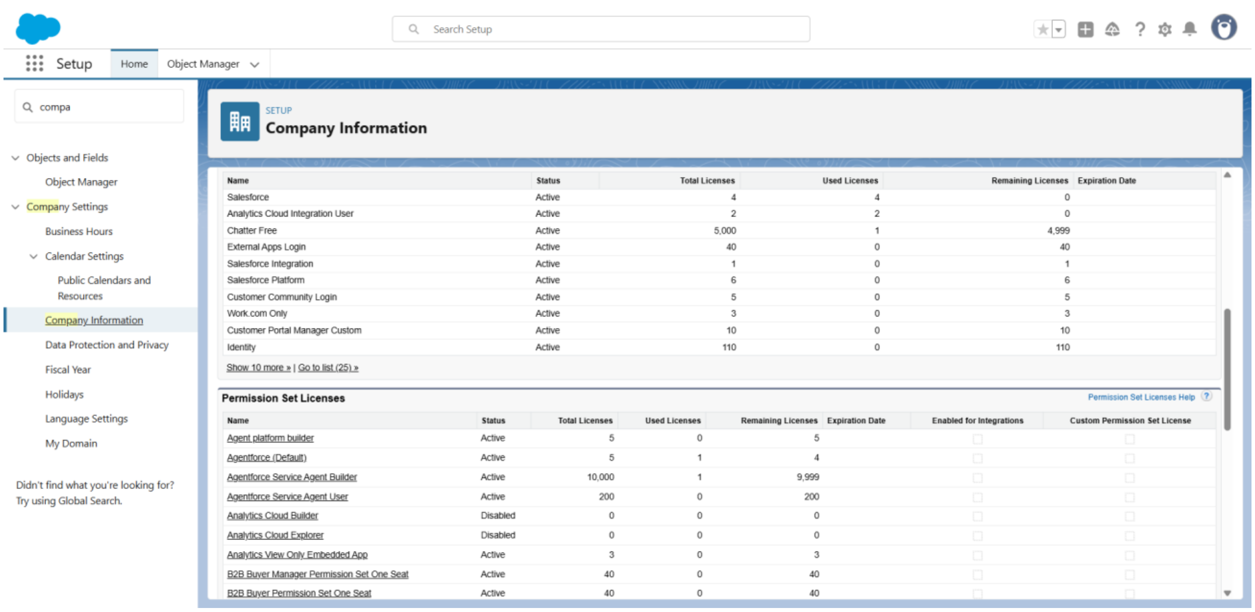
Phase 2: Org Setup & Configuration

1. Salesforce Editions

Salesforce offers different editions depending on the organization’s size and requirements. For this project, a **Developer Edition** org is used, which provides:

- **Core CRM Objects:** Accounts, Contacts, Cases, Events, Tasks
- **Customization Options:** Custom fields, Profiles, Permission Sets, Roles
- **Sandbox Support:** Single developer sandbox for testing metadata changes
- **License Limitations:** 5 users, standard Salesforce licenses

Rationale: Developer Edition is ideal for testing and learning because it provides most features without requiring production licenses.



