

Phase 2: Org Setup & Configuration

Project Title: SmartCare CRM – Salesforce-Powered Healthcare Management & Patient Engagement Suite

1. Introduction

This phase covers setting up a Salesforce Developer Org to simulate a healthcare environment for patient management, appointment booking, doctor scheduling, and prescription tracking.

2. Objectives

- Configure a Salesforce Developer Org named “SmartCare CRM.”
- Create sample users (Hospital Admin, Doctor, Receptionist).
- Secure sensitive patient data using OWD and sharing rules.
- Demonstrate Appointment booking, Doctor assignment, and role-based visibility.

3. Configuration Steps

Step 0 — Company Info

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

The screenshot shows the 'Company Information' setup page in Salesforce. The organization's profile is displayed, showing details like Organization Name (SmartCare CRM), Primary Contact (OrgFarm EPIC), Division (India), and Fiscal Year Starts In (January). The page includes sections for Organization Detail, Phone, and various usage metrics. A 'Help for this Page' link is visible in the top right corner.

Organization Detail		Edit	Phone
Organization Name	SmartCare CRM		Phone
Primary Contact	OrgFarm EPIC		Fax
Division			Default Locale
Address	India		English (India)
Fiscal Year Starts In	January		Default Language
Activate Multiple Currencies	<input type="checkbox"/>		English
Enable Data Translation	<input type="checkbox"/>		Default Time Zone
Newsletter	<input checked="" type="checkbox"/>		(GMT+05:30) India Standard Time (Asia/Kolkata)
Admin Newsletter	<input checked="" type="checkbox"/>		Currency Locale
Hide Notices About System Maintenance	<input type="checkbox"/>		English (United States) - USD
Hide Notices About System Downtime	<input type="checkbox"/>		Used Data Space
Locale Formats	ICU		396 KB (8%) [View]
			Used File Space
			421 KB (2%) [View]
			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
			00DgK000007a1eH
			Organization Edition
			Developer Edition
			Instance
			CAN96

Business Hours & Holidays

- Created “Hospital Business Hours”.
- Added relevant Holidays and linked them to Hospital Business Hours.

The screenshot shows two main sections: 'Business Hours Detail' and 'Holidays [2]'.
Business Hours Detail: This section displays a table of business hours for the 'Hospital Business Hours' named 'Business Hours'. It includes columns for Day, Start Time, and End Time. The table shows:

Day	Start Time	End Time
Sunday	9:00 AM	6:00 PM
Monday	24 Hours	
Tuesday	24 Hours	
Wednesday	9:00 AM to 6:00 PM	
Thursday	24 Hours	
Friday	24 Hours	
Saturday	9:00 AM to 6:00 PM	

Holidays: This section lists two holidays: 'Independence Day' (Date: 8/15/2026 All Day) and 'Republic Day' (Date: 1/26/2026 All Day).

Holiday Name	Description	Date and Time
Independence Day		8/15/2026 All Day
Republic Day		1/26/2026 All Day

Users

- Created 3 sample users:

Hospital Admin | admin@smartcare.com | System Administrator | Hospital Admin
Dr. Anjali Rao | anjali.rao@smartcare.com | Doctor | Doctor
Receptionist Riya | riya.receptionist@smartcare.com | Receptionist | Receptionist

Profiles

- Cloned Standard User → created Doctor profile.
- Cloned Standard User → created Receptionist profile.
- Adjusted Object Permissions:
 - Patient_c: Doctor = Read/Edit/Create/Delete, Receptionist = Read/Create/Edit
 - Appointment_c: Doctor = Read/Create/Edit, Receptionist = Read/Create/Edit
 - Prescription_c: Doctor = Full Access, Receptionist = Read only

Role Hierarchy

- Created simple hierarchy:

Hospital Admin (top)

- Doctor
- Receptionist



Org-Wide Defaults (OWD)

- Setup → Sharing Settings.
- Patient_c = Private.
- Appointment_c = Private.
- Prescription_c = Controlled by Parent.

Appointment	Private	Private	✓
Doctor	Public Read/Write	Private	✓
Mentor	Private	Private	✓
Order Detail	Public Read/Write	Private	✓
Patient	Private	Private	✓
Prescription	Controlled by Parent	Controlled by Parent	

Sharing Rule (Receptionist ↔ Doctor access)

- Created Public Group “Doctors” containing all doctor users.
- Created Owner-based sharing rule:
 - o Owned by: Receptionist
 - o Share with: Doctors group
 - o Access Level: Read/Write

Group
Doctors

[Help for this Page](#)

Edit		Delete
Label	Doctors	
Group Name	Doctors	
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>	
Description		
Created By	9/23/2025, 8:54 AM	Modified By
	9/23/2025, 8:54 AM	

All Users in Group [View Group Members](#)

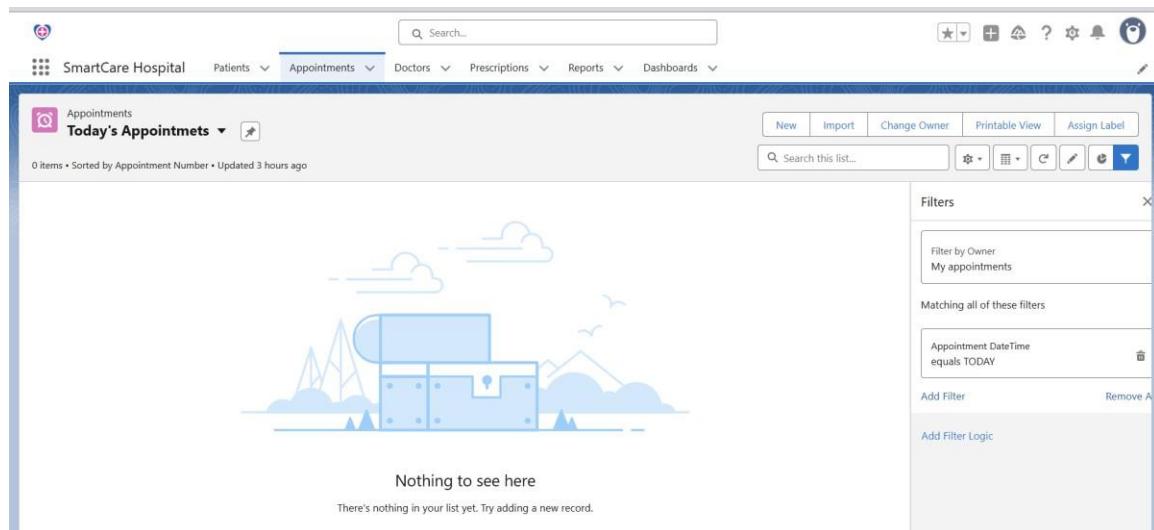
Full Name	Reason For Membership
Hospital Admin	Manager of Group Member
Dr. Anjali Rao	Group Member

Login Access Policy

- Enabled “Administrators Can Log in as Any User.”

SmartCare Lightning App

- Setup → App Manager → New Lightning App “SmartCare Hospital.”
- Added tabs: Patients, Appointments, Doctors, Prescriptions, Reports, Dashboards.



Testing

- Logged in as Receptionist → created an Appointment assigning Dr. Anjali.
- Logged in as Dr. Anjali (using Login-As) → verified she can view & edit the Appointment.
- Verified OWD & sharing restrict unauthorized access.

4. Results / Observations

- Receptionist can create Appointments and assign them to Doctors.
- Doctor automatically gains Read/Write to Appointments via sharing rule.
- Hospital Admin sees everything.
- OWD set to Private ensures sensitive patient data is secure.