

# Phase 2: Org Setup & Configuration - Complete Implementation Report

## □ Clinic Appointment Booking System

**Industry:** Healthcare

**Project Type:** B2C Healthcare CRM Implementation

**Target Users:** Clinical Managers, Doctors, Administrative Staff

---

## 2.1 Salesforce Editions

**Recommended Edition:** Enterprise Edition

**Justification:**

- Advanced security features for healthcare data
  - Custom objects support for clinic-specific entities
  - API access for integrations with medical devices
  - Advanced reporting for healthcare analytics
  - Workflow and process automation capabilities
- 

## 2.2 Company Profile Setup

### Step-by-Step Configuration

**Navigation:** Setup → Company Information

**Company Details Configuration:**

**Company Name:** HealHub Healthcare System

**Company Division:** Primary Care Division

**Street:** [Complete clinic address]

**City:** Bagalkot

**State/Province:** Karnataka

**Zip/Postal Code:** 581210

**Country:** India

**Phone:** +91 77952 21426

---

## 2.3 Business Hours & Holidays

### Business Hours Configuration

**Navigation:** Setup → Business Hours → New Business Hours

#### Primary Business Hours Setup:

Business Hours Name: Clinic Operating Hours  
Description: Standard operating hours for clinic appointments and consultations  
Time Zone: Eastern Standard Time

Weekly Schedule:

Day	Status	Start Time	End Time
Monday	✓ Active	09:00 AM	06:00 PM
Tuesday	✓ Active	09:00 AM	06:00 PM
Wednesday	✓ Active	09:00 AM	06:00 PM
Thursday	✓ Active	09:00 AM	06:00 PM
Friday	✓ Active	09:00 AM	06:00 PM
Saturday	✓ Active	09:00 AM	02:00 PM
Sunday	✗ Closed	--	--

#### Emergency Hours Setup:

Business Hours Name: Emergency Care Hours  
Description: 24/7 emergency medical services  
Time Zone: Eastern Standard Time

All Days: 12:00 AM to 11:59 PM (24/7)

### Holiday Configuration

**Navigation:** Setup → Holidays → New Holiday

#### Holiday Calendar for 2024-2025:

Holiday Name	Date	Description
Makara Sankranti	2025-01-14	State / Regional Holiday
Republic Day	2025-01-26	National Holiday
Maha Shivaratri	2025-02-26	Religious Observance
Ugadi	2025-03-30	Kannada / Telugu New Year

Idul Fitr / Eid-ul-Fitr	2025-03-31	Religious Holiday
:contentReference[oaicite:4]{index=4}		
Mahavir Jayanti	2025-04-10	Religious Observance
:contentReference[oaicite:5]{index=5}		
Dr. B. R. Ambedkar Jayanti	2025-04-14	National / State Holiday
:contentReference[oaicite:6]{index=6}		
Good Friday	2025-04-18	Christian Religious Holiday
:contentReference[oaicite:7]{index=7}		
Basava Jayanti	2025-04-30	Karnataka / Regional Holiday
:contentReference[oaicite:8]{index=8}		
May Day / Labour Day	2025-05-01	Public Holiday
:contentReference[oaicite:9]{index=9}		
Bakrid / Eid al Adha	2025-06-07	Religious Holiday
:contentReference[oaicite:10]{index=10}		
Muharram	2025-07-06	Islamic Observance
:contentReference[oaicite:11]{index=11}		
Independence Day	2025-08-15	National Holiday
:contentReference[oaicite:12]{index=12}		
Ganesh Chaturthi	2025-08-27	Regional / Religious Holiday
:contentReference[oaicite:13]{index=13}		
Eid-e-Milad (Maulud Nabi)	2025-09-05	Islamic Religious Holiday
:contentReference[oaicite:14]{index=14}		
Mahalaya Amavasya	2025-09-21	Religious / Regional
Observance :contentReference[oaicite:15]{index=15}		
Maha Navami	2025-10-01	Festival / Regional Holiday
:contentReference[oaicite:16]{index=16}		
Vijaya Dashami & Gandhi Jayanti	2025-10-02	Festival + National Holiday
:contentReference[oaicite:17]{index=17}		
Maharishi Valmiki Jayanti	2025-10-07	Cultural / Religious
Observance :contentReference[oaicite:18]{index=18}		
Diwali / Deepavali	2025-10-20	Festival of Lights
:contentReference[oaicite:19]{index=19}		
Kannada Rajyotsava	2025-11-01	Karnataka State Day Holiday
:contentReference[oaicite:20]{index=20}		
Kanakadasa Jayanti	2025-11-08	Regional / Cultural Holiday
:contentReference[oaicite:21]{index=21}		
Christmas Day	2025-12-25	National / Christian Holiday
:contentReference[oaicite:22]{index=22}		
Clinic Training Day	2025-06-15	Internal Training Day
(clinic-specific)		
Annual Maintenance	2025-07-10	System / Infrastructure
Maintenance (internal)		