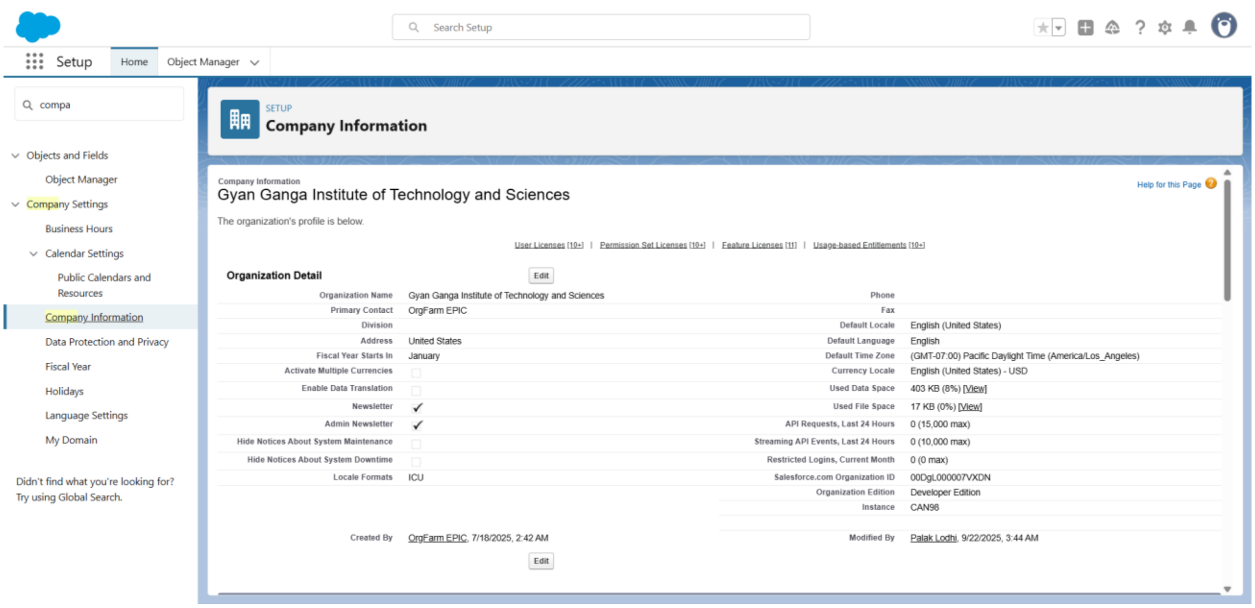
2. Company Profile Setup

Configuration:

- Primary Contact: Name - Palak Lodhi , Email - palak.lodhi.aiml22@ggits.net
- Default Locale: English (India)
- Default Time Zone: GMT+5:30 Asia/Kolkata
- Default Currency: INR

Purpose:

Ensures accurate formatting for reports, dashboards, and date-time calculations across the org.



3. Business Hours & Holidays

Configuration:

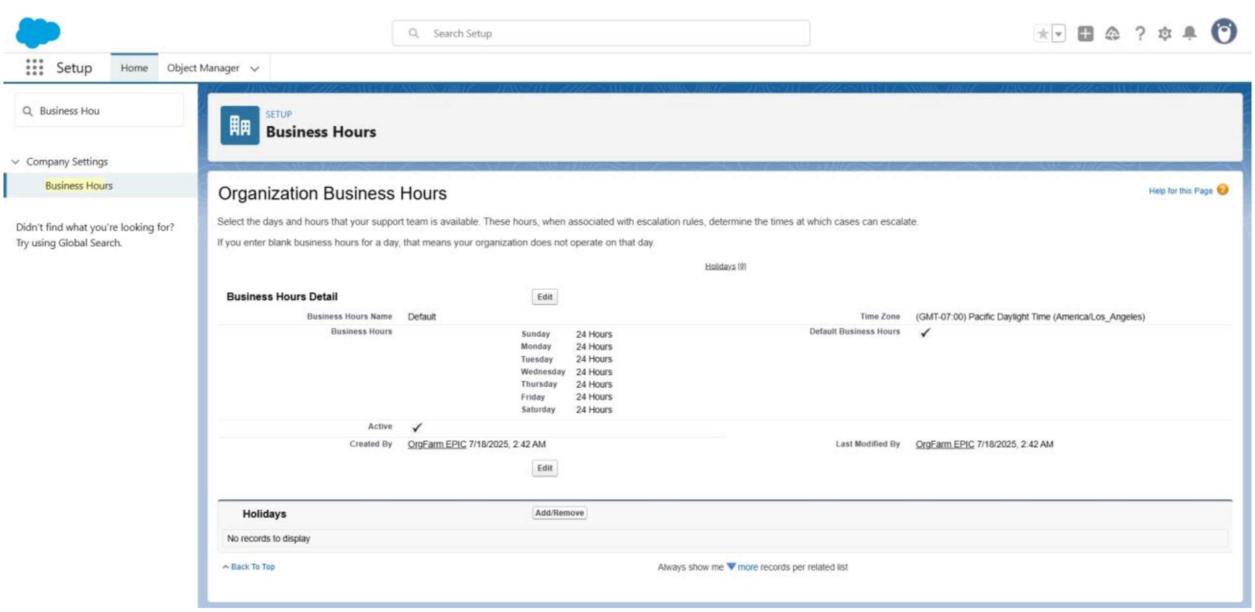
- Business Hours: Monday to Friday, 09:00 – 17:00
- Holidays: Organization-specific (optional)

Steps:

1. Setup → Business Hours → New
2. Enter Business Hours Name: Standard Business Hours
3. Select working days and times
4. Save

Purpose:

Defines operational hours for appointments, Events, and SLA calculations for Cases.



