

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.

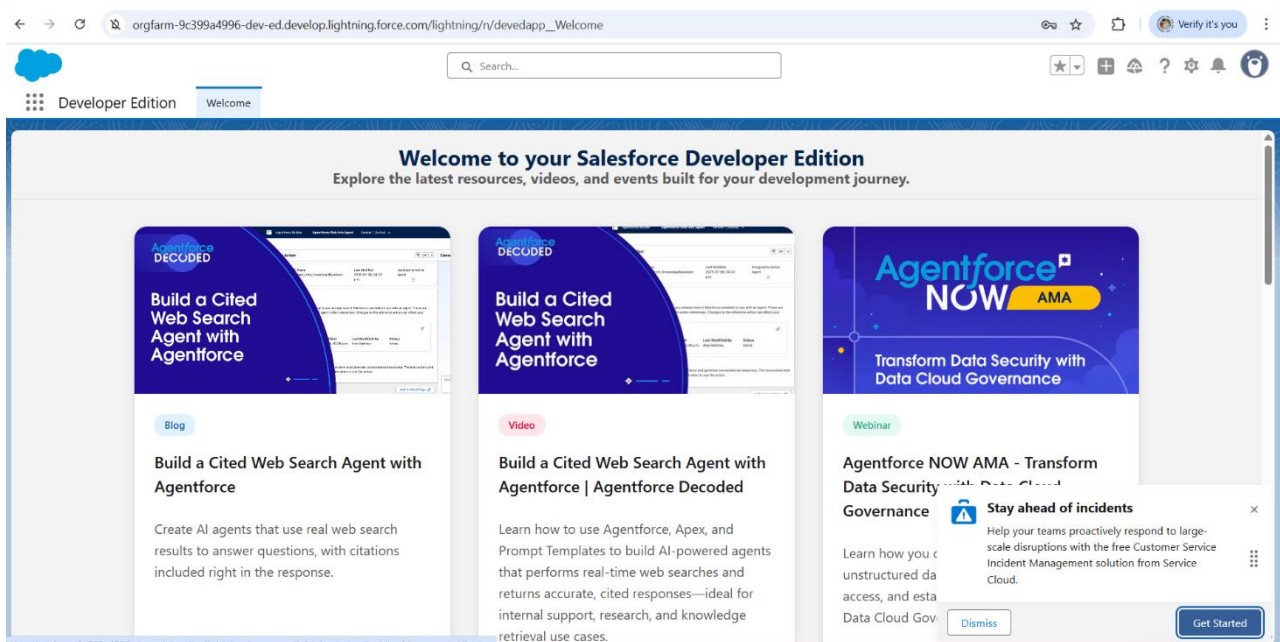
2. Objectives

- 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.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Company Information' and 'Smart Health Care'. It displays the organization's profile details, including 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 'Edit' button is visible next to the Organization Name. The right sidebar shows 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (10)', and 'Usage-based Entitlements (10)'. The bottom of the page shows 'Created By: OrgFarm EPIC, 9/17/2025, 1:03 PM' and 'Modified By: Palla Bhugartha, 9/22/2025, 3:52 AM'.

