MediCare Connect — Phase 2: Org Setup & Configuration

1. Introduction

This phase covers setting up a Salesforce Developer Org to simulate a hospital environment for appointment booking, doctor scheduling and medical case management.

2. Objectives

- Configure a clean Salesforce Developer Org named “MediCare Connect.”
- Create sample users (Hospital Admin, Doctor, Receptionist).
- Secure data using OWD and sharing rules.
- Demonstrate Appointment booking and cross-role visibility.

3. Configuration Steps

Step 0 — Company Info

- Signed up for Developer Edition and logged in.
- Setup → Company Information → updated Organization Name = *MediCare Connect*, Locale = English (India), Timezone = IST.

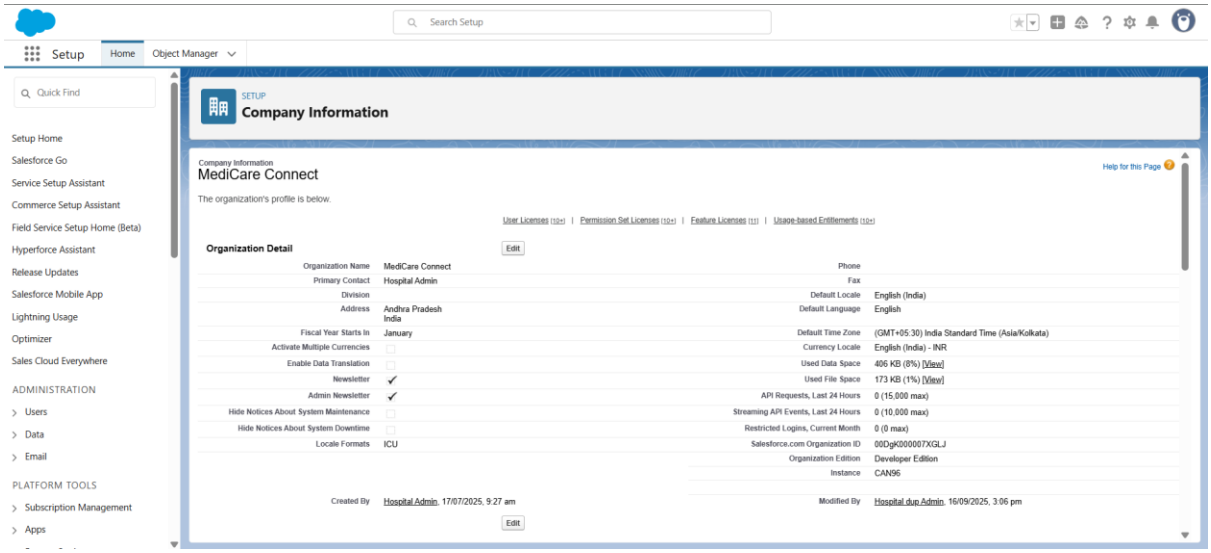

Fig.1 CompanyInfo

Step 1 — Business Hours & Holidays

- Created “Hospital Business Hours” Mon–Sat 9 AM–6 PM.
- Added relevant Holidays and linked them to Business Hours.