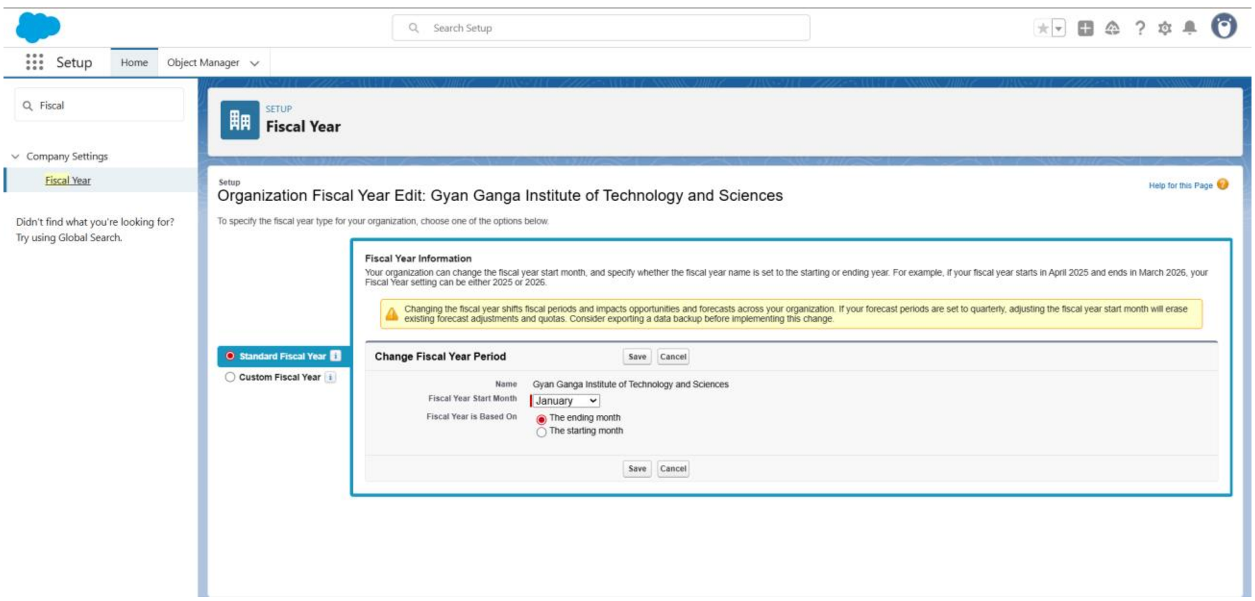
4. Fiscal Year Settings

Configuration:

- Fiscal Year Type: Standard (January – December)

Purpose:

Ensures accurate reporting, dashboards, and KPI calculations aligned with organizational fiscal periods.



5. User Setup & Licenses

Purpose: Create test users to verify profile and permission configurations.

Test Users Created in the Org:

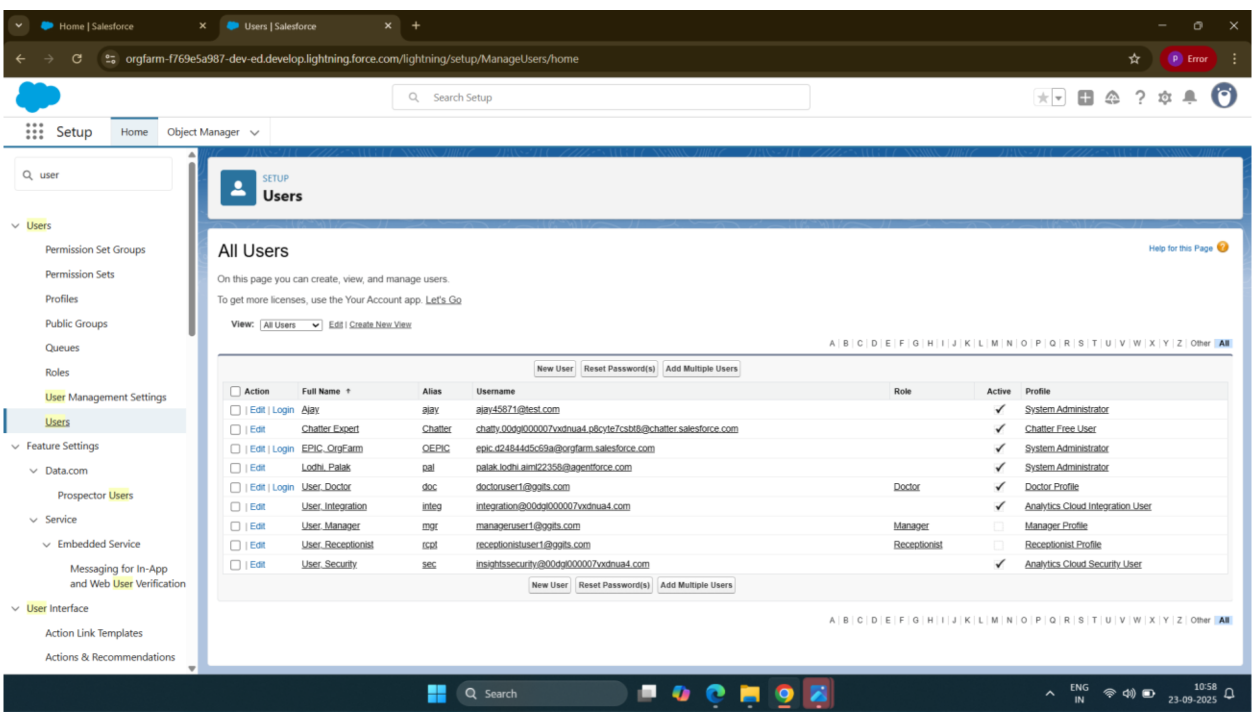
User Type	Full Name	Alias	Username	Role	Profile	Active