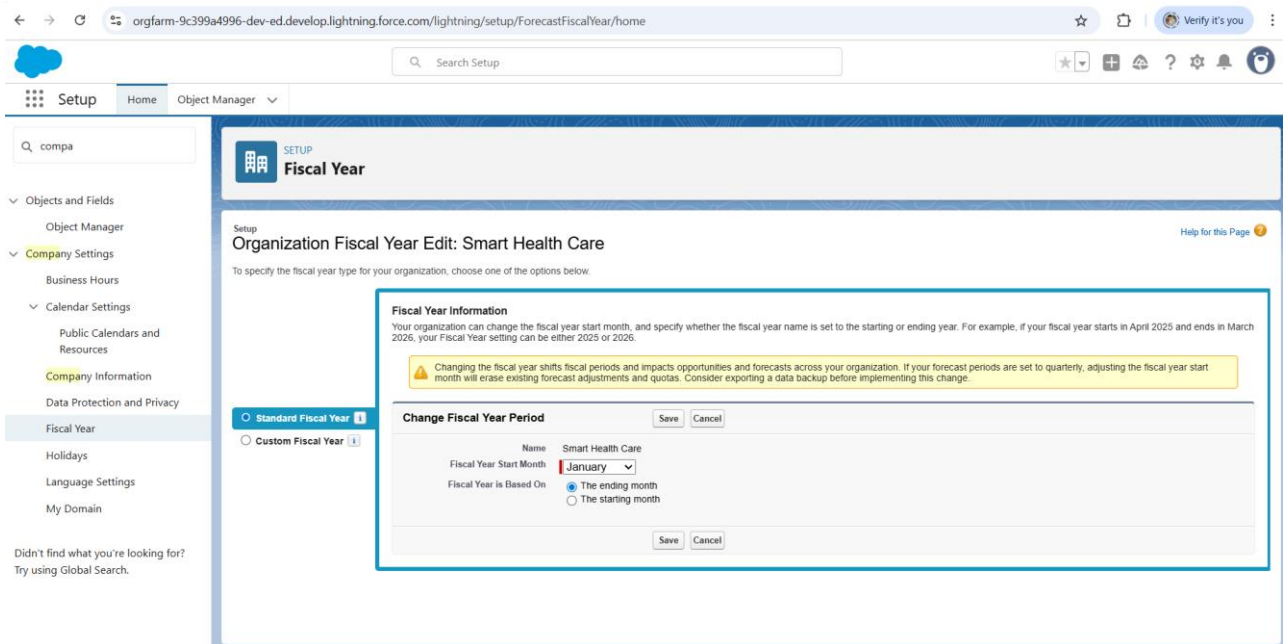
3.3 Business Hours & Holidays

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

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Business Hours' and 'Organization Business Hours'. It displays the organization's business hours details, including Business Hours Name, Clinic Hours, Time Zone, and Default Business Hours. The 'Edit' button is visible next to the Business Hours Name. The right sidebar shows 'Holidays (0)'. The bottom of the page shows 'Created By: Palla Bhugartha, 9/22/2025, 4:00 AM' and 'Last Modified By: Palla Bhugartha, 9/22/2025, 4:00 AM'.

