Health Clinic Appointment & Prescription System

Phase 2: Org Setup & Configuration

1. Introduction

This phase focuses on setting up a Salesforce Developer Org to simulate a clinic environment. The setup supports appointment booking, doctor scheduling, and prescription management, with a secure access model to ensure patient confidentiality.

2. Objectives

• Configure a Salesforce Developer Org named Health Clinic System.

• Create sample users: Clinic Admin, Doctor, Receptionist.

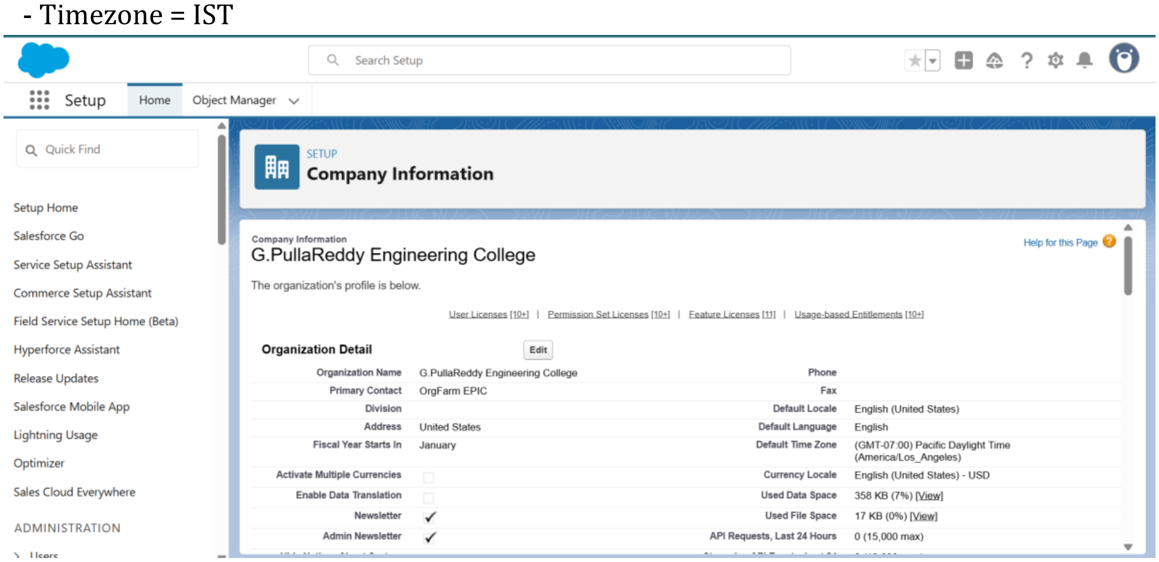
• Apply Org-Wide Defaults (OWD) and Sharing Rules for secure data access.

• Demonstrate end-to-end appointment booking and prescription tracking.

3. Configuration Steps

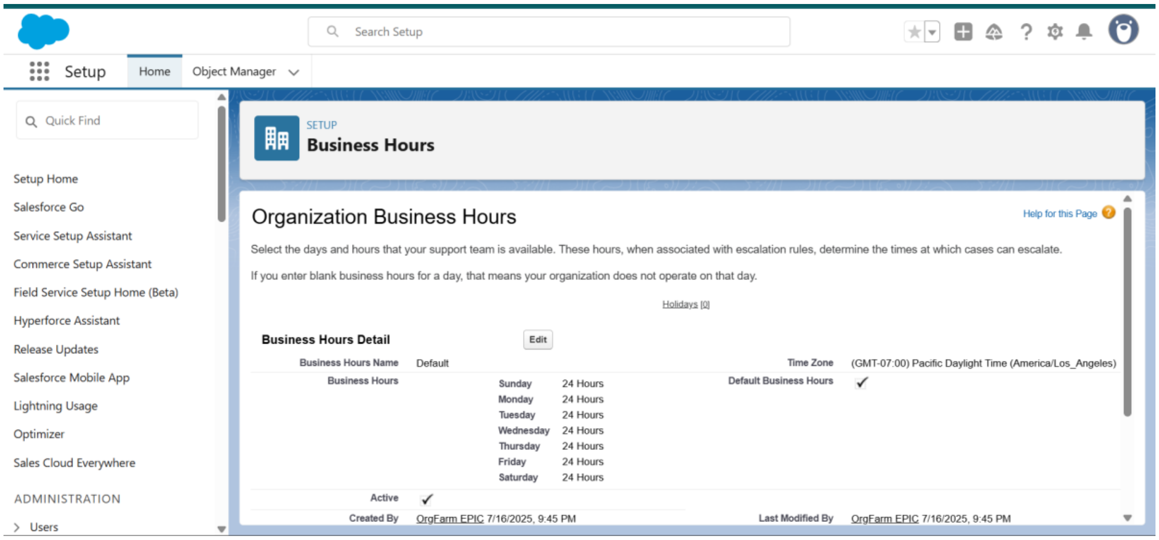
Step 0 — Company Info

• Signed up for a Developer Edition Org and logged in.
• Setup → Company Information → updated:
  - Organization Name = Health Clinic System
  - Locale = English (India)
  - Timezone = IST



