

Patient Management System for Clinics/Hospitals

Phase 2: Org Setup & Configuration

Key Learning Objectives:

- Set up Salesforce Developer Edition effectively
- Configure healthcare-specific organizational settings
- Establish foundation for user management and security

1. Salesforce Org Setup:

Create Developer Edition account and configure company profile.

salesforce

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- ✓ Build apps fast with drag-and-drop tools
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- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
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Steps
1 Select Type

Agentforce

Customer Support

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First name Last name

Job title Work email

Company Country/Region

India

☐ I agree to the [Main Services Agreement – Developer Services and Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Search

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2. Company Profile Details

- **Company Name:** Tech Tales Healthcare Pvt Ltd
- **Legal Name:** Tech Tales Healthcare Private Limited
- **Address:** 2nd Floor, Crystal Plaza, MG Road, Bengaluru, Karnataka, India, 560001
- **Default Currency:** INR (Indian Rupee)
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- **Phone:** +91-9876543210

- **Primary Contact:** Avinash Varikuti (Project Owner)
- **Locale:** English (India)
- **Division:** Healthcare Services

Company Information | Salesforce

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/page?address=%2F00DgL00000BuyG6%3FretURL%3D%252Fsetup%252Fhome%26appLayout%3...

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Setup

Search Setup

Company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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SETUP

Company Information

Company Information

Techi Tales Healthcare Pvt Ltd

The organization's profile is below.

User Licenses (10) | Permission Set Licenses (10) | Feature Licenses (11) | Usage-based Entitlements (10)

Organization Detail

Organization Name	Techi Tales Healthcare Pvt Ltd	Phone	+91-9876543210
Primary Contact	Avinash Varikuti	Fax	
Division	Healthcare Services	Default Locale	English (United States)
Address	2nd Floor, Crystal Plaza, MG Road, Bengaluru 560001, Karnataka, India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	39 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL00000BuyG6
		Organization Edition	Developer Edition

3. Business Hours & Holidays Setup

- **Business Hours Name:** Tech Tales Healthcare - Support Hours
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- **Working Days and Hours:**
 - Monday to Friday: 9:00 AM to 6:00 PM
 - Saturday: 9:00 AM to 1:00 PM
 - Sunday: Closed

Business Hours | Salesforce

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/home

ACTION MOVIES MARATHI HISTORI... ONE SHOT IWT YCCE ALUMINI AI IMAGE GENERAT... SQL PRACTICE AGENTIC AI AI TOOLS

Search Setup

Setup Home Object Manager

Business Hours

Company SettingsBusiness HoursCalendar SettingsPublic Calendars and ResourcesCompany InformationData Protection and PrivacyFiscal YearHolidaysLanguage SettingsMy Domain