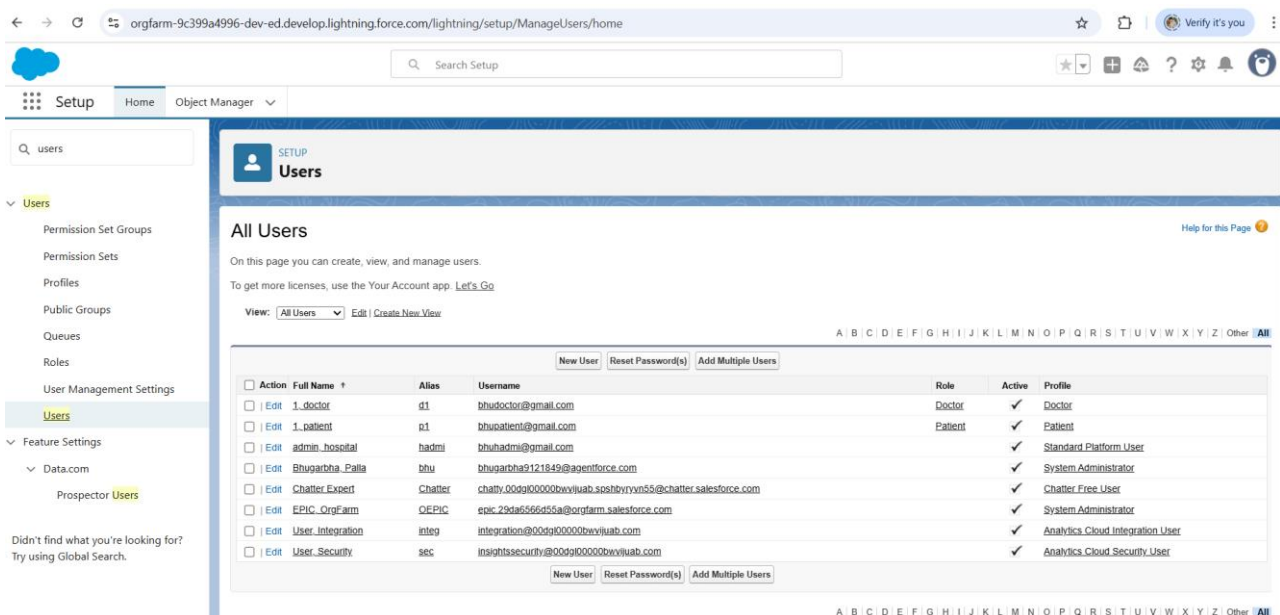
3.4 Fiscal Year

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



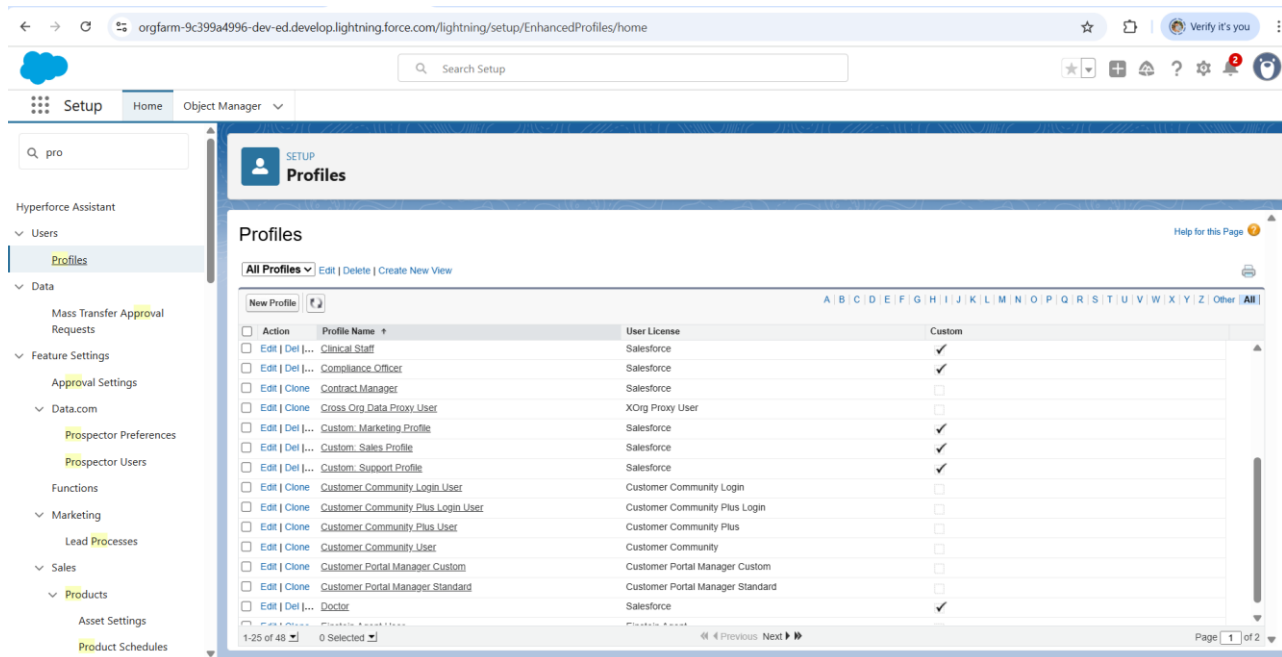
3.5 User Setup & Licenses

- 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).

