

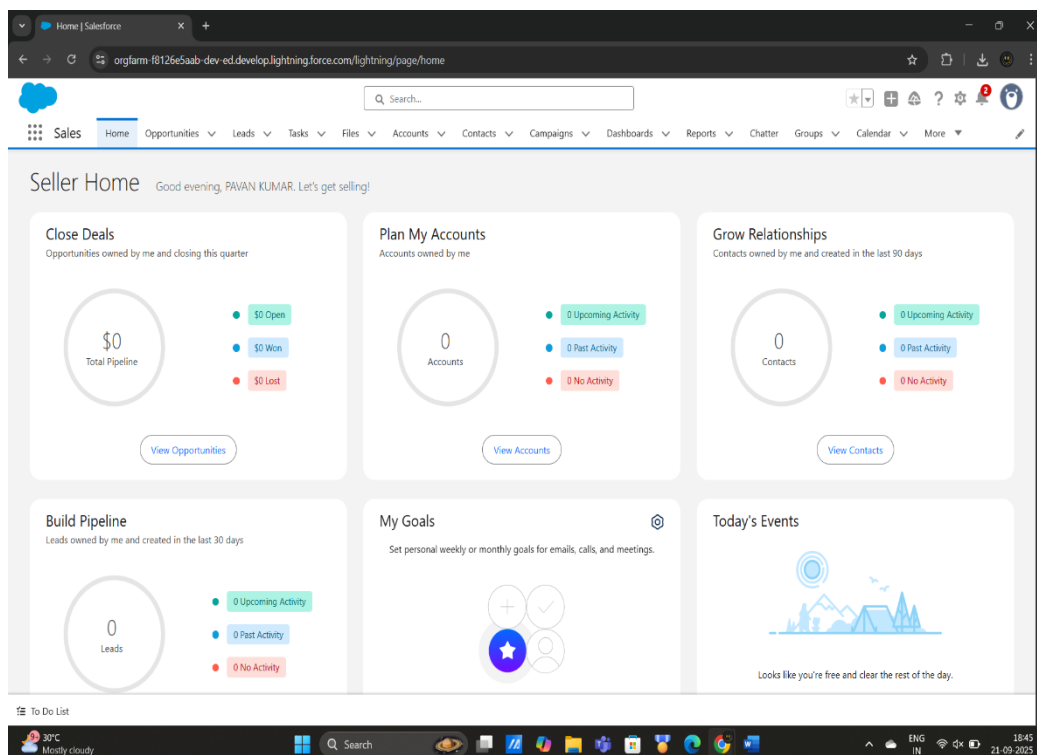
Phase 2: Org Setup & Configuration for Hospital Patient Engagement and Appointment Management

Goal of Phase 2

- Prepare the Salesforce environment for hospital-specific workflows.
- Set up Users, Roles, Profiles, Permissions, and Sharing Settings aligned with hospital staff and patient engagement needs.
- Configure Company Information, Business Hours, Holidays, and Fiscal Year rules.
- Ensure secure access and data visibility based on stakeholder roles.

