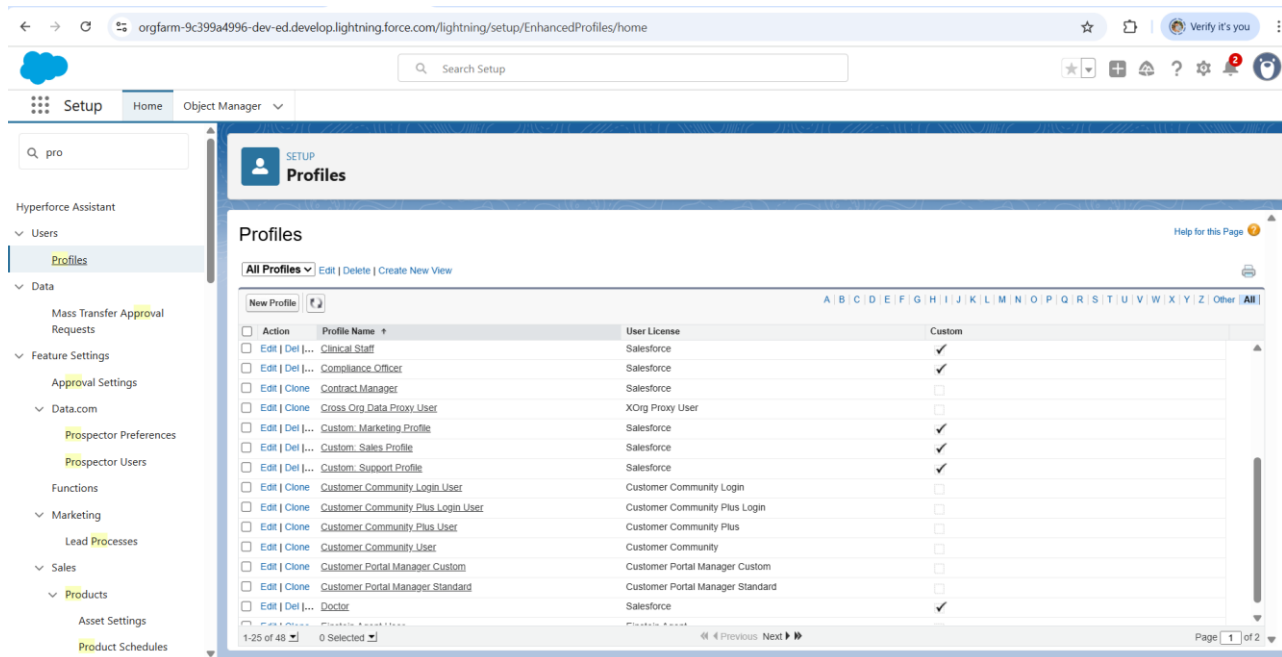- Chose **Standard Fiscal Year** (Jan–Dec).

3.5 User Setup & Licenses

- Created test users:
    - Hospital Admin
    - Doctor
    - Patient

- Each assigned a role and profile.

3.6 Profiles

- Cloned Standard User profile into:
    - Compliance Officer (Read/write to compliance documents and reports).
    - Hospital Admin (Full access to all data and setup).
    - Patient(Book/Reschedule/Cancel appointments)
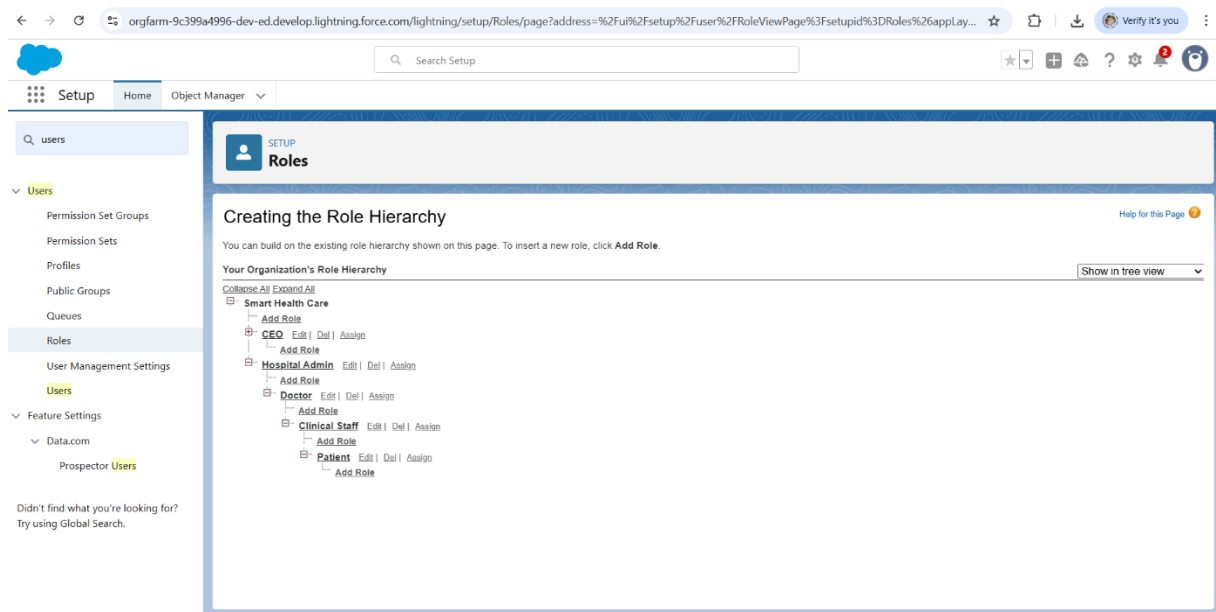   - Clinical Staff (manage schedule, view patients, update appointments).

