Phase 2: Org Setup & Configuration

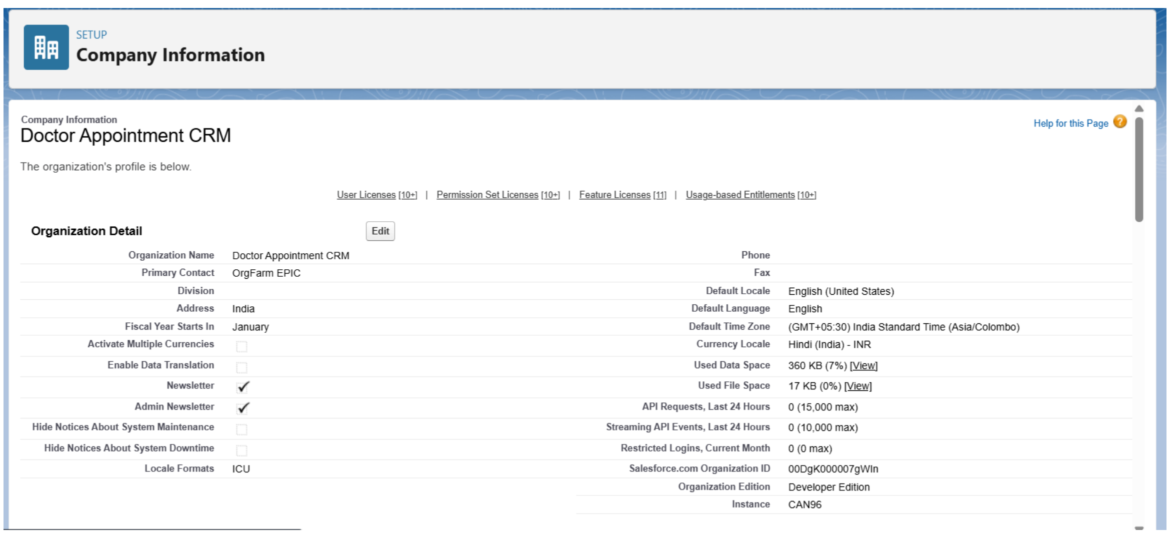
Doctor Appointment & Consultation System (Healthcare CRM)

❖ Salesforce Edition & Org Setup

- **Salesforce Edition:** Salesforce Developer Edition (suitable for CRM prototyping & testing).
- **Dev Org Setup:** Created a dedicated Developer Org for **Doctor Appointment CRM** project.

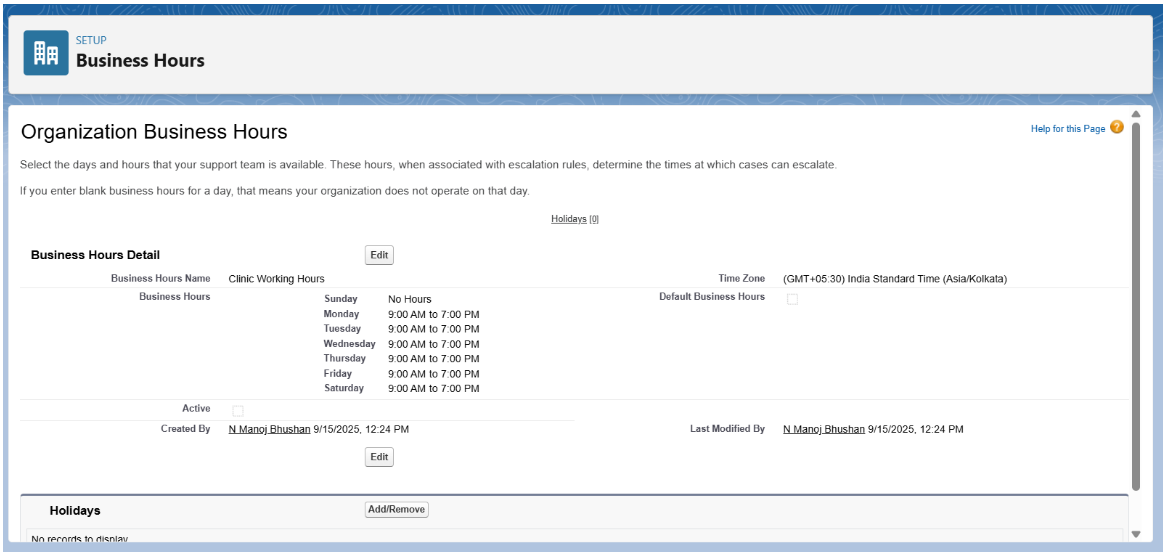
❖ Company Profile Setup:

  - Company Name: **Doctor Appointment CRM**
  - Default Currency: INR
  - Default Time Zone: (GMT+05:30) India Standard Time
  - Language: English (India)

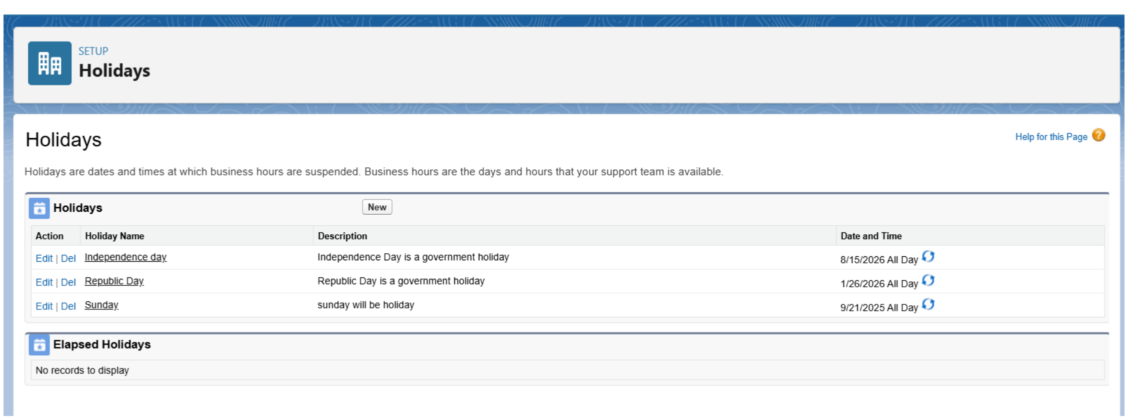


❖ Business Hours & Holidays:

  - Working Hours: 9 AM – 7 PM (Mon–Sat)
    - Setup → **Company Settings → Business Hours** → Create New.
    - Label: Clinic Working Hours
    - Time: 9 AM – 7 PM (Mon–Sat)