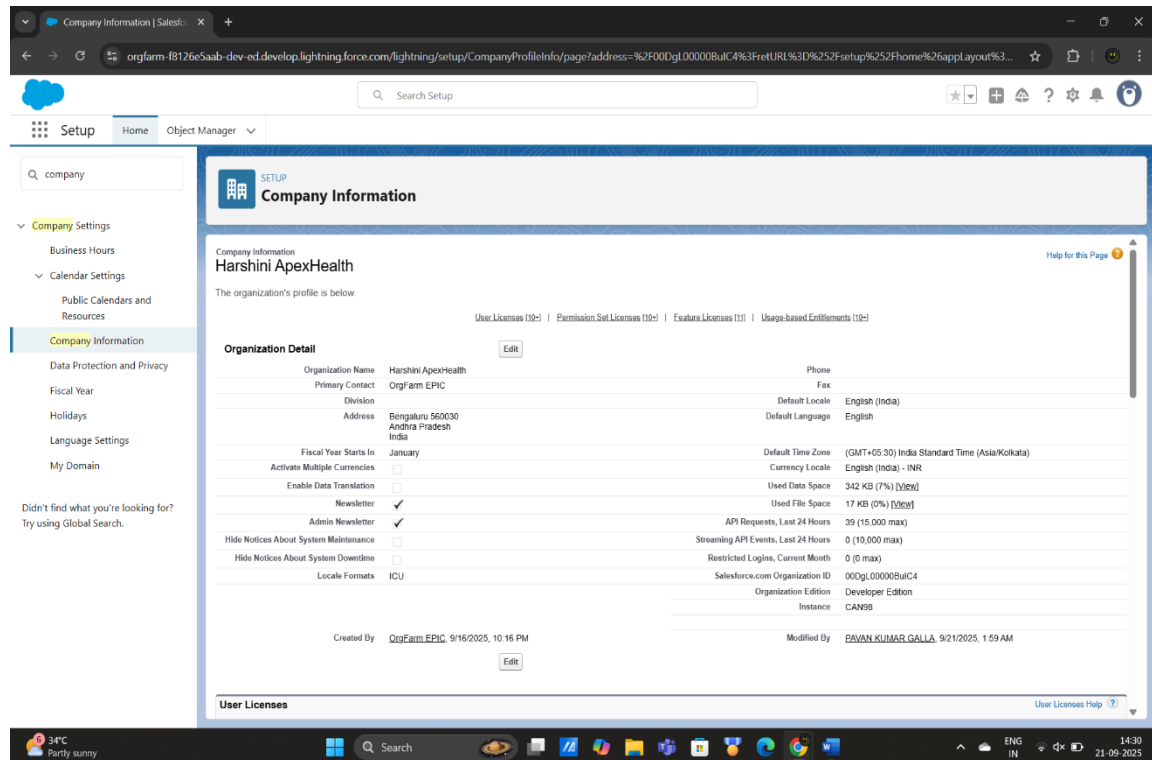
Step 1: Salesforce Environment Setup

- Edition used → Developer Edition
- Signed up for a Salesforce Developer Edition and logged into the Lightning Experience. Confirmed access to the Setup area using the gear icon.



Step 2: Company Profile Setup

- Company Info



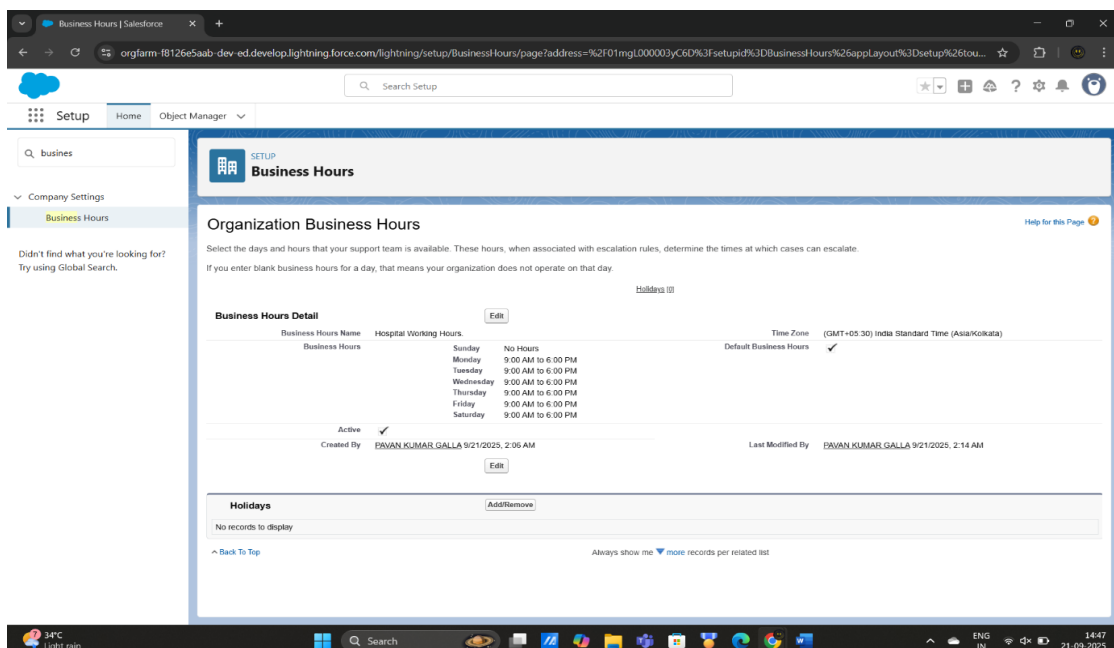
The screenshot shows the Salesforce Setup interface for the 'Company Information' page. The left sidebar contains navigation links for 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information' (selected), 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area displays the 'Company Information' for 'Harshini ApexHealth'. It includes a table for 'Organization Detail' with fields like Organization Name, Division, Address, Fiscal Year Starts In, and various system settings. Below the table, it shows 'Created By' and 'Modified By' information. The bottom of the page shows the 'User Licenses' section.