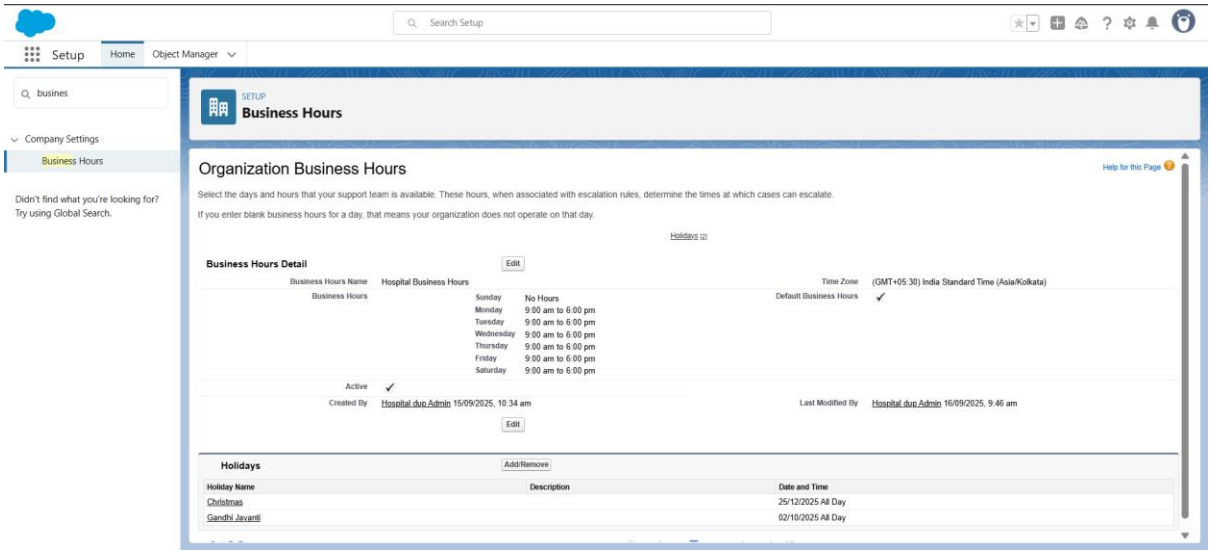

Fig.2 BusinessHours

Step 2 — Users

- Created 3 sample users:

Display Name	Username (example)	Profile	Role
Hospital Admin	admin_swaroop@medicare.com	System Administrator	Hospital Admin
Dr. Anita Sharma	anita.sharma@medicare.com	Doctor	Doctor
Receptionist Riya	riya.receptionist@medicare.com	Receptionist	Receptionist

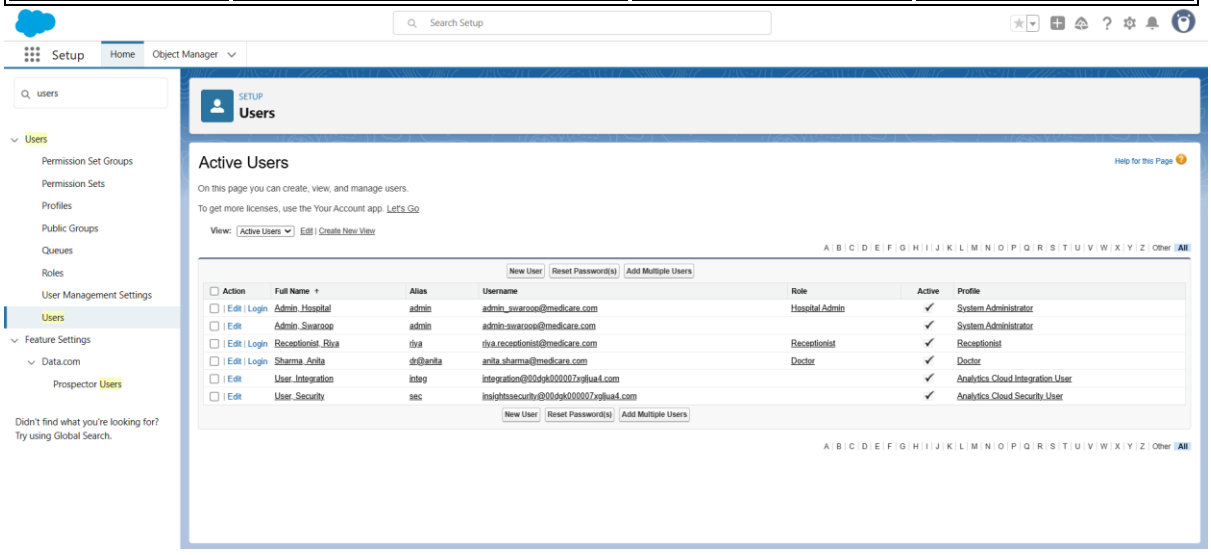

Fig.3 Users_List

Step 3 — Profiles

- Cloned Standard User → created **Doctor** profile.
- Cloned Standard User → created **Receptionist** profile.
- Adjusted Object Permissions:
    - Appointment__c: Doctor = Read/Create/Edit, Receptionist = Read/Create/Edit
    - MedicalCase__c: Doctor = Read/Edit/Create, Receptionist = Read only
    - Contact (Patients): both Read/Create/Edit as needed.