Manager	User, Manager	mgr	manageruser1@ggits.com	Manager	Manager Profile	No
Doctor	User, Doctor	doc	doctoruser1@ggits.com	Doctor	Doctor Profile	Yes
Receptionist	User, Receptionist	rcpt	receptionistuser1@ggits.com	Receptionist	Receptionist Profile	No

Manager: Responsible for supervising all hospital activities, can view and manage all patient records, appointments, and treatments.

Doctor: Can create and update patient records (Contacts), schedule and manage appointments (Events), and record treatments (Cases).

Receptionist: Can create patient records (Contacts) and schedule appointments (Events) but cannot create treatment records (Cases).



6. Profiles

Profiles Created:

- Manager Profile
- Doctor Profile
- Receptionist Profile

Object Permissions:

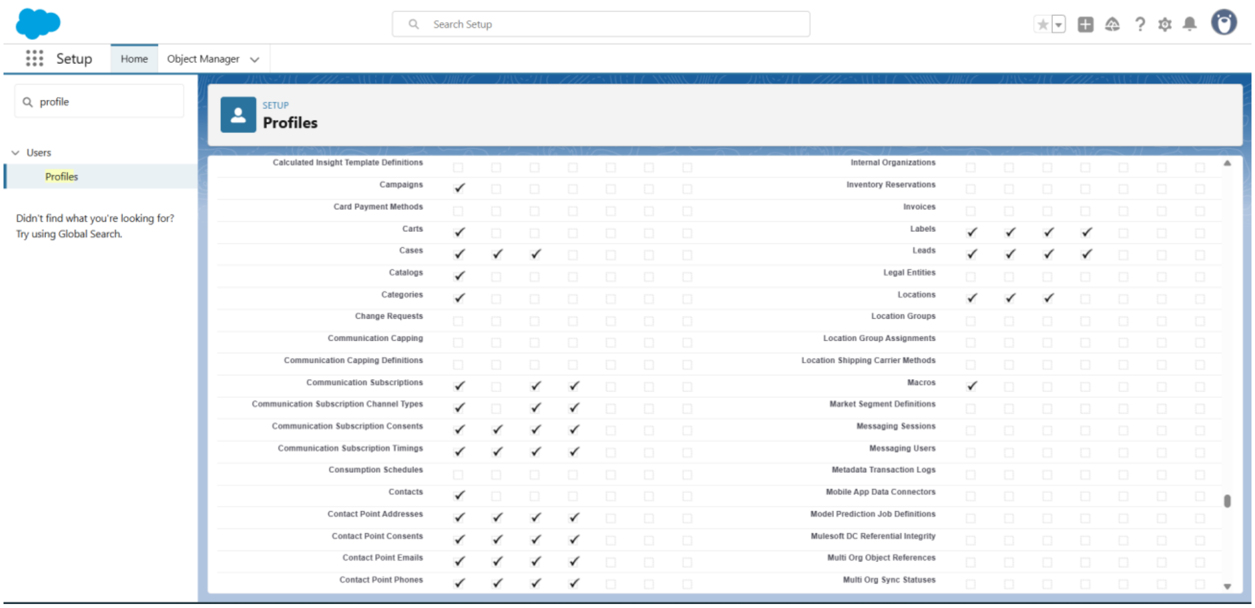
Profile	Contacts	Events	Cases
Manager	R/C/E/D	R/C/E/D	R/C/E/D
Doctor	R	R/C/E	R/C/E
Receptionist	R/C/E	R/C/E	R

