

# Phase 2 – Org Setup & Configuration

## Goal of Phase 2

Configure the Salesforce Org with company details, business hours, fiscal year, users, profiles, roles, Org-Wide Defaults (OWD), and sharing rules so that the environment is secure and ready for custom objects related to **Patient Records & Treatment Tracking**.

## Steps Followed

### 1. Salesforce Edition & Org Setup :

- Logged in to Salesforce Developer Edition.
- Setup → Quick Find → Company Information → verified *Edition = Developer Edition*.

### 2. Company Profile Setup :

- Setup → Quick Find → Company Information → Edit.
  - **Time Zone:** Asia/Kolkata
  - **Default Currency:** INR
  - **Default Languages:** English, Telugu, Gujarati
- Saved changes.

The screenshot displays the 'Company Information' setup page in Salesforce. The header includes a 'SETUP' icon and the title 'Company Information'. Below the header, a message states 'The organization's profile is below.' and there are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The main section is titled 'Organization Detail' and contains an 'Edit' button. The details are organized into two columns:

Organization Detail	
Organization Name	CuraCloud Solutions
Primary Contact	OrgFarm EPIC
Division	Healthcare Operations
Address	123 MG Road Kadapa 516001 Andhra Pradesh India
Phone	91 98765 43210
Fax	+91 98765 43211
Default Locale	English (United States)
Default Language	English
Fiscal Year Starts In	January
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>
Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>
Used Data Space	342 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>
Used File Space	17 KB (0%) <a href="#">View</a>
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	00DgI00000C0k1z
Organization Edition	Developer Edition
Instance	CAN98
Created By	OrgFarm EPIC, 9/18/2025, 1:19 PM
Modified By	Mokshagna Sheshagari, 9/24/2025, 9:02 AM

At the bottom, there is an 'Edit' button.

### 3. Business Hours & Holidays :

- Setup → Quick Find → Business Hours → *New Business Hours*.
  - **Label:** CuraCloud Clinic Hours
  - **Time Zone:** Asia/Kolkata
  - Checked **Active** and **Use these as default**.
  - Set **Sunday = Closed**.
- Saved.

**Organization Business Hours**

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

**Business Hours Detail**

Business Hours Name	Time Zone
CuraCloud Clinic Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

**Business Hours**

Day	Hours
Sunday	No Hours
Monday	9:00 AM to 5:00 PM
Tuesday	9:00 AM to 5:00 PM
Wednesday	9:00 AM to 5:00 PM
Thursday	9:00 AM to 5:00 PM
Friday	9:00 AM to 5:00 PM
Saturday	9:00 AM to 1:00 PM

**Active** ☒

**Created By** Mokshagna Sheshagari 9/23/2025, 11:19 PM

**Last Modified By** Mokshagna Sheshagari 9/23/2025, 11:19 PM

**Holidays**

No records to display

#### 4. Fiscal Year Settings :

- Setup → Quick Find → Fiscal Year.
- Verified that Standard Fiscal Year is enabled.
- Did not enable custom fiscal year.

**Organization Fiscal Year Edit: CuraCloud Solutions**

To specify the fiscal year type for your organization, choose one of the options below.

**Fiscal Year Information**

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

**Change Fiscal Year Period**

**Standard Fiscal Year** ☒ **Custom Fiscal Year** ☐

**Name** CuraCloud Solutions

**Fiscal Year Start Month** January

**Fiscal Year is Based On** ☒ The ending month ☐ The starting month

#### 5. User Setup & Licenses :

Created internal users representing key staff:

- **Clinic Administrator**
- **Doctor**
- **Nurse**

For each user:

- Setup → Quick Find → **Users** → **New User**
- Filled required fields (Name, Email, Username).
- **User License:** Salesforce Platform
- Assigned appropriate **Role** and **Profile** (see below).
- Checked **Generate Password** → Saved.