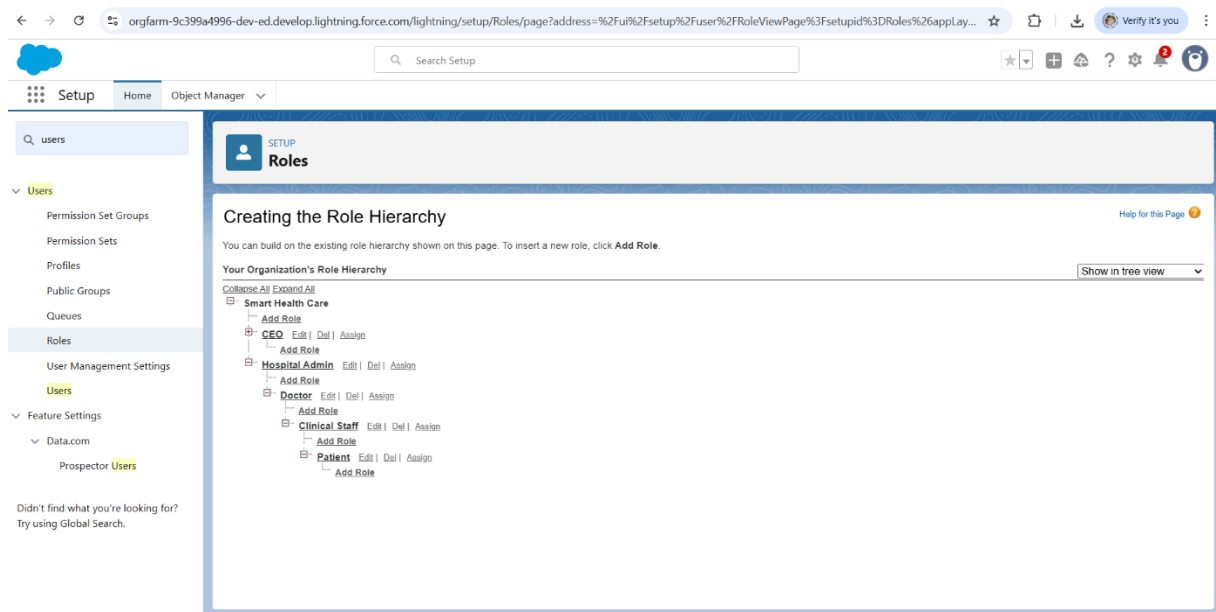


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a navigation menu with categories like Users, Data, Feature Settings, Approval Settings, Data.com, Prospectors, Functions, Marketing, Lead Processes, Sales, Products, and Asset Settings. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column has checkboxes indicating whether a profile is custom or standard.

Action	Profile Name	User License	Custom
Edit Del ...	Clinical Staff	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Compliance Officer	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom - Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom - Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom - Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
Edit Del ...	Doctor	Salesforce	<input checked="" type="checkbox"/>

3.7 Roles

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



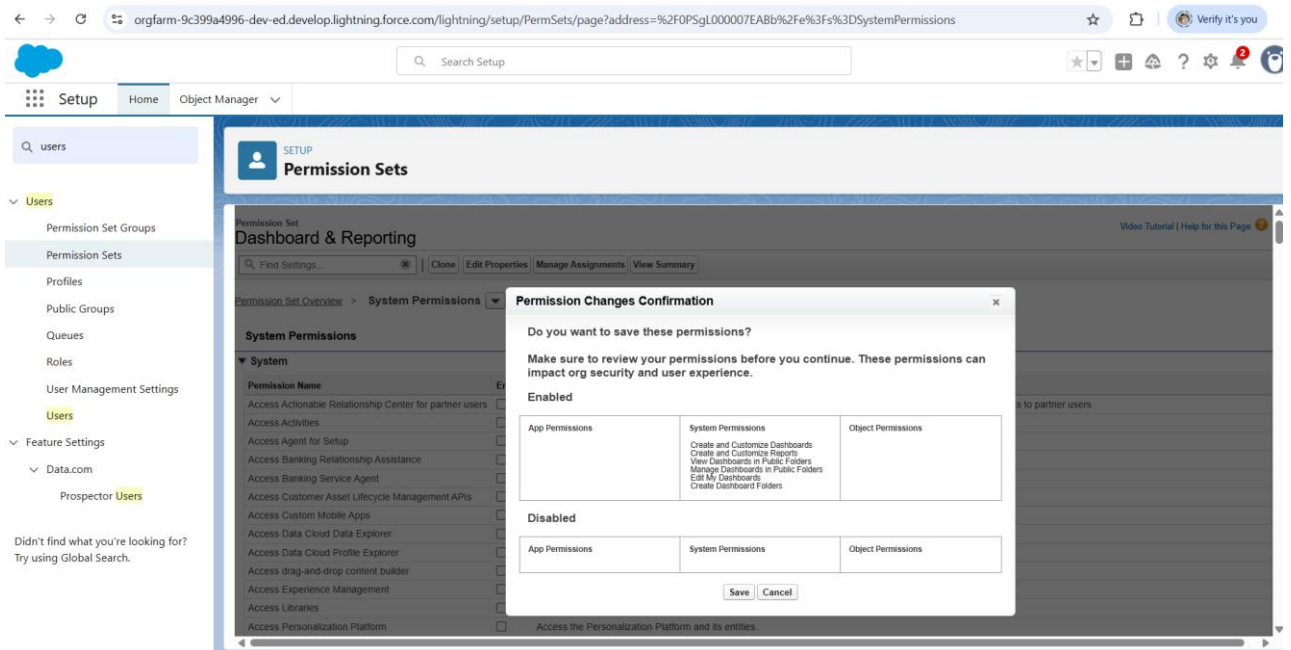
The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a navigation menu with categories like Users, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors. The main content area is titled 'Roles' and shows a tree view of the role hierarchy. The hierarchy starts with 'Smart Health Care' at the top, which has a child role 'CEO'. 'CEO' has a child role 'Hospital Admin'. 'Hospital Admin' has a child role 'Doctor'. 'Doctor' has a child role 'Clinical Staff'. 'Clinical Staff' has a child role 'Patient'.

```

graph TD
    SmartHealthCare[Smart Health Care] --> CEO[CEO]
    CEO --> HospitalAdmin[Hospital Admin]
    HospitalAdmin --> Doctor[Doctor]
    Doctor --> ClinicalStaff[Clinical Staff]
    ClinicalStaff --> Patient[Patient]
  
