# Phase 2: Org Setup & Configuration

**Goal**: To prepare the Salesforce environment through setup and configuration to support the Hospital Appointment & Health Tracker System.

## **1. Salesforce Editions**

**Edition Used**: Salesforce Developer Edition (Dev Org) – free, full-featured org for testing and configuration.

**Rationale**: Suitable for healthcare project prototyping, customizations, and testing before moving into production.

## **2. Company Profile Setup**

* **Company Name**: Hospital Appointment & Health Tracker System
* **Default Locale**: English (India)
* **Currency**: Indian Rupee (INR) – primary; USD enabled for international patients.
* **Default Time Zone**: Asia/Kolkata (IST)
* **Business Address**: Hospital HQ (configurable).

Configured Organization Name, Locale, Time Zone, and Currency.  
Enabled INR as primary currency for local billing and USD for international use.  
Prepared base org settings.

## **Business Hours & Holidays**

## **Standard Business Hours**: 9:00 AM – 8:00 PM IST (Monday–Saturday).

## **Holidays Configured**: Republic Day (26 Jan), Independence Day (15 Aug), Gandhi Jayanti (2 Oct), Diwali, and local holidays.

## **Purpose**: Ensures appointment scheduling, escalations, and automated reminders respect working days and timings.

## **4. Fiscal Year Settings**

* **Type**: Standard Fiscal Year (Jan–Dec).
* **Reason**: Aligns with hospital billing and insurance cycles.
* **Future**: Custom fiscal year can be enabled if required by hospital policy.

## **5. User Setup & Licenses**

**User Types Configured**:

1. **Patient User** (Community/Experience Cloud License) → Register, book appointments, and view health records.
2. **Doctor User** (Salesforce Platform License) → Manage appointments, update health records, and prescriptions.
3. **Reception Staff User** (Salesforce Platform License) → Manage bookings, rescheduling, and patient inquiries.
4. **Hospital Admin User** (Salesforce License) → Manage hospital dashboards, billing, and reports.
5. **System Admin User** (Salesforce License) → Manage overall Salesforce Org.

## **Profiles**

## **Patient Profile**: Limited access (book appointments, view/update personal info, see their own health records).

## **Doctor Profile**: Can view their patients, update records, and manage appointments.

* **Reception Staff Profile**: Manage bookings, cancellations, and patient records.
* **Hospital Admin Profile**: Full reporting and monitoring rights.
* **System Administrator**: Full org access.

## **7. Roles**

**Hierarchy Setup**:

* System Admin (Top)
* Hospital Admins
* Doctors
* Reception Staff
* Patients

Role hierarchy ensures visibility (e.g., Admins can see all appointments, Doctors see only their patients, Patients see only their own records).

## **8. Permission Sets**

Additional access via permission sets:

* **Reports\_Access**: For Admins to create/modify reports.
* **Analytics\_Access**: For Doctors to view patient analytics dashboards.
* **Appointment\_Access**: For Reception Staff to manage appointment records.
* **Health\_Record\_Update**: For Doctors to edit patient vitals & prescriptions.
* Assigned permission sets as per role requirements.

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

* **Appointment Data**: Controlled by Parent (linked to Patient & Doctor).
* **Patient Records**: Private – visible only to patient, their doctor, and admins.
* **Doctor Records**: Public Read Only – visible to admins, restricted to doctors themselves.
* **Billing Data**: Private – visible to patient and admins only.

## **10. Sharing Rules**

* Doctors can view and manage only their assigned patient records.
* Reception staff can update appointments for all patients.
* Hospital Admins have full visibility of all records.

## **11. Login Access Policies**

* Restrict patient portal logins to 6 AM – 11 PM IST.
* Enforce IP restrictions for hospital staff and admins.
* Enable Two-Factor Authentication (2FA) for system admins and doctors.

## **12. Dev Org Setup**

* Created free Salesforce Developer Org as baseline.
* Enabled **Experience Cloud** for patient portal.
* Installed **VS Code + SFDX CLI** for implementation.
* Setup GitHub repository for version control.

## **13. Sandbox Usage**

* Developer Sandbox for testing.
* For production scale: Partial Sandbox for demo data, Full Sandbox for UAT.

## **14. Deployment Basics**

* Configurations and custom objects built in Dev Org/Sandbox.
* Deployment to Production via Change Sets (profiles, roles, flows, objects).
* Version control with GitHub (for Apex classes, Lightning components).

## **Phase 2 Deliverable**

By the end of Phase 2, we have:

* Configured company setup, users, profiles, roles, and OWDs.
* Enabled Experience Cloud portal for patients.
* Setup security, login policies, and sharing models.
* Prepared sandbox & deployment plan for upcoming phases.