**SETUP Users**

**All Users** Help for this Page

On this page you can create, view, and manage users.  
To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Admin_Sita	SAdmin	sita.admin@curacloudsolutions.com	Clinic Admin	✓	System Administrator
<a href="#">Edit</a>	Chatter_Expert	Chatter	chatty.00dgl00000c0kizua1jed72lihozt1@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC_QrgFarm	OEPIc	epic.a5fa19atf269@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Kumar_R	rkumar	r.kumar@curacloudsolutions.com	Doctor	✓	Doctor Profile
<a href="#">Edit</a>	Kumari_Anitha	akumari	anitha.nurse@curacloudsolutions.com	Nurse	✓	Standard Platform User
<a href="#">Edit</a>	Sheshagari_Mokshagna	mok	mokshagna149387@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00dgl00000c0kizua1.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00dgl00000c0kizua1.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

## 6. Profiles :

Cloned Standard User to create these custom profiles and set object permissions:

- **Clinic\_Admin\_Profile**
  - Object Permissions: Read, Create, Edit, Delete on
    - Patient\_\_c
    - Visit\_\_c
    - Treatment\_Plan\_\_c
- **Doctor\_Profile**
  - Object Permissions:
    - Patient\_\_c: Read, Edit
    - Visit\_\_c: Read, Create, Edit
    - Treatment\_Plan\_\_c: Read, Create, Edit
- **Nurse\_Profile**
  - Object Permissions:
    - Patient\_\_c: Read, Edit

- Visit\_\_c: Read, Create, Edit
- Treatment\_Plan\_\_c: Read only
- For all three profiles, set Tabs for
  - Patient, Visit, and Treatment\_Plan → Default On

The screenshot shows the Salesforce 'Profiles' setup page. At the top, there's a 'SETUP Profiles' header. Below it, the 'Doctor Profile' is selected. A note states: '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.' Below this, a link says: '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.'

A row of links for various access settings is visible: [Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

The 'Profile Detail' section shows:
 

- Name: Doctor Profile
- User License: Salesforce
- Description:
- Created By: Mokshagna Sheshagari, 9/24/2025, 3:16 AM
- Modified By: Mokshagna Sheshagari, 9/24/2025, 3:41 AM

 Buttons for 'Edit', 'Clone', 'Delete', and 'View Users' are present.

The 'Page Layouts' section is titled 'Standard Object Layouts' and lists various layouts with links to view assignments:
 

- Global: [Global Layout \[ View Assignment \]](#)
- Email Application: [Not Assigned \[ View Assignment \]](#)
- Home Page Layout: [Home Page Default \[ View Assignment \]](#)
- Account: [Account Layout \[ View Assignment \]](#)
- Alternative Payment Method: [Alternative Payment Method Layout \[ View Assignment \]](#)
- Appointment Invitation: [Appointment Invitation Layout \[ View Assignment \]](#)
- Location Group Assignment: [Location Group Assignment Layout \[ View Assignment \]](#)
- Macro: [Macro Layout \[ View Assignment \]](#)
- Object Milestone: [Object Milestone Layout \[ View Assignment \]](#)
- Operating Hours: [Operating Hours Layout \[ View Assignment \]](#)
- Opportunity: [Opportunity Layout \[ View Assignment \]](#)
- Opportunity Product: [Opportunity Product Layout \[ View Assignment \]](#)

## 7 Roles & Role Hierarchy :

- **Navigation:**  
Setup → Quick Find → Roles → Set Up Roles → Add Role
- **Created Role Hierarchy:**
  - System Administrator (top level)
    - Clinic Admin
      - Doctor
      - Nurse
- Saved each role after creation.

SETUP

Roles

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

**Your Organization's Role Hierarchy** Show in tree view

Collapse All Expand All

- CuraCloud Solutions
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - CFO Edit | Del | Assign
      - Add Role
      - Clinic Admin Edit | Del | Assign
        - Add Role
        - Doctor Edit | Del | Assign
          - Add Role
          - Lab Technician Edit | Del | Assign
            - Add Role
            - Nurse Edit | Del | Assign
              - Add Role
              - Reception Edit | Del | Assign
                - Add Role
    - COO Edit | Del | Assign
      - Add Role
    - SVP, Customer Service & Support Edit | Del | Assign
      - Add Role
    - SVP, Human Resources Edit | Del | Assign
      - Add Role
    - SVP, Sales & Marketing Edit | Del | Assign
      - Add Role

