

## 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

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### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

#### App Details

\*App Name ⓘ


\*Developer Name ⓘ

Description ⓘ

TCS-MediConnect is a comprehensive hospital management and CRM solution. It leverages AI to

#### App Branding

Image ⓘ



TCS-MediConnect

[Clear](#)

Primary Color Hex

Value ⓘ

#0070D2

Org Theme Options

Next

\*Developer Name ⓘ  

Jonnala\_Parnika

Description ⓘ  
TCS-MediConnect is a comprehensive hospital management and CRM solution. It leverages AI to

TCS-MediConnect

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  
TCS-MediConnect is a comprehensive hospital management...

\* Navigation Style

☒ Standard navigation

☐ Console navigation

\* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

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

\* Navigation Style

☒ Standard navigation

☐ Console navigation

\* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

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

\* Navigation Style

☒ Standard navigation  
☐ Console navigation

\* Supported Form Factors

☒ Desktop and phone  
☐ Desktop  
☐ Phone

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

- \* Navigation Style

☒ Standard navigation

☐ Console navigation

\* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

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

Desktop

Phone

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

- Desktop

Phone

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

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

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

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.

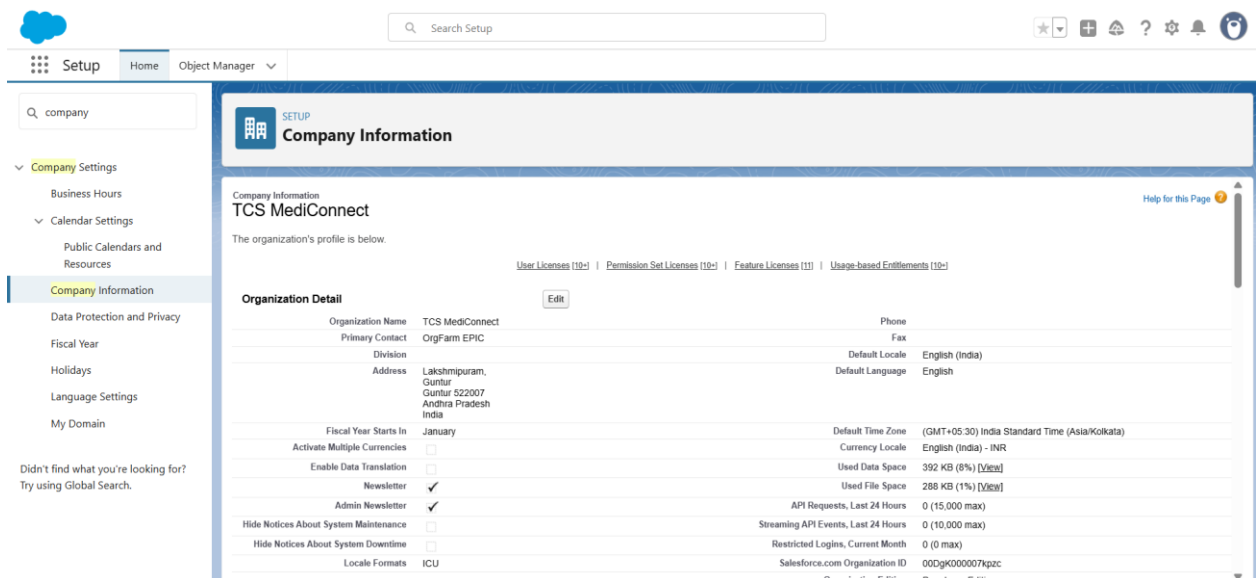
2. Update fields:

- 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.



The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and shows the profile for 'TCS MediConnect'. The organization's name is 'TCS MediConnect', and the primary contact is 'OrgFarm EPIC'. The address is 'Lakshimpuram, Guntur 522007, Andhra Pradesh, India'. The default time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)', the default currency is 'English (India) - INR', and the default language is 'English'. The page also shows various system settings like 'Fiscal Year Starts In January', 'API Requests, Last 24 Hours' (0), and 'Streaming API Events, Last 24 Hours' (0).

Organization Detail	
Organization Name	TCS MediConnect
Primary Contact	OrgFarm EPIC
Division	
Address	Lakshimpuram, Guntur 522007, 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
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	392 KB (8%) <a href="#">View</a>
Used File Space	288 KB (1%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000007kpzc
Organization Edition	Developer Edition

Setup

Home

Object Manager

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

SETUP

Company Information

Organization Detail

Edit

Organization Name	TCS MediConnect	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Lakshimpuram, Guntur Guntur 522007 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	392 KB (8%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	288 KB (1%) <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	00DgK000007kpzc
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 7/21/2025, 4:14 AM

Modified By

Pamika Jotnala, 9/23/2025, 10:50 AM

Edit

### 3. Business Hours & Holidays

- Where to Go:

- Setup → Company Settings → Business Hours.