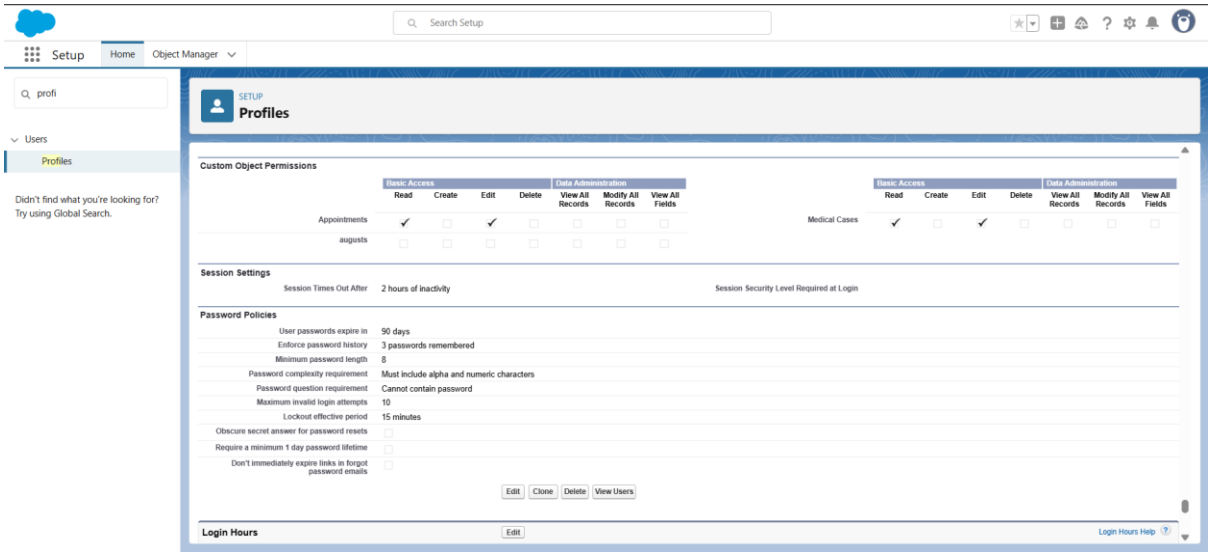

Fig.4 Doctor profile (showing appointments and medical cases permissions)

