

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)

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Company Information' and the organization name is 'Doctor Appointment CRM'. It displays various configuration settings for the organization, such as organization name, primary contact, division, address, fiscal year start, and multiple currencies. It also shows system usage metrics like API requests and streaming API events. The 'Edit' button is visible at the top right of the form.

Organization Detail		Edit	
Organization Name	Doctor Appointment CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	360 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007gWIn
		Organization Edition	Developer Edition
		Instance	CAN96

❖ 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)

Business Hours Detail

Business Hours Name	Clinic Working Hours	Time Zone																
Business Hours	<table border="1"> <thead> <tr> <th>Day</th> <th>Hours</th> </tr> </thead> <tbody> <tr><td>Sunday</td><td>No Hours</td></tr> <tr><td>Monday</td><td>9:00 AM to 7:00 PM</td></tr> <tr><td>Tuesday</td><td>9:00 AM to 7:00 PM</td></tr> <tr><td>Wednesday</td><td>9:00 AM to 7:00 PM</td></tr> <tr><td>Thursday</td><td>9:00 AM to 7:00 PM</td></tr> <tr><td>Friday</td><td>9:00 AM to 7:00 PM</td></tr> <tr><td>Saturday</td><td>9:00 AM to 7:00 PM</td></tr> </tbody> </table>	Day	Hours	Sunday	No Hours	Monday	9:00 AM to 7:00 PM	Tuesday	9:00 AM to 7:00 PM	Wednesday	9:00 AM to 7:00 PM	Thursday	9:00 AM to 7:00 PM	Friday	9:00 AM to 7:00 PM	Saturday	9:00 AM to 7:00 PM	(GMT+06:30) India Standard Time (Asia/Kolkata)
Day	Hours																	
Sunday	No Hours																	
Monday	9:00 AM to 7:00 PM																	
Tuesday	9:00 AM to 7:00 PM																	
Wednesday	9:00 AM to 7:00 PM																	
Thursday	9:00 AM to 7:00 PM																	
Friday	9:00 AM to 7:00 PM																	
Saturday	9:00 AM to 7:00 PM																	
		Default Business Hours <input type="checkbox"/>																
Active <input checked="" type="checkbox"/>																		
Created By N Manoj Bhushan	9/15/2025, 12:24 PM	Last Modified By N Manoj Bhushan 9/15/2025, 12:24 PM																
Edit																		

Holidays [Add/Remove](#)

No records to display

- 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

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.

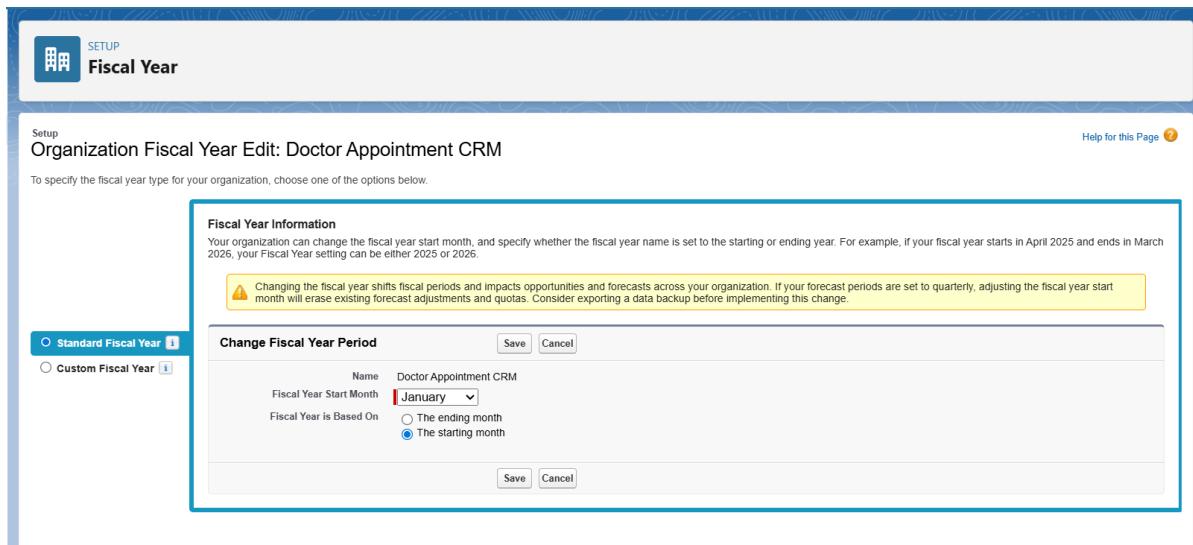
Action	Holiday Name	Description	Date and Time
Edit Del	Independence Day	Independence Day is a government holiday	8/15/2026 All Day Edit
Edit Del	Republic Day	Republic Day is a government holiday	1/26/2026 All Day Edit
Edit Del	Sunday	sunday will be holiday	9/21/2025 All Day Edit