- Steps:

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

SETUP

Business Hours

Organization Business Hours

Help for this Page

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 Edit

Save

Cancel

Step 1. Business Hours Name

Business Hours Name

Default

Active

Use these business hours as the default

☒

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Monday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Tuesday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Wednesday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Thursday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Friday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours
Saturday	9:00 AM	to	9:00 PM	<input type="checkbox"/> 24 hours

Save

Cancel

- **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.

H

# 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.

[Help for this Page](#)

Holidays <span style="float: right;"><a href="#">New</a></span>			
Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Gandhi Jayanti		10/2/2025 All Day <a href="#">↻</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Independence Day		8/15/2026 All Day <a href="#">↻</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Republic Day		1/28/2026 All Day <a href="#">↻</a>
<a href="#">Edit</a>   <a href="#">Del</a>	TCS MedConnect Foundation Day		9/20/2026 All Day <a href="#">↻</a>

Elapsed Holidays	
No records to display	



## 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.

**SETUP**  
**Fiscal Year**

Setup  
Organization Fiscal Year Edit: TCS MediConnect

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.

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

**Change Fiscal Year Period** [Save] [Cancel]

Name: TCS MediConnect  
Fiscal Year Start Month: April  
Fiscal Year is Based On: ☒ The ending month ☐ The starting month

[Save] [Cancel]

## 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

SETUP

Users

User

Doctor User

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	Doctor User	Role	Doctors
Alias	duser	User License	Salesforce
Email	doctor.user@tcs-mediconnect.com <a href="#">[Verify]</a>	Profile	Doctor Profile
Username	doctor.user@tcs-mediconnect.com	Active	<input checked="" type="checkbox"/>
Nickname	User17587266806202372342 <a href="#">[i]</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	TCS-MediConnect	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	Amaravathi Road Guntur Andhra Pradesh India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

SETUP

Users

User

Manager User

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	Manager User	Role	Manager
Alias	muser	User License	Salesforce
Email	manager.user@tcs-mediconnect.com <a href="#">[Verify]</a>	Profile	Manager Profile
Username	manager.user@tcs-mediconnect.com	Active	<input checked="" type="checkbox"/>
Nickname	User17587271364521279664 <a href="#">[i]</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	TCS-MediConnect	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	Amaravathi Road Guntur Andhra Pradesh India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

SETUP

Users

User

Patient User

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	Patient User	Role	
Alias	puser	User License	Salesforce Platform
Email	patient.user@tcs-mediconnect.com <a href="#">[Verify]</a>	Profile	Standard Platform User
Username	patient.user@tcs-mediconnect.com	Active	<input checked="" type="checkbox"/>
Nickname	User17587291007263566001 <a href="#">[i]</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	TCS-MediConnect	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	Amaravathi Road Guntur Andhra Pradesh India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

**SETUP Users**

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

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	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d9k000007kpzcuaa.iponzkfujnpa@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	EPIC_OrgFarm	OEPIE	epic.61666ebb730b@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Jonnala, Pamika	par	parnika2599411@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Staff_Hospital	hstaff	hospitalstaff.user@tcs-mediconnect.com	Hospital Staff	<input type="checkbox"/>	Hospital Staff Profile
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	User_Doctor	duser	doctor.user@tcs-mediconnect.com	Doctors	<input checked="" type="checkbox"/>	Doctor Profile
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	integ	integration@00d9k000007kpzcuaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	User_Manager	muser	manager.user@tcs-mediconnect.com	Manager	<input checked="" type="checkbox"/>	Manager Profile
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	User_Patient	puser	patient.user@tcs-mediconnect.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	insightssecurity@00d9k000007kpzcuaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple 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
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Gold Partner User	Gold Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Identity User	Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Manager Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>

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
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community User	Partner Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Work.com Only User	Work.com Only	<input type="checkbox"/>

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
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Gold Partner User	Gold Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Hospital Staff Profile	Salesforce	<input checked="" type="checkbox"/>

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
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community User	Customer Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Doctor Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Identity User	External Identity	<input type="checkbox"/>

SETUP

Profiles

Profile

Manager Profile

Help for this Page

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.

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.

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]

Profile Detail

Edit

Clone

Delete

View Users

Name	Manager Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pamika Jonnala, 9/23/2025, 11:47 AM	Modified By	Pamika Jonnala, 9/23/2025, 11:47 AM

SETUP

Profiles

Profile

Doctor Profile

Help for this Page

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.

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.

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]

Profile Detail

Edit

Clone

Delete

View Users

Name	Doctor Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pamika Jonnala, 9/23/2025, 11:40 AM	Modified By	Pamika Jonnala, 9/23/2025, 11:40 AM

SETUP

Profiles

Profile

Accounts Staff Profile

Help for this Page

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.

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.