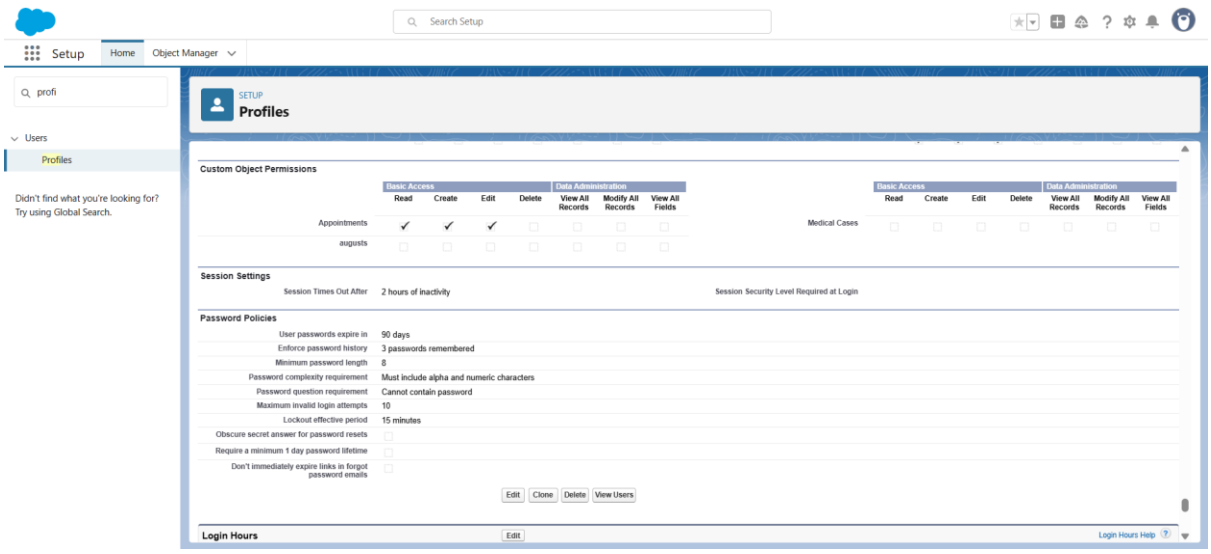

Fig.5 Receptionist profile (showing appointments and medical cases permissions)

Step 4 — Role Hierarchy

- Created simple hierarchy:
    - Hospital Admin (top)
        - Doctor
            - Receptionist

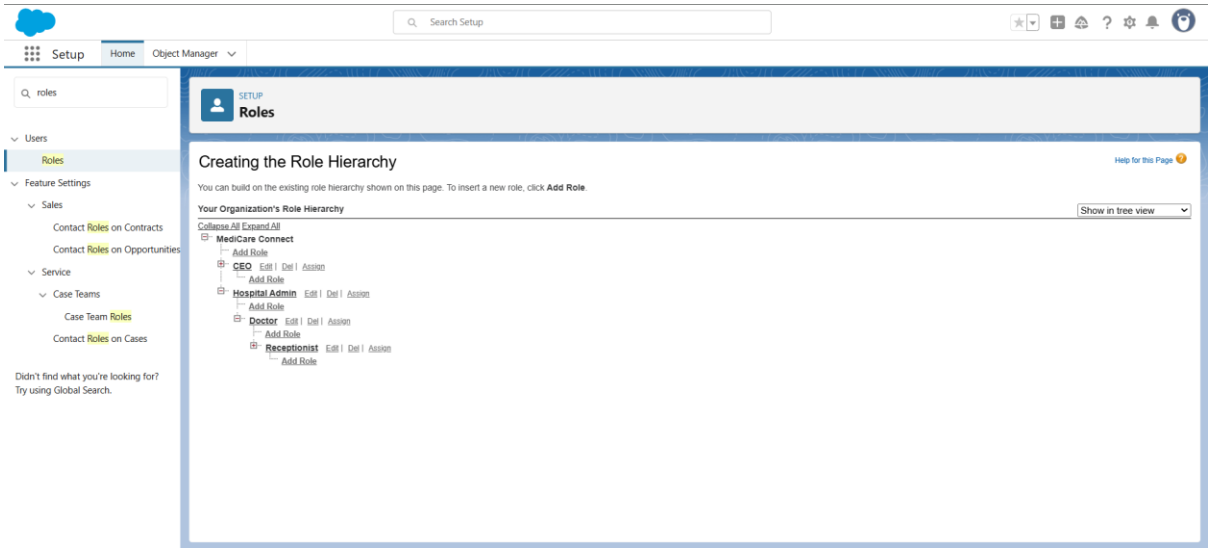

Fig.6 Roles

Step 5 — Org-Wide Defaults (OWD)

- Setup → Sharing Settings.
- Appointment__c = Private.
- MedicalCase__c = Private.