Organization Detail	
Organization Name	Harshini ApexHealth
Primary Contact	OrgFarm EPIC
Division	
Address	Bengaluru 560030 Andhra Pradesh India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Created By: OrgFarm EPIC, 9/16/2025, 10:16 PM
Modified By: PAVAN KUMAR GALLA, 9/21/2025, 1:59 AM

Step 3: Business Hours & Holidays

- Time Zone = IST
- Hours = Mon–Fri, 9 AM–6 PM and Sunday Holiday

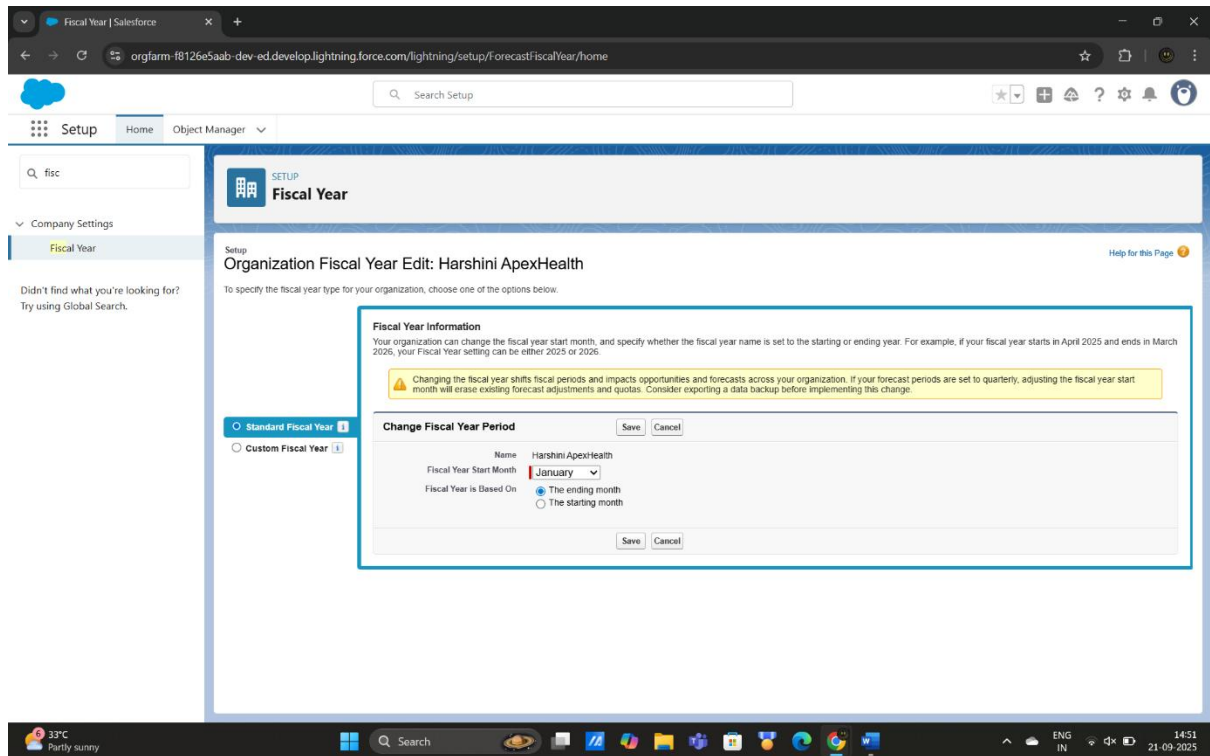


The screenshot shows the Salesforce Setup interface for the 'Business Hours' page. The left sidebar contains navigation links for 'Company Settings', 'Business Hours' (selected), 'Calendar Settings', 'Public Calendars and Resources', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area displays the 'Organization Business Hours' for 'Harshini ApexHealth'. It includes a table for 'Business Hours Detail' with fields like Business Hours Name, Hospital Working Hours, Time Zone, and various system settings. Below the table, it shows 'Created By' and 'Last Modified By' information. The bottom of the page shows the 'Holidays' section.

