

# Phase 2: Org Setup & Configuration

## AI-Enabled Hospital & Pharmacy Management System

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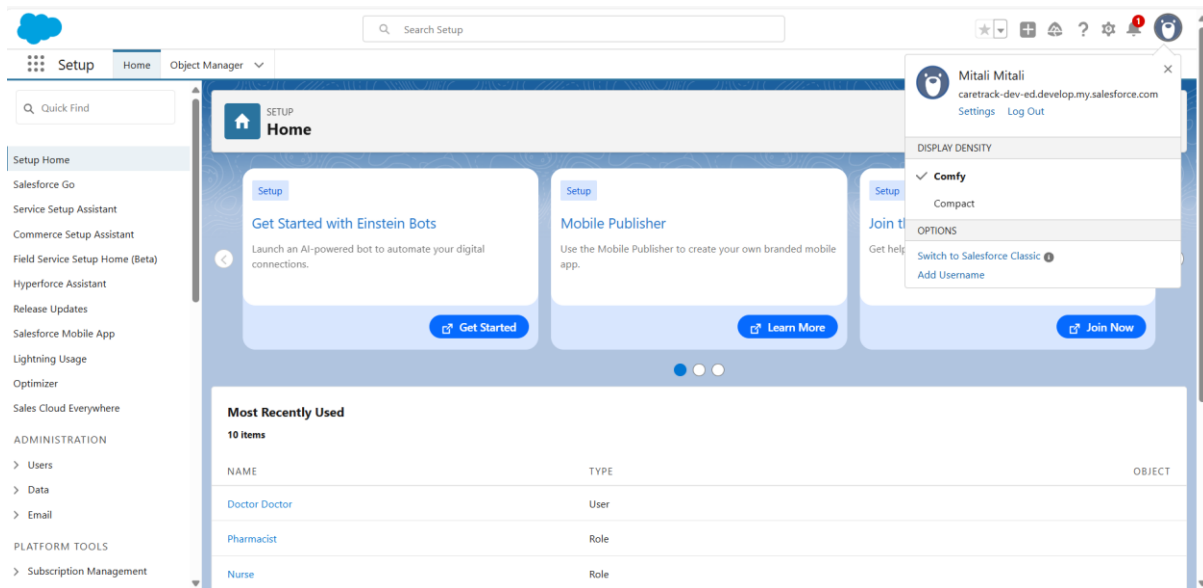
**Goal:** To configure the Salesforce org with users, roles, profiles, permissions, and security settings to create a strong foundation for the Hospital & Pharmacy Management System.

### Tasks in Phase 2:

- Salesforce Editions
  - Company Profile Setup
  - Business Hours & Holidays
  - Fiscal Year Settings
  - User Setup & Licenses
  - Profiles
  - Roles
  - Permission Sets
  - OWD
  - Sharing Rules
  - Login Access Policies
  - Dev Org Setup
  - Sandbox Usage
  - Deployment Basics
-