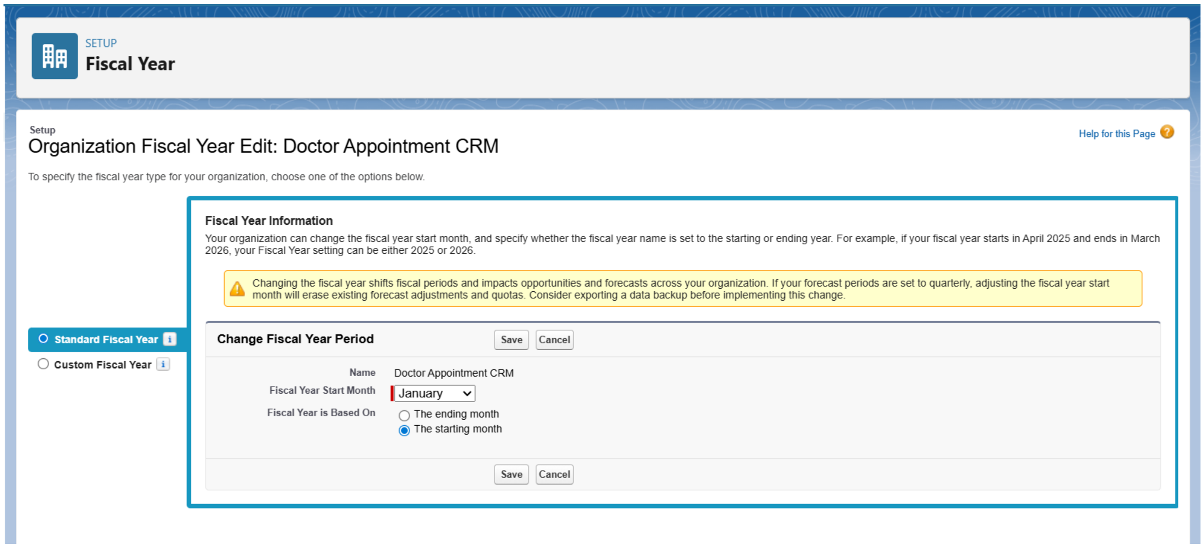


- Holidays Configured: Sundays (non-working),National holidays (Republic Day, Independence Day).
    - Setup → **Company Settings → Holidays** → Add National Holidays + Sundays.
        - Name: Sunday
        - Description: Sunday will be holiday
        - Recurring Holiday: ✅
            - Frequency: weekly
            - Sunday: ✅
    - Click save
    - Same for republic holiday and Independence day with one change
        - Recurring Holiday: ✅
            - Frequency: yearly
            - On: 26 January



❖ Fiscal Year setting:

- Setup → **Company Settings → Fiscal Year**.
- Select **Standard Fiscal Year (Jan–Dec)**.



❖ User Setup & Licenses

Users :

- System Admin (full access)
- Doctor (manages appointments & prescriptions)
- Receptionist (appointment scheduling, patient intake)
- Support Agent (handles escalations & patient cases)
- Patient Portal User
- **"Due to Developer Org limitations of 2 active users only, So Admin and Doctor users were created. Receptionist, Support Agent, and Patient roles are defined in hierarchy for future scope."**
- Go to: Setup → Users → Users → New User.
  - Fill in basic details:
  - First Name / Last Name : Manoj
  - Email : manoj.doctor@healthcrm.com
  - Username : manoj.doctor@healthcrm.com
  - Alias / Nickname : Manoj
  - Company : Doctor Appointment CRM