```

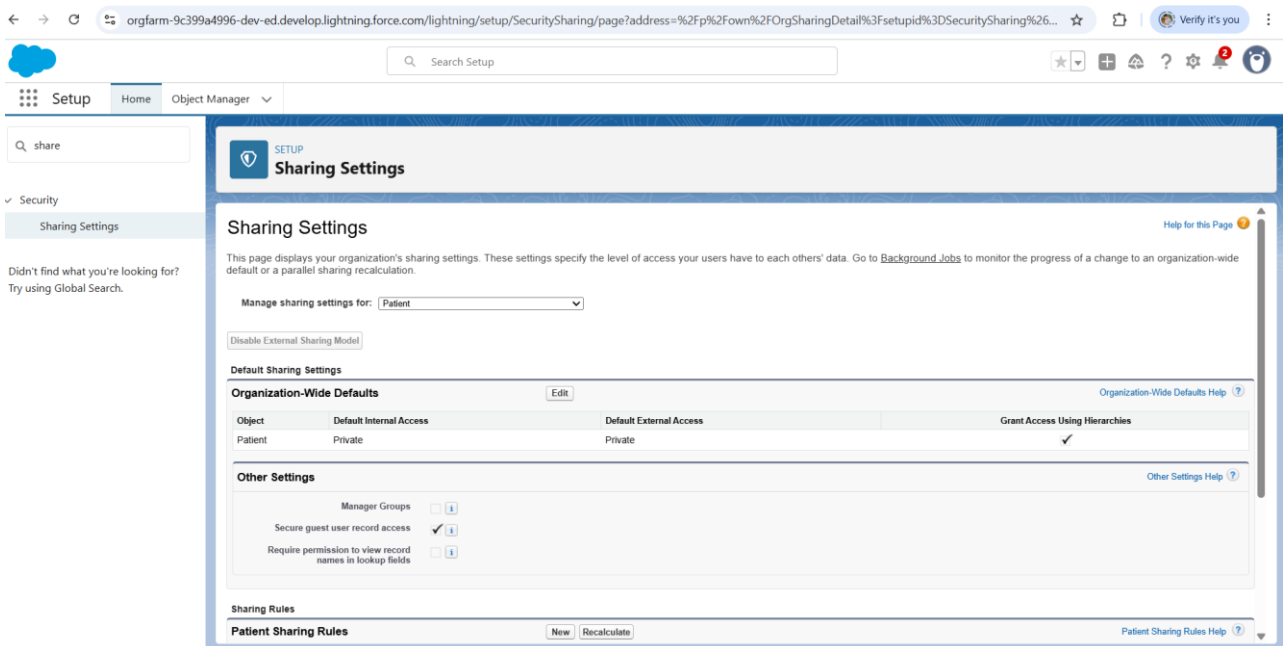
3.8 Permission Sets

- 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.

orgfarm-9c399a4996-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fsetup%2Fown%2FshareRule.jsp%3Fid%3D02egl0000001sHh%26en...

Setup Home Object Manager

Search Setup

Setup

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Setup

Compliance Document Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.

Label: Compliance Document
Rule Name: Compliance_Document
Description:

Compliance Document: owned by members of All Internal Users
Share with Role: Hospital Admin
Access Level: Read Only
Created By: Palla Bhugarthi, 9/23/2025, 9:58 AM
Modified By: Palla Bhugarthi, 9/23/2025, 9:58 AM

Save Cancel

3.11 Login Access Policies

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

orgfarm-9c399a4996-dev-ed.develop.lightning.force.com/lightning/setup/LoginAccessPolicies/home

Setup Home Object Manager

Search Setup

Setup

Identity

Login Flows

Login History

Security

Login Access Policies

Didn't find what you're looking for? Try using Global Search.

Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options

Setting Enabled

Administrators Can Log in as Any User ☒

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

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 .

The screenshot shows the Salesforce Setup interface for configuring field-level security for the 'Medical History' field. The left sidebar shows the navigation menu with 'Setup' selected. The main content area displays the 'Set Field-Level Security' page for 'Medical History'. At the top, there are 'Save' and 'Cancel' buttons. Below them is a table with columns 'Field Label' and 'Data Type'. The 'Medical History' field is listed with a 'Text Area(255)' data type. Below this, there is a table for 'Field-Level Security for Profile' with columns for 'Profile', 'Visible', and 'Read-Only'.

Field-Level Security for Profile	Visible	Read-Only
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Compliance Officer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.