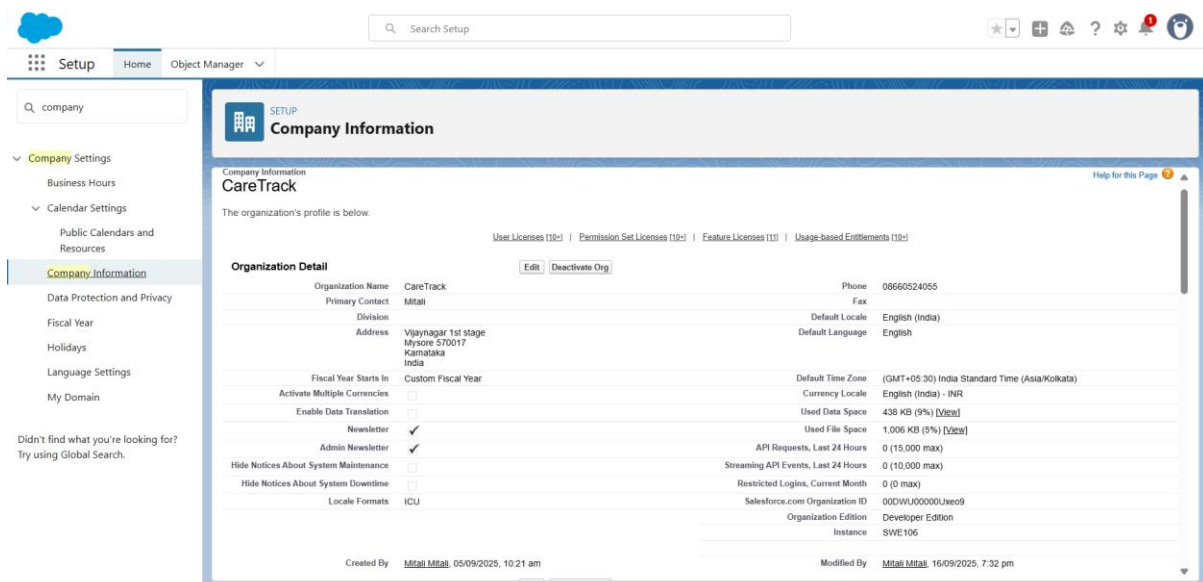
## Salesforce Edition

I used the Developer Edition org for this project. It provided all the features I needed to build and test the Hospital & Pharmacy application.



## Company Profile Setup

I updated the company profile with the project name, set the time zone to IST, local to English (India), and currency to INR. This ensured appointments and billing records follow Indian settings.



## Business Hours & Holidays

I created Hospital Standard Hours and added holidays like Independence Day. This will help in future for workflows and appointment scheduling.

### Hospital Standard Hours

Setup

Home

Object Manager

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for?

Try using Global Search.

Business Hours

Organization Business Hours

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
<a href="#">Edit</a>	Hospital Working Hours	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Help for this Page

### Business Holidays

Setup

Home

Object Manager

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for?

Try using Global Search.

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Christmas	Christmas holidays	25/12/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Dashehra		01/10/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Diwali	Holiday for diwali	29/10/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Independence Day	Holiday for Independence day	15/08/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Kannada Rajyotsava		01/11/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Labour Day	Holiday for labour day	01/05/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	New Year's Day	New year holiday	01/01/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Republic Day	Holiday for Republic day	26/01/2026 All Day

Elapsed Holidays

No records to display

Help for this Page

## Fiscal Year

I kept the Standard Fiscal Year (April–March) since it is enough for hospital billing and reporting.

cloud

Search Setup

Setup Home Object Manager

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

SETUP

Fiscal Year

Help for this Page

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years

New

Action	Year	FY Start Date	FY End Date	Description
<a href="#">Edit</a>	2025	01/04/2025	31/03/2026	Fiscal Year starts

Custom Fiscal Year Names

Action	Field Label
<a href="#">Edit</a>   <a href="#">Replace</a>	Quarter Prefix
<a href="#">Edit</a>   <a href="#">Replace</a>	Period Prefix
<a href="#">Edit</a>   <a href="#">Replace</a>	Quarter Name
<a href="#">Edit</a>   <a href="#">Replace</a>	Period Name

## User Setup & Licenses

I created test users for Doctor, Nurse, Admin, Patient and Pharmacist and assigned them Salesforce Platform licenses. These users helped me test role-based access.

cloud

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

SETUP

Users

Help for this Page

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>   <a href="#">Login</a>	admin_admin	ad	m23249751@gmail.com	Hospital Admin	✓	System Administrator
<a href="#">Edit</a>	Chatter_Expert	Chatter	chatty.00dvwu0000uueo92ab.01knus2zh3hd@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	Doctor_Doctor	ac	m60178315@gmail.com	Doctor	✓	Standard Platform User
<a href="#">Edit</a>	Mitali_Mitali	Mitali	mitalicanapol@gmail.com		✓	System Administrator
<a href="#">Edit</a>   <a href="#">Login</a>	Nurse_Nurse	npura	nurse_123@gmail.com	Nurse	✓	Standard Platform User
<a href="#">Edit</a>   <a href="#">Login</a>	Pharma_Pharmacist	pochar	pharma1243@gmail.com	Pharmacist	✓	Standard Platform User
<a href="#">Edit</a>	User_Integration	integ	integration@000dvwu0000uueo92ab.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightsssecurity@000dvwu0000uueo92ab.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

