Phase 2: Org Setup & Configuration

1. Salesforce Editions

- **What to Do:**
  - Sign up for a **Salesforce Developer Edition** (this is free and has full CRM features).
  - Link: https://developer.salesforce.com/signup
- **How:**
  - Fill in your details (Name, Email, Company: TCS MediConnect).
  - You'll receive a confirmation email → set your password.

How to Create a New Lightning App

- **Navigate to App Manager:** Go to Setup → in the Quick Find box, type App Manager and select it.
- Click the **New Lightning App** button. This will open the wizard that you see in the screenshots.

Step 1: App Details & Branding

- This is the first screen of the wizard. Fill in these details:
- **App Name:** TCS MediConnect
- **Developer Name:** (Your Name)
- **Description:** TCS-MediConnect is a comprehensive hospital management and CRM solution. It leverages AI to streamline patient records, appointments, and communication, creating a more connected and efficient healthcare ecosystem.
- **Image:** Upload your custom logo.

- **Primary Color Hex Value:** #0070D2 (This is the standard Salesforce blue.)
- **Org Theme Options:** Check the box that says Use the app's image and color instead of the org's custom theme.

Step 2: App Options

- **Navigation Style:** Select **Standard navigation**.
- **Supported Form Factors:** Select **Desktop and phone**.
- **Setup Experience:** Select **Setup (full set of Setup options)**.
- **App Personalization Settings:** Leave all of these checkboxes **unchecked** to allow your users to customize their view.

Step 3: Utility Items (Desktop Only)

- Click **Add Utility Item**.
- Select **Notes**.
- Click **Add Utility Item** again.
- Select **My Appointments**.
- For both items, make sure the **Start automatically** checkbox is **not checked**.

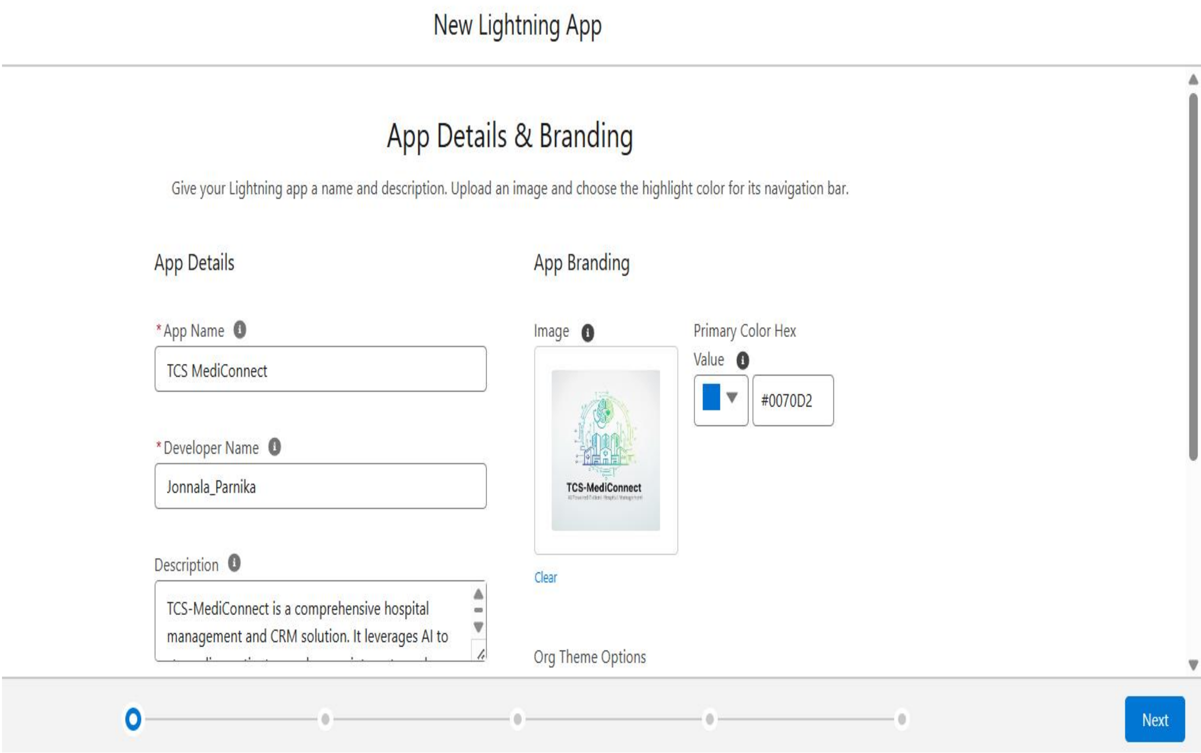
Step 4: Navigation Items

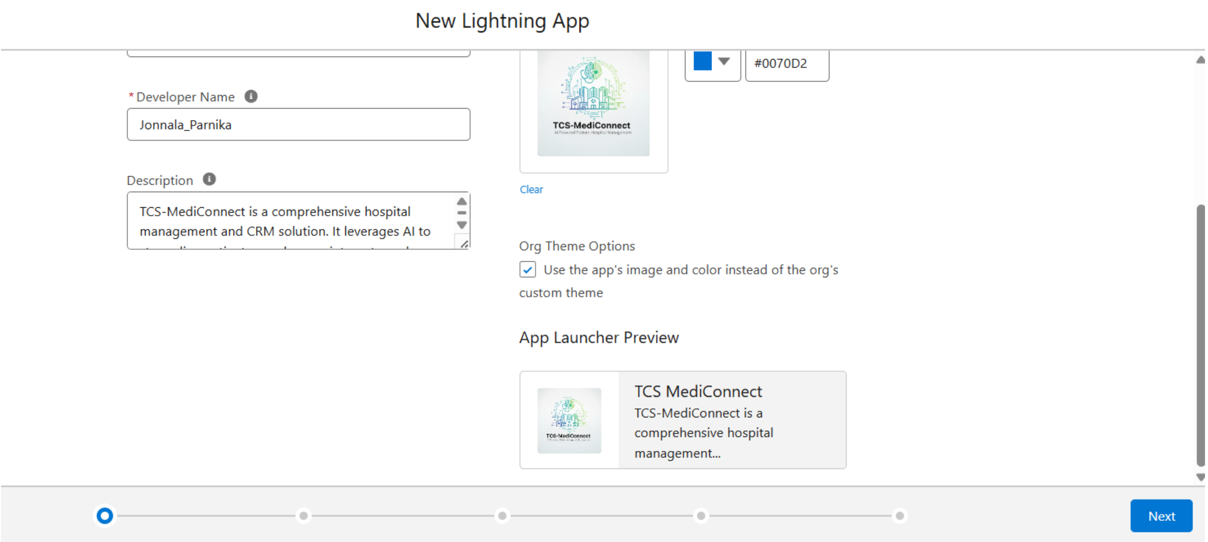
- These will be the tabs at the top of your app.
- From the **Available Items** list on the left, move these to the **Selected Items** list on the right:
- Reports
- Dashboards
- You will add tabs for **Patients**, **Doctors**, and **Appointments** later after you create those custom objects.

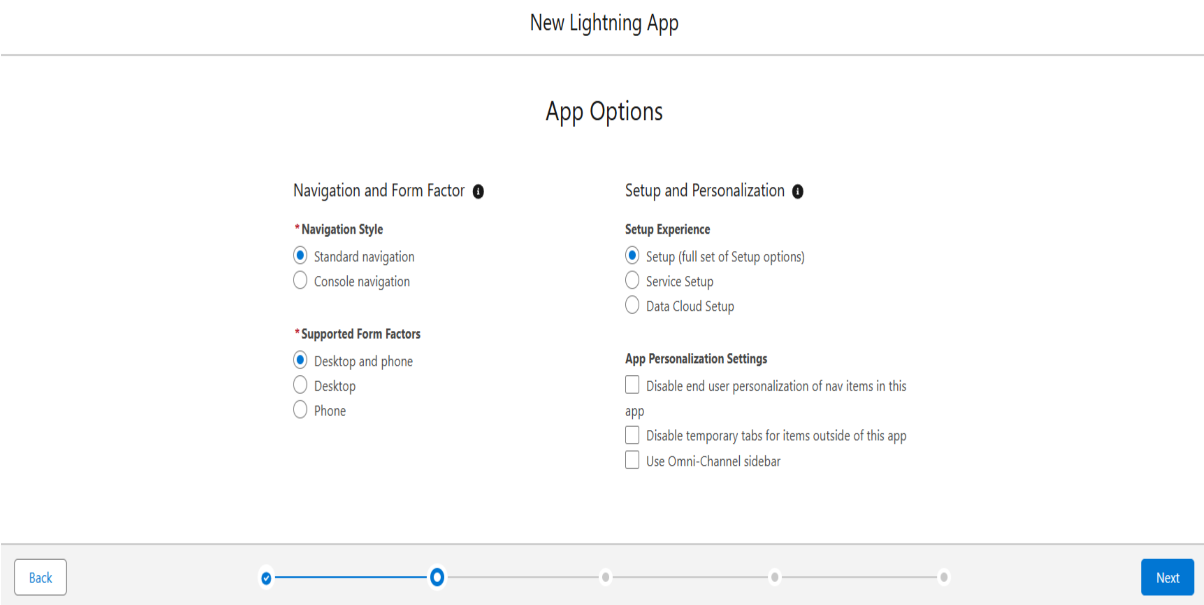
Step 5: User Profiles

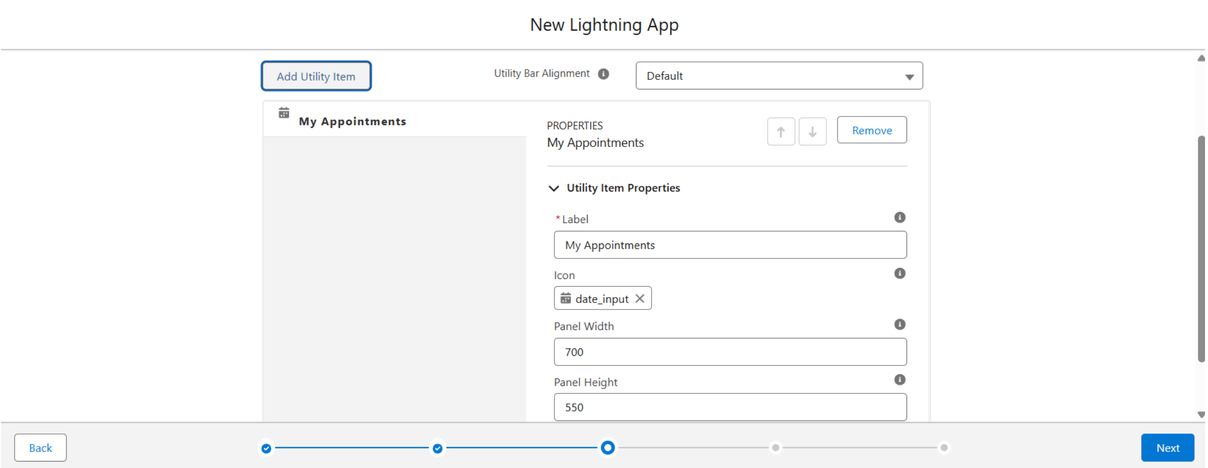
- This is the final step where you grant access to your app.