## 2.4 Fiscal Year Settings

### Configuration Steps

**Navigation:** Setup → Company Settings → Fiscal Year

#### Fiscal Year Setup:

Fiscal Year Type: ✓ Standard Fiscal Year

Starting Month: January  
☐ Enable Custom Fiscal Years

Fiscal Year Timeline:

- FY 2024: January 1, 2024 - December 31, 2024
- FY 2025: January 1, 2025 - December 31, 2025

Quarterly Breakdown:

Quarter	Start Date	End Date
Q1	January 1	March 31
Q2	April 1	June 30
Q3	July 1	September 30
Q4	October 1	December 31

## 2.5 User Setup & Licenses

### User License Requirements

#### License Distribution Plan:

User Role	Quantity	License Type	Monthly Cost
Clinical Manager	1	Salesforce	\$165
Senior Doctor	2	Salesforce	\$330
Junior Doctor	3	Salesforce	\$495
Administrative Manager	1	Salesforce	\$165
Administrative Staff	3	Salesforce	\$495
Nurse (Read-Only)	2	Customer	\$50
TOTAL	12		\$1,700

### User Creation Process

Navigation: Setup → Users → New User

#### User Template 1: Clinical Manager

First Name: [Manager First Name]  
Last Name: [Manager Last Name]  
Alias: clinmgr  
Email: manager@[clinic-domain].com  
Username: manager@[clinic-domain].com.sandbox  
Nickname: Manager  
Role: Clinical Manager  
Profile: Clinical Manager  
User License: Salesforce

Active: ✓  
Generate new password and notify user immediately: ✓

Email Encoding: UTF-8  
Language: English  
Locale: English (United States)  
Time Zone: (GMT-05:00) Eastern Standard Time

## User Template 2: Doctor

First Name: [Doctor First Name]  
Last Name: [Doctor Last Name]  
Alias: dr[lastname]  
Email: [doctor-email]@[clinic-domain].com  
Username: [doctor-username]@[clinic-domain].com.sandbox  
Nickname: Dr. [LastName]  
Role: Senior Doctor / Junior Doctor  
Profile: Doctor  
User License: Salesforce  
  
Manager: Clinical Manager  
Department: Medical Services  
Title: [Medical Doctor / Specialist]

## User Template 3: Administrative Staff

First Name: [Staff First Name]  
Last Name: [Staff Last Name]  
Alias: admin[number]  
Email: [staff-email]@[clinic-domain].com  
Username: [staff-username]@[clinic-domain].com.sandbox  
Role: Administrative Staff  
Profile: Administrative Staff  
User License: Salesforce  
  
Manager: Administrative Manager  
Department: Administration  
Title: [Front Desk Coordinator / Billing Specialist]

---

## 2.6 Profiles

### Profile Configuration Matrix

**Navigation:** Setup → Profiles\*\*

### Clinical Manager Profile

**Base Configuration:**

Clone From: System Administrator  
Profile Name: Clinical Manager  
Profile Description: Complete system access for clinic management and oversight

Object Permissions:

- ✓ All Standard Objects (Full CRUD)
- ✓ All Custom Objects (Full CRUD)

System Permissions:

- ✓ API Enabled
- ✓ Bulk API Hard Delete
- ✓ Convert Leads
- ✓ Create and Customize Applications
- ✓ Create and Customize Reports
- ✓ Create and Customize Dashboards
- ✓ Create Apex Classes
- ✓ Create Custom Fields
- ✓ Delete Activities
- ✓ Edit Events
- ✓ Edit Tasks
- ✓ Export Reports
- ✓ Import Custom Objects
- ✓ Manage Categories
- ✓ Manage Data Integrations
- ✓ Manage Dynamic Dashboards
- ✓ Manage Public Documents
- ✓ Manage Public Reports
- ✓ Manage Users
- ✓ Mass Email
- ✓ Modify All Data
- ✓ Run Reports
- ✓ Transfer Record
- ✓ Use Team Reassignment Wizards
- ✓ View All Data
- ✓ View Setup and Configuration
- ✓ Weekly Data Export

## Doctor Profile

### Base Configuration:

Clone From: Standard User  
Profile Name: Doctor  
Profile Description: Medical professionals with patient and case access

Tab Visibility:

Tab	Visibility
Home	Default On

Patients (Contacts)	Default On
Medical Cases (Cases)	Default On
Appointments (Events)	Default On
Doctors	Default On
Bills	Tab Hidden
Accounts	Tab Hidden
Reports	Available
Dashboards	Available
Files	Available

#### Object Permissions:

Contact (Patient): Read, Create, Edit  
 Case (Medical Case): Read, Create, Edit  
 Event (Appointment): Read, Create, Edit  
 Doctor\_\_c: Read, Create, Edit  
 Bill\_Information\_\_c: Read Only

#### System Permissions:

- ✓ API Enabled
- ✓ Create and Customize Reports
- ✓ Edit Events
- ✓ Edit Tasks
- ✓ Export Reports
- ✓ Run Reports
- ✓ Mass Email

## Administrative Staff Profile

### Base Configuration:

Clone From: Standard User

Profile Name: Administrative Staff

Profile Description: Front desk, scheduling, and billing staff

#### Tab Visibility:

Tab	Visibility
Home	Default On
Patients (Contacts)	Default On
Appointments (Events)	Default On
Bills	Default On
Reports	Available
Dashboards	Available
Medical Cases (Cases)	Tab Hidden
Doctors	Available

#### Object Permissions:

Contact (Patient): Read, Create, Edit  
 Event (Appointment): Read, Create, Edit, Delete  
 Bill\_Information\_\_c: Read, Create, Edit  
 Case (Medical Case): Read Only

Doctor\_\_c: Read Only

System Permissions:

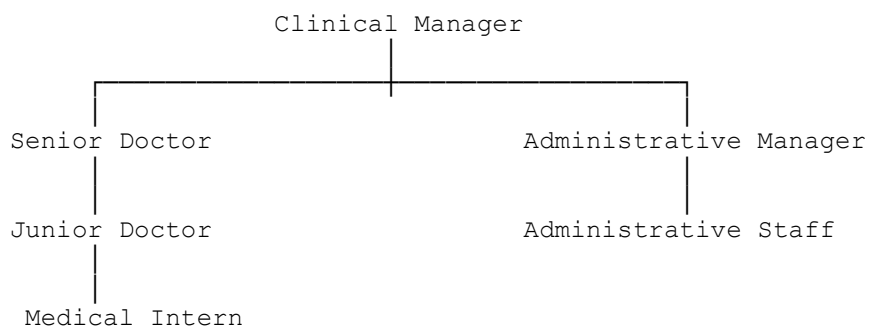
- ✓ API Enabled
  - ✓ Create and Customize Reports
  - ✓ Edit Events
  - ✓ Edit Tasks
  - ✓ Export Reports
  - ✓ Run Reports
- 

## 2.7 Roles

### Role Hierarchy Structure

**Navigation:** Setup → Roles → Set Up Roles

Clinic Organization Hierarchy:



### Role Configuration Details

#### Role 1: Clinical Manager

Role Name: Clinical Manager  
Role Label: Clinical Manager  
This role reports to: --None-- (Top Level)  
Contact Sharing: Controlled by Parent  
Account Sharing: Controlled by Parent  
Opportunity Sharing: Controlled by Parent  
Case Sharing: Controlled by Parent

Description: Top-level management with complete oversight of clinic operations

Access Level: Can see all records in the organization

#### Role 2: Senior Doctor

Role Name: Senior Doctor  
Role Label: Senior Doctor



This role reports to: Clinical Manager  
Contact Sharing: Controlled by Parent  
Account Sharing: Controlled by Parent

Description: Experienced medical professionals with supervisory responsibilities  
Access Level: Can see records owned by subordinates and shared records

### **Role 3: Junior Doctor**

Role Name: Junior Doctor  
Role Label: Junior Doctor  
This role reports to: Senior Doctor

Description: Medical professionals providing direct patient care  
Access Level: Can see own records and shared records

### **Role 4: Administrative Manager**

Role Name: Administrative Manager  
Role Label: Administrative Manager  
This role reports to: Clinical Manager

Description: Manages front desk, billing, and administrative operations  
Access Level: Can see administrative records and shared medical records

### **Role 5: Administrative Staff**

Role Name: Administrative Staff  
Role Label: Administrative Staff  
This role reports to: Administrative Manager

Description: Front desk, scheduling, and billing support staff  
Access Level: Limited access to patient records for operational purposes

---

## **2.8 Permission Sets**

### **Permission Set Configuration**

**Navigation:** Setup → Permission Sets\*\*

#### **Advanced Medical Access Permission Set**

Permission Set Label: Advanced Medical Access  
API Name: Advanced\_Medical\_Access  
Description: Additional permissions for senior medical staff  
License: Salesforce

Assigned Apps:

✓ Clinic Management App

System Permissions:

- ✓ Access Activities
- ✓ Close Conversation Threads
- ✓ Create and Customize List Views
- ✓ Delete Activities
- ✓ Edit Events
- ✓ Edit My Reports
- ✓ Edit Tasks
- ✓ Manage Cases
- ✓ Mass Edit Records
- ✓ Run Reports
- ✓ Transfer Record

Object Settings:

Contact: View All, Modify All  
Case: View All, Modify All  
Event: View All, Modify All  
Doctor\_\_c: View All, Modify All

Field Permissions:

Contact.Medical\_History\_\_c: Read, Edit  
Contact.Current\_Medications\_\_c: Read, Edit  
Case.Diagnosis\_\_c: Read, Edit  
Case.Treatment\_Plan\_\_c: Read, Edit

## Billing Management Permission Set

Permission Set Label: Billing Management  
API Name: Billing\_Management  
Description: Financial and billing operations access  
License: Salesforce

System Permissions:

- ✓ Create and Customize Reports
- ✓ Export Reports
- ✓ Mass Edit Records
- ✓ Run Reports

Object Settings:

Bill\_Information\_\_c: View All, Modify All  
Contact: Read, Edit (billing fields only)  
Account: Read (insurance providers)

Field Permissions:

Bill\_Information\_\_c.Amount\_Paid\_\_c: Read, Edit  
Bill\_Information\_\_c.Payment\_Status\_\_c: Read, Edit  
Bill\_Information\_\_c.Payment\_Method\_\_c: Read, Edit  
Contact.Primary\_Insurance\_\_c: Read, Edit  
Contact.Insurance\_Policy\_Number\_\_c: Read, Edit

## Emergency Access Permission Set

Permission Set Label: Emergency Access  
API Name: Emergency\_Access  
Description: Emergency medical access permissions  
License: Salesforce

System Permissions:

- ✓ View All Data (temporary)
- ✓ Edit Records in All Personal Views
- ✓ Mass Edit Records

Object Settings:

Contact: View All, Modify All  
Case: View All, Modify All  
Event: View All, Modify All

Assignment Rules:

- Only assigned during emergency situations
  - Must be removed within 24 hours
  - Requires Clinical Manager approval
- 