- Click save
- Same for System admin

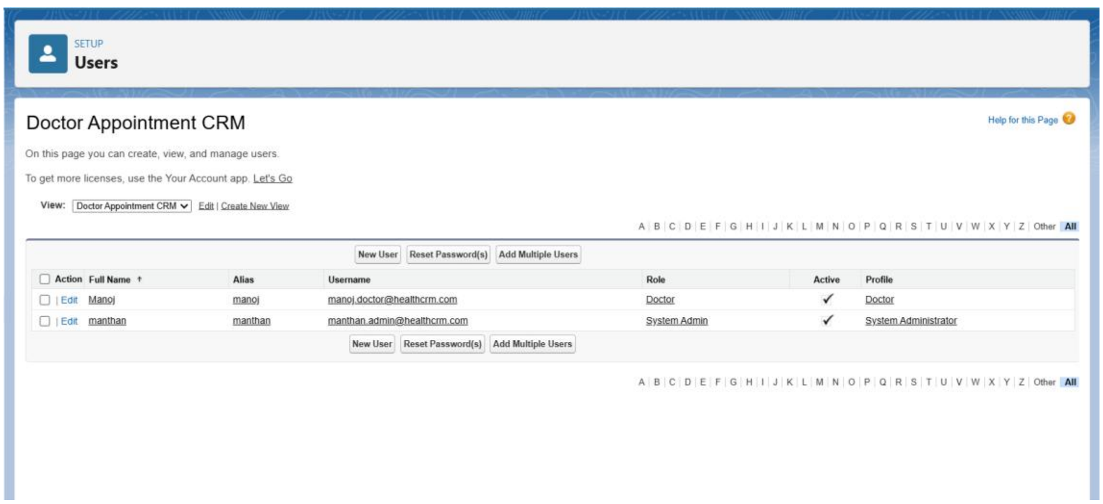
- Role, License & Profile Selection

1. System Admin (Full Access)

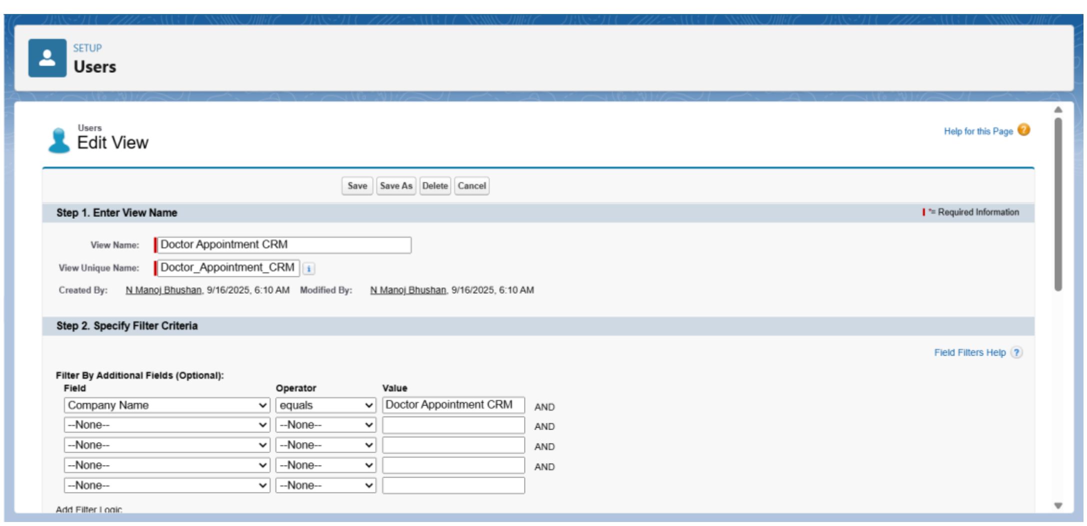
- **Role:** System Admin
- **User License:** Salesforce
- **Profile:** System Administrator

2. Doctor

- **Role:** Doctor
- **User License:** Salesforce Platform
- **Profile:** (Create custom) *Doctor*