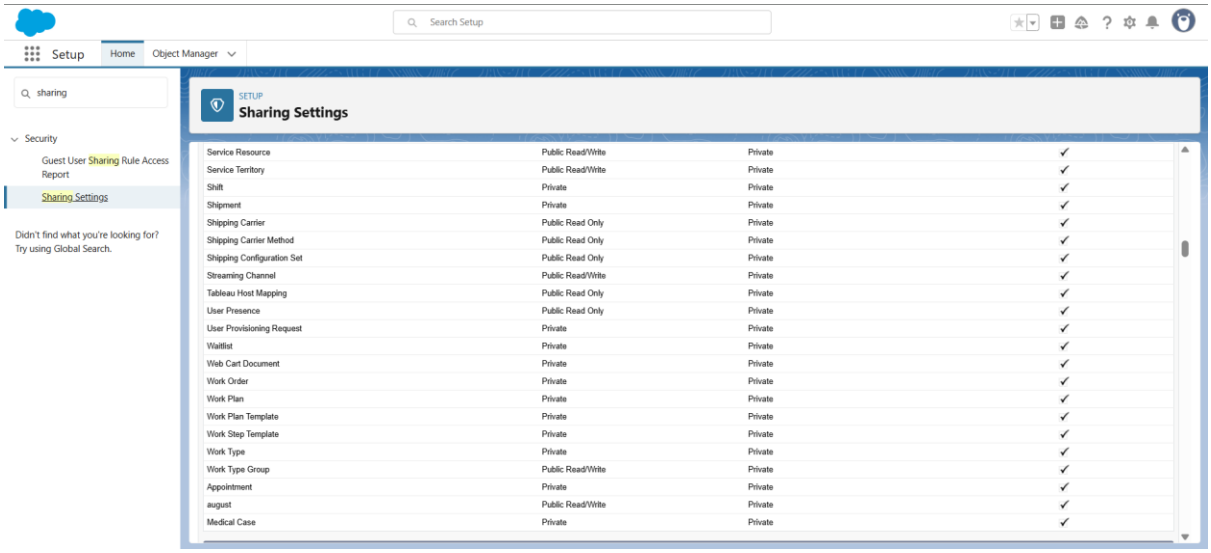

Fig.7 SharingSettings_OWD

Step 6 — Sharing Rule (Receptionist ↔ Doctor access)

- Created **Public Group "Doctors"** containing all doctor users.
- Created **Owner-based sharing rule**:
    - Owned by: Receptionist (or criteria Doctor__c != null)
    - Share with: Doctors group
    - Access Level: Read/Write.

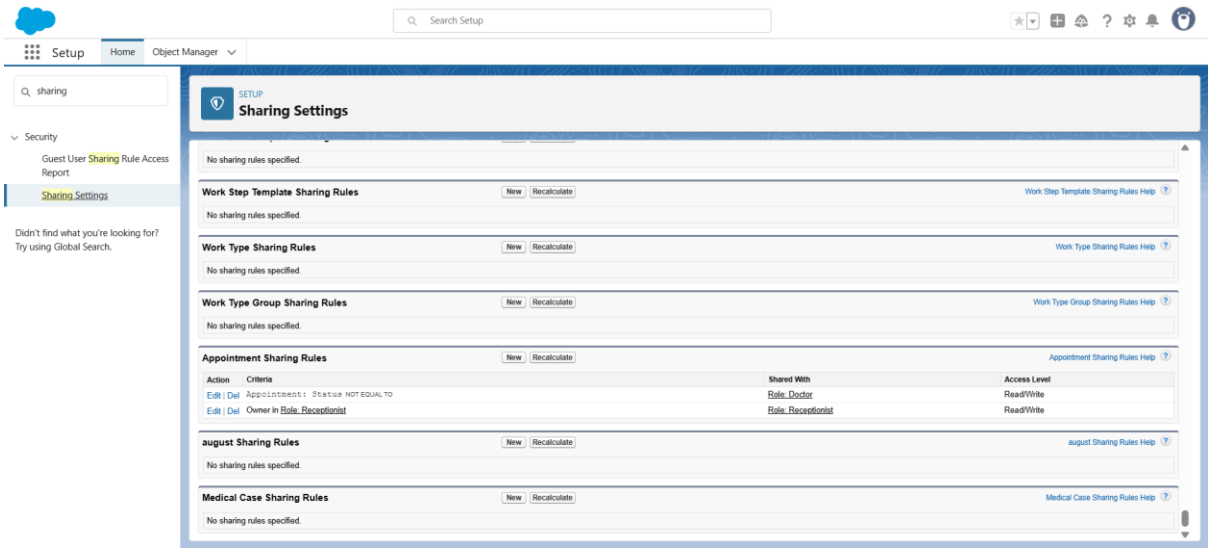

Fig.8 SharingRule

Step 7 — Login Access Policy

- Enabled "Administrators Can Log in as Any User."