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SETUPBusiness Hours

Organization Business Hours

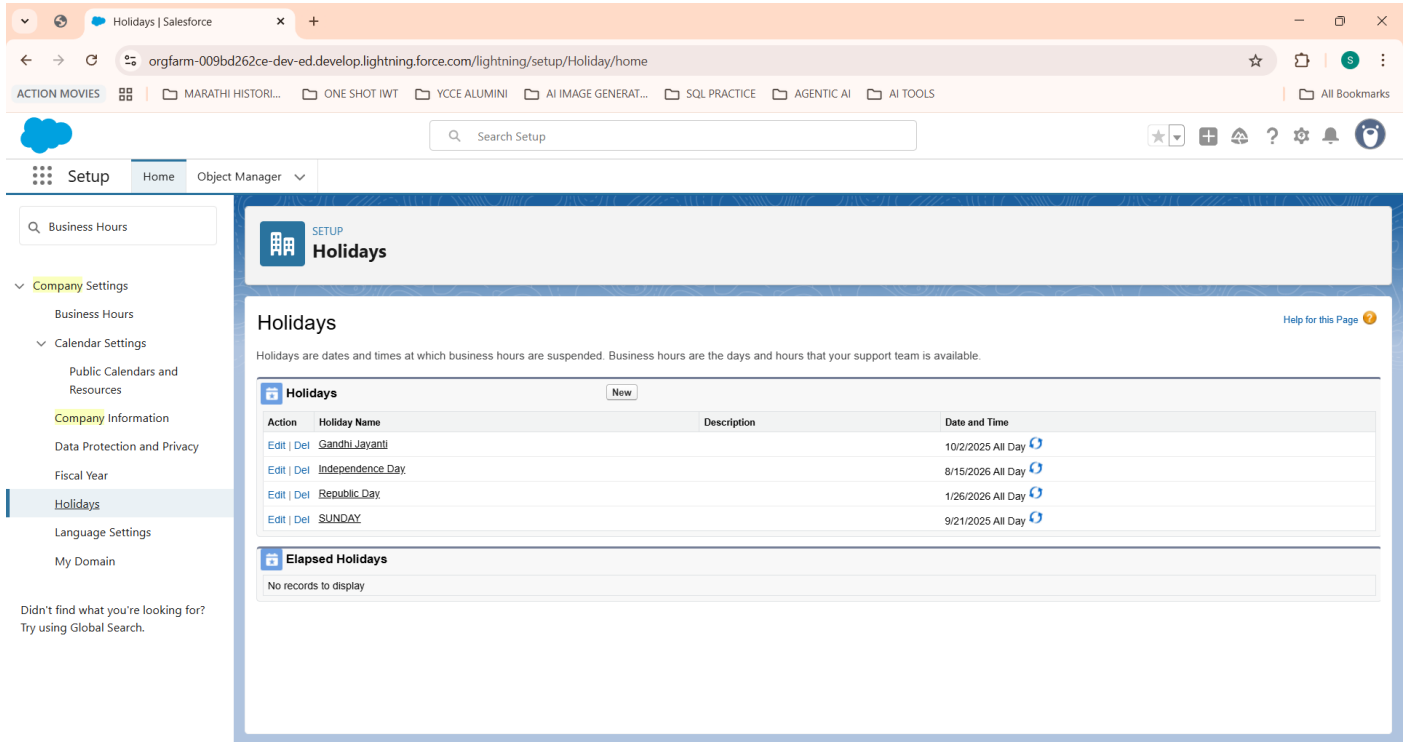
New Business Hours

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	Tech Tales Healthcare - Support Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

https://orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/home

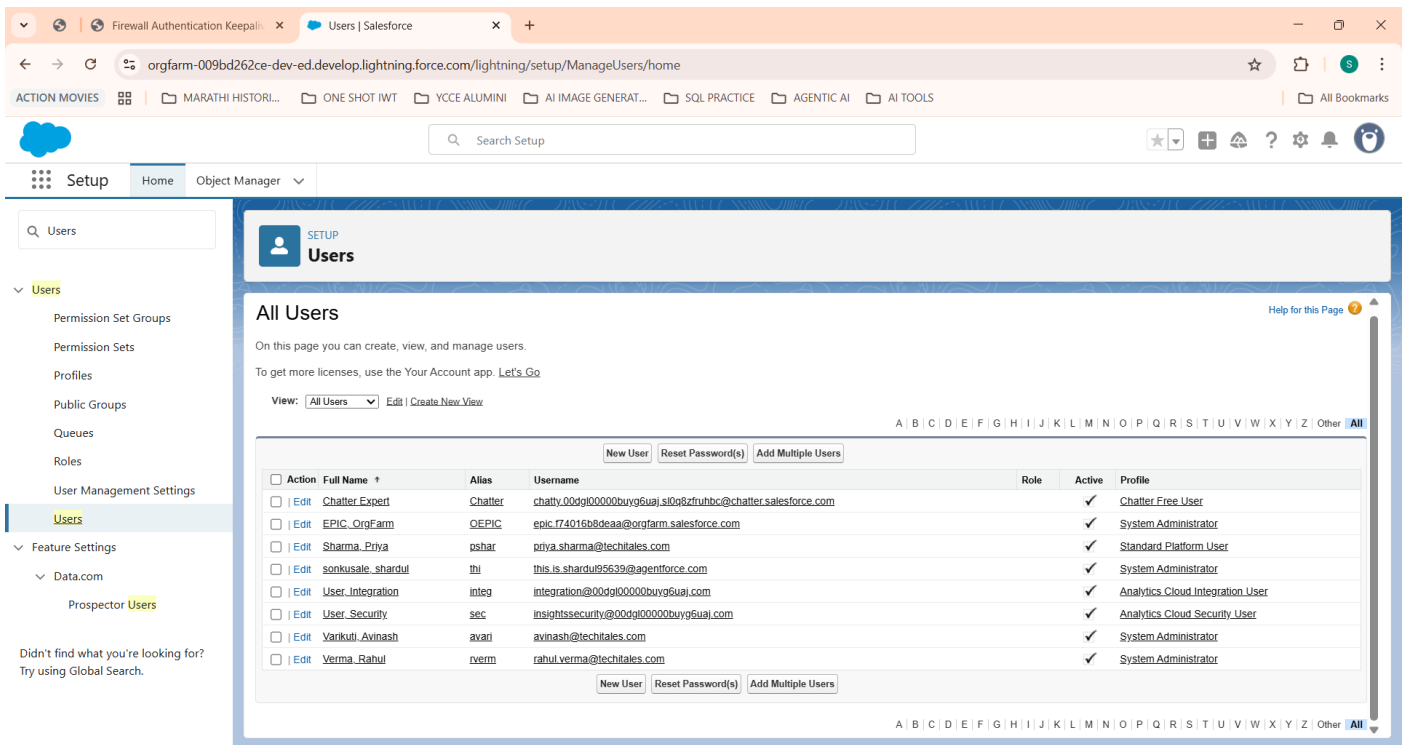
- **Holidays:**

- January 26, 2026 - Republic Day (All day)
- August 15, 2026 - Independence Day (All day)
- October 2, 2026 - Gandhi Jayanti (All day)