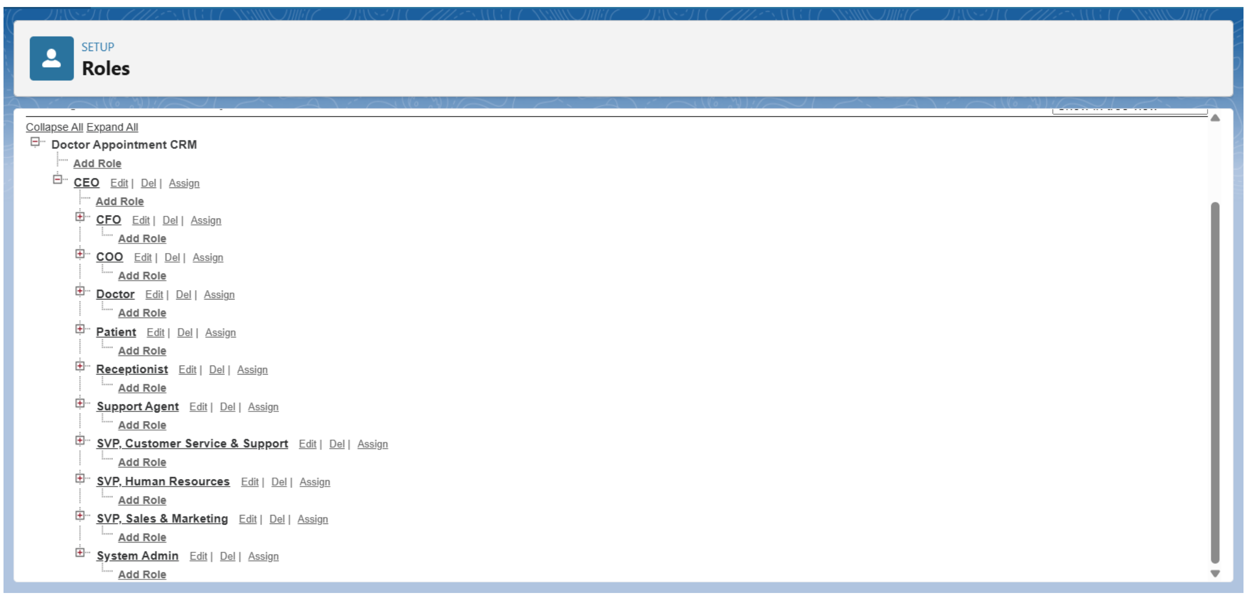


- Created a **new view** for **company field** and added value as Doctor Appointment CRM