Business Hours Detail	
Business Hours Name	Hospital Working Hours
Business Hours	Sunday: No Hours Monday: 9:00 AM to 6:00 PM Tuesday: 9:00 AM to 6:00 PM Wednesday: 9:00 AM to 6:00 PM Thursday: 9:00 AM to 6:00 PM Friday: 9:00 AM to 6:00 PM Saturday: 9:00 AM to 6:00 PM
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours	<input checked="" type="checkbox"/>

Created By: PAVAN KUMAR GALLA, 9/21/2025, 2:05 AM
Last Modified By: PAVAN KUMAR GALLA, 9/21/2025, 2:14 AM

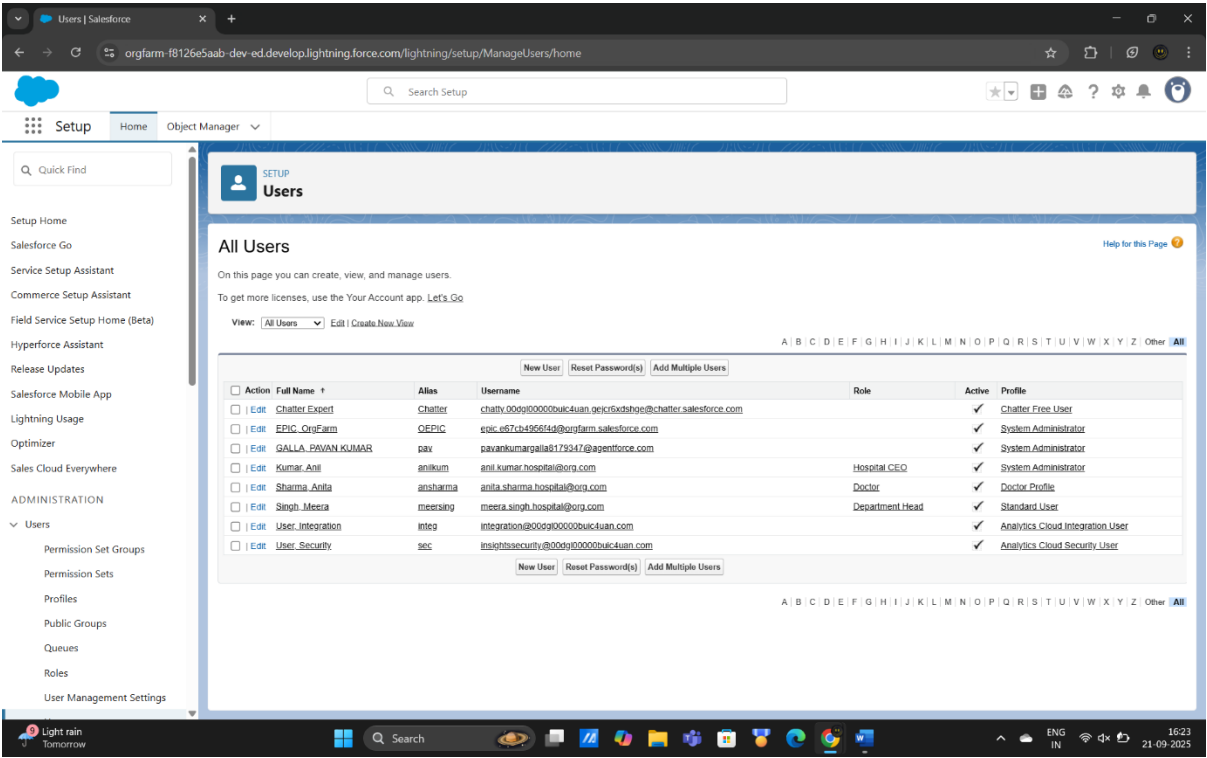
Step 4 - Fiscal Year Settings



Step 5 : Role Hierarchy



Step 6: Users & Licenses



Role	Description	Profile	License Type
Hospital CEO	Overall admin, full access to all hospital resources	System Administrator	Salesforce
Department Head	Department-level manager (e.g. Cardiology head)	Standard User	Salesforce
Doctor	Provides consultation, manages patient care	Custom Doctor Profile	Salesforce Platform
Nurse	Assists doctors, limited patient record access	Custom Nurse Profile	Salesforce Platform
Reception/Admin	Manages patient registration, billing, appointments	Receptionist Profile	Salesforce Platform
Finance Team	Handles billing, payments, financial reporting	Finance Profile	Salesforce Platform
IT Support	Manages Salesforce system, restricted access	System Administrator	Salesforce

Step 7: Permission Sets

Extra access for specific users → create Permission Set

Step 8 - Sharing Rules

As Objects Not yet created will complete in Phase 3

Step 9: Dev Org

Build in Dev Org

Expected Outcome (Phase 2 Completion)

- Salesforce org fully setup
- Users, Roles, Profiles, Permission Sets, OWD, Business Hours, Holidays configured
- Ready for Phase 3: Data Modeling & Relationships