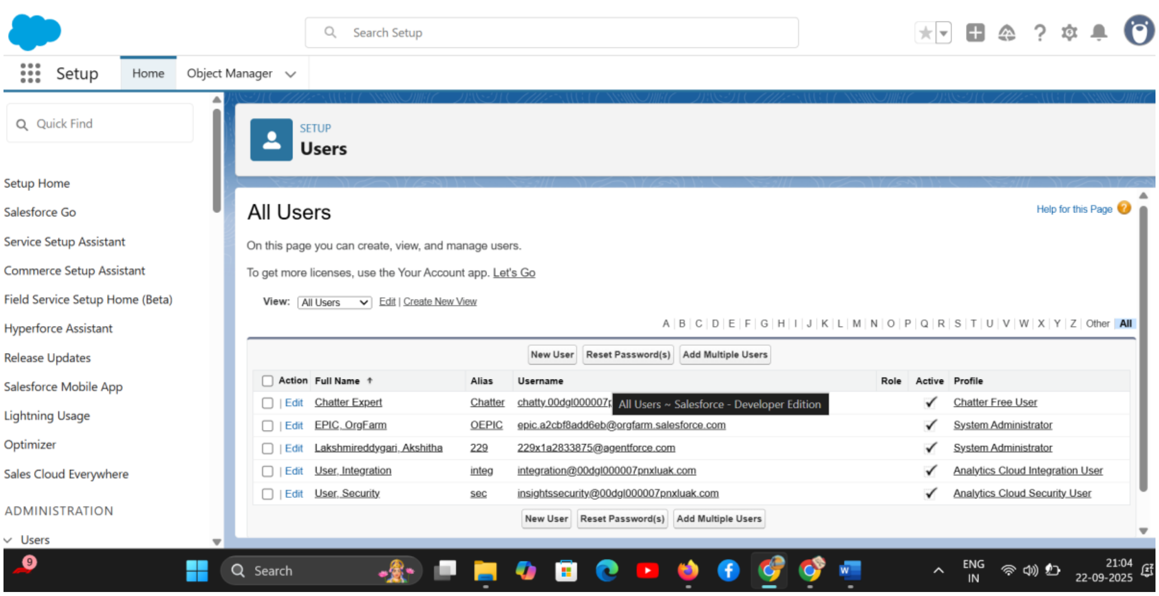
Step 1 — Business Hours & Holidays

• Created Clinic Business Hours → Mon–Sat, 9 AM–6 PM.
• Added relevant public holidays (e.g., National Holidays).
• Linked holidays to business hours for scheduling.



Step 2 — Users

Created 3 sample users with different roles:

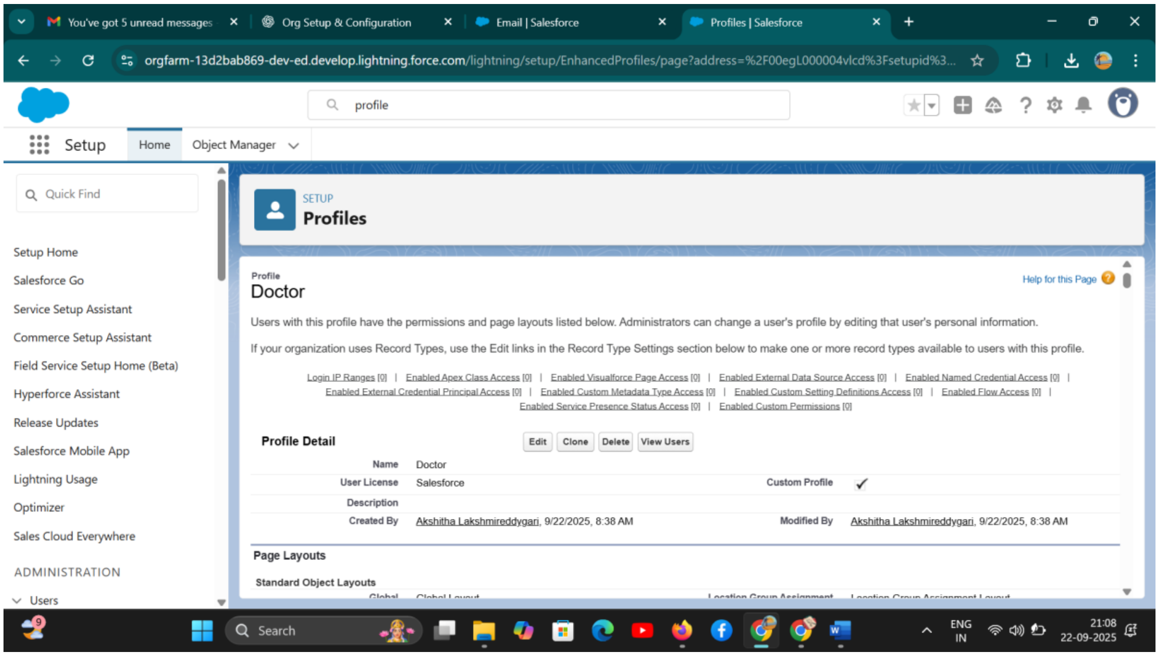


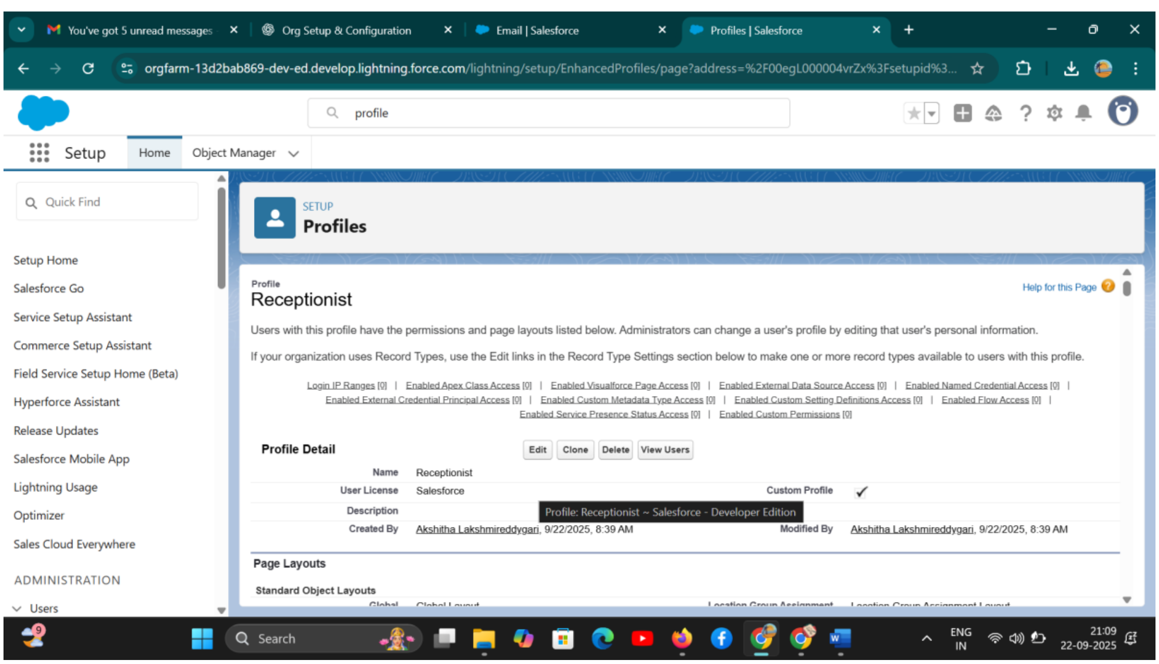
Step 3 — Profiles

• Doctor Profile (cloned from Standard User):
  - Appointment__c → Create, Read, Edit
  - Prescription__c → Create, Read, Edit

