**Phase 2: Org Setup & Configuration**

**Purpose:**  
The purpose of this phase is to configure the Salesforce Developer Org to behave like a hospital system. This includes setting company information, users, business hours, and login/security policies before building hospital-related objects and automation.

**Step 1: Create or Open Salesforce Developer Org**

* Action: Go to <https://developer.salesforce.com/signup>
* Fill in details:
  + First Name: HospitalAdmin
  + Company: Your Hospital Name
  + Username: [admin@hospitalcrm.com](mailto:admin@hospitalcrm.com)
* Result: Open your org in Lightning Experience.

**Step 2: Company Profile Setup**

* Navigation: Setup → Company Information
* Steps:
  + Edit → Set Organization Name: Hospital Appointment Management System
  + Set Fiscal Year: January to December
  + Set Default Locale: English (India)
  + Set Currency: INR (₹)
* Note: This step ensures the org reflects hospital-specific details.

**Step 3: Business Hours & Holidays**

* Navigation: Setup → Business Hours → New
* Business Hours:
  + Label: Hospital Working Hours
  + Time Zone: IST (+5:30)
  + Monday–Saturday: 9:00 AM → 5:00 PM
  + Sunday: closed
* Save

**Add Holiday:**

* Navigation: Setup → Holidays → New
  + Name: Independence Day Holiday
  + Date: 15 Aug
  + Associated Business Hours: Hospital Working Hours
* Save
* Note: Business hours and holidays determine when cases can escalate.

Step 4: Fiscal Year Settings

* Navigation: Setup → Company Information → Fiscal Year → Edit Custom Fiscal Year (optional)
* Steps:
  + Choose Standard Fiscal Year (Jan–Dec) unless a custom period is required.
* Save
* Screenshot Placeholder: [Insert Fiscal Year Screenshot Here]

Step 5: User Setup & Licenses

* Navigation: Setup → Users → New User

| **Full Name** | **Alias** | **Email** | **Profile** | **Role** | **License Suggestion** |
| --- | --- | --- | --- | --- | --- |
| Admin User | admin | [admin@hospital.com](mailto:admin@hospital.com) | System Administrator | CEO | Salesforce (Full) |
| Receptionist User | recep | [recep@hospital.com](mailto:recep@hospital.com) | Standard User | Reception Staff | Salesforce Platform |
| Doctor User | doctor | [doctor@hospital.com](mailto:doctor@hospital.com) | Standard User | Doctors Dept | Salesforce Platform |

* Screenshot Placeholder: [Insert Users List Screenshot Here]
* Note: Roles like Reception Staff and Doctors Dept must be created before assigning.

**Step 6: Login Access Policies**

* Navigation: Setup → Login Access Policies
* Steps:
  + Enable: Administrators Can Log in as Any User
* Screenshot Placeholder: [Insert Login Access Policies Screenshot Here]
* Note: This allows admins to test and troubleshoot user accounts.