

Phase 2: Org Setup & Configuration

1. Company Profile Setup

Defined hospital/clinic details such as name, address, default locale, language, and time zone. This ensures that all users across the hospital work with the same standard settings.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a list of setup categories: Setup, Home, Object Manager, Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays the profile for 'Saran Global Healthcare'. The profile includes an 'Edit' button and a table of organization details.

Organization Detail	
Organization Name	Saran Global Healthcare
Primary Contact	OrgFarm EPIC
Division	
Address	United States
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	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	77 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgL00000C477r

2. Business Hours & Holidays

Configured hospital service hours as **8 AM – 8 PM**, and added holidays (e.g., New Year's Day). This ensures automated processes like patient follow-ups and reminders do not trigger outside care hours.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. Under 'Company Settings', 'Business Hours' is selected. The main content area is titled 'Business Hours' and contains the 'Organization Business Hours' section. This section includes instructions on how to set business hours and a table for 'Business Hours Detail'. The table lists days of the week and their corresponding hours (all set to 24 hours). The time zone is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Default Business Hours' checkbox is unchecked. The 'Active' checkbox is checked. The 'Created By' and 'Last Modified By' fields both show 'Dasam Harisaran' with a timestamp of '9/24/2025, 6:32 AM'.

Business Hours Detail

Business Hours Name	Business Hours	Time Zone
Hospital Business Hours	24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	24 Hours	
Monday	24 Hours	
Tuesday	24 Hours	
Wednesday	24 Hours	
Thursday	24 Hours	
Friday	24 Hours	
Saturday	24 Hours	

Created By: Dasam Harisaran 9/24/2025, 6:32 AM
Last Modified By: Dasam Harisaran 9/24/2025, 6:32 AM

The screenshot shows the Salesforce Setup interface for the 'Holidays' section. The left navigation menu is the same as the previous screenshot, with 'Holidays' selected under 'Company Settings'. The main content area is titled 'Holidays' and contains the 'Holiday Detail' section. This section includes instructions on how to set holidays and a form for 'Holiday Detail'. The 'Holiday Name' is 'New Year's Day', the 'Description' is '1/1/2026 All Day', and the 'Date and Time' is '1/1/2026 All Day'. The 'Created By' and 'Last Modified By' fields both show 'Dasam Harisaran' with a timestamp of '9/24/2025, 6:33 AM'. Below the holiday detail, there is a 'Business Hours' section with an 'Add/Remove' button and a message 'No records to display'.

Holiday Detail

Holiday Name	Description	Date and Time
New Year's Day	1/1/2026 All Day	1/1/2026 All Day

Created By: Dasam Harisaran 9/24/2025, 6:33 AM
Last Modified By: Dasam Harisaran 9/24/2025, 6:33 AM

