

Hospital Management System – Phase 2 Document

Goal

Set up the Salesforce Developer Org and configure the environment for the Hospital Management System. This phase involves creating custom objects (Doctor, Patient, Appointment), configuring user roles, profiles, sharing settings, and preparing the system for data entry and testing.

Salesforce Editions & Org Setup

- Use a **Salesforce Developer Edition** (free Developer Org).
- Set company profile: Hospital name, local time zone.
- Define business hours (e.g., 24x7 for emergency services).
- Set fiscal year: Standard (Jan–Dec) or hospital-specific.

User Setup & Roles

- **Admin**: Full system access.
- **Doctors**: Access to their schedules, patient records.
- **Receptionist**: Manage appointments and patient registration.
- **Billing Staff**: Handle invoices and payments.

Role Hierarchy:

Admin → Doctors/Receptionists/Billing Staff.

Profiles & Permission Sets

- **Profiles**: Create custom profiles (Doctor Profile, Receptionist Profile, Billing Profile).
- **Permission Sets**: For additional permissions such as report generation or special access.

Org-Wide Defaults & Sharing

- **Patient Object**: Private – only assigned doctor and admin can view.
- **Doctor Object**: Public Read Only – so receptionists can view schedules.
- **Appointment Object**: Private – only involved doctor, receptionist, and admin can view.
- Configure **Sharing Rules** to allow necessary record visibility.

Custom Objects & Fields

Create three main custom objects with the following example fields:

Doctor: Name, Specialty, Contact Info, Availability.

Patient: Name, Age, Gender, Contact Info, Medical History.

Appointment: Date, Time, Doctor (Lookup), Patient (Lookup), Status, Notes.

Relationships:

- Appointment → Doctor: Lookup
- Appointment → Patient: Lookup

Page Layouts & Compact Layouts

- Design Doctor, Patient, and Appointment page layouts to display relevant fields.
- Compact layouts for mobile users showing key info: e.g., Appointment Date, Doctor Name, Patient Name.

Initial Data & Testing

- Enter sample data for doctors, patients, and appointments.
- Test appointment booking flows, doctor schedule visibility, and data security.

Outcome

At the end of Phase-2, the Salesforce environment for the Hospital Management System will be fully configured with custom objects, user roles, security settings, and sample data, ready for process automation and further development in Phase-3.