4. User Setup & Licenses

Name	Email	Role	User License	Profile
Avinash Varikuti	avinash@techitales.com	Salesforce Admin	Salesforce	System Administrator
Priya Sharma	priya.sharma@techitales.com	Business Analyst	Salesforce Platform	Standard User
Rahul Verma	rahul.verma@techitales.com	Developer	Salesforce Platform	System Administrator
Aman Singh	aman.singh@techitales.com	Tester	Salesforce Platform	Standard User



5. Roles & Profiles

Profile Name	What they can do	Example Role Assignment
System Administrator	All permissions (setup, security, etc)	Salesforce Admin
Healthcare Provider	Access patient/medical records only	Healthcare Provider
Private Person	Access only their own cases/requests	Private Person
Standard User	General access	Tester/Business Analyst

Salesforce profiles control *what users can do* (object access, tab visibility, permissions):

- **System Administrator** (*Standard profile – use as is*)
 - For main admin managing all configuration and security
 - Full access to all setup, objects, fields, users
- **Standard User** (*Standard profile – use as is or clone*)
 - For typical business or medical support staff
 - Can create and edit most records, but cannot access admin setup
- **Custom Profiles** (*clone to customize if required*):
 - Clone Standard User and create:
 - **Healthcare Provider**
 - Full access to Patient Records, Medical Appointments, Prescriptions
 - No admin/metadata access
 - **Private Person**
 - Can view own cases and private requests only
 - Limited or read-only access to sensitive data

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the 'Tester' role details, including its hierarchy, modified by, and sharing groups. Below the details is a section for 'Users in Tester Role' with a table showing no records.

Role Detail

Label	Role Name
Tester	Tester
This role reports to	CEO
Modified By	shardul sonkusale, 9/22/2025, 12:29 AM
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Users in Tester Role

Users in Tester Role
No records to display

6. Permission Sets

Permission sets grant additional capabilities to specific users without changing their main profile.

Examples for your app:

• Report Creator

- Permissions: Create and Customize Reports
- Assigned To: Users who should build/run reports (e.g., Business Analyst, Healthcare Provider)

• Data Importer

- Permissions: Import Custom Objects, Data Import Wizard Access
- Assigned To: Admin or power users who need to load bulk data, e.g., for Patient Records

• Patient Data Viewer

- Permissions: Read-Only access to all patient objects
- Assigned To: Compliance or auditing users who should only view sensitive information

Screenshot of the Salesforce Setup page for the 'Report Creator' permission set. The page shows the 'Current Assignments' table with one user, Avinash Varikuti, assigned the role of System Administrator. The page also includes a search bar and a sidebar with navigation options.

Full Name ↑	Active	Role	Profile	User License	Expires On
Avinash Varikuti	✓		System Administrator	Salesforce	

7. Organization-Wide Defaults (OWD)

Object	OWD Setting	Reason
Patient Records	Private	Protect patient privacy (PHI)
Medical Appointments	Private	Only owners/team can see details
Prescriptions	Private	Confidential drug information

Screenshot of the Salesforce Setup page for the 'Sharing Settings' configuration. The page displays a table of sharing settings for various objects, including Patient, Appointment, and Prescription, with columns for the object name, sharing setting, and a checkbox for enabling the setting.

Object	Sharing Setting	Enabled
Appointment	Private	✓
Patient	Private	✓
Prescription	Private	✓

8. Creating Sharing Rules

- **Owner-Based Example:**

Share Patient Records owned by "Healthcare Provider" with "Business Analyst" (read only)

- **Criteria-Based Example:**

Share Medical Appointments where "Urgent = True" with "SVP, Customer Service & Support" (read/write)

[illegible]

Sharing Settings

Appointment Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Appointment: Appointment Type EQUALS Emergency	Role: SVP Customer Service & Support	Read/Write

General Request Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Owner in All Internal Users	All Internal Users	Read/Write

Patient Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Healthcare Provider	Role and Internal Subordinates: Business Analyst	Read Only

Prescription Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Healthcare Provider	Role: Salesforce Admin	Read Only

Private Request Sharing Rules

No sharing rules specified.

Object	Rule Type	Criteria/Role	Access	Who Gets Access
Patient Records	Owner-Based	Healthcare Provider	Read-Only	Business Analyst role
Prescriptions	Criteria-Based	Status = 'Urgent'	Read/Write	SVP, Customer Service & Support
Restricted Requests	Owner-Based	Admin Role	Read/Write	Private Person (escalation cases)

These sharing rules mirror actual healthcare operations:

1. **Care Team Coordination:** Doctors, nurses, and analysts need coordinated access to patient data
2. **Emergency Response:** Critical cases must be escalated to supervisors immediately
3. **Medication Safety:** Prescriptions need oversight and review capabilities
4. **Compliance Requirements:** Restricted data stays locked down except for audits
5. **Operational Efficiency:** General requests flow freely for team collaboration