

Phase 2 – Org Setup & Configuration (with Screenshot Guidance)

🎯 Objective

To configure the Salesforce Developer Edition organization for the Hospital Management Project. This includes setting up company details, users, profiles, permission sets, roles, and security settings.

◆ 1. Company Information & Business Hours

- Updated **Company Profile** with hospital details.
- Configured **Business Hours** and **Holidays**.

📸 Screenshot:

The screenshot shows the 'Company Information' page under the 'SETUP' tab. The page title is 'Company Information'. It displays various organization details such as Organization Name (Hospital Appointment Management), Primary Contact (OrgFarm EPIC), Address (United States), and various system metrics like Used Data Space (605 KB (12%)), Used File Space (20 KB (0%)), and API Requests, Last 24 Hours (67 (15,000 max)). The page also shows the creation and modification details: Created By (OrgFarm EPIC, 7/20/2025, 3:01 AM) and Modified By (Shaik.Jasmin, 9/18/2025, 7:04 AM).

The screenshot shows the 'Business Hours' configuration page under the 'SETUP' tab. The page title is 'Business Hours'. It includes steps for editing business hours: Step 1. Business Hours Name (Business Hours Name: Hospital Hours, Active: checked), Step 2. Time Zone (Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)), and Step 3. Business Hours (a table showing daily business hours from 12:00 AM to 12:00 AM, with all entries checked for 24 hours). The page also includes a note: 'If you enter blank business hours for a day, that means your organization does not operate on that day.'

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Action	Holiday Name	Description	Date and Time
Edit Del	Bakrid	National holiday	9/18/2025 All Day
Edit Del	Christmas	National Holiday	12/25/2026 All Day
Edit Del	Ramadan	Govt Holiday	3/2/2026 All Day

Elapsed Holidays

No records to display

◆ 2. User Setup

Created separate users for each role: Admin, Doctor, Receptionist, Patient.

Users

User Receptionist Jasmin S

User Profile Help for this Page

User Detail

Name	Receptionist Jasmin S	Role	Receptionist
Alias	rs	User License	Salesforce Platform
Email	(receptionists@example.com) [Verify]	Profile	Standard Platform User
Username	receptionists@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User1758130030121179847	Marketing User	<input type="checkbox"/>
Title	Receptionist	Offline User	<input type="checkbox"/>
Company	Health Care	Knowledge User	<input type="checkbox"/>
Department	Health Care	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Users

User Jasmin Doctor s

User Profile Help for this Page

User Detail

Name	Jasmin Doctor s	Role	Doctor
Alias	Doctor1	User License	Salesforce
Email	(jasmindoctor@gmail.com) [Verify]	Profile	Standard User
Username	jasmindoctor@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17581277490276321601	Marketing User	<input type="checkbox"/>
Title	Cardiologist	Offline User	<input type="checkbox"/>
Company	Health Care	Knowledge User	<input type="checkbox"/>
Department	Health Care	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>

ROLES:

Patient

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Hospital Appointment Management » CEO » Admin » Doctor » Receptionist » Patient

[Users in Patient Role \(0\)](#)

Role Detail		Label	Role Name	Role as displayed on reports	Sharing Groups	Role: Role and Internal Subordinates
This role reports to	Patient	Receptionist	Patient	Patient		
Modified By	Shalik Jasmin	9/17/2025, 9:44 AM				
Opportunity Access	Users in this role can edit all opportunities	Role: Patient – Salesforce - Developer Edition of who owns the opportunities				
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases					

Doctor

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Hospital Appointment Management » CEO » Admin » Doctor

[Users in Doctor Role \(1\)](#)

Role Detail		Label	Role Name	Role as displayed on reports	Sharing Groups	Role: Role and Internal Subordinates
This role reports to	Doctor	Admin	Doctor	Doctor		
Modified By	Shalik Jasmin	9/17/2025, 9:27 AM				
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities					
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases					

Users in Doctor Role

Action	Full Name	Alias	Username	Active
Edit	Jasmin Doctor s	Doctor1	jasmindoctor@gmail.com	✓

◆ 3. Profiles & Permission Sets

Created custom profiles: Admin Profile, Doctor Profile, Receptionist Profile, Patient Profile

Profiles

Profile Detail

Name	Custom Profile
Patient Profile	✓
User license	Salesforce Platform
Description	
Created By	Shalik Jasmin
Modified By	Shalik Jasmin