## 2.9 Organization-Wide Defaults (OWD)

### Sharing Settings Configuration

**Navigation:** Setup → Sharing Settings → Organization-Wide Defaults

Object	Internal Users	External Users
Account	Public Read Only	Private
Contact	Private	Private
Opportunity	Public Read Only	Private
Case	Private	Private
Event	Private	Private
Task	Private	Private
Doctor__c	Public Read Only	Private
Bill_Information__c	Private	Private

### Justification for Settings:

#### Private Settings (Contact, Case, Event, Task, Bill):

- Contains sensitive medical and financial information
- HIPAA compliance requirement
- Only record owner and users above in role hierarchy can access
- Sharing rules will grant additional access as needed

#### Public Read Only (Account, Doctor):

- Reference data that multiple users need to access
  - Insurance providers (Accounts) visible to all for claim processing
  - Doctor information accessible for appointment scheduling
- 

## 2.10 Sharing Rules

### Sharing Rules Configuration

**Navigation:** Setup → Sharing Settings\*\*

### Contact Sharing Rules

#### Rule 1: Doctor Patient Access

Rule Name: Doctor Patient Access  
Rule Type: Based on record owner  
Description: Allow doctors to access their patients' records

Owned by members of: Public Group "All Doctors"  
Share with: Role "Clinical Manager" and Subordinates  
Access Level: Read/Write

Criteria: Contact.Patient\_Status\_\_c equals "Active"

#### Rule 2: Administrative Patient Access

Rule Name: Administrative Patient Access  
Rule Type: Based on criteria  
Description: Administrative staff access to active patients

Criteria:  
- Record Type equals "Active Patient"  
- Patient Status equals "Active"

Share with: Role "Administrative Manager" and Subordinates  
Access Level: Read Only

### Case Sharing Rules

#### Rule 1: Medical Team Case Access

Rule Name: Medical Team Case Access  
Rule Type: Based on record owner

Owned by members of: Public Group "Medical Staff"  
Share with: Public Group "All Doctors"  
Access Level: Read/Write

Description: Allow medical team collaboration on cases

## Event Sharing Rules

### Rule 1: Appointment Management Access

Rule Name: Appointment Management Access

Rule Type: Based on criteria

Criteria:

- Appointment Status not equal to "Cancelled"
- Activity Date greater than TODAY() - 7

Share with: Role "Administrative Manager" and Subordinates

Access Level: Read/Write

Description: Administrative access to current appointments

---

## 2.11 Login Access Policies

### Login Security Configuration

**Navigation:** Setup → Session Settings\*\*

### Session Security Settings

Session Security Levels:

Setting	Value	Description
Session Timeout	2 hours	Auto logout
Disable session timeout warning popup	<input checked="" type="checkbox"/> Disabled	Force logout
Lock sessions to the IP address from which they originated	<input checked="" type="checkbox"/> Enabled	Prevent session hijacking
Require HttpOnly attribute	<input checked="" type="checkbox"/> Enabled	XSS protection
Use POST requests for cross-domain requests	<input checked="" type="checkbox"/> Enabled	CSRF protection
Enable caching and autocomplete on login page	<input checked="" type="checkbox"/> Enabled	Performance optimization

### Password Policies

**Navigation:** Setup → Password Policies\*\*

Password Requirements:

Policy	Setting	Requirement
Minimum password length	8 characters	Security
Password complexity	Mixed case, numbers, symbols	Strong passwords
Password expiration	90 days	Regular updates
Enforce password history	5 passwords	Prevent reuse
Maximum invalid login attempts	5 attempts	Account lockout
Lockout effective period	30 minutes	Security delay
Obscure secret answer	✓ Enabled	Hide hint
Require a security question	✓ Enabled	Account recovery

## Login IP Ranges

**Navigation:** Profile → Login IP Ranges\*\*

### Clinical Manager Profile IP Ranges:

Start IP Address: 192.168.1.1  
End IP Address: 192.168.1.255  
Description: Clinic internal network

Start IP Address: 10.0.0.1  
End IP Address: 10.0.0.255  
Description: VPN access range