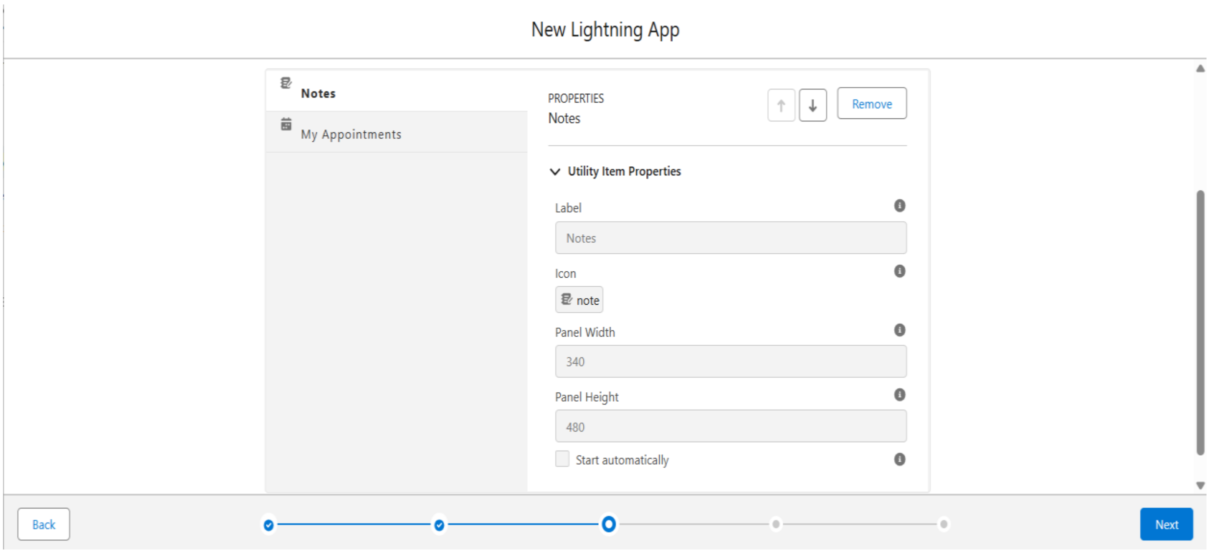
    - From the **Available Profiles** list on the left, move these to the **Selected Profiles** list on the right:
    - System Administrator
    - Standard User
    - Once you've done this, click **Save & Finish**.
    - This process will successfully create your **TCS MediConnect** app with all the settings we have planned.
- **Why:**
    - This Developer Org acts as your sandbox where you build, test, and configure your CRM portal.
    - It supports Custom Objects (Patient, Doctor…), Flows, Apex, and Experience Cloud for the Patient Portal.

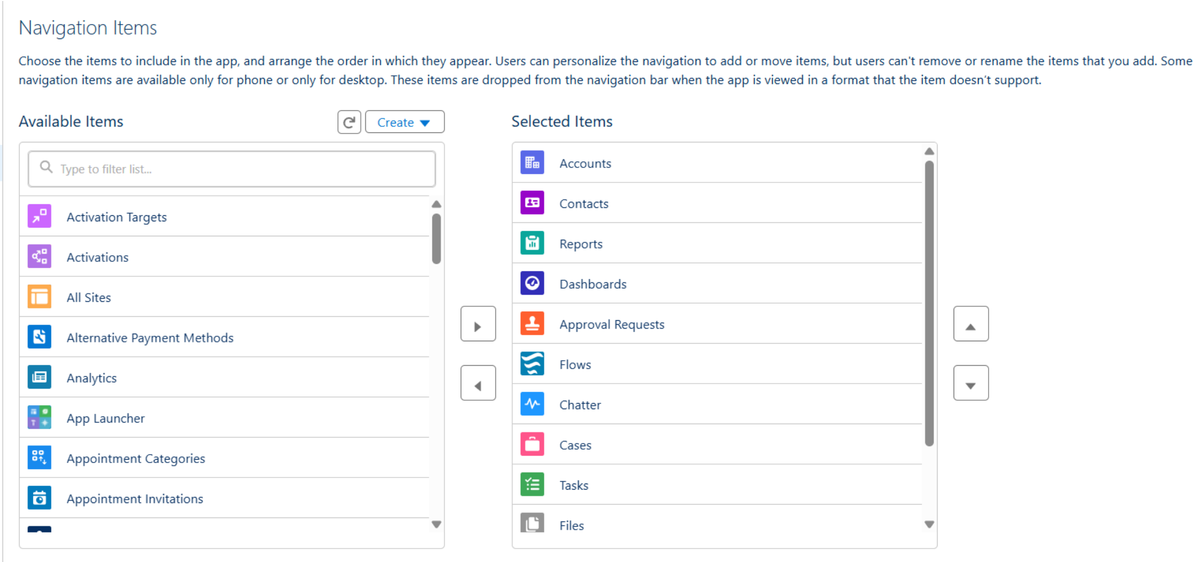


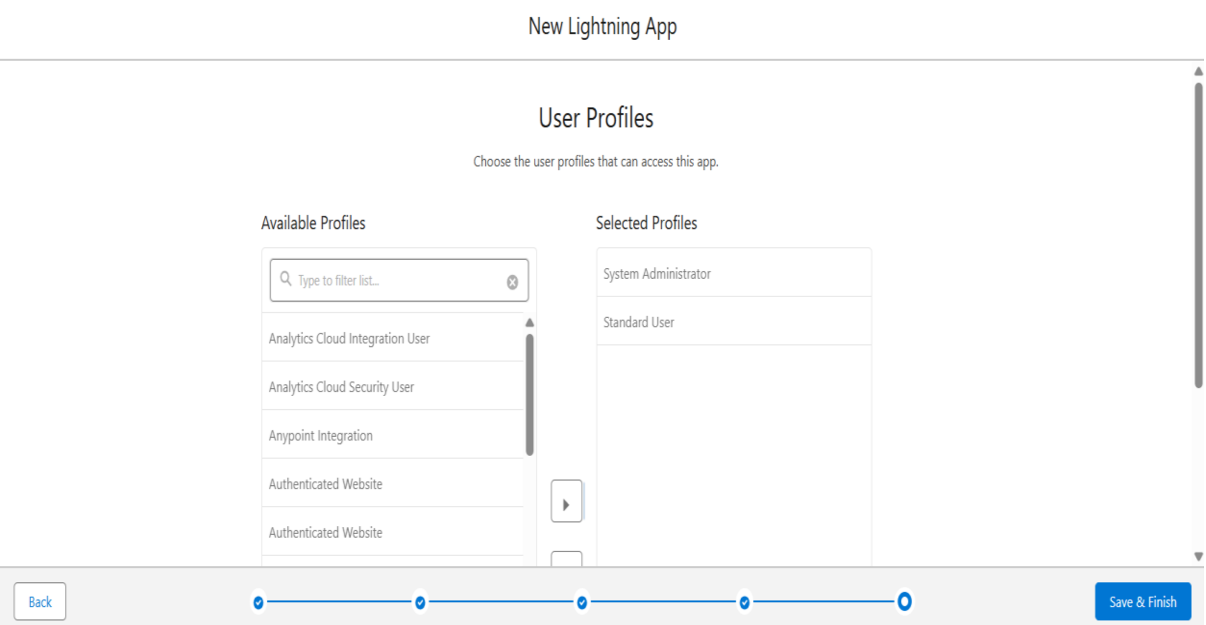

New Lightning App
* Developer Name
Jonnala_Parnika
Description
TCS-MediConnect is a comprehensive hospital management and CRM solution. It leverages AI to
TCS-MediConnect
#0070D2
Clear
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
TCS MediConnect
TCS-MediConnect is a comprehensive hospital management...
Next


New Lightning App
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
Data Cloud Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Use Omni-Channel sidebar
Back
Next


New Lightning App
Add Utility Item
Utility Bar Alignment
Default
My Appointments
PROPERTIES
My Appointments
Remove
Utility Item Properties
* Label
My Appointments
Icon
date_input
Panel Width
700
Panel Height
550
Back
Next


New Lightning App
Notes
My Appointments
PROPERTIES
Notes
Remove
Utility Item Properties
Label
Notes
Icon
note
Panel Width
340
Panel Height
480
Start automatically
Back
Next


Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Activation Targets
Activations
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Selected Items
Accounts
Contacts
Reports
Dashboards
Approval Requests
Flows
Chatter
Cases
Tasks
Files