Business Hours

No records to display

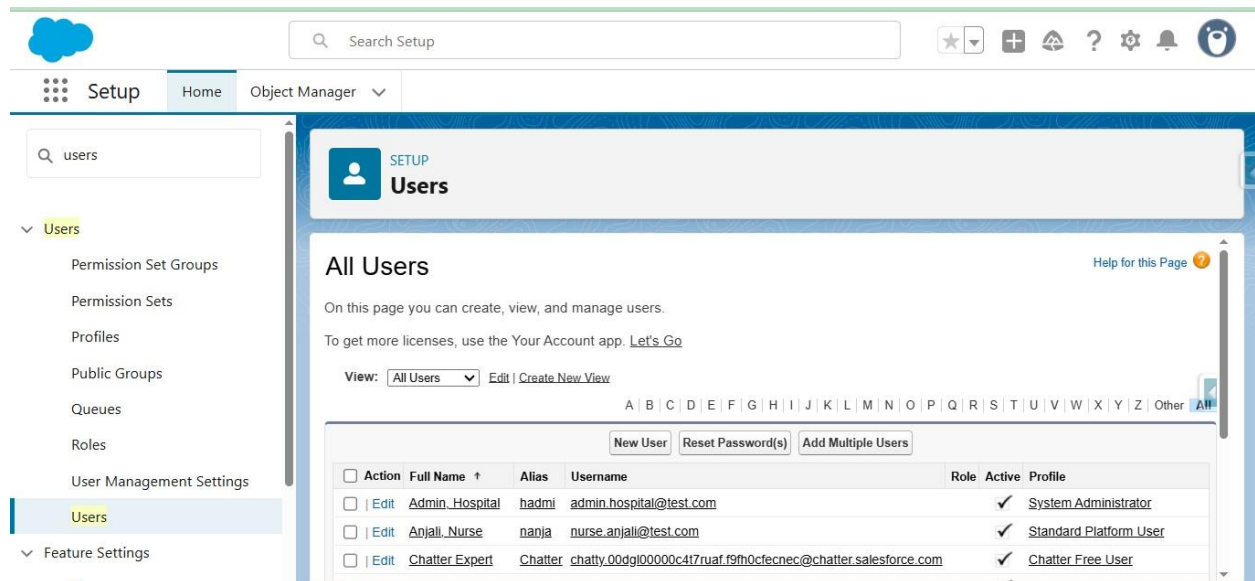
3. User Setup & Profiles

Created sample users:

- **Admin** → Full control.

- **Doctor/Nurse** → Manage assigned patients.
- **Care Coordinator** → Manage care plans.
- **Patient** → View their own records only.

Profiles were assigned to restrict or allow access to healthcare data based on role.

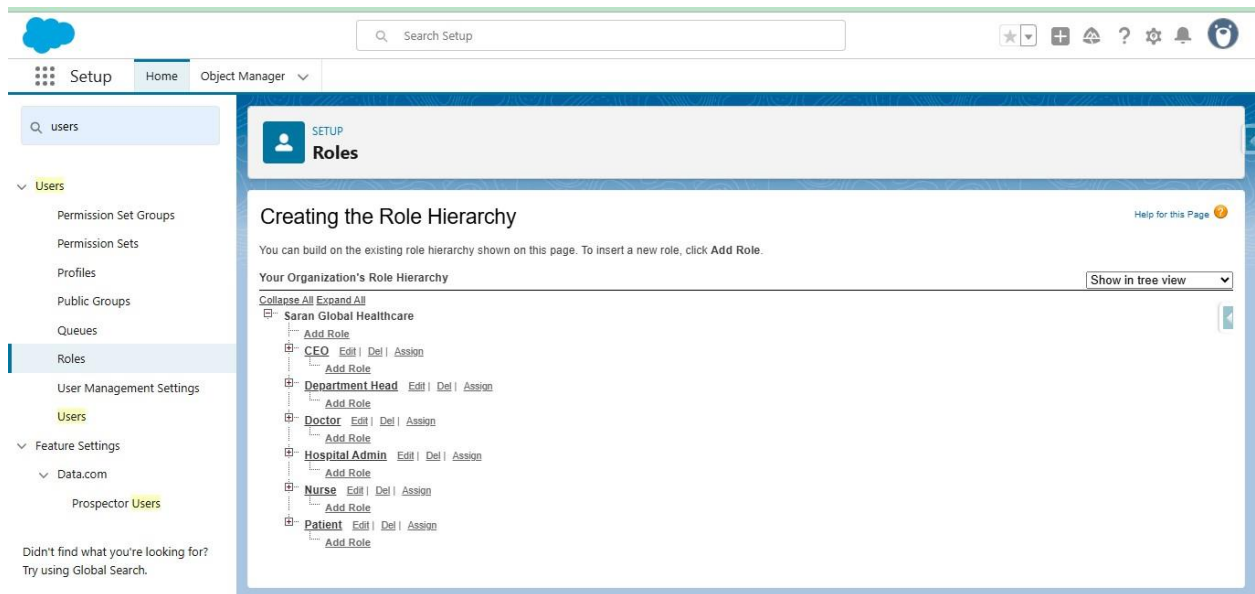


4. Roles & Hierarchy

Established a role hierarchy:

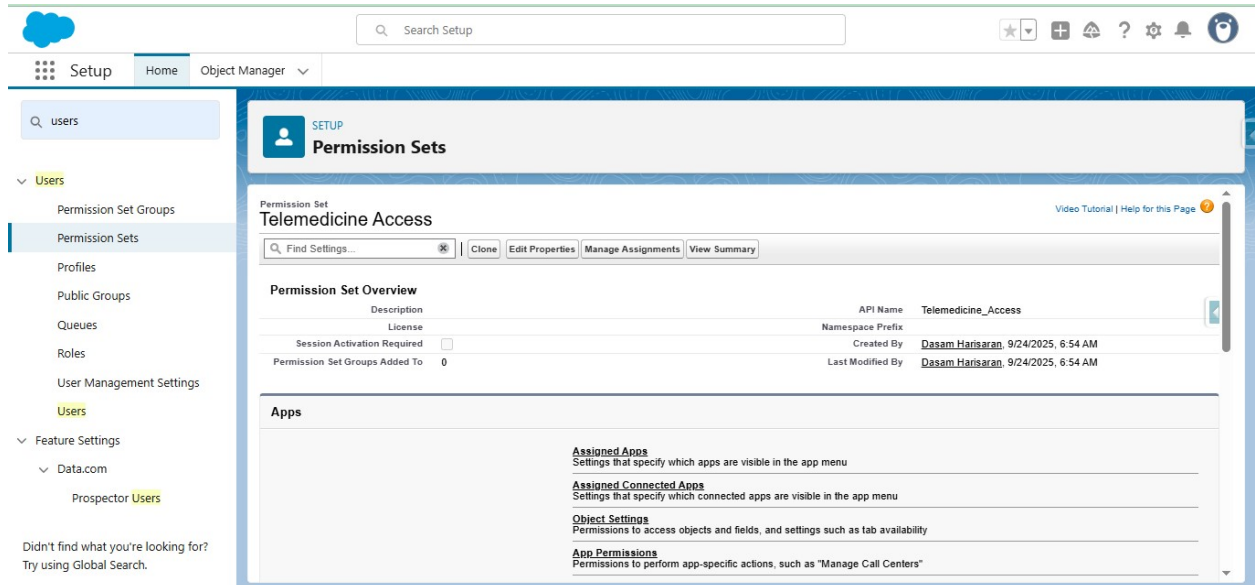
Hospital → **Department** → **Doctor** → **Nurse** → **Patient**.

This ensures upward visibility so supervisors can monitor the work of their teams.