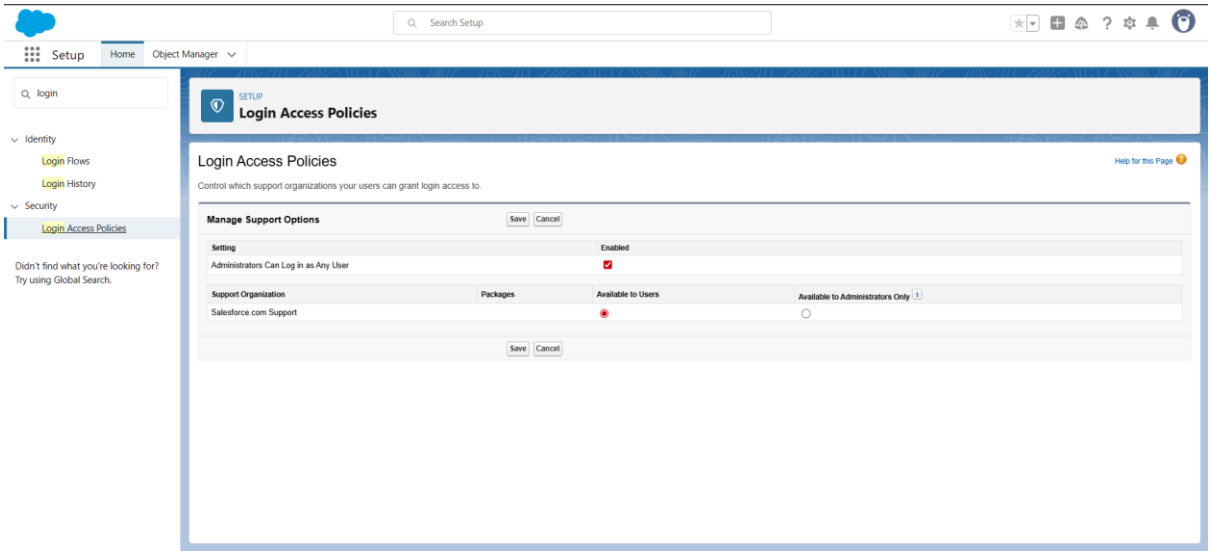

Fig.9 LoginAccess

Step 8 — MediCare Lightning App

- Setup → App Manager → New Lightning App “MediCare.”
- Added tabs: Patients (Contacts), Appointments, Medical Cases, Reports, Dashboards (and custom Doctor object if created).