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]

Profile Detail

Edit

Clone

Delete

View Users

Name	Accounts Staff Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pamika Jonnala, 9/23/2025, 11:45 AM	Modified By	Pamika Jonnala, 9/23/2025, 11:45 AM

## 7. Roles

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

- **Steps:**

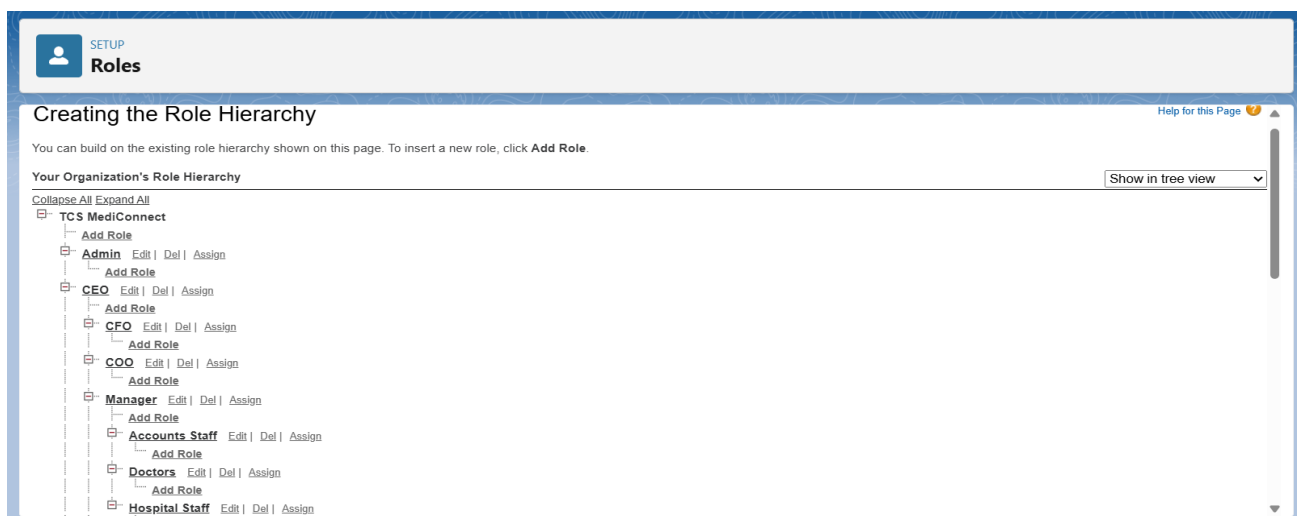
1. Create Role Hierarchy:

- 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

Help for this Page

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

All Permission Sets

Edit | Delete | Create New View

New

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

Permission Sets

Help for this Page

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

All Permission Sets

Edit | Delete | Create New View

New

A

B

C

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P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

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

Permission Sets

Help for this Page

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

All Permission Sets

Edit | Delete | Create New View

New

A

B

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R

S

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U

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Z

Other

All

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

**Sharing Settings**

### Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.

Manage sharing settings for: All Objects

Disable External Sharing Model

**Default Sharing Settings**

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help ?

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	✓

**Sharing Settings**

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	

**Other Settings**

Other Settings Help ?

## 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

Setup

Appointment Sharing Rule

Help for this Page

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Appointment\_Share\_Doctor

Rule Name

Appointment\_Share\_Doctor

Description

Appointment: owned by members of

Share with

Access Level

Created By

Role and Internal Subordinates: Doctors

Role and Internal Subordinates: Hospital Staff

Read/Write

Pamika Jonnala, 9/25/2025, 10:11 AM

Modified By

Pamika Jonnala, 9/25/2025, 10:11 AM

Save

Cancel

SETUP

Sharing Settings

Setup

Billing Sharing Rule

Help for this Page

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Billing\_Share\_Staff\_Manag

Rule Name

Billing\_Share\_Staff\_Manag

Description

Billing: owned by members of

Share with

Access Level

Created By

Role and Internal Subordinates: Hospital Staff

Role and Internal Subordinates: Manager

Read/Write

Pamika Jonnala, 9/25/2025, 10:13 AM

Modified By

Pamika Jonnala, 9/25/2025, 10:13 AM

Save

Cancel

SETUP

Sharing Settings

Appointment Sharing Rules

New

Recalculate

Appointment Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Doctors</u>	<u>Role and Internal Subordinates: Hospital Staff</u>	Read/Write
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Group: All MediConnect Team</u>	<u>Group: All MediConnect Team</u>	Read/Write

Billing Sharing Rules

New

Recalculate

Billing Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Hospital Staff</u>	<u>Role and Internal Subordinates: Manager</u>	Read/Write

Chatbot Log Sharing Rules

New

Recalculate

Chatbot Log Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Hospital Staff</u>	<u>Role and Internal Subordinates: Admin</u>	Read Only

Doctor Sharing Rules

New

Recalculate

Doctor Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Doctors</u>	<u>Role and Internal Subordinates: Manager</u>	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
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Doctors</u>	<u>Role and Internal Subordinates: Hospital Staff</u>	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
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <u>Role and Internal Subordinates: Doctors</u>	<u>Role and Internal Subordinates: Manager</u>	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.

**SETUP Profiles**

### Login Hours Help for this Page

Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.

All times are in (GMT+05:30) India Standard Time (Asia/Kolkata)

Day	Start Time	End Time	
Sunday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Monday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Tuesday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Wednesday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Thursday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Friday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
Saturday	9:00 AM	9:00 PM	<a href="#">Clear times</a>
<a href="#">Clear all times</a>			

## 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.