## User license for admin user (similar for all the users)

User ProfileHelp for this Page

admin admin

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	admin admin	Role	Hospital Admin
Alias	ad	User License	Salesforce
Email	m23249161@gmail.com <a href="#">Verify</a>	Profile	System Administrator
Username	m23249161@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17577705058393586599	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>

## Profiles

I cloned the Standard Platform User profile and created custom profiles like Doctor Profile, Admin Profile, Nurse Profile, Patient Profile and Pharmacist Profile. For example, the Doctor Profile had access to Patients and Appointments, while the Pharmacist Profile had access to Inventory and Orders.

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

SETUP

Profiles

Profiles

My Custom Profiles | Edit | Delete | Create New View

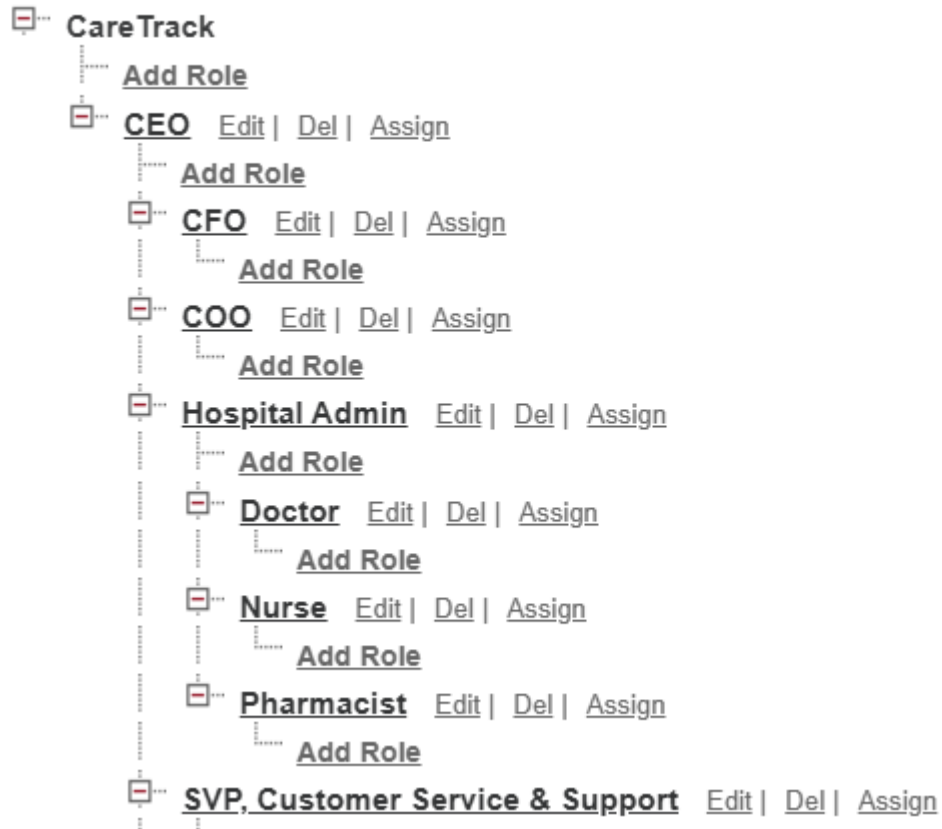
Action	Profile Name	Last Modified By	Custom
<input type="checkbox"/> Edit   Del   ...	Admin Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	B2B Reordering Portal Buyer Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Marketing Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Sales Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Support Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Doctor Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Nurse Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Patient Profile	Mitali_Mitali	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Pharmacist Profile	Mitali_Mitali	<input checked="" type="checkbox"/>