- Patient (Contact) → Read, Create, Edit

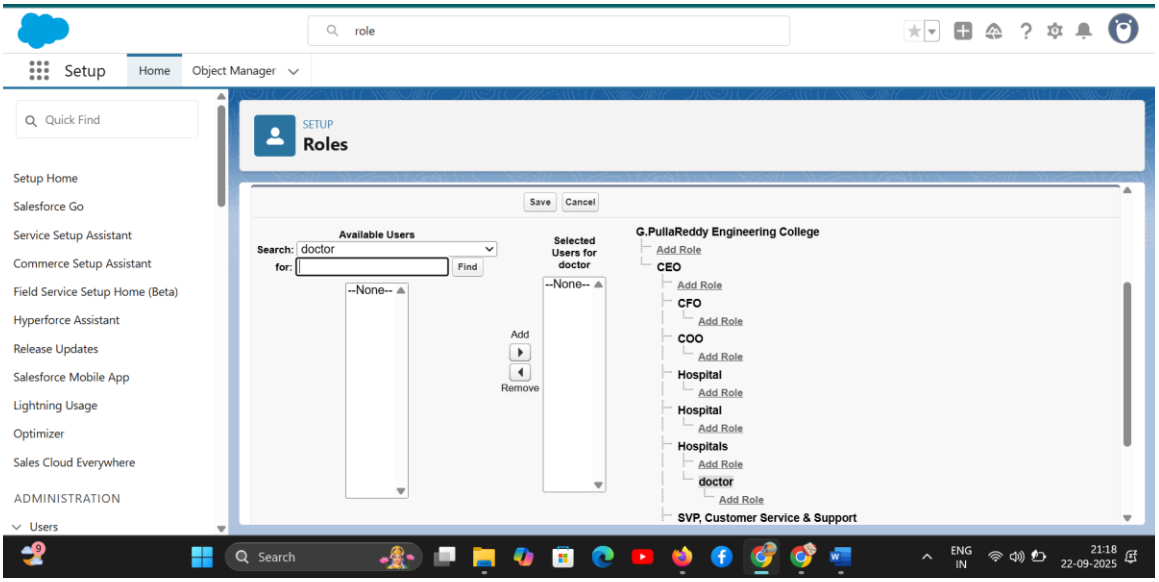
• Receptionist Profile (cloned from Standard User):
- Appointment__c → Create, Read, Edit
- Prescription__c → Read only
- Patient (Contact) → Create, Read, Edit





Step 4 — Role Hierarchy

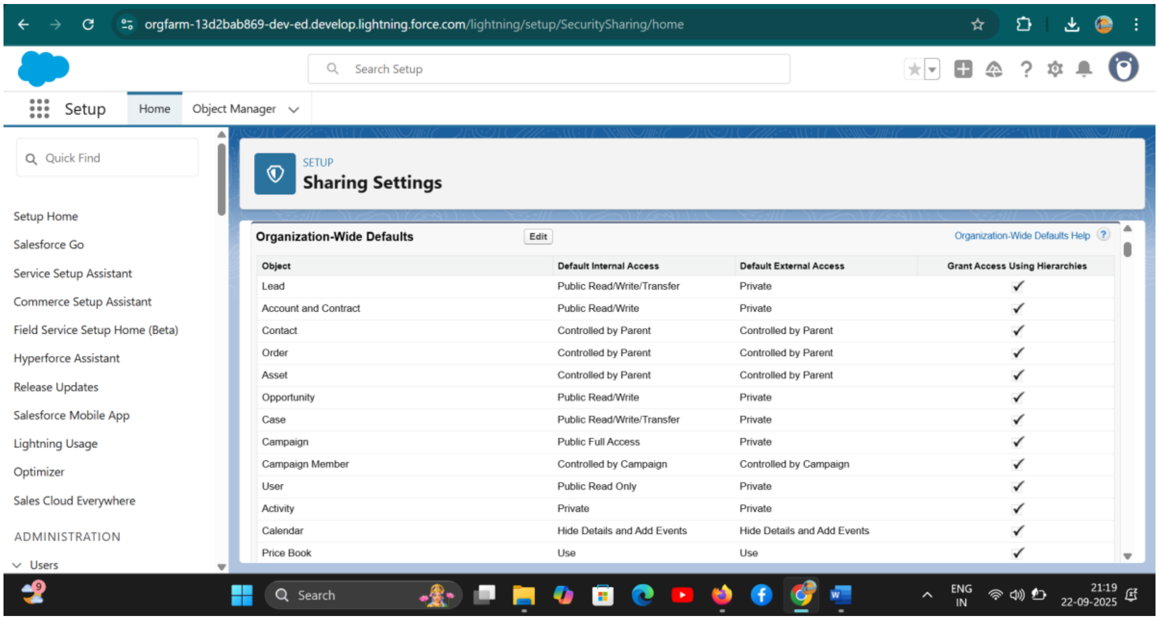
• Clinic Admin (Top)
  - Doctor
  - Receptionist



Step 5 — Org-Wide Defaults (OWD)

• Appointment__c = Private
• Prescription__c = Private
• Patient (Contact) = Private

This ensures records are only visible to owners unless shared explicitly.