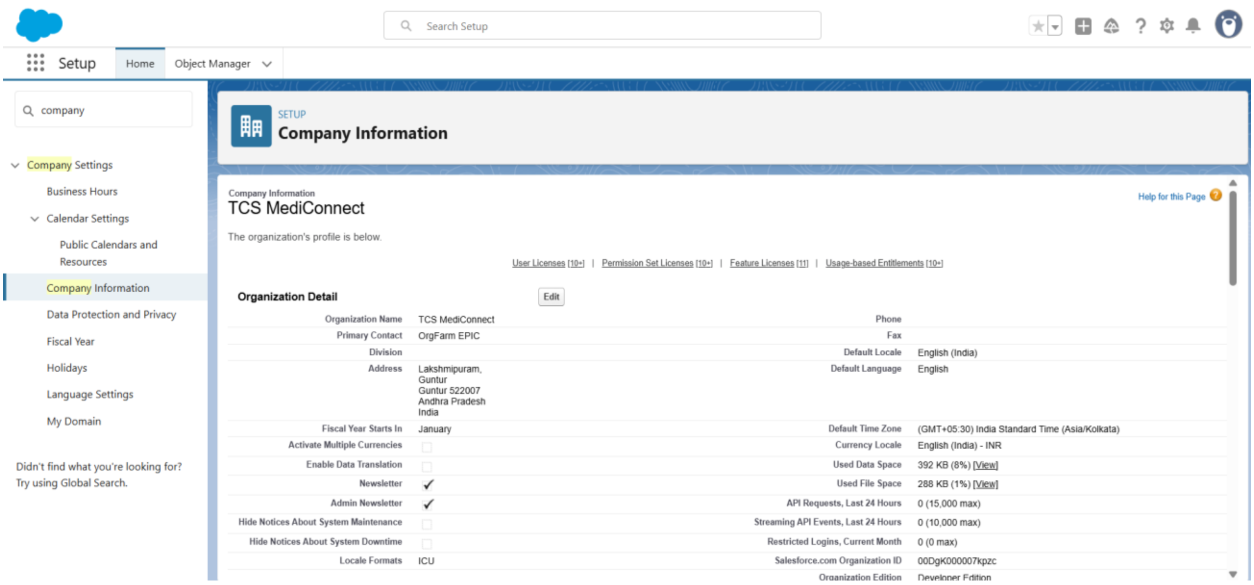

New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
Selected Profiles
System Administrator
Standard User
Back
Save & Finish

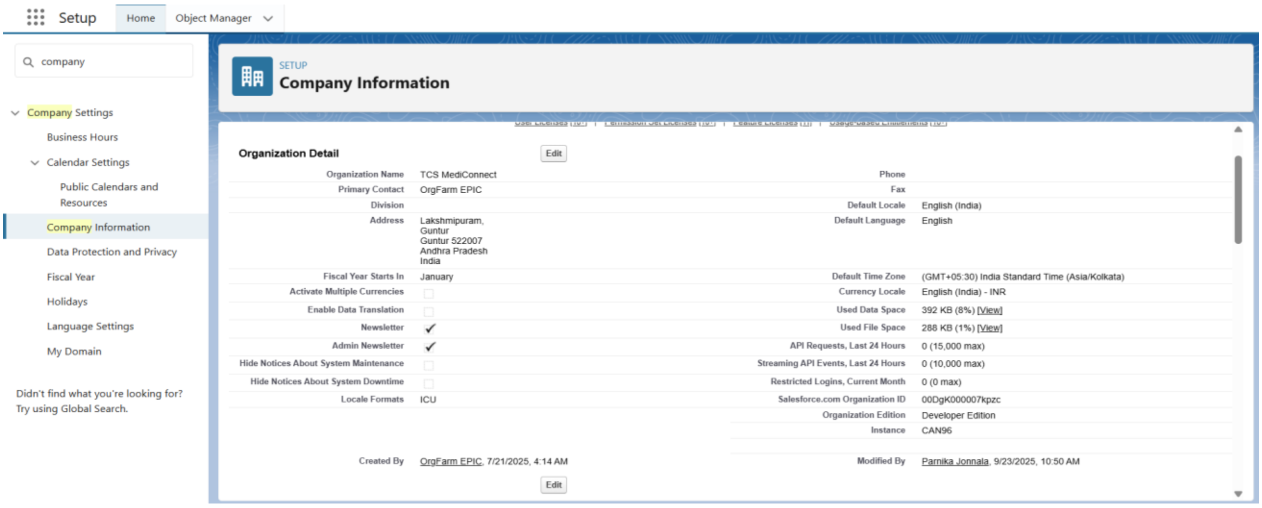
2. Company Profile Setup

- **Where to Go:**
  - Click ⚙ Setup (top right) → Company Settings → Company Information.
- **Steps:**

1. Click Edit.
2. Update fields:
   - Organization Name → TCS MediConnect
   - Default Time Zone → Asia/Kolkata (IST)
   - Default Currency → INR (₹)
   - Default Language → English
3. Save.

- **Why:**
  - This ensures all users see consistent time zones, language, and billing currency across the system.

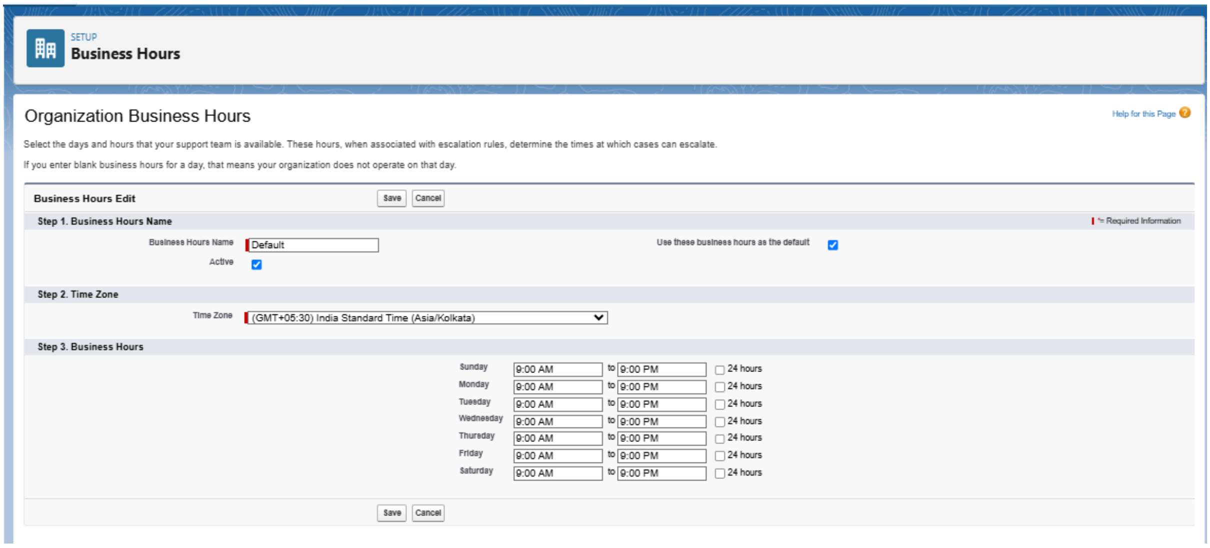


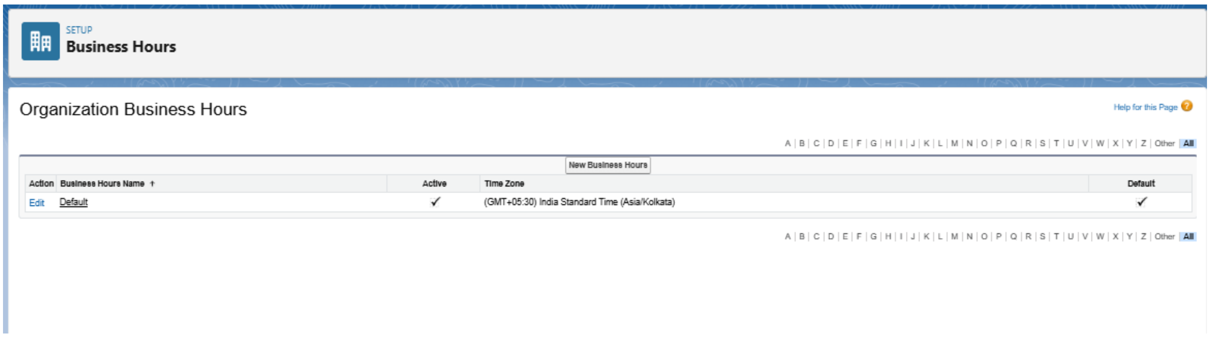


3. Business Hours & Holidays

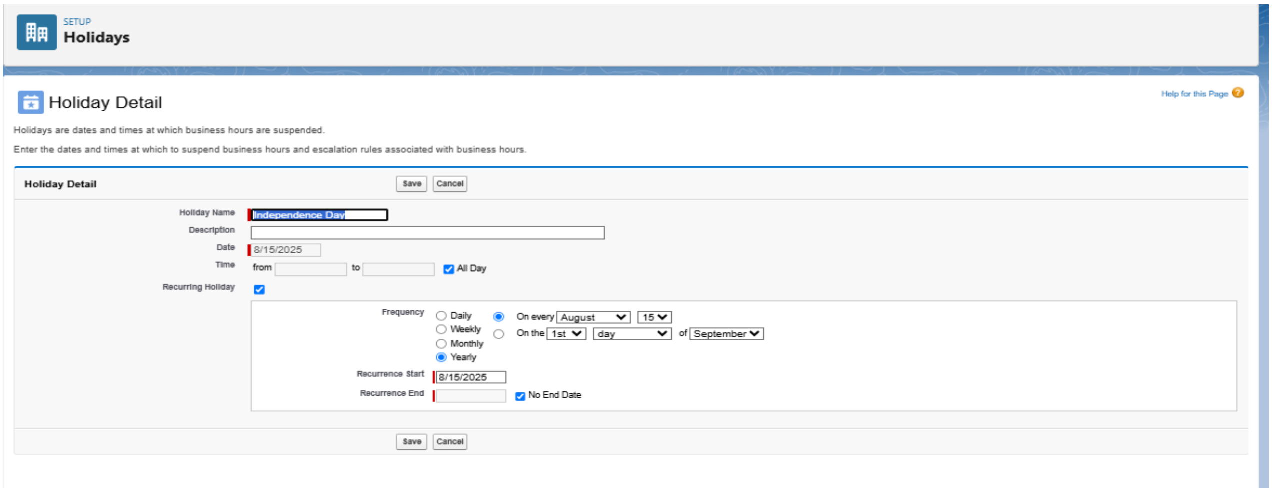
- **Where to Go:**
  - Setup → Company Settings → Business Hours.
- **Steps:**