Steps:

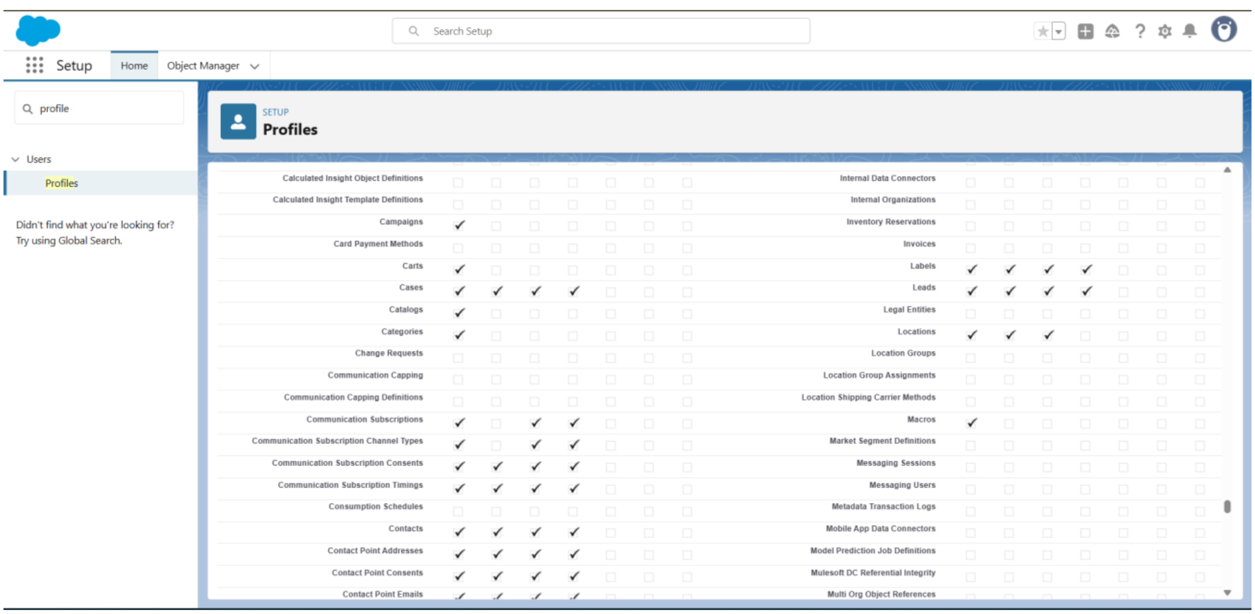
1. Setup → Profiles → Clone Standard User
2. Rename profile accordingly
3. Edit Object Settings → configure permissions per above

Purpose:
Profiles define baseline permissions for objects. Combined with roles and OWD, they control record-level access.