1-9 of 9 | 0 Selected | Page 1 of 1

## Roles

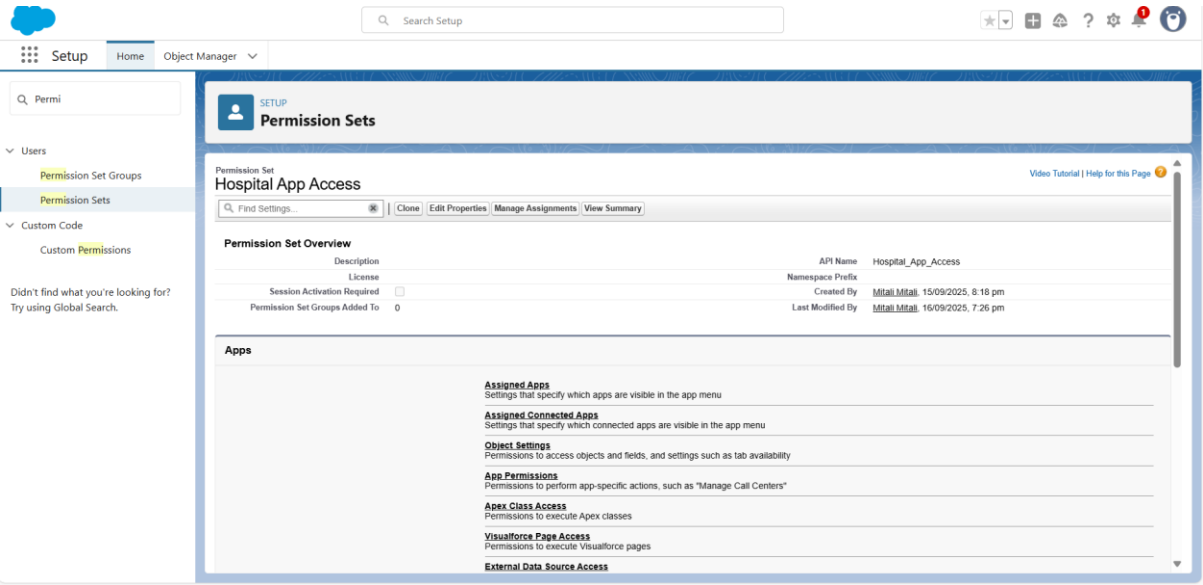
I created a Hospital Admin role under CEO, and child roles for Doctor, Nurse, and Pharmacist. I assigned my test users to these roles. This way, Hospital Admin could see records created by doctors or nurses.

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



## Permission Sets

I made a Hospital App Access permission set and gave CRUD access to all custom objects (Patients, Doctors, Appointments, Pharmacy Inventory, Billing, Medicine Orders).

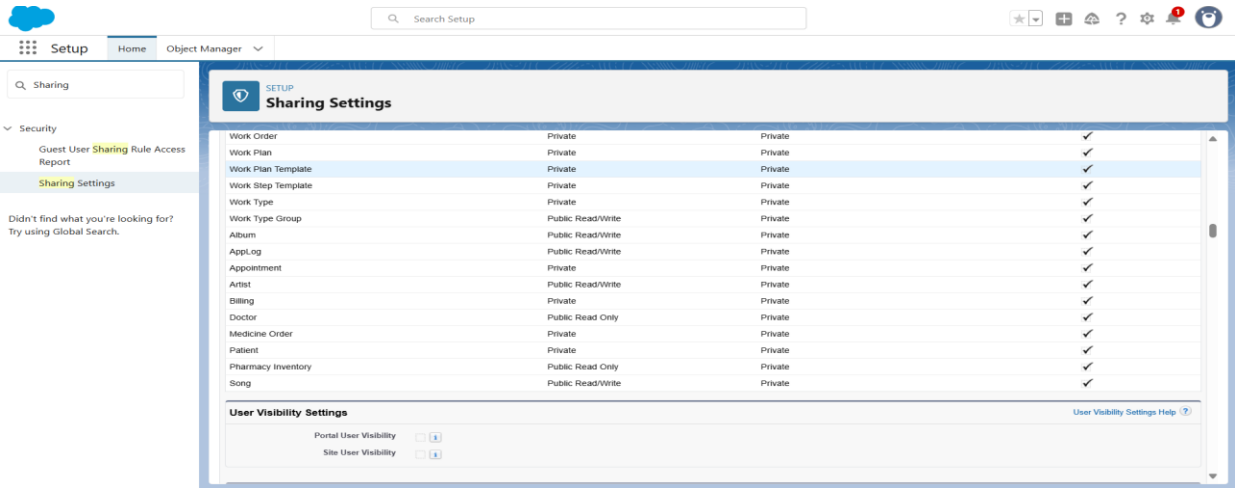


## OWD (Organization-Wide Defaults)

I set OWD as:

- Patients → Private
- Appointments → Private
- Pharmacy Inventory → Public Read Only
- Billing → Private
- Medicine Orders → Private

This kept sensitive data restricted while keeping inventory visible.