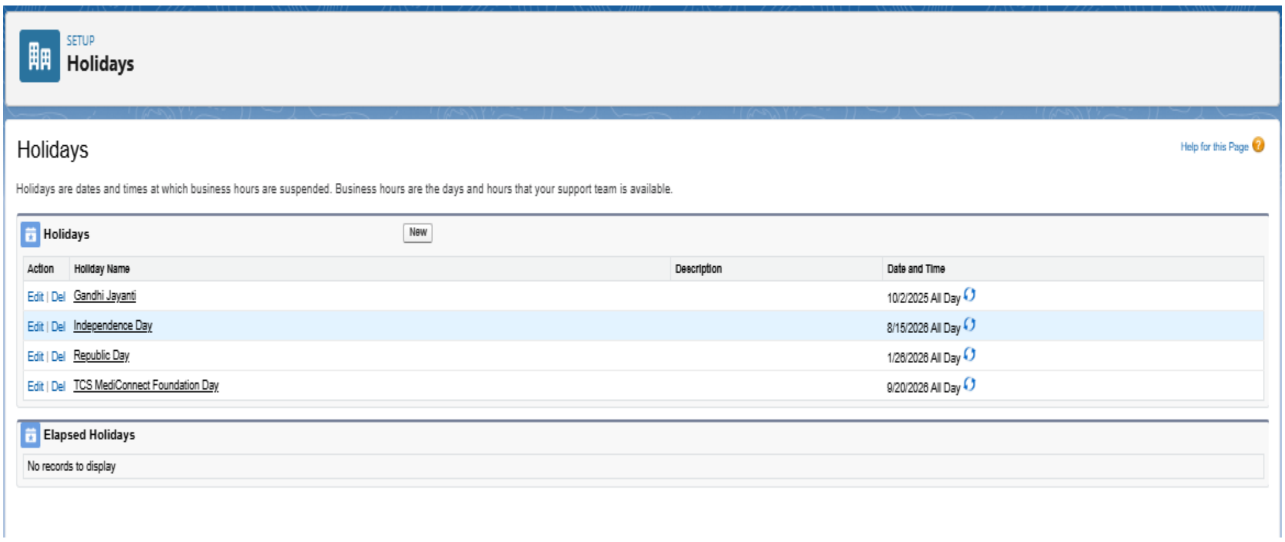
1. Click New Business Hours.
2. Enter: Hospital Working Hours (9:00 AM – 9:00 PM, Sunday – Monday).
3. Save.





- **Add Holidays:**
  - Navigate: Setup → Company Settings → Holidays.
  - Example: Independence Day (Aug 15), Republic Day , Foundation Day .
- **Why:**
  - Ensures appointment bookings and approvals don't happen outside working hours or on holidays.



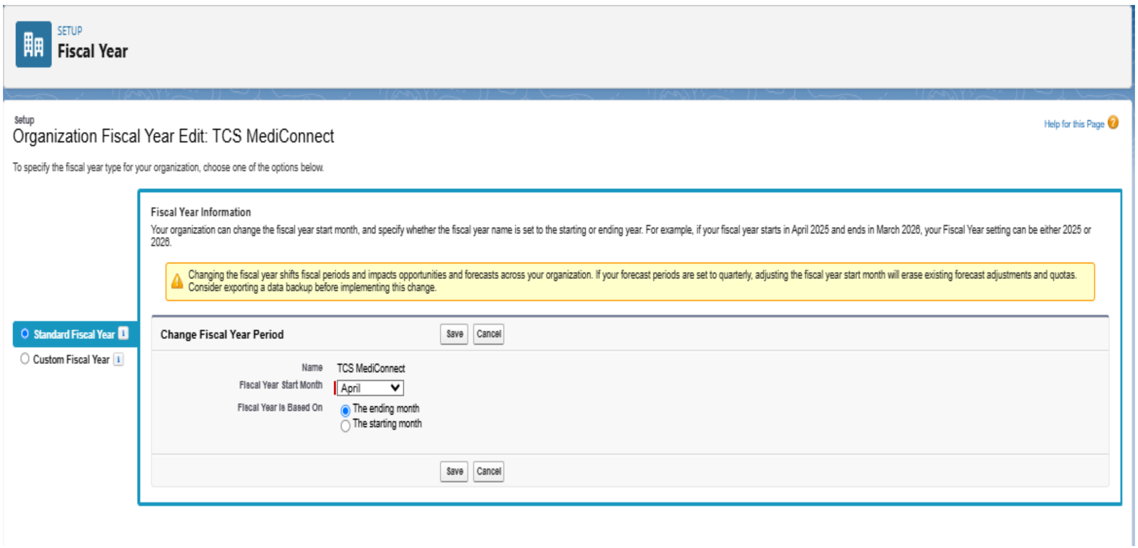


4. Fiscal Year Settings

- **Where to Go:**
  - Setup → Company Settings → Fiscal Year.
- **Steps:**

1. Select Standard Fiscal Year (Apr).
2. Confirm & Save.

- **Why:**
  - Enables accurate billing, revenue tracking, and insurance claim reporting for hospitals.