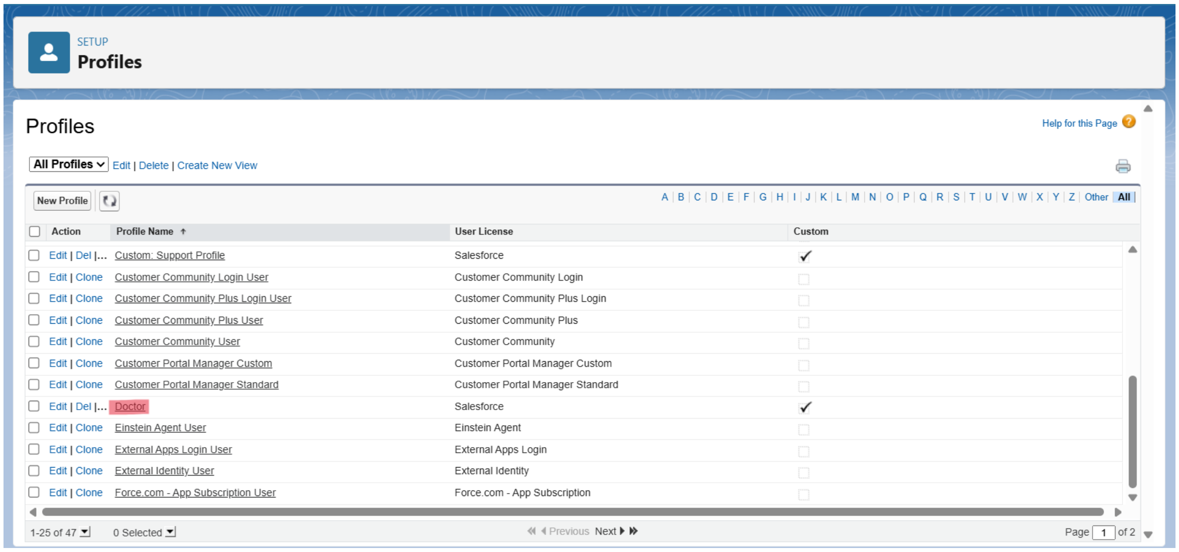
❖ Profiles & Roles

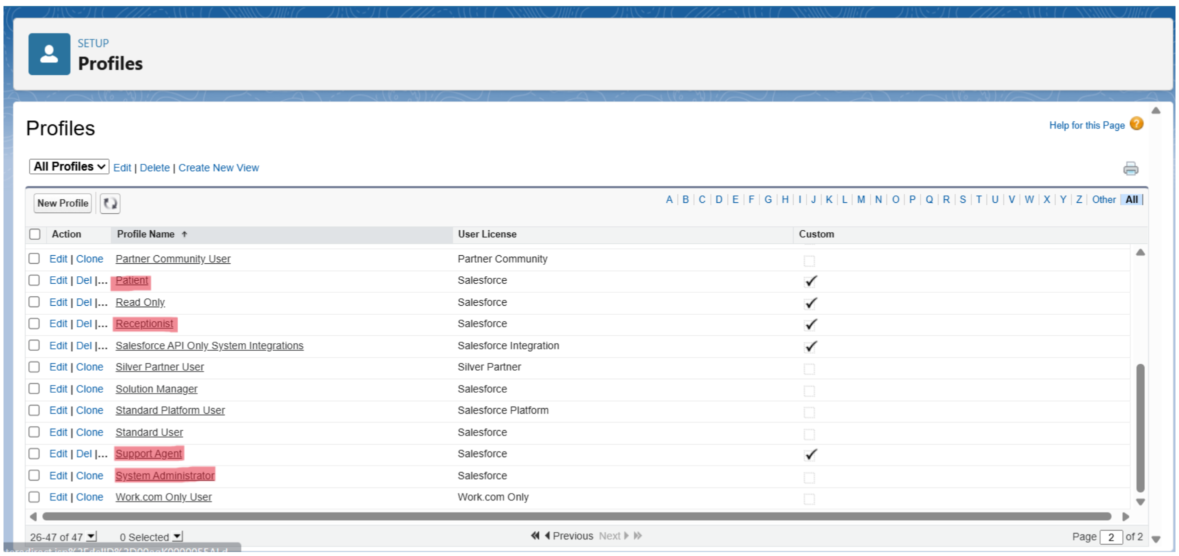
- Go to: **Setup → Users → Roles → Set Up Roles**.
- Click **"Add Role"** under the hierarchy.
    - System Admin (Top level)
    - Doctors
    - Receptionists
    - Support Agents
    - Patients (lowest level, limited access)
- **Due to Developer Org limitations (2 active users), only Admin and Doctor users were created. Receptionist, Support Agent, and Patient roles are defined in hierarchy for future scope.**



❖ Profiles

- Setup → Profiles → Clone Standard Profile.
- Doctor Profile
- Receptionist Profile
- Support Agent Profile
- Patient Profile