Page Layouts

Standard Object Layouts	Global	Lead	Location
Email Application	Global Layout [View Assignment]	Lead Layout [View Assignment]	Location Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Location Group Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Account	Accent Layout [View Assignment]	Object Milestone Layout [View Assignment]	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours Layout [View Assignment]	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product Layout [View Assignment]	Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Layout [View Assignment]	Payment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]		
Assigned Resource	Assigned Resource Layout [View Assignment]		

Profile Doctor Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name		Doctor Profile	Custom Profile
User License	Salesforce Platform		<input checked="" type="checkbox"/>
Description			
Created By	Shakir Jasmin_9/17/2025, 10:47 AM	Modified By	Shakir Jasmin_9/17/2025, 10:58 AM

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default	Location Layout
Account	Account Layout	Location Group Layout
Alternative Payment Method	Alternative Payment Method Layout	Location Group Assignment Layout
Appointment Invitation	Appointment Invitation Layout	Object Milestone Layout
		Organization House
		Organization House Layout

◆ 4. Role Hierarchy

Created role hierarchy to reflect hospital structure: Admin → Doctor → Receptionist → Patient.

📸 Screenshots:

- Role Hierarchy tree (Setup → Roles).

Your Organization's Role Hierarchy

Collapse All Expand All

- Hospital Appointment Management
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Admin [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Doctor [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Receptionist [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Patient [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Receptionists [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)

Show in tree view

◆ 5. Organization-Wide Defaults (OWD)

Configured OWD: Patients = Private, Appointments = Private, Billing = Private.

📸 Screenshots:

- Sharing Settings page showing OWD setup.

◆ 6. Sharing Rules

Configured Sharing Rules:

- Appointments shared with Patient & Doctor.
- Patients shared with assigned Doctor.

📸 Screenshots:

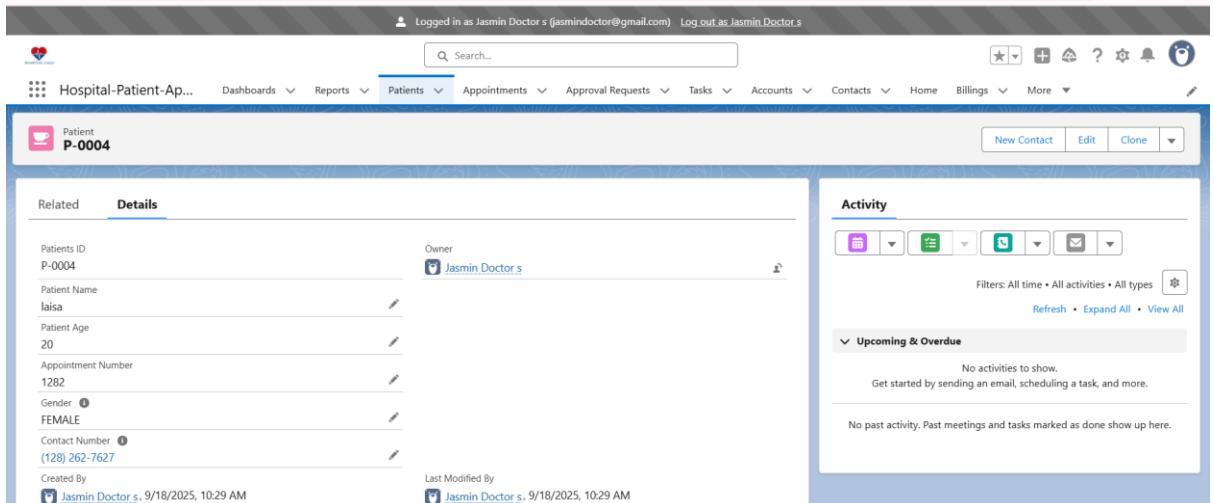
◆ 7. Testing

Used “Login As” to test permissions.

- Admin → Full Access.
- Doctor → Can view/edit Patients & Appointments.
- Receptionist → Can manage Appointments only.
- Patient → Can view only their own data.
-

Screenshots:

- Doctor logging in (showing Patients tab and Appointments).



Patient
P-0004

Details	
Patient ID	P-0004
Patient Name	Iaisa
Patient Age	20
Appointment Number	1282
Gender	FEMALE
Contact Number	(128) 262-7627
Created By	Jasmin Doctor s, 9/18/2025, 10:29 AM
Last Modified By	Jasmin Doctor s, 9/18/2025, 10:29 AM

Activity

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

- Patient logging in (showing only their record).

Outcome

At the end of Phase 2:

- Org is configured with Company Info, Users, Profiles, Roles, Security settings.
- Verified access works correctly using “Login As”.