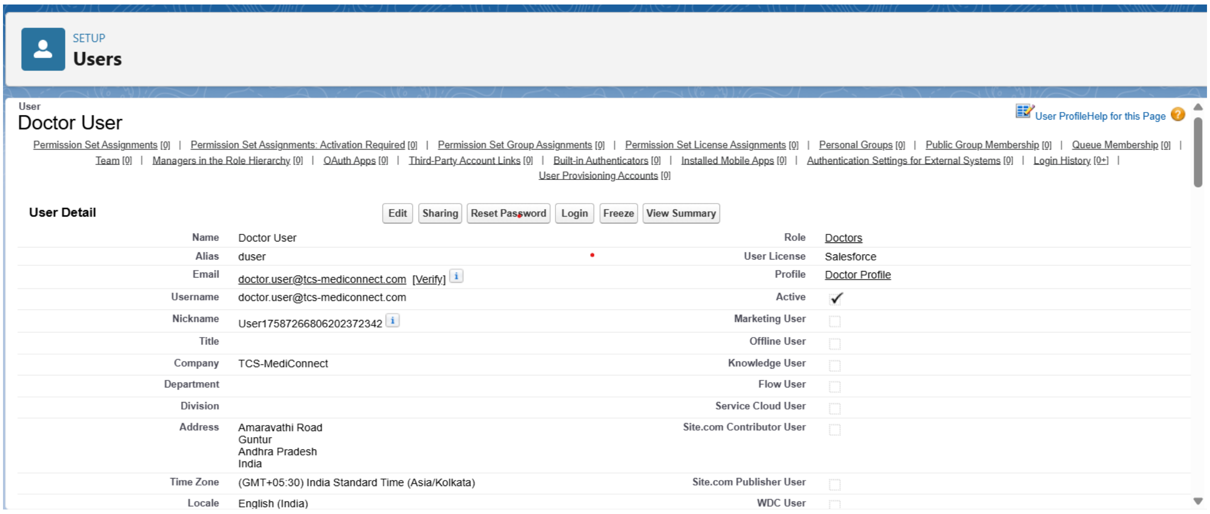


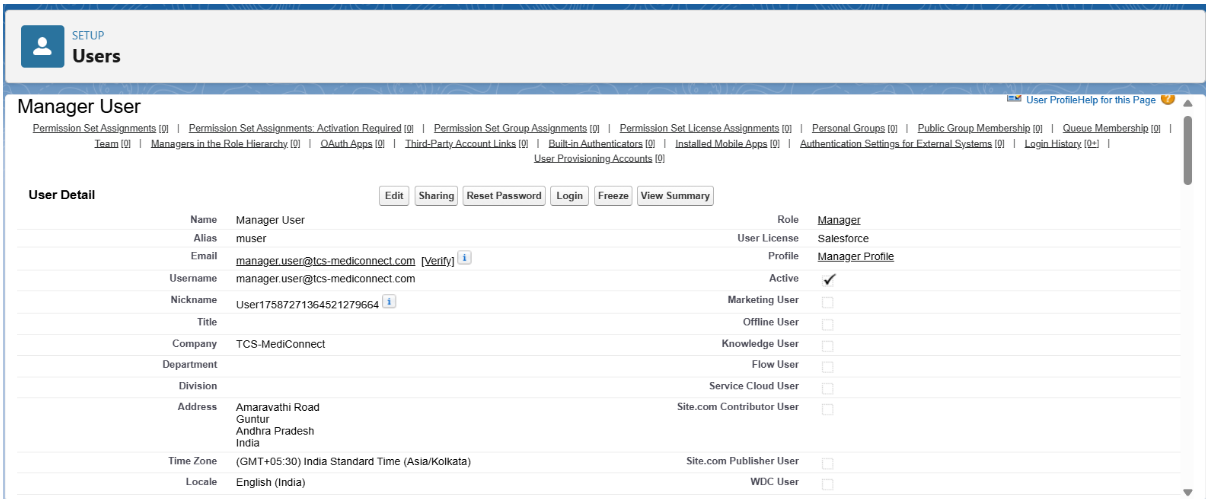
5. User Setup & Licenses

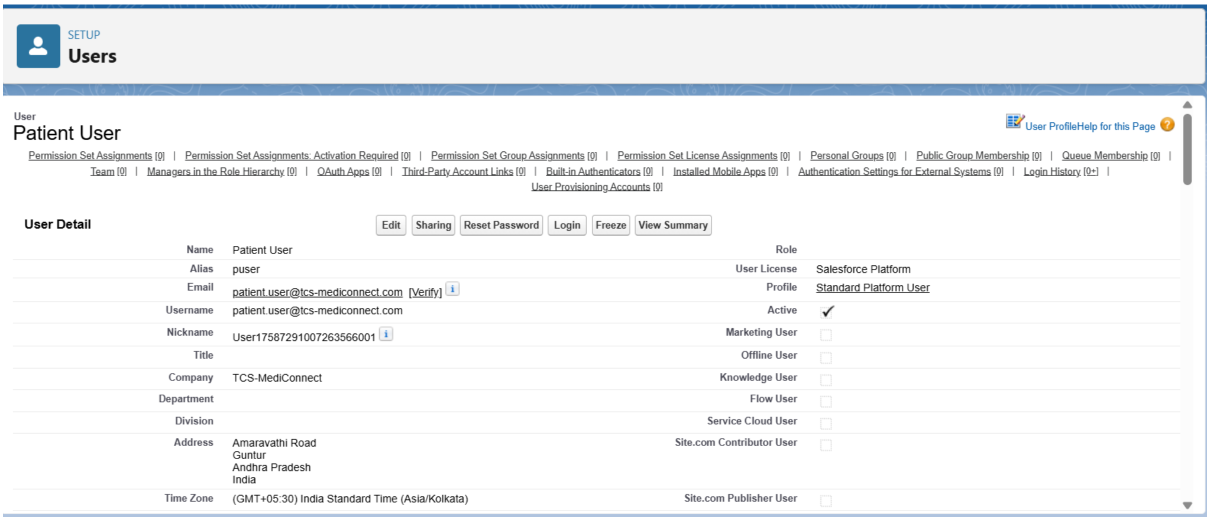
- **Where to Go:**
  - Setup → Users → Users → New User.
- **Steps:**

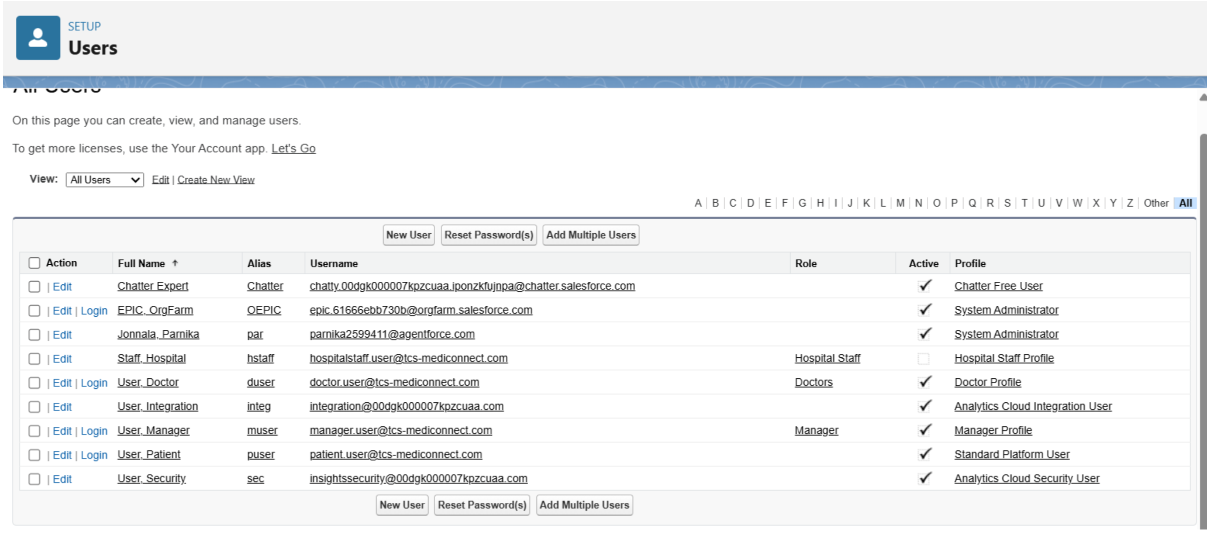
1. Create users like:
   - **Doctor User** → Profile: Doctor
   - **Hospital Staff User** → Profile: Staff
   - **Admin User** → Profile: System Admin
   - **Manager User** → Profile: Manager

- **Patient User** → Later added as Community/Experience Cloud users









2. Assign Salesforce licenses (for doctors, staff, managers).

- **Why:**
    - Different stakeholders need different access levels to the CRM portal.

6. Profiles

- **Where to Go:**
    - Setup → Profiles → New Profile (or Clone existing).
- **Steps:**

1. Clone Standard User → rename as *Doctor Profile*.
2. Clone Standard User → rename as *Hospital Staff Profile*.
3. Clone Standard User : Manager → rename as *Manager Profile*.
4. Use System Administrator → for Admin.

- **Access Control Example:**
    - **Doctor Profile** → Access to *Appointments, Feedback* (Read/Write), but no Billing edits.
    - **Staff Profile** → Access to *Appointments, Billing, Insurance Claims*.
    - **Manager Profile** → Full access + Reports/Dashboards.
- **Why:**
    - Profiles define what objects and features each role can access.

SETUP
Profiles

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

Action	Profile Name ↑	User License	Custom
Edit | Clone	Force.com - App Subscription User	Force.com - App Subscription	
Edit | Clone	Force.com - Free User	Force.com - Free	
Edit | Clone	Gold Partner User	Gold Partner	
Edit | Clone	High Volume Customer Portal	High Volume Customer Portal	
Edit | Clone	High Volume Customer Portal User	High Volume Customer Portal	
Edit | Clone	Identity User	Identity	
Edit | Del |...	Manager Profile	Salesforce	✓
Edit | Clone	Marketing User	Salesforce	
Edit | Clone	Minimum Access - API Only Integrations	Salesforce Integration	
Edit | Clone	Minimum Access - Salesforce	Salesforce	
Edit | Clone	Partner App Subscription User	Partner App Subscription	

SETUP
Profiles

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

Action	Profile Name ↑	User License	Custom
Edit | Clone	Partner App Subscription User	Partner App Subscription	
Edit | Clone	Partner Community Login User	Partner Community Login	
Edit | Clone	Partner Community User	Partner Community	
Edit | Del |...	Read Only	Salesforce	✓
Edit | Del |...	Salesforce API Only System Integrations	Salesforce Integration	✓
Edit | Clone	Silver Partner User	Silver Partner	
Edit | Clone	Solution Manager	Salesforce	
Edit | Clone	Standard Platform User	Salesforce Platform	
Edit | Clone	Standard User	Salesforce	
Edit | Clone	System Administrator	Salesforce	
Edit | Clone	Work.com Only User	Work.com Only	

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

Action	Profile Name ↑	User License	Custom
Edit | Clone	Force.com - Free User	Force.com - Free	
Edit | Clone	Gold Partner User	Gold Partner	
Edit | Clone	High Volume Customer Portal	High Volume Customer Portal	
Edit | Clone	High Volume Customer Portal User	High Volume Customer Portal	
Edit | Del |...	Hospital Staff Profile	Salesforce	✓

Profiles

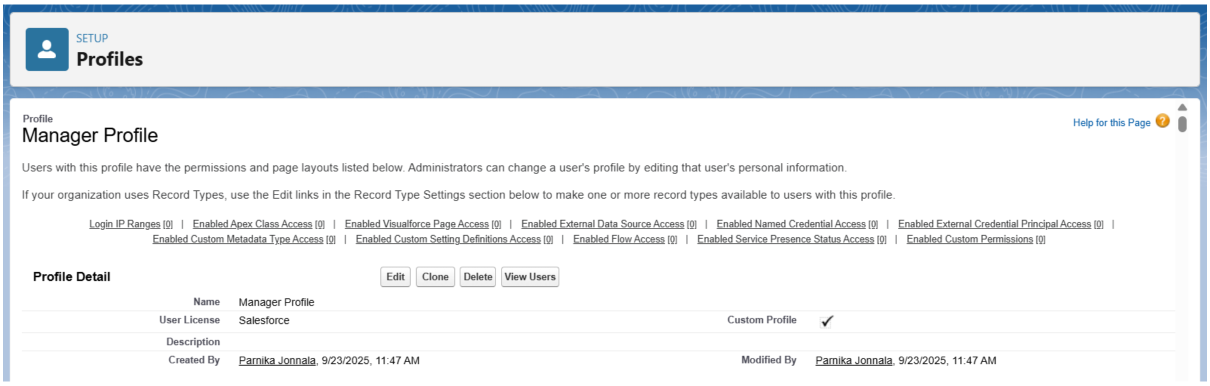
Help for this Page

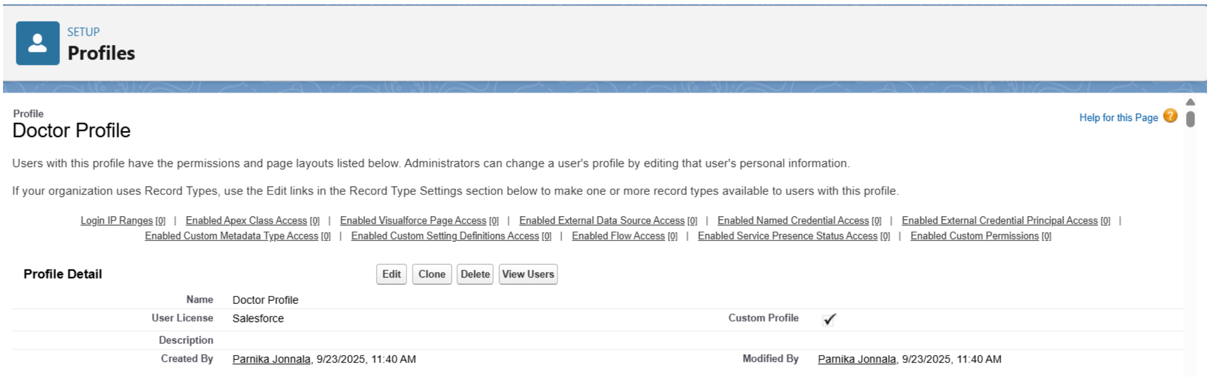
All Profiles | Edit | Delete | Create New View