## 8 Permission Sets :

- Go to Setup → Quick Find → Permission Sets → Click Permission Sets.
- Click New to create a new permission set.
- Created Permission Sets:**
  - Upload Reports / Files – Grants file upload permissions for Nurse and Lab Technician.
  - Edit Sensitive Fields – Allows editing of critical patient details for Doctor.
  - Create Treatment Plans – Enables creation of treatment plans for Nurse.
  - Admin Extra Access – Provides additional administrative privileges for Clinic Admin.
- Saved each permission set for assignment to the appropriate users.

SETUP

Permission Sets

Permission Set

**Admin Extra Access** Video Tutorial | Help for this Page

Find Settings... Clone Edit Properties Manage Assignments View Summary

**Permission Set Overview**

Description	API Name	Admin_Extra_Access
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Mokshagna Sheshagari, 9/24/2025, 7:03 AM
Permission Set Groups Added To 0	Last Modified By	Mokshagna Sheshagari, 9/24/2025, 7:03 AM

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

## 9.Org-Wide Defaults (OWD) :

Setup → Quick Find → Sharing Settings → Edit.

- Patient\_\_c: Private (patient confidentiality)
- Visit\_\_c: Controlled by Parent
- Treatment\_Plan\_\_c: Controlled by Parent
- Saved.

SETUP Sharing Settings			
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Doctor	Public Read/Write	Private	✓
Patient	Private	Private	✓
Treatment Plan	Private	Private	✓
Visit	Private	Private	✓

## 10. Sharing Rules :

setup → Quick Find → Sharing Settings → New Sharing Rule.

- Share all Patient\_\_c records where *Clinic* = “Main Clinic” with Role = Doctor.

SETUP Sharing Settings			
No sharing rules specified.			
<b>Work Type Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Work Type Sharing Rules Help ?</a>			
No sharing rules specified.			
<b>Work Type Group Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Work Type Group Sharing Rules Help ?</a>			
No sharing rules specified.			
<b>Doctor Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Doctor Sharing Rules Help ?</a>			
No sharing rules specified.			
<b>Patient Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Patient Sharing Rules Help ?</a>			
Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Doctor	Role: Nurse	Read/Write
<b>Treatment Plan Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Treatment Plan Sharing Rules Help ?</a>			
Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Nurse	Role: Doctor	Read/Write
<b>Visit Sharing Rules</b> <a href="#">New</a> <a href="#">Recalculate</a> <a href="#">Visit Sharing Rules Help ?</a>			
Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Doctor	Role: Nurse	Read/Write

## 11.Login Access Policies :

- Setup → Quick Find → Login Access Policies.
- Checked Administrators Can Log in as Any User.
- Saved.

The screenshot shows the 'Login Access Policies' configuration page in Salesforce Setup. The page has a header with the 'SETUP' icon and the title 'Login Access Policies'. Below the header, there is a sub-header 'Login Access Policies' and a description: 'Control which support organizations your users can grant login access to.' A 'Help for this Page' link is visible in the top right corner. The main content area is titled 'Manage Support Options' and contains a 'Save' and 'Cancel' button. Below this, there is a table with two columns: 'Setting' and 'Enabled'. The first row shows the setting 'Administrators Can Log in as Any User' with a checked checkbox. Below the table, there is a section for 'Support Organization' with columns for 'Packages', 'Available to Users', and 'Available to Administrators Only'. The 'Available to Users' column has a radio button selected, and the 'Available to Administrators Only' column has a radio button. At the bottom of the section, there are 'Save' and 'Cancel' buttons.

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

## Outcome of Phase 2 :

The Salesforce org is now fully configured with:

- Company profile (time zone, currency, supported languages)
- Clinic business hours & standard fiscal year
- Users mapped to real clinic roles
- Profiles Clinic\_Admin, Doctor, Nurse with appropriate object permissions
- Role hierarchy ensuring secure data visibility
- OWD and sharing rules protecting patient privacy

This configuration provides a secure foundation for custom object creation and automation in the Patient Records & Treatment Tracking application.

