

## 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' page in the Salesforce Setup interface. The page title is 'SmartCare CRM'. Below the title, it states 'The organization's profile is below.' There are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (10)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing a table of organization settings. The table has columns for the setting name, its current value, and an 'Edit' button. The settings include Organization Name (SmartCare CRM), Primary Contact (OrgFarm EPIC), Phone, Fax, Division, Address, Fiscal Year Starts In (January), Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats (ICU), Default Locale (English (India)), Default Language (English), Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Currency Locale (English (United States) - USD), Used Data Space (396 KB (8%)), Used File Space (421 KB (2%)), 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), and Instance (CAN96).

Organization Detail		Edit
Organization Name	SmartCare CRM	
Primary Contact	OrgFarm EPIC	
Phone		
Fax		
Division		
Address	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	
Default Locale	English (India)	
Default Language	English	
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	
Currency Locale	English (United States) - USD	
Used Data Space	396 KB (8%) <a href="#">View</a>	
Used File Space	421 KB (2%) <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	00DgK000007a1eH	
Organization Edition	Developer Edition	
Instance	CAN96	

## Business Hours & Holidays

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

Holidays (2)

**Business Hours Detail** [Edit](#)

Business Hours Name	Hospital Business Hours	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Monday</td><td>24 Hours</td></tr><tr><td>Tuesday</td><td>24 Hours</td></tr><tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>24 Hours</td></tr><tr><td>Friday</td><td>24 Hours</td></tr><tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr></table>	Sunday	9:00 AM to 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	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	9:00 AM to 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															
Default Business Hours		<input type="checkbox"/>														

Active ☒

Created By  9/23/2025, 9:00 AM [Edit](#)

Last Modified By  9/23/2025, 9:20 AM

**Holidays** [Add/Remove](#)

Holiday Name	Description	Date and Time
<a href="#">Independence Day</a>		8/15/2026 All Day <a href="#">🔗</a>
<a href="#">Republic Day</a>		1/26/2026 All Day <a href="#">🔗</a>

## 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:
  - o Patient\_c: Doctor = Read/Edit/Create/Delete, Receptionist = Read/Create/Edit
  - o Appointment\_c: Doctor = Read/Create/Edit, Receptionist = Read/Create/Edit
  - o Prescription\_c: Doctor = Full Access, Receptionist = Read only

## Role Hierarchy

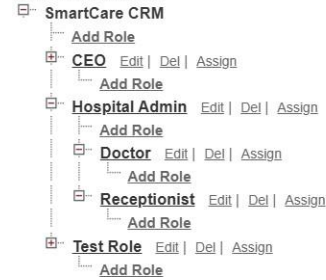
- Created simple hierarchy:

Hospital Admin (top)

- Doctor
- Receptionist

## Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



## 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](#)

Label

Doctors

Group Name

Doctors

Grant Access Using Hierarchies

✓

Description

Created By

Modified By

9/23/2025, 8:54 AM

9/23/2025, 8:54 AM

All Users in Group

View Group Members

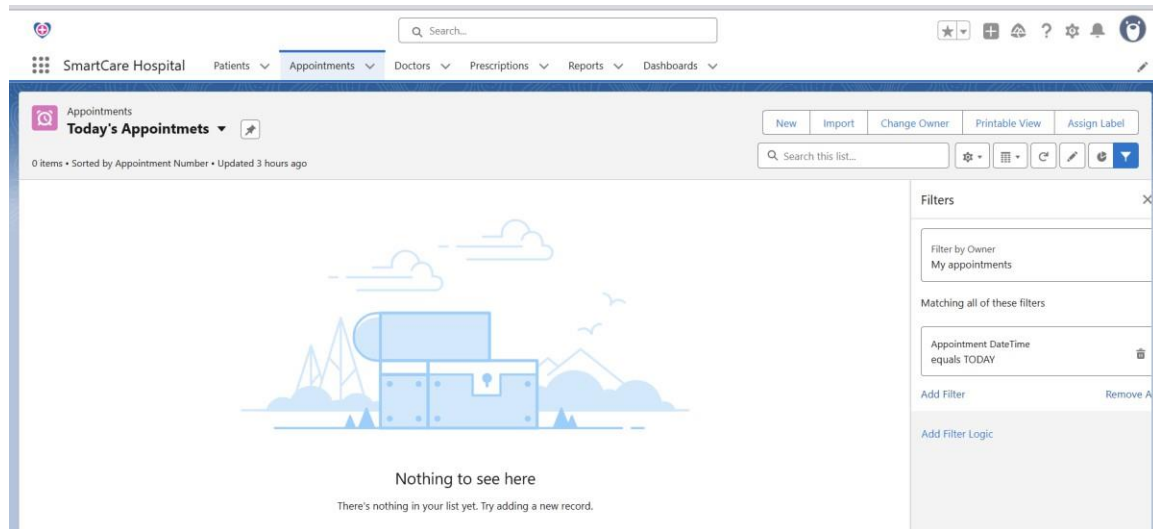
Full Name	Reason For Membership
Hospital Admin	Manager of Group Member
Dr. Anjali Rao	Group Member

## 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.