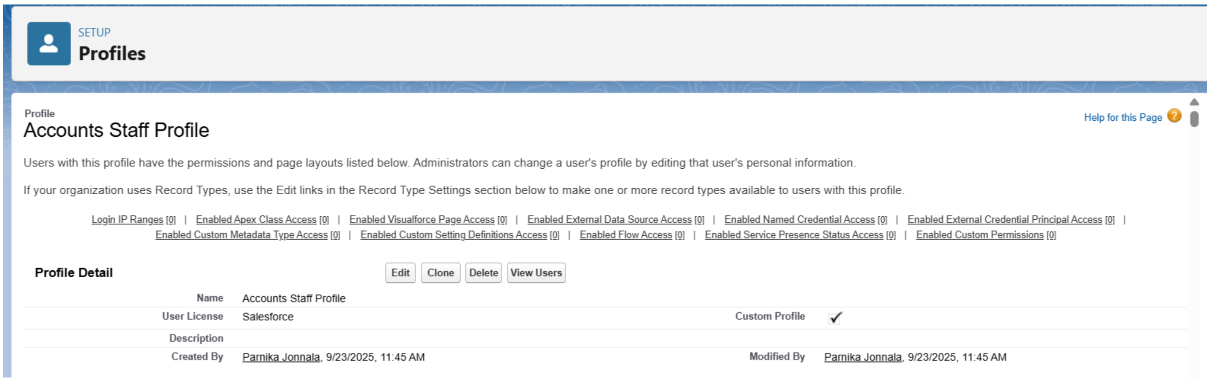
New Profile

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

Action	Profile Name ↑	User License	Custom
Edit | Del |...	Custom: Support Profile	Salesforce	✓
Edit | Clone	Customer Community Login User	Customer Community Login	
Edit | Clone	Customer Community Plus Login User	Customer Community Plus Login	
Edit | Clone	Customer Community Plus User	Customer Community Plus	
Edit | Clone	Customer Community User	Customer Community	
Edit | Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	
Edit | Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	
Edit | Del |...	Doctor Profile	Salesforce	✓
Edit | Clone	Einstein Agent User	Einstein Agent	
Edit | Clone	External Apps Login User	External Apps Login	
Edit | Clone	External Identity User	External Identity	







7. Roles

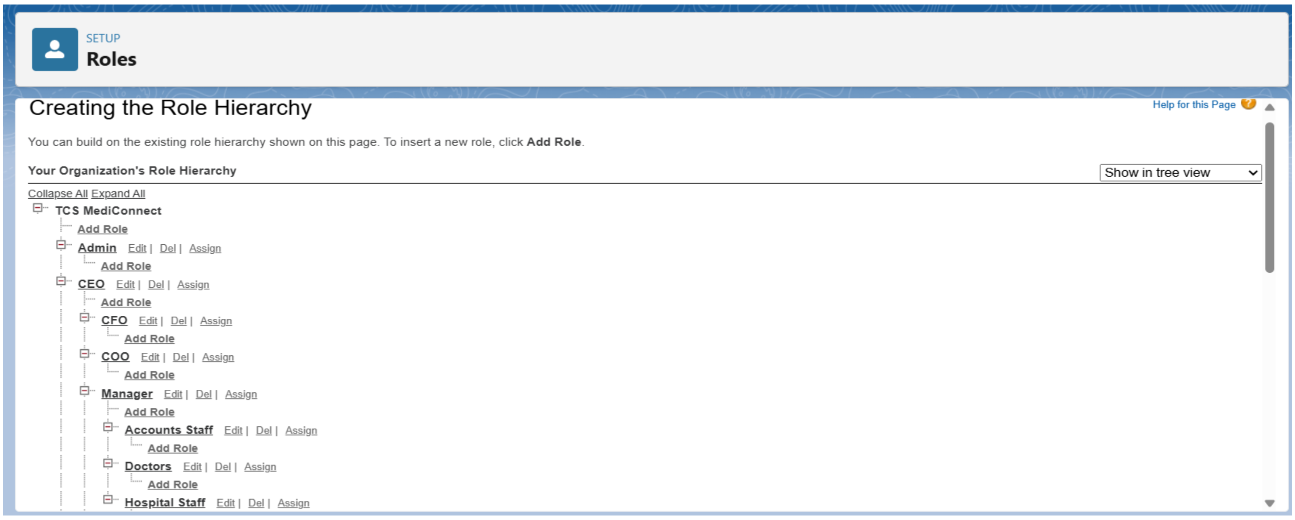
- **Where to Go:**
  - Setup → Roles → Set Up Roles.
- **Steps:**

1. Create Role Hierarchy:
   - Admin (Top)
   - Managers

        - Doctors
        - Hospital Staff
        - Accounts Staff
        - Patients (Portal/Community)

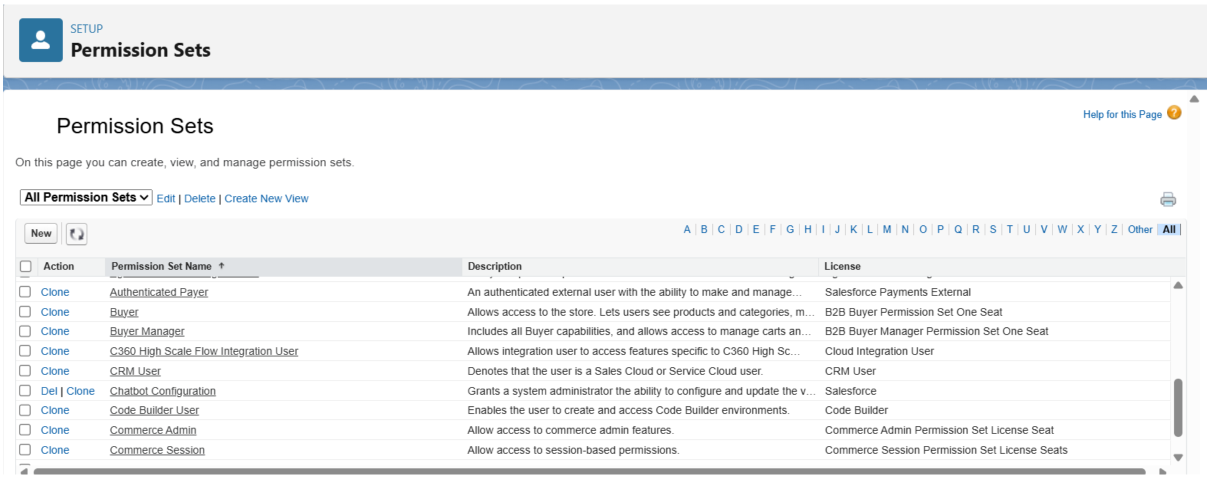
2. Save hierarchy.

- **Why:**
    - Record visibility flows upward (e.g., staff's records visible to managers/admins).



8. Permission Sets

- **Where to Go:**
    - Setup → Permission Sets → New Permission Set.
- **Steps:**
    - Create permission sets for extra features beyond profiles. Examples:
        - *Feedback Dashboard Access* → for Doctors.
        - *Reports Access* → for Staff needing analytics.
        - *Chatbot Configuration* → for Admins.
- **Why:**
    - Avoids editing profiles repeatedly → gives flexibility for advanced access.



SETUP
Permission Sets

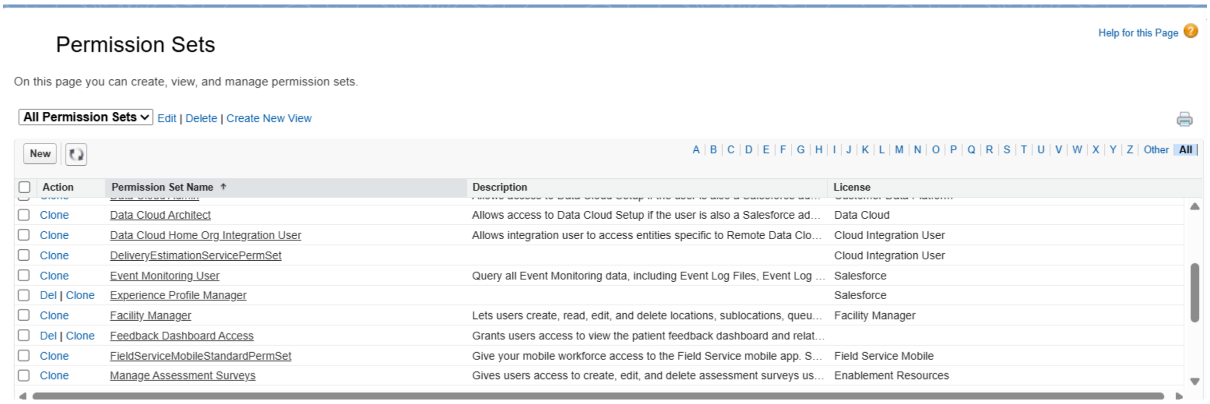
Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Help for this Page

Action	Permission Set Name ↑	Description	License
Clone	Authenticated Payer	An authenticated external user with the ability to make and manage…	Salesforce Payments External
Clone	Buyer	Allows access to the store. Lets users see products and categories, m…	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an…	B2B Buyer Manager Permission Set One Seat
Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Sc…	Cloud Integration User
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Del | Clone	Chatbot Configuration	Grants a system administrator the ability to configure and update the v…	Salesforce
Clone	Code Builder User	Enables the user to create and access Code Builder environments.	Code Builder
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Commerce Session	Allow access to session-based permissions.	Commerce Session Permission Set License Seats