## Sharing Rules

Since OWD was strict, I created Sharing Rules to give Hospital Admin access to all Patients and Appointments owned by doctors. This ensured admins could see everything.

Appointment Sharing Rules

New

Recalculate

Appointment Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Doctor</a>	<a href="#">Role: Hospital Admin</a>	Read/Write

Billing Sharing Rules

New

Recalculate

Billing Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Doctor</a>	<a href="#">Role: Hospital Admin</a>	Read/Write

Doctor Sharing Rules

New

Recalculate

Doctor Sharing Rules Help

?

No sharing rules specified.

Medicine Order Sharing Rules

New

Recalculate

Medicine Order Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Pharmacist</a>	<a href="#">Role: Hospital Admin</a>	Read/Write

Patient Sharing Rules

New

Recalculate

Patient Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Doctor</a>	<a href="#">Role: Hospital Admin</a>	Read/Write

Pharmacy Inventory Sharing Rules

New

Recalculate

Pharmacy Inventory Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Pharmacist</a>	<a href="#">Role: Hospital Admin</a>	Read/Write

## Login Access Policies

I enabled Administrators Can Log in as Any User, which made it easier to test by logging in as Doctor, Nurse, or Pharmacist without managing separate logins.

Setup

Home

Object Manager

Search Setup

★

+

🔄

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⚙️

🔔

👤

login

Identity

Login Flows

Login History

Security

Login Access Policies

Didn't find what you're looking for?

Try using Global Search.

SETUP

Login Access Policies

Help for this Page

Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options

Save Cancel

Setting

Enabled

Administrators Can Log in as Any User

☒

Support Organization

Packages

Available to Users

Available to Administrators Only

Salesforce.com Support

☒

☐

Trailhead Security Support

Trailhead Security

Not Available

☐

Save Cancel



## Dev Org Setup

I set up My Domain(**caretrack-dev-ed.develop.my.salesforce.com**) and changed Email Deliverability to All Email, so login credentials and notifications could be sent to users.

### My Domain

The screenshot shows the Salesforce Setup interface for the 'My Domain' settings. The left sidebar contains a search bar with 'my do' and a list of settings including 'Company Settings' and 'My Domain'. The main content area is titled 'My Domain Settings' and includes a description: 'My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.' Below this, there are two sections: 'My Domain Details' and 'Routing and Policies'. The 'My Domain Details' section shows the 'Current My Domain URL' as 'caretrack-dev-ed.develop.my.salesforce.com with partitioned enhanced domains', the 'My Domain Name' as 'caretrack-dev-ed', and the 'Domain Suffix' as 'Standard (\*.my.salesforce.com)'. The 'Routing and Policies' section includes 'Salesforce Edge Network' (checked), 'Login Policy' (with options to prevent login from Salesforce and SOAP API), and 'Content Delivery Network' (checked). The 'Cookies' section has an option to 'Require first-party use of Salesforce cookies' which is unchecked.

Setup

My Domain

My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

**My Domain Details**

Current My Domain URL: caretrack-dev-ed.develop.my.salesforce.com with partitioned enhanced domains

My Domain Name: caretrack-dev-ed

Domain Suffix: Standard (\*.my.salesforce.com)

**Routing and Policies**

Salesforce Edge Network: ☒ Salesforce Edge Network applies to most provisioned and deployed domains for this org. See Salesforce Edge Network in Salesforce Help for details.