### Doctor Profile IP Ranges:

Start IP Address: 0.0.0.0  
End IP Address: 255.255.255.255  
Description: Allow all IPs (mobile access required)  
Additional Security: MFA required for external access

### Administrative Staff Profile IP Ranges:

Start IP Address: 192.168.1.1  
End IP Address: 192.168.1.255  
Description: Clinic internal network only

---

## 2.12 Dev Org Setup

### Development Environment Configuration

## Sandbox Strategy

Sandbox Types and Usage:

Sandbox Type	Quantity	Purpose
Developer	2	Individual development Feature testing
Developer Pro	1	Integration testing Performance testing
Partial Copy	1	User acceptance testing Training environment
Full Sandbox	1	Pre-production testing Data migration testing

## Sandbox Creation Process

**Navigation:** Setup → Sandboxes → New Sandbox\*\*

### Development Sandbox Configuration:

Sandbox Name: ClinicDev01  
Description: Primary development environment for clinic system  
Sandbox Type: Developer  
Create From: Production

Sandbox Template: [None - Full metadata copy]

Auto Activate: ✓  
Copy Chatter Data: ✗

---

## 2.13 Deployment Basics

### Change Set Deployment Strategy

#### Deployment Path Configuration:

Production ← Full Sandbox ← Partial Copy ← Developer Pro ← Developer

- Development Flow:
1. Developer Sandbox: Individual feature development
  2. Developer Pro: Integration and system testing
  3. Partial Copy: User acceptance testing
  4. Full Sandbox: Final pre-production validation
  5. Production: Live deployment

## Change Set Templates

**Navigation:** Setup → Deploy → Outbound Change Sets\*\*

### Change Set: Clinic System Foundation

Change Set Name: Clinic\_System\_Foundation\_v1.0

Description: Core clinic management system components

Components Include:

- ✓ Custom Objects (Doctor\_\_c, Bill\_Information\_\_c)
- ✓ Custom Fields (All Contact, Event, Case customizations)
- ✓ Page Layouts (Patient layouts, Appointment layouts)
- ✓ Validation Rules (All patient and appointment validations)
- ✓ Profiles (Clinical Manager, Doctor, Administrative Staff)
- ✓ Permission Sets (Advanced Medical, Billing Management)
- ✓ Sharing Rules (Doctor Patient Access, Administrative Access)

Deployment Notes:

- Deploy during maintenance window
  - Test all functionality post-deployment
  - Validate user access and permissions
- 

## Implementation Timeline

Phase 2 Implementation Schedule:

Week 1:

- └ Day 1: Company Profile & Business Hours Setup
- └ Day 2: User Creation & Profile Configuration
- └ Day 3: Role Hierarchy & Permission Sets
- └ Day 4: OWD & Sharing Rules Configuration
- └ Day 5: Login Policies & Security Setup

Week 2:

- └ Day 1-2: Sandbox Environment Setup
- └ Day 3-4: Change Set Preparation
- └ Day 5: Testing & Validation

Total Estimated Time: 10 business days

Resources Required: 1 Salesforce Administrator

---

## Success Criteria

**Phase 2 Completion Checklist:**

- ☐ Company profile fully configured with accurate business information
- ☐ Business hours reflect actual clinic operating schedule



- ☐ All user accounts created with appropriate licenses and permissions
- ☐ Profile permissions properly restrict access based on role requirements
- ☐ Role hierarchy supports clinic organizational structure
- ☐ OWD settings ensure HIPAA compliance for sensitive data
- ☐ Sharing rules enable appropriate data collaboration
- ☐ Login security policies meet healthcare security standards
- ☐ Development environments ready for customization work
- ☐ Change set deployment process established and tested

**Next Phase Preparation:** ✓ Foundation ready for Phase 3: Data Modeling & Relationships ✓  
Security framework supports healthcare data requirements  
✓ User access structure enables efficient clinic operations ✓ Development environment  
prepared for custom object creation

---

**Report Generated:** 20-09-2025

**Prepared By:** Shambhulinga Ganiger

**Status:** Phase 2 - COMPLETE ☒