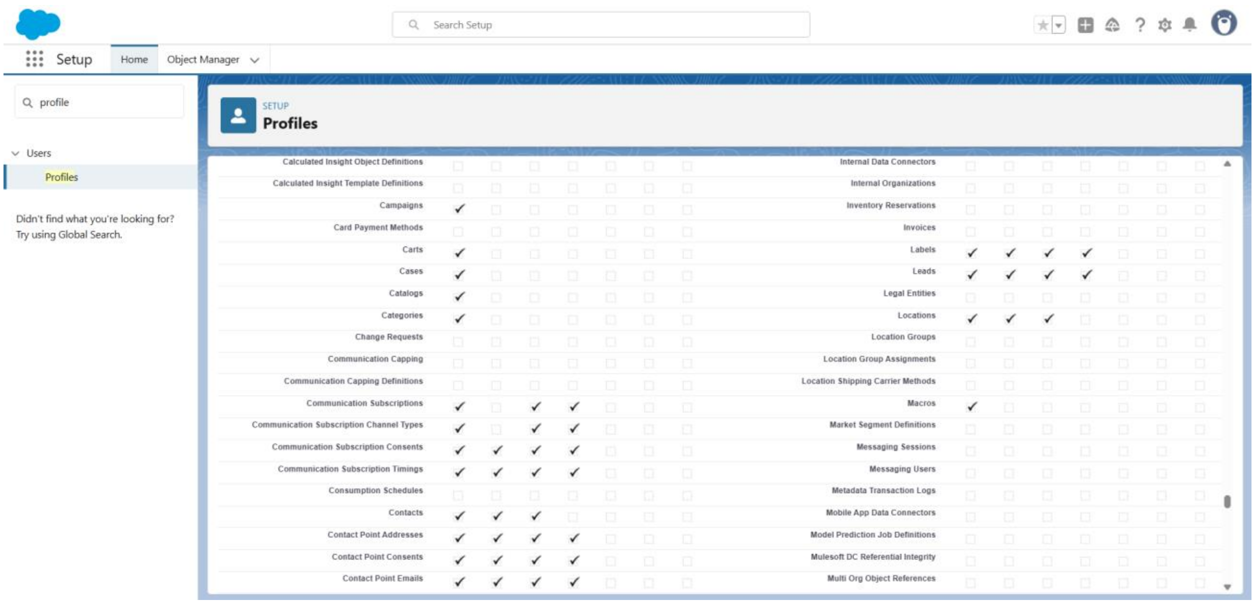
Doctor Profile :



Manager Profile :

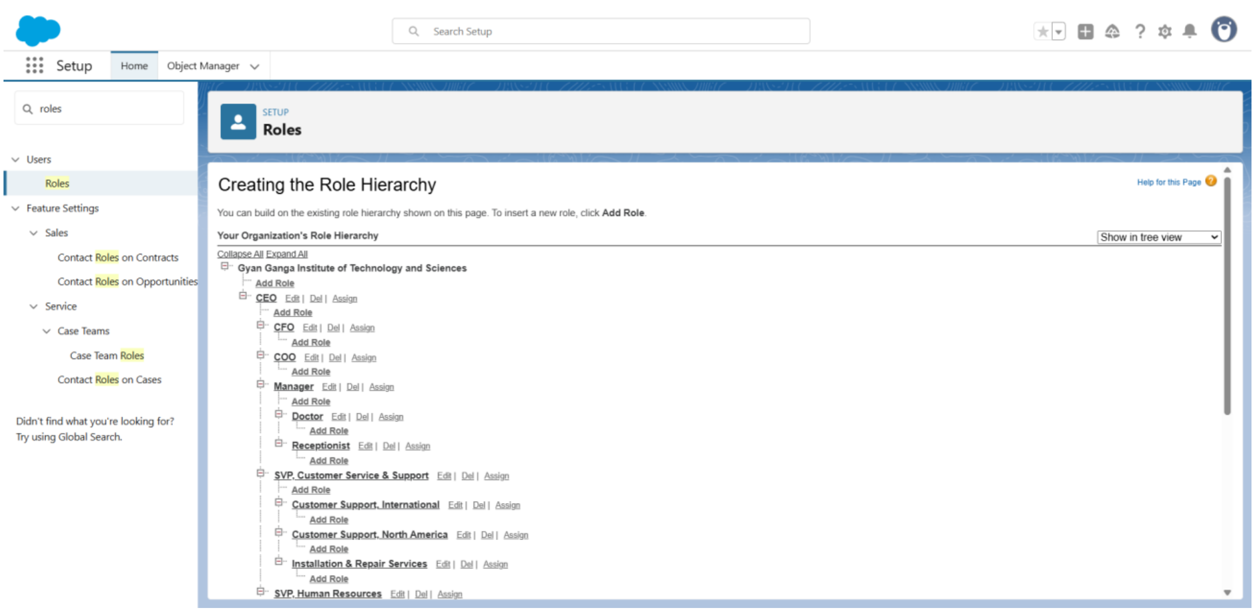


Receptionist Profile :



7. Roles

Role Hierarchy:



Steps:

1. Setup → Roles → Enable Roles (if not already enabled)
2. Add Role under parent role (CEO → Manager → Doctor/Receptionist)
3. **Save each role**

Purpose:
Roles manage record-level visibility:

- **Managers see all subordinate records**
- **Doctors see only their patient records**
- **Receptionists have limited access**