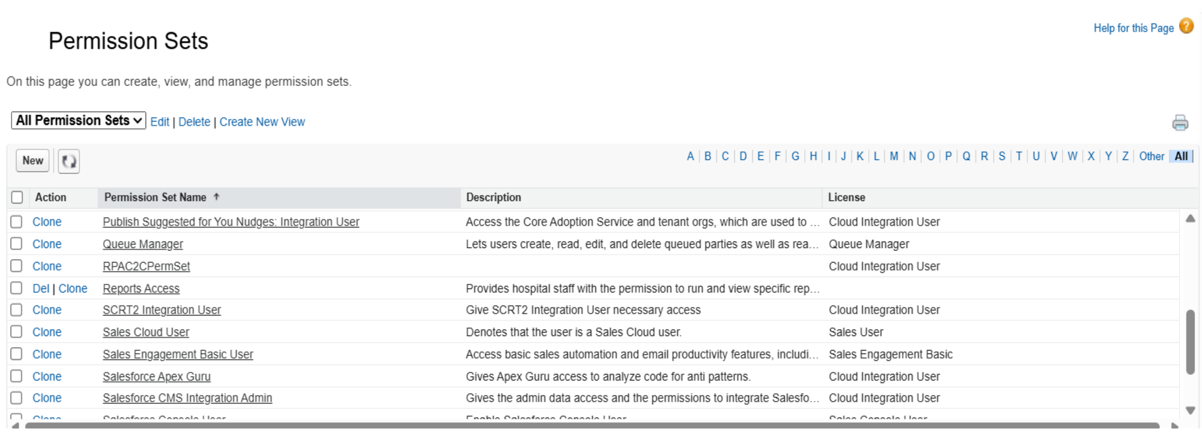
Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Help for this Page

Action	Permission Set Name ↑	Description	License
Clone	Data Cloud Architect	Allows access to Data Cloud Setup if the user is also a Salesforce ad…	Data Cloud
Clone	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Clo…	Cloud Integration User
Clone	DeliveryEstimationServicePermSet		Cloud Integration User
Clone	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log …	Salesforce
Del | Clone	Experience Profile Manager		Salesforce
Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queu…	Facility Manager
Del | Clone	Feedback Dashboard Access	Grants users access to view the patient feedback dashboard and relat…	
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S…	Field Service Mobile
Clone	Manage Assessment Surveys	Gives users access to create, edit, and delete assessment surveys us…	Enablement Resources



Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Help for this Page

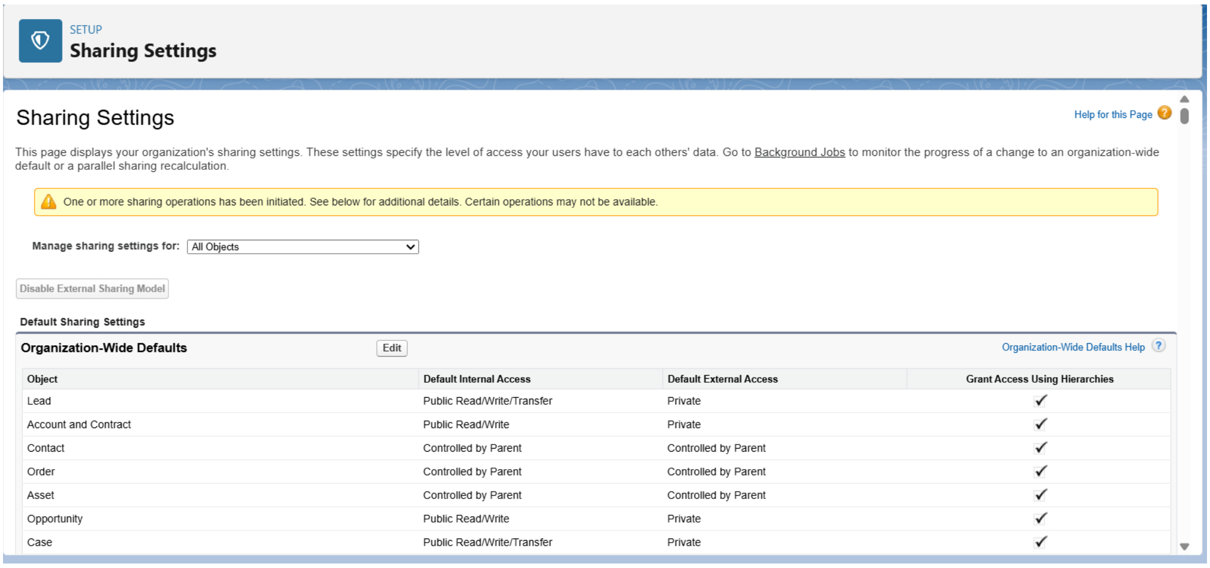
Action	Permission Set Name ↑	Description	License
Clone	Publish Suggested for You Nudges: Integration User	Access the Core Adoption Service and tenant orgs, which are used to …	Cloud Integration User
Clone	Queue Manager	Lets users create, read, edit, and delete queued parties as well as rea…	Queue Manager
Clone	RPAC2CPermSet		Cloud Integration User
Del | Clone	Reports Access	Provides hospital staff with the permission to run and view specific rep…	
Clone	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Clone	Sales Engagement Basic User	Access basic sales automation and email productivity features, includi…	Sales Engagement Basic
Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesfo…	Cloud Integration User

9. Org-Wide Defaults (OWD)

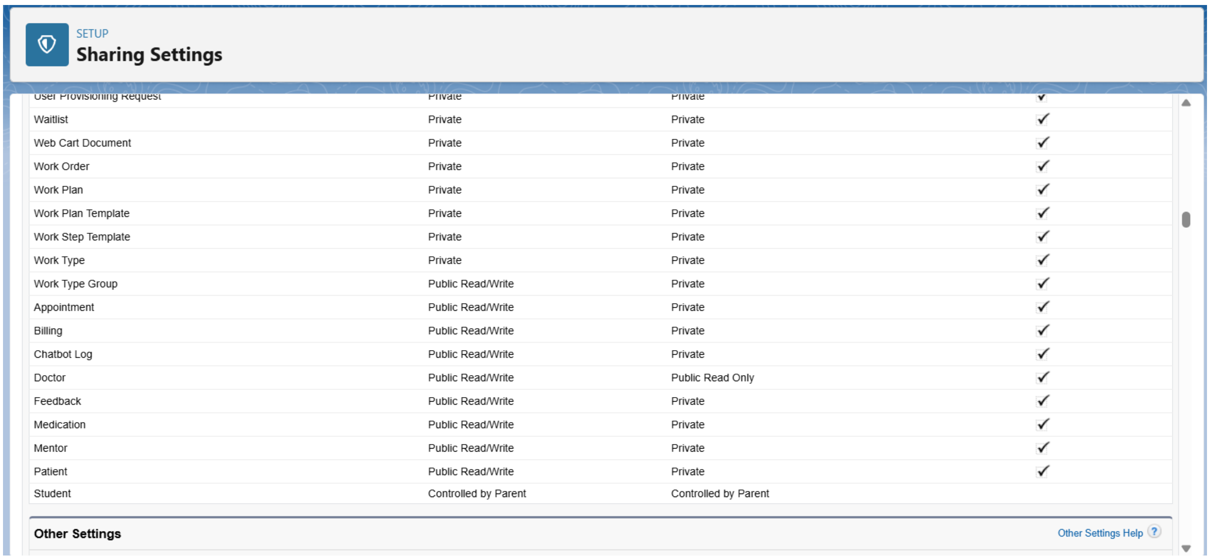
- **Where to Go:**
  - Setup → Sharing Settings.
- **Steps:**
  - Set Default Access:
    - Patients → Private.

- Appointments → Private.
- Billing/Insurance → Private.
- Feedback → Public Read Only.

- **Why:**
  - Protects sensitive patient/billing data while allowing feedback visibility for improvements.