Login Policy: ☐ If a My Domain change is in progress, your login policy also applies to the provisioned My Domain login URL.  
☐ Prevent login from https://login.salesforce.com and https://welcome.salesforce.com  
☐ Prevent SOAP API login from https://login.salesforce.com

Content Delivery Network: ☒ Use Content Delivery Network (CDN) by default when enhanced domains are enabled for Experience Cloud sites

Cookies: ☐ Require first-party use of Salesforce cookies

### Deliverability Settings

The screenshot shows the Salesforce Setup interface for the 'Deliverability' settings. The left sidebar contains a search bar with 'deliv' and a list of settings including 'Email', 'Deliverability', 'Email Delivery Settings', 'Email Domain Filters', 'Email Relays', 'Test Deliverability', 'Feature Settings', 'Salesforce Files', 'Content Deliveries and Public Links', 'Notification Builder', and 'Notification Delivery Settings'. The main content area is titled 'Deliverability' and includes a description: 'Configure the settings on this page to improve your organization's email deliverability. Some settings apply to emails sent through Salesforce and emails sent through external accounts that you can connect to Salesforce. Other settings apply to emails sent through Salesforce or email relay only.' Below this, there are four sections: 'Deliverability', 'Bounce Management (Emails from Salesforce or Email Relay Only)', 'Data Protection and Privacy', and 'Email Security Compliance (Emails from Salesforce or Email Relay Only)'. The 'Deliverability' section shows the 'Access level' as 'All email' and the 'Access to Send Email (All Email Services)' as 'Deliverability - Salesforce - Developer Edition'. The 'Bounce Management' section has 'Activate bounce management' checked and 'Return bounced emails to sender' unchecked. The 'Data Protection and Privacy' section has 'Enforce email privacy settings' unchecked. The 'Email Security Compliance' section has 'Enable compliance with standard email security mechanisms' checked. The 'Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only)' section has a link to 'Configure TLS settings for outbound emails'.

Setup

Deliverability

Deliverability

Configure the settings on this page to improve your organization's email deliverability. Some settings apply to emails sent through Salesforce and emails sent through external accounts that you can connect to Salesforce. Other settings apply to emails sent through Salesforce or email relay only.

**Deliverability**

Access to Send Email (All Email Services): Deliverability - Salesforce - Developer Edition

Access level: All email

**Bounce Management (Emails from Salesforce or Email Relay Only)**

When Bounce Management is activated and a user sends an email to an invalid email address, the email bounces back to Salesforce and the user is prevented from sending email to that address until it is validated.

☒ Activate bounce management

☐ Return bounced emails to sender

**Data Protection and Privacy**

☐ Enforce email privacy settings

**Email Security Compliance (Emails from Salesforce or Email Relay Only)**

Enable these options to improve the deliverability of the email you send to recipients who use email security and authentication mechanisms.

☒ Enable compliance with standard email security mechanisms

**Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only)**

Configure TLS settings for outbound emails.

<https://caretrack-dev-ed.develop.lightning.force.com/lightning/setup/OrgEmailSettings/home>

## **Sandbox**

Developer Edition doesn't allow creating real sandboxes. In an Enterprise org, I would have used a Developer Sandbox for testing. To simulate this, I planned to use a second Developer Org as a sandbox for practice.

This ensures I don't accidentally break my main org while experimenting.

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## **Deployment**

In this project, I explored the different ways Salesforce allows us to move changes from one org to another. Since I am working on a Developer Edition org, I don't have access to Change Sets (they are only available in Enterprise orgs with Sandboxes). So, for my implementation, I used the Unmanaged Package approach to deploy my custom objects and fields.

How It Helps My Project?

By creating and installing this package, I proved that my Hospital & Pharmacy Management System is not locked to one org. I can package it and deploy it to any other Salesforce org if required. This also shows how the project could be moved from a test org to a real production org in future.

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## **Conclusion**

In Phase 2, I successfully set up and configured my Salesforce org for the Hospital & Pharmacy Management System. I updated the company details, defined business hours, and created separate users for Doctor, Nurse, Admin, Patient and Pharmacist with proper roles and profiles. I also built permission sets, set OWD rules, and added sharing rules to secure sensitive data like patients and billing, while still giving the Hospital Admin full visibility. Along the way, I configured My Domain, enabled email deliverability, and practiced deployment using unmanaged packages. These steps gave my project a solid and realistic foundation, making it well-prepared for the advanced automation and reporting I'll be working on in Phase 3 and so on.

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