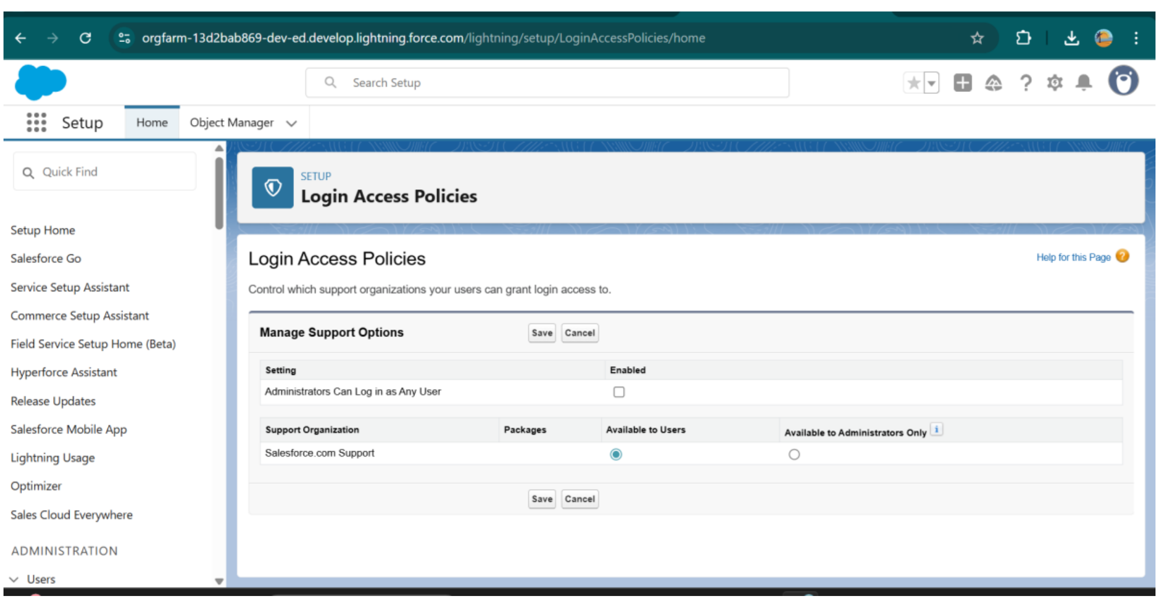


Step 6 — Sharing Rules

- Created Public Group 'Doctors' with all doctor users.
- Sharing Rule:
  - Records owned by Receptionist → shared with Doctors
  - Access Level = Read/Write

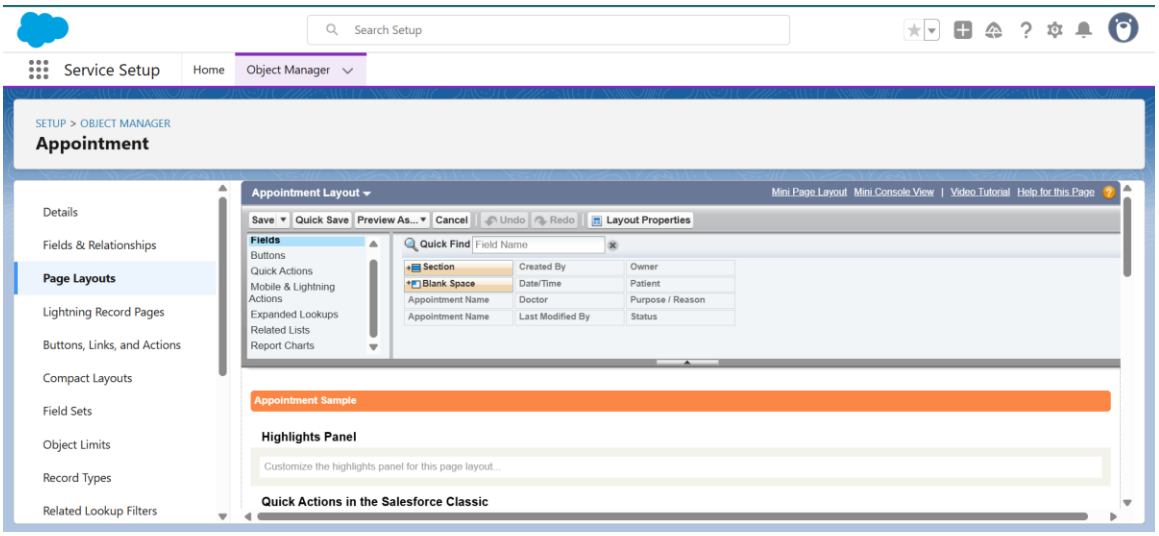
Step 7 — Login Access Policies

- Enabled Administrators Can Log in as Any User to simplify testing.



Step 8 — Lightning App Setup