8. Permission Sets

Configuration:

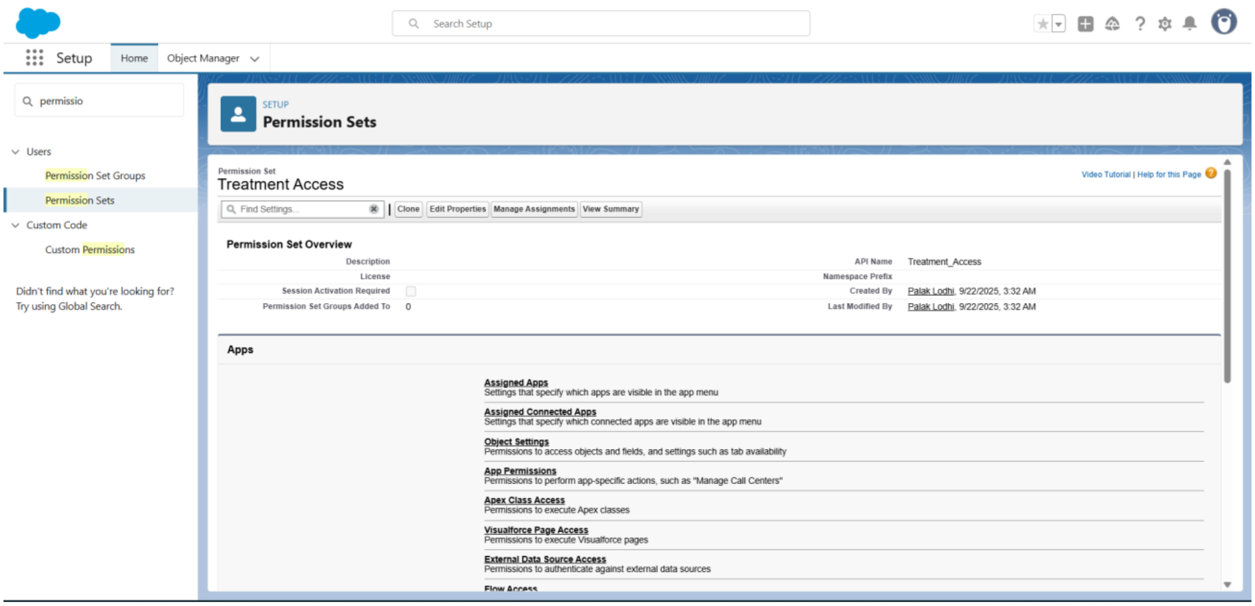
- **Name: Treatment Access**
- **License: None**
- **Assigned to: Doctor User**

Steps:

1. Setup → Permission Sets → New
2. **Configure Case object permissions (Read/Create/Edit)**

3. **Assign to Doctor user**

Purpose:
Permission sets provide additional access without altering the user's profile, improving flexibility.



9. Org-Wide Defaults (OWD)

Configuration:

- Contacts → Private
- Cases → Private
- Events → Controlled by related Contact

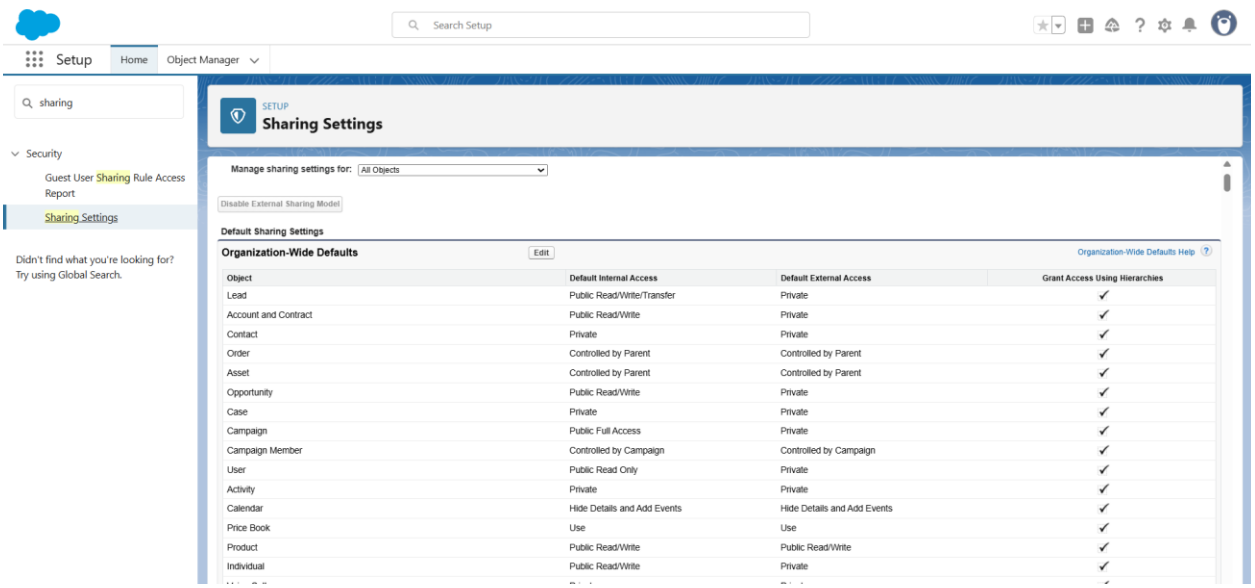
Steps:

1. Setup → Sharing Settings → Edit

2. Set default internal access for Contacts and Cases to Private

3. Save

Purpose:
Ensures patient information privacy. Access is then controlled via role hierarchy or permission sets.



10. Sharing Rules

- No custom sharing rules created in Phase 2
- Default access controlled via Role Hierarchy

Purpose:
Allows for role-based sharing of records without additional rules.

11. Login Access Policies

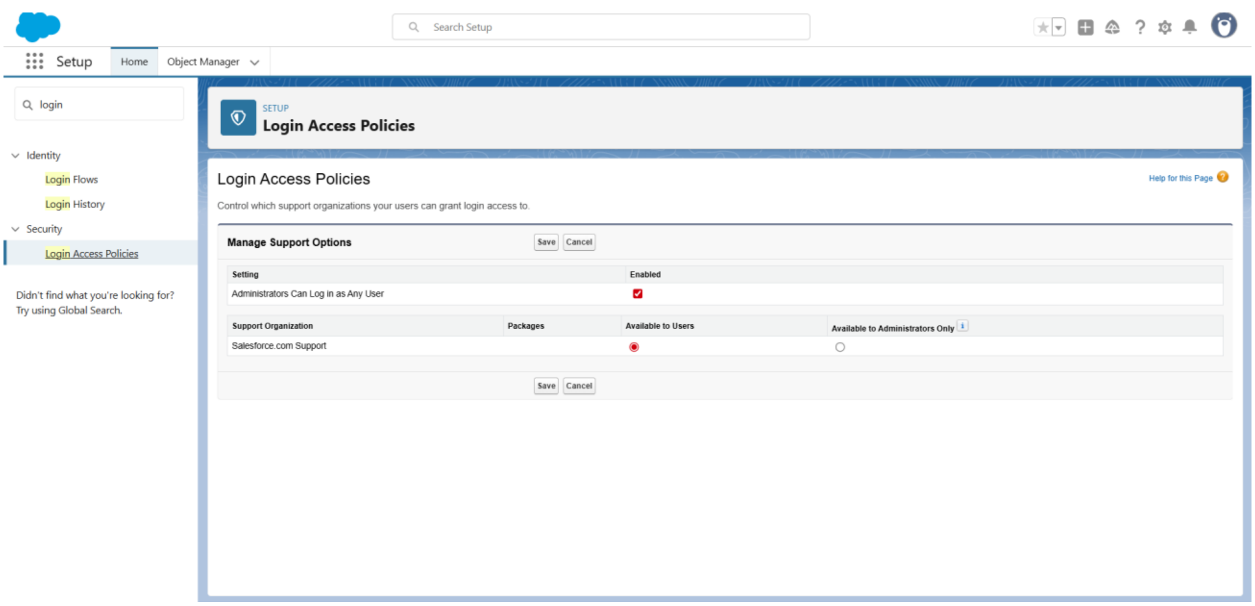
Configuration:

- Administrators Can Log in as Any User → Enabled

Steps:

1. Setup → Login Access Policies → Enable checkbox
2. Save

Purpose:
Allows admin to test visibility and permissions for different users without logging out and logging in manually.



13. Sandbox Usage

- Not used for Phase 2
- Developer Org sufficient for testing configurations

14. Deployment Basics

- Phase 2 focuses on **preparation of org structure**
- No deployments done yet
- Phase 3 will involve workflows, automation, and metadata deployment