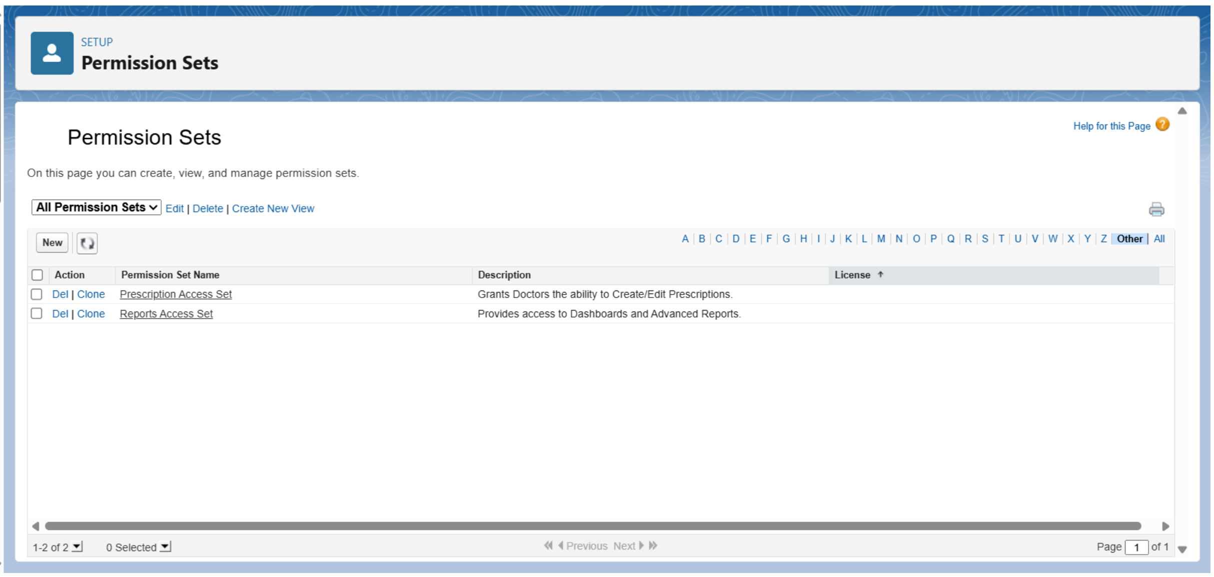




❖ Permission Sets

- Go to: **Setup → Users → permission → New**
  - Prescription Access Set (for Doctors)
    - **Label:** Prescription Access Set
    - **API Name:** Prescription_Access_Set
    - **Description:** Grants Doctors the ability to Create/Edit Prescriptions.
    - **License:** Leave as --None-- (so it can be assigned to any user).
    - Save

        - Reports Access Set (for Managers/Admin)
            - **Label:** Prescription Access Set
            - **API Name:** Prescription_Access_Set
            - **Description:** Grants Doctors the ability to Create/Edit Prescriptions.
            - **License:** Leave as --None-- (so it can be assigned to any user).
            - Save
    - **Object is created in phase 3 so object is not assigned, it will be assigned in phase 3**



❖ Organization-Wide Defaults (OWD)

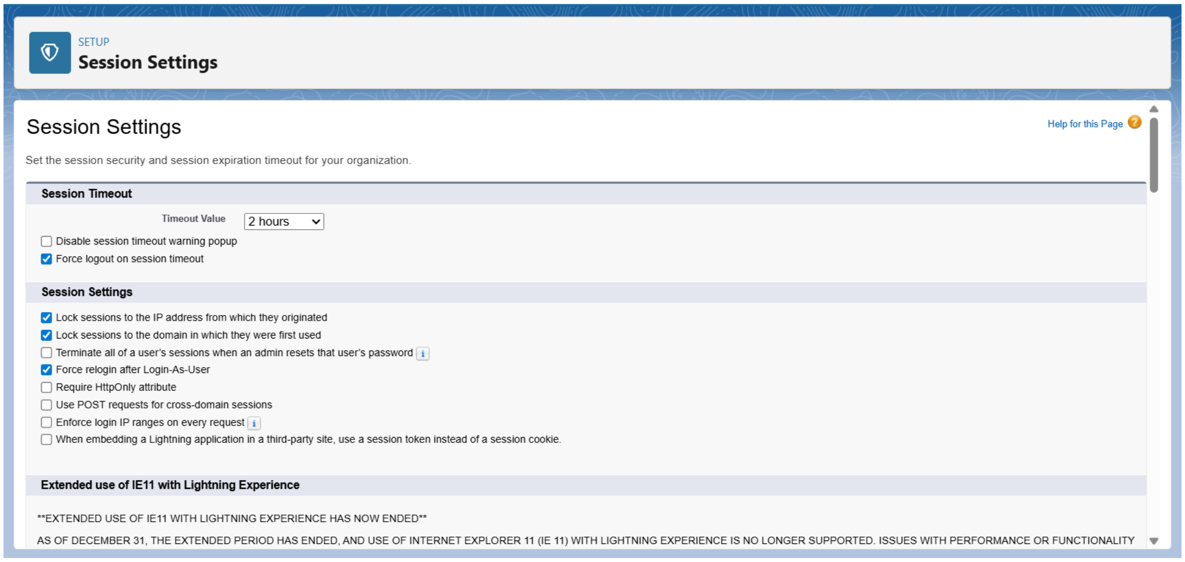
- **This need object and objects will be created in phase 3, so this will be skipped.**

❖ Sharing Rules

- **This need object and objects will be created in phase 3, so this will be skipped.**

❖ Login & Access Policies

- Setup → Security → Session Settings
    - Enable: *Force relog in after session timeout*.
    - Save.



❖ Sandbox Usage and Deployment Basics

- Sandbox is used for testing automation before deployment.
- Both are for future phases.