Elapsed Holidays

No records to display

❖ 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

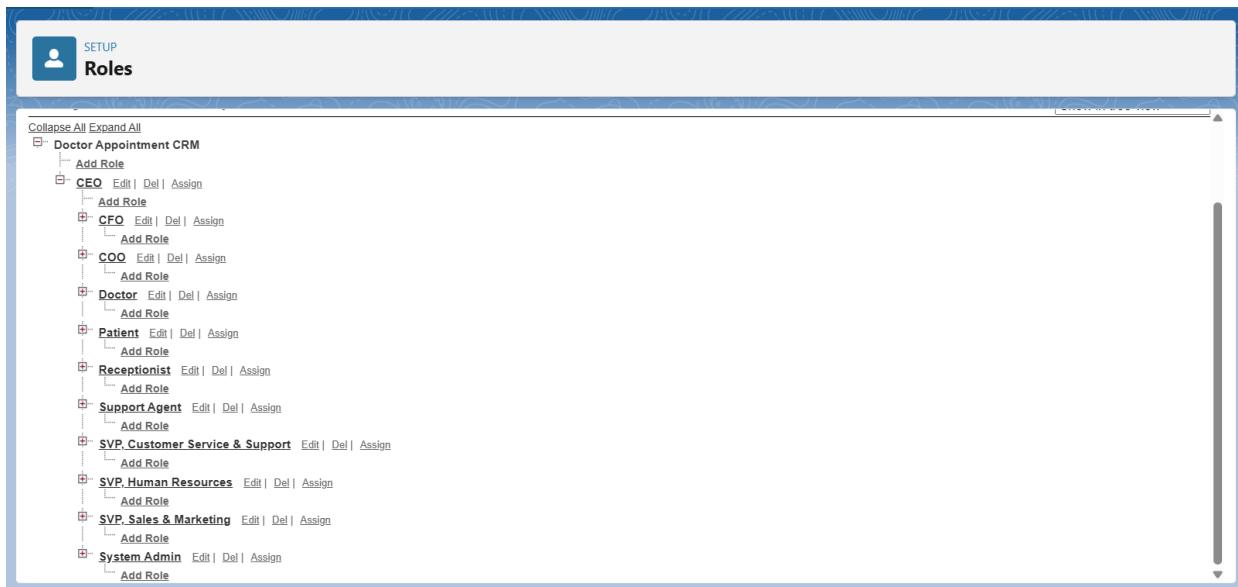
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Manoj	manoj	manoj.doctor@healthcrm.com	Doctor	✓	Doctor
<input type="checkbox"/>	Manthan	manthan	manthan.admin@healthcrm.com	System Admin	✓	System Administrator

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

Field	Operator	Value
Company Name	equals	Doctor Appointment CRM
~None~	~None~	

❖ 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

Profiles			
All Profiles ▼ Edit Delete Create New View			
New Profile ▼ Help for this Page ?			
Action	Profile Name ▼	User License	Custom
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"/>
Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
Edit Clone	External_Apps_Login User	External Apps Login	<input type="checkbox"/>
Edit Clone	External_Identity User	External Identity	<input type="checkbox"/>
Edit Clone	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>

Profiles			
All Profiles ▼ Edit Delete Create New View			
New Profile ▼ Help for this Page ?			
Action	Profile Name ▼	User License	Custom
Edit Clone	Partner_Community_User	Partner Community	<input type="checkbox"/>
Edit Del ...	Patient	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	ReadOnly	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Receptionist	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Salesforce_API_Only_System_Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Clone	Silver_Partner_User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution_Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard_Platform_User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard_User	Salesforce	<input type="checkbox"/>
Edit Del ...	Support_Agent	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	System_Administrator	Salesforce	<input type="checkbox"/>
Edit Clone	Work.com_Only_User	Work.com Only	<input type="checkbox"/>

❖ 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**

The screenshot shows the Salesforce 'Permission Sets' page under the 'SETUP' tab. The page title is 'Permission Sets'. A sub-header says 'On this page you can create, view, and manage permission sets.' Below this is a toolbar with 'All Permission Sets' dropdown, 'Edit | Delete | Create New View', and a 'Help for this Page' link. A 'New' button and a trash bin icon are also present. The main area displays a table with two rows of data:

Action	Permission Set Name	Description	License
<input type="checkbox"/> Del Clone	Prescription Access Set	Grants Doctors the ability to Create/Edit Prescriptions.	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All
<input type="checkbox"/> Del Clone	Reports Access Set	Provides access to Dashboards and Advanced Reports.	

At the bottom, there are navigation links for '1-2 of 2' and '0 Selected', and a 'Page 1 of 1' indicator.

❖ 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.

The screenshot shows the Salesforce Setup interface for 'Session Settings'. At the top left is a blue shield icon with a white key symbol, followed by the word 'SETUP' in white. To its right is the title 'Session Settings' in bold black text. In the top right corner is a small blue circle with a question mark and the text 'Help for this Page'.

The main content area has a light gray background. It contains several sections:

- Session Timeout**: A section with a dropdown menu set to '2 hours'. Below it are two checkboxes: one unchecked labeled 'Disable session timeout warning pop-up' and one checked labeled 'Force logout on session timeout'.
- Session Settings**: A section containing several checkboxes:
 - Lock sessions to the IP address from which they originated
 - Lock sessions to the domain in which they were first used
 - Terminate all of a user's sessions when an admin resets that user's password [\[i\]](#)
 - Force relogin after Login-As-User
 - Require HttpOnly attribute
 - Use POST requests for cross-domain sessions
 - Enforce login IP ranges on every request [\[i\]](#)
 - When embedding a Lightning application in a third-party site, use a session token instead of a session cookie
- Extended use of IE11 with Lightning Experience**: A section containing the message '**EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED**' and the note 'AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY'.

❖ Sandbox Usage and Deployment Basics

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