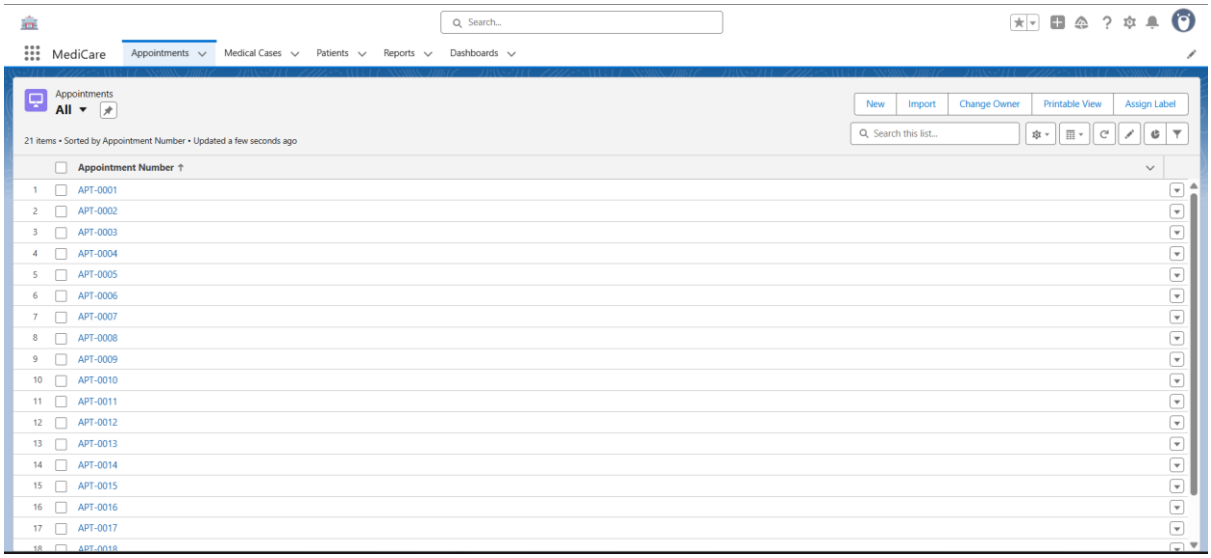

Fig.10 AppManager

Step 9 — Testing

- Logged in as Receptionist → created an Appointment selecting Dr. Anita.
- Logged in as Dr. Anita (using Login-As) → verified she can view & edit the Appointment.
- Verified OWD & sharing restrict other users.

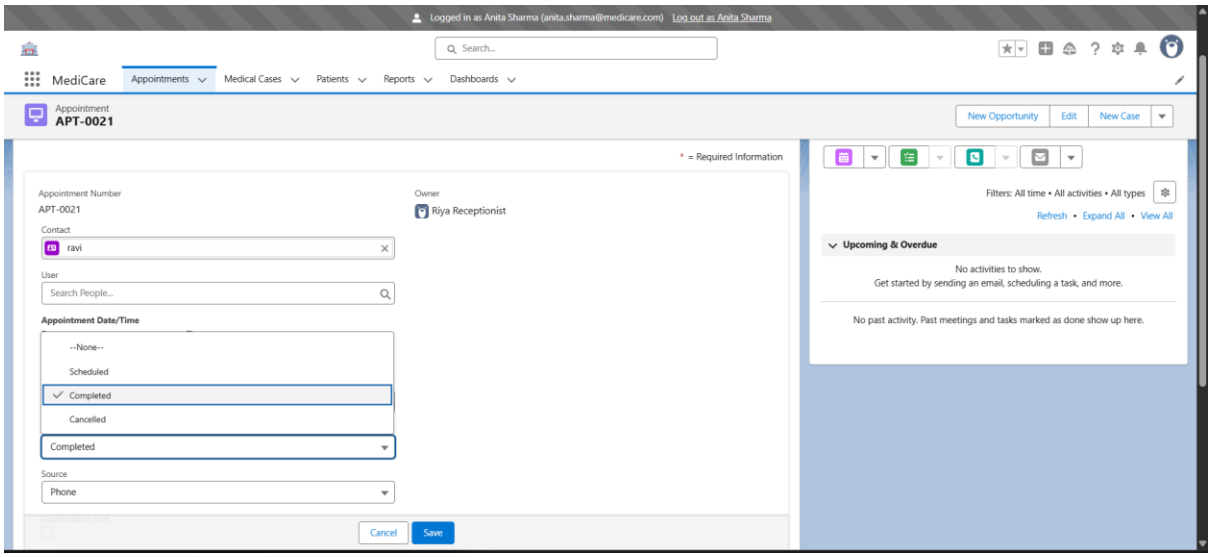

Fig.11 Testing (Doctor’s view of the appointment detail page)

4. Results / Observations

- Receptionist can create Appointments and still edit them.
- Doctor automatically gains Read/Write to Appointments via sharing rule.
- Hospital Admin sees everything.
- OWD set to Private ensures secure baseline.

5. Next Steps (Optional Enhancements)

- Add email/SMS reminders via Flow.
- Add dashboards for appointment analytics.
- Add teleconsultation record type and file upload for prescriptions.