

Project: Hospital Appointment & Bed Management CRM

Phase 2 — Org Setup and Configuration

Objective:

Prepare the Salesforce organization to reflect a real-world hospital company setup.

Step 2.1 — Open Setup (Critical Step)

1. Locate the **top-right corner** of the Salesforce interface
2. Click the **Gear icon**
3. Select **Setup**

You are now inside the Salesforce administrative environment.

Step 2.2 — Company Information (Hospital Identity)

1. In **Setup**, locate the **Quick Find** search box on the left panel

Enter:

Company Information

- 2.
3. Click **Company Information**

Verify or Update the Following:

Company Name

CityCare Hospital

-

Time Zone

(GMT+05:30) India Standard Time

-

Default Currency

INR

-

Click **Save** if the fields are editable.

This configuration impacts reports, approvals, and time-based automation.

Step 2.3 — Fiscal Year (Reporting Foundation)

In **Quick Find**, type:

Fiscal Year

- 1.
2. Click **Fiscal Year**
3. Select **Standard Fiscal Year**
4. Set the **Start Month** to **January**
5. Click **Save**

This setting is required for revenue tracking and dashboards.

Step 2.4 — Business Hours (Hospital Working Time)

In **Quick Find**, type:

Business Hours

- 1.
2. Click **Business Hours**
3. Click **New**

Configuration Details:

Name

Hospital Working Hours

-
- **Time Zone:** India Standard Time (IST)
- **Working Days:**
 - Monday to Saturday: 9:00 AM – 6:00 PM
 - Sunday: Not selected
- **Active:** Enabled

Click **Save**.

Step 2.5 — Holidays (No Approvals on These Days)

In **Quick Find**, type:
Holidays

- 1.
2. Click **Holidays**
3. Click **New**

Example Configuration:

Holiday Name

Republic Day

-
- **Date:** 26 January
- **Recurring:** Enabled

Click **Save**.

Approvals and automation will not execute on configured holidays.

Step 2.6 — Users (Hospital Personnel)

User Roles Overview:

User Role	Responsibility
Administrator	System configuration
Receptionist	Appointment creation
Manager	Case and record approvals

Create Receptionist User

In **Quick Find**, type:
Users

- 1.
2. Click **Users**
3. Click **New User**

User Details:

- **First Name:** Reception
- **Last Name:** Staff
- **Alias:** recp
- **Email:** Your email address (Salesforce allows reuse)

Username

receptionist.hospital@sfdev.com

-
- **Profile:** Standard User
- **Role:** Leave blank for now
- **Active:** Enabled

Click **Save**.

Step 2.7 — Profiles (Access Control)

Key Concept:

- **Profile defines what a user can do in Salesforce**

Profiles used in this project:

- **Standard User:** Receptionist
- **System Administrator:** Administrator

No profile customization is required at this stage.

Step 2.8 — Roles (Data Visibility)

In **Quick Find**, type:
Roles

- 1.
2. Click **Roles**

3. Select **Set Up Roles**

Create the Following Role Hierarchy:

Hospital Manager
└─ Receptionist

Steps:

- Add the role **Hospital Manager**
- Under it, add **Receptionist**

Click **Save**.

Managers automatically gain visibility into subordinate records.

Step 2.9 — Org-Wide Defaults (Security Baseline)

In **Quick Find**, type:
Sharing Settings

- 1.
2. Scroll to **Org-Wide Defaults**

Set the following:

- **Contact:** Public Read Only
- Custom objects will be configured later

Click **Save**.

Step 2.10 — Login Hours (Security Control)

1. Navigate to **Profiles**
2. Open **Standard User**
3. Click **Login Hours**
4. Configure:
 - Monday to Saturday: 9:00 AM – 6:00 PM

Click **Save**.

This restricts login access outside working hours.

Phase 2 Completion Summary

Phase 2 is now complete.

Key Outcomes:

- Salesforce setup fundamentals
- Company-level configuration
- User, profile, and role management
- Core security controls
- Realistic hospital organization structure

You have now progressed beyond the beginner level.

Default Sharing Settings			
Organization-Wide Defaults		Edit	Organization-Wide Defaults Help ?
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

Login Hours			Edit	Delete
Day	Start Time		End Time	
Sunday	End of Day		End of Day	
Monday	7:30 PM PST		4:30 AM PST	
Tuesday	7:30 PM PST		4:30 AM PST	
Wednesday	7:30 PM PST		4:30 AM PST	
Thursday	7:30 PM PST		4:30 AM PST	
Friday	7:30 PM PST		4:30 AM PST	
Saturday	7:30 PM PST		4:30 AM PST	

Login Hours


Select the days and hours that users with this profile are allowed to log in. times even for users in different time zones.

SaveCancel

All times are in (GMT+05:30) India Standard Time (Asia/Kolkata)

Day	Start Time	End Time	
Sunday	End of Day ▾	End of Day ▾	Clear times
Monday	9:00 AM ▾	6:00 PM ▾	Clear times
Tuesday	9:00 AM ▾	6:00 PM ▾	Clear times
Wednesday	9:00 AM ▾	6:00 PM ▾	Clear times
Thursday	9:00 AM ▾	6:00 PM ▾	Clear times
Friday	9:00 AM ▾	6:00 PM ▾	Clear times
Saturday	9:00 AM ▾	6:00 PM ▾	Clear times
Clear all times			

EditSharingReset PasswordFreezeView Summary

Name	Front Desk	Role	Receptionist
Alias	recep	User License	Salesforce
Email	altamashfaruqui036@gmail.com [Verified]	Profile	Standard User
Username	altamashfaruqui036@gmail.com	Active	<input checked="" type="checkbox"/>
Name	Hospital Manager	Role	Hospital Manager
Alias	hmanager	User License	Salesforce
Email	altamashfaruqui.manager@gmail.com [Verify] 	Profile	System Administrator
Username	altamashfaruqui.manager@gmail.com	Active	<input checked="" type="checkbox"/>



SETUP

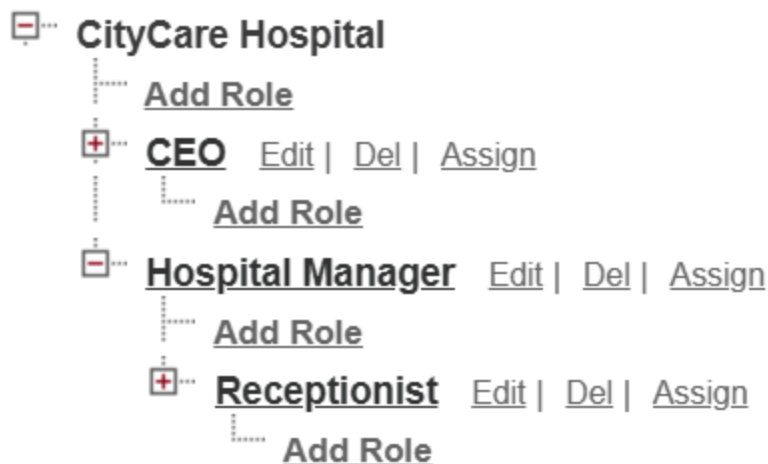
Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To ir

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)





SETUP

Holidays

Holiday Detail

Save

Cancel

Holiday Name Republic Day

Description

Date 1/26/2026

Time from to ☒ All Day

Recurring Holiday ☒

Frequency

☐ Daily

☐ Weekly

☐ Monthly

☒ Yearly

☒ On every January 26

☐ On the 1st day of December

Recurrence Start 1/26/2026

Recurrence End ☒ No End Date