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓

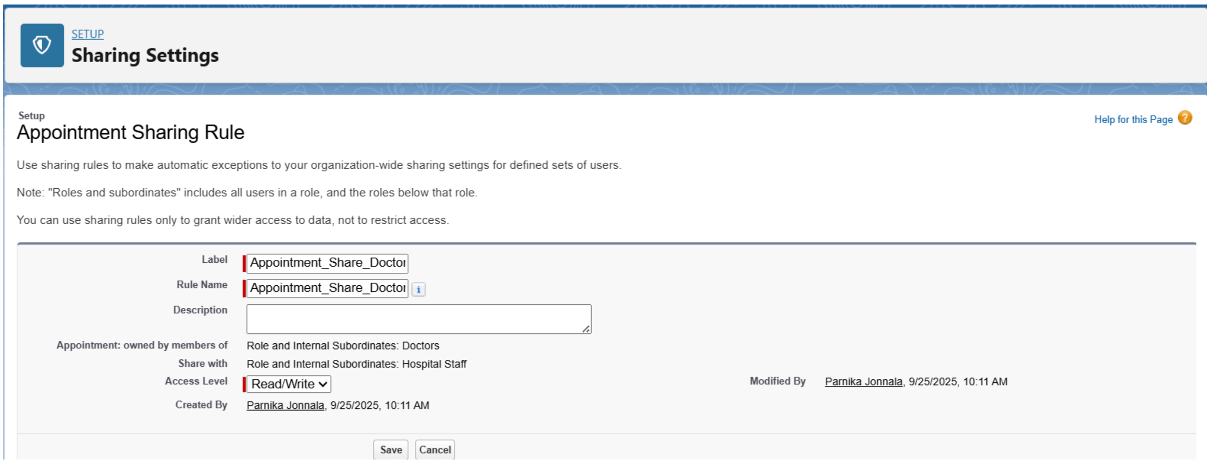


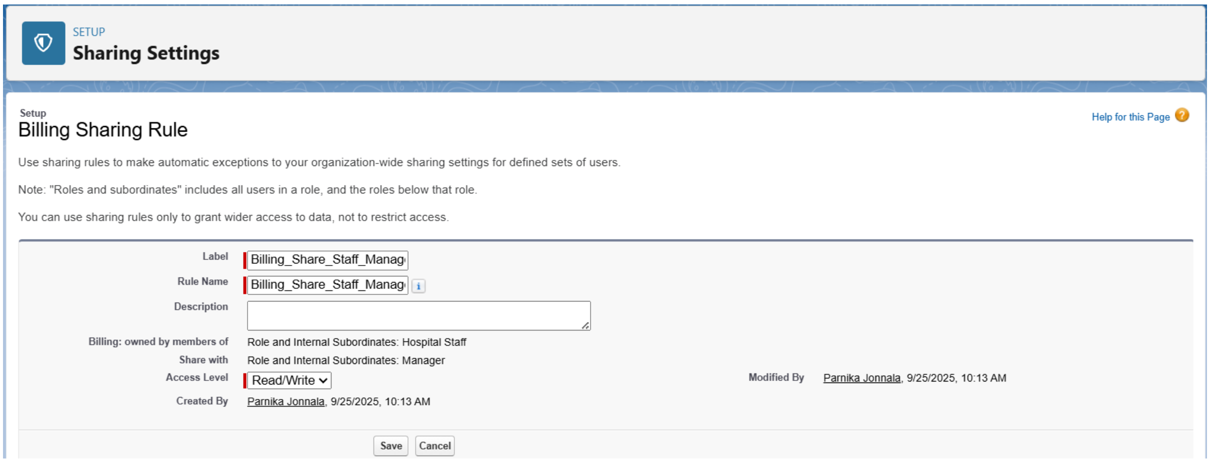
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Appointment	Public Read/Write	Private	✓
Billing	Public Read/Write	Private	✓
Chatbot Log	Public Read/Write	Private	✓
Doctor	Public Read/Write	Public Read Only	✓
Feedback	Public Read/Write	Private	✓
Medication	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Patient	Public Read/Write	Private	✓
Student	Controlled by Parent	Controlled by Parent	

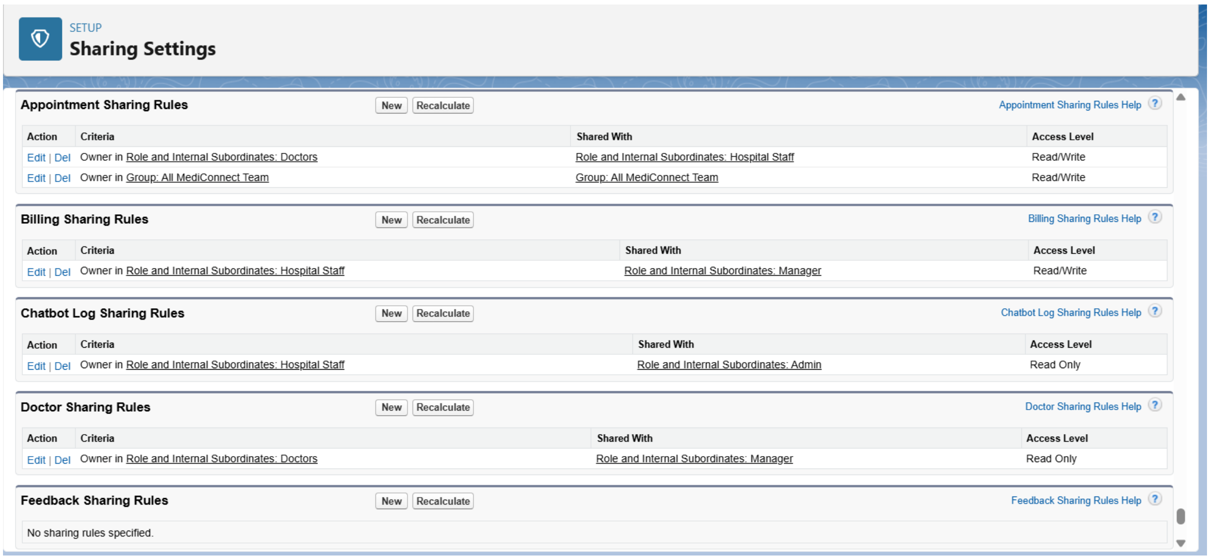
10. Sharing Rules

- **Where to Go:**
  - Setup → Sharing Settings → Sharing Rules.

- **Steps:**
  - Example rules:
    - Share Appointments → Staff ↔ Doctors in same department.
    - Share Billing → With Managers for approvals.
- **Why:**
  - Balances data privacy with collaboration.







SETUP
Sharing Settings

Appointment Sharing Rules New Recalculate Appointment Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Doctors	Role and Internal Subordinates: Hospital Staff	Read/Write
Edit | Del	Owner in Group: All MediConnect Team	Group: All MediConnect Team	Read/Write

Billing Sharing Rules New Recalculate Billing Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Hospital Staff	Role and Internal Subordinates: Manager	Read/Write

Chatbot Log Sharing Rules New Recalculate Chatbot Log Sharing Rules Help

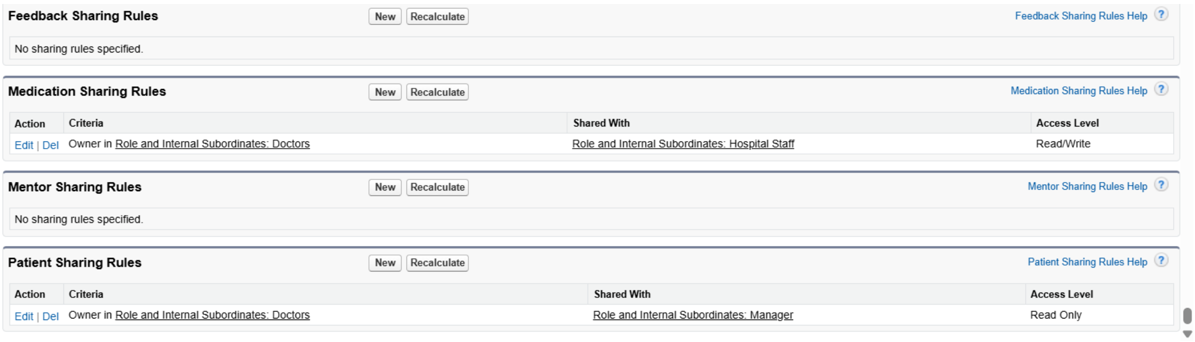
Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Hospital Staff	Role and Internal Subordinates: Admin	Read Only

Doctor Sharing Rules New Recalculate Doctor Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Doctors	Role and Internal Subordinates: Manager	Read Only

Feedback Sharing Rules New Recalculate Feedback Sharing Rules Help

No sharing rules specified.



Feedback Sharing Rules New Recalculate Feedback Sharing Rules Help

No sharing rules specified.

Medication Sharing Rules New Recalculate Medication Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Doctors	Role and Internal Subordinates: Hospital Staff	Read/Write

Mentor Sharing Rules New Recalculate Mentor Sharing Rules Help

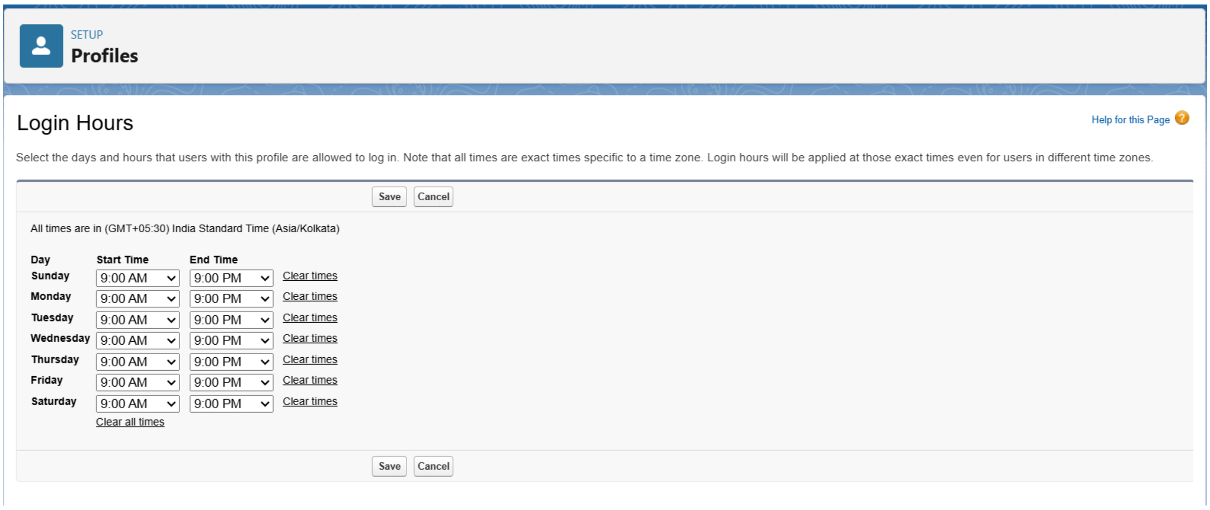
No sharing rules specified.

Patient Sharing Rules New Recalculate Patient Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Doctors	Role and Internal Subordinates: Manager	Read Only

11. Login Access Policies

- **Where to Go:**
  - Setup → Login Access Policies.
- **Steps:**
  - Restrict Doctors & Staff login → 9:00 AM to 6:00 PM.
  - Allow Admins & Managers → full-time access.
- **Why:**
  - Adds security & control, avoids off-hour misuse.



12. Dev Org Setup

- **What to Do:**
  - Treat this Developer Org as your sandbox.
  - Create custom objects: Patient, Doctor, Appointment, Billing, Feedback, Chatbot Logs.
- **Why:**
  - Isolates building & testing before production.

13. Sandbox Usage

- **Note:** In real companies:
  - Build & Test → Sandbox.
  - Deploy → Production.
- For your project:
  - Developer Org = Sandbox (since it's a student/project-level setup).

14. Deployment Basics

- **Where to Go:**
  - Setup → Outbound Change Sets (in Sandbox/Dev Org).
- **Steps:**

1. Create Outbound Change Set → Add components (Objects, Fields, Workflows).

2. Upload to Production Org.
3. In Production → Go to Inbound Change Set → Deploy.

- **Alternative:** Use VS Code + Salesforce CLI for deployment.
- **Why:**
    - Ensures safe movement of changes from test org → live hospital system.