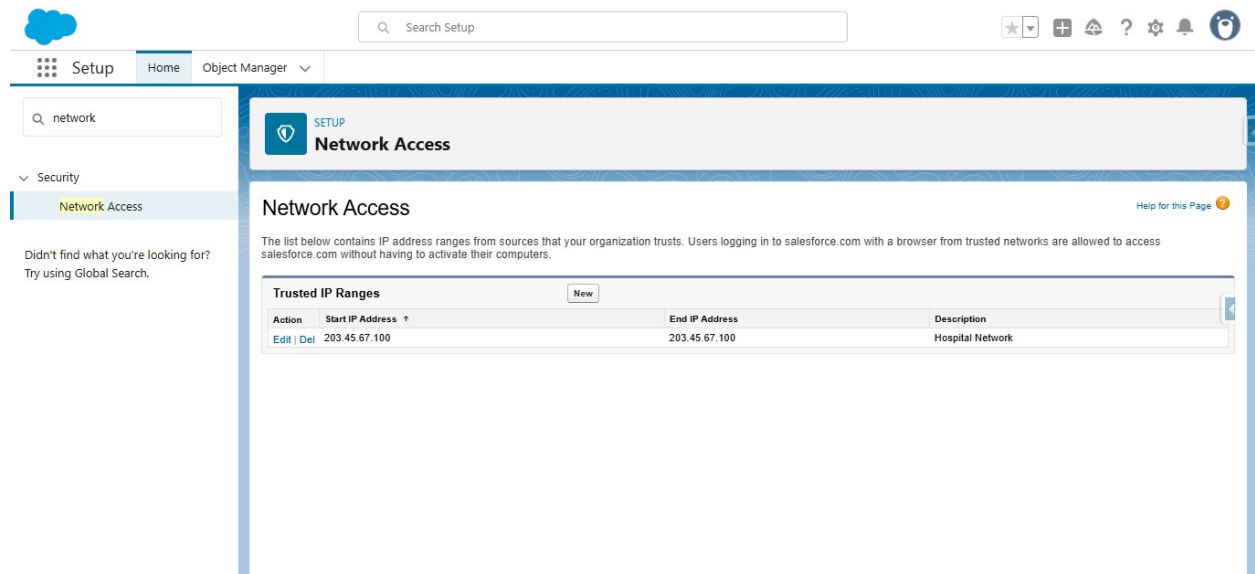
5. Permission Sets

Created additional permission sets for extra functionality, such as **Telemedicine Access**. This allows flexible assignment of permissions without changing base profiles.



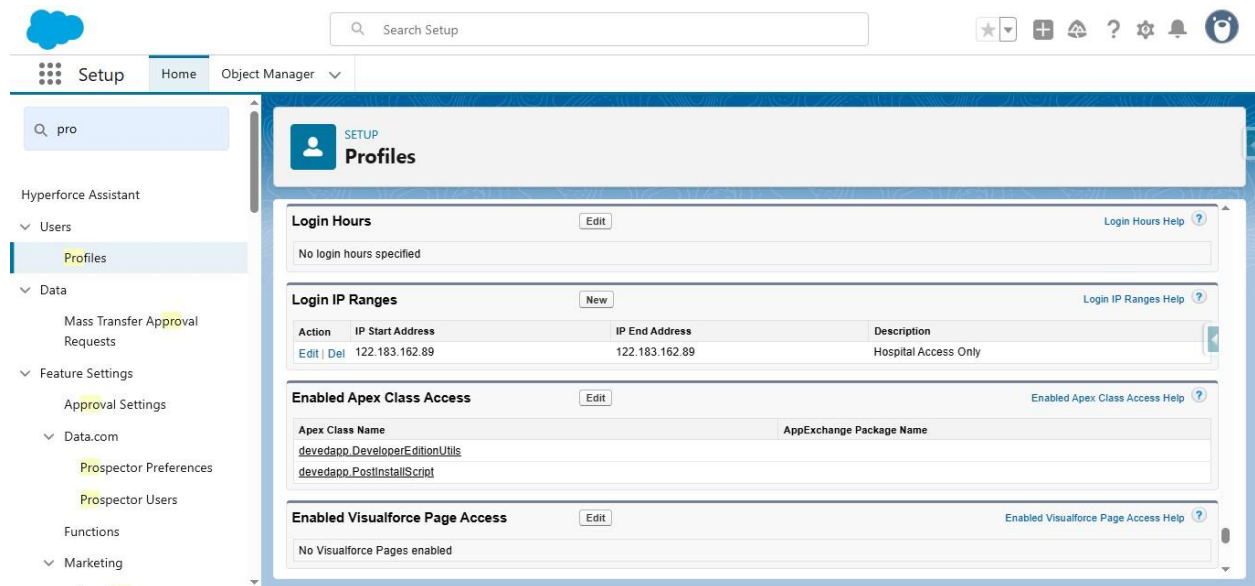
6. Organization-Wide Defaults (OWD) & Sharing Rules

- **OWD:** Patients are set to **Private** (users see only their own records).
- **Sharing Rules:** Configured to allow cross-department access when required (e.g., specialist doctors viewing another department's patients).



7. Login Access Policies

Restricted login IPs for Admins, Doctors, and Nurses to hospital networks, while Patients can log in through portals with fewer restrictions. This improves security for internal users while maintaining accessibility for patients.



8. Deployment Basics

Prepared outbound change sets to migrate configurations (users, profiles, sharing rules) into another Salesforce org. This ensures changes can be tested and safely deployed.

✓ Outcome

Phase 2 ensures the Salesforce environment is properly structured with:

- Secure access
- Hospital-specific hours
- A clear hierarchy of roles

This foundation supports all upcoming phases like Data Modeling, Automation, and Reporting.