3.7 Roles

- Role hierarchy created:
  - CEO (default)
  - Hospital admin – Doctor – Clinical Staff – Patient

3.8 Permission Sets

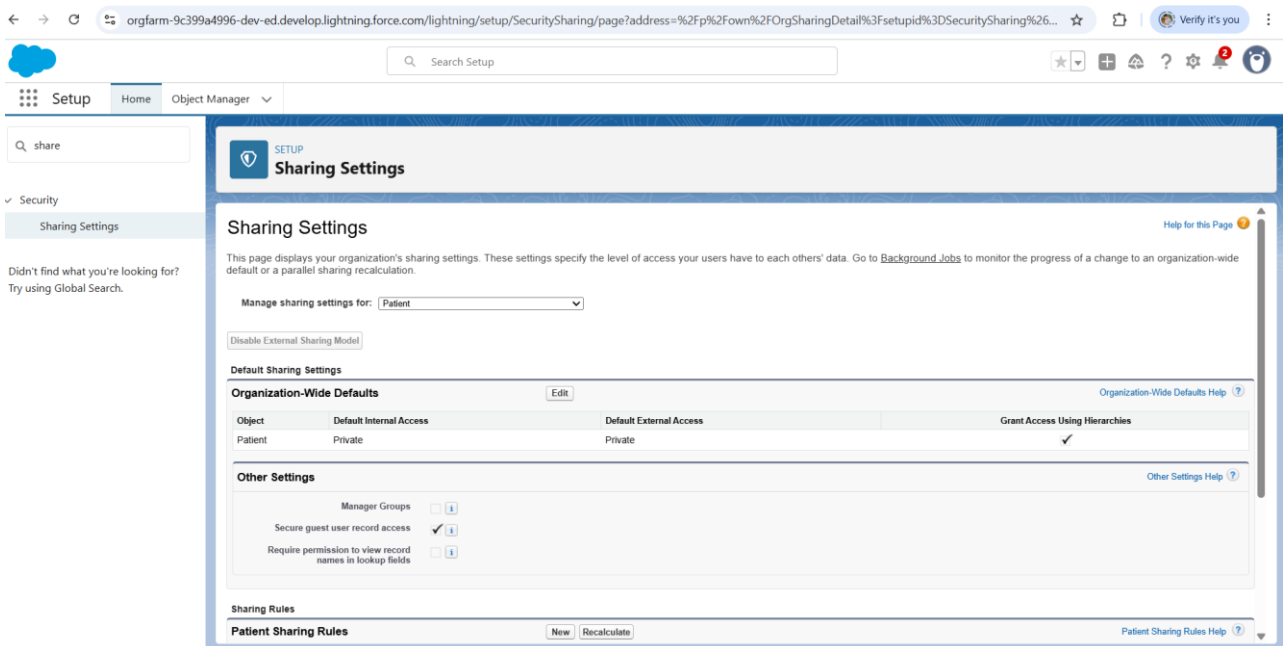- Created **Reports Access** permission set for dashboards.
- Assigned to Hospital Admin & Compliance Officer.
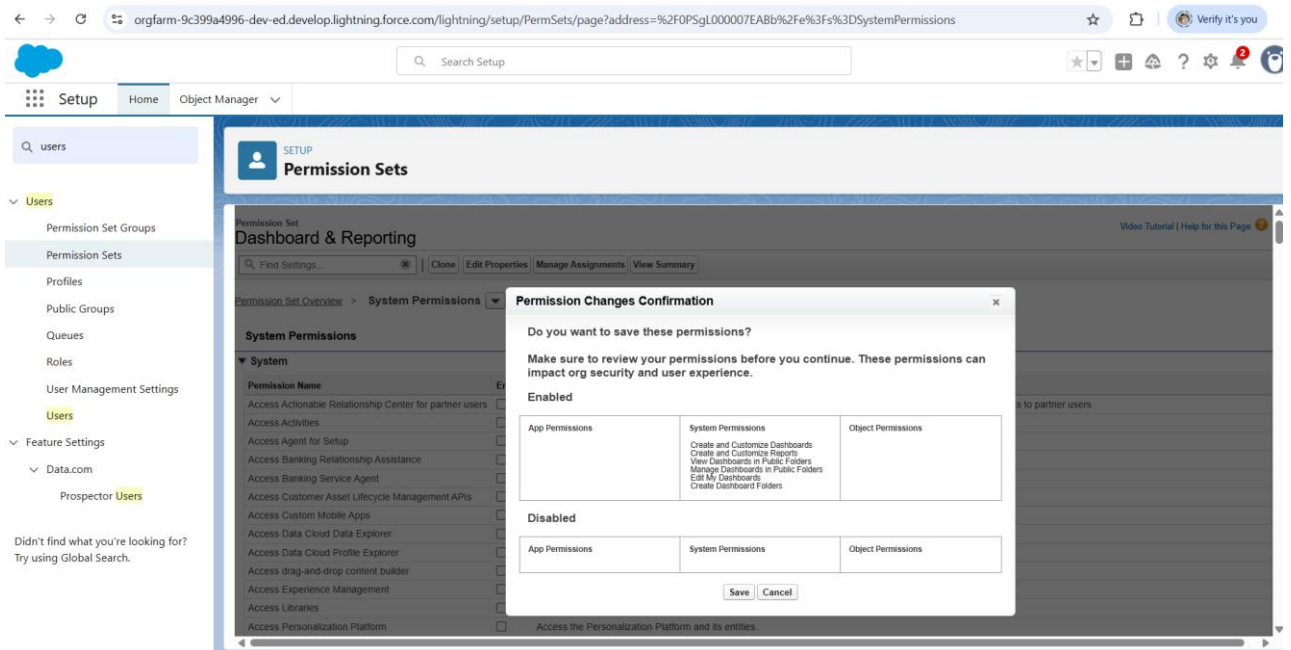
3.9 Org-Wide Defaults (OWD)

- Patient: Private
- Appointment: Private.
- Compliance Documents: Private.

3.10 Sharing Rules

- Planned to share Patient records with Assigned Clinical Staff.
- Compliance Documents with Compliance Officer & Hospital Admin.
- To be finalized after custom objects are created in Phase 3.

3.11 Login Access Policies

• Enabled "Administrators can log in as any user" to troubleshoot.

3.12 Security & Field-Level Security

• Field-level security applied for sensitive fields.
• Example: **Patient** -Restrict visibility for roles/profiles who should not see Medical History .

3.13 Sandbox & Testing Strategy

- Developer Edition has no full sandboxes.
- For testing, we use:
  - A second Developer Org as Sandbox.
  - Optionally Scratch Orgs with Salesforce CLI.

3.14 Deployment Basics

- Deployment Options:
  - Outbound Change Sets.
  - Salesforce CLI (sfdx source push/deploy).– ANT Migration Tool.
- For this project: plan to use Change Sets for simple deployment.

4. Expected Outcomes

- Salesforce Org fully configured with profiles, roles, and security.
- Defined business hours, fiscal year, and company profile.
- Sandbox strategy documented.
- Ready for Phase 3: Data Modeling & Relationships.

5. Conclusion

Phase 2 established the secure foundation for the Smart Healthcare Appointment & Compliance Hub. By setting up roles, profiles, permission sets, OWD, and login policies, the project now has role-based access control. Sandbox and deployment strategies were defined to support future development. This environment is now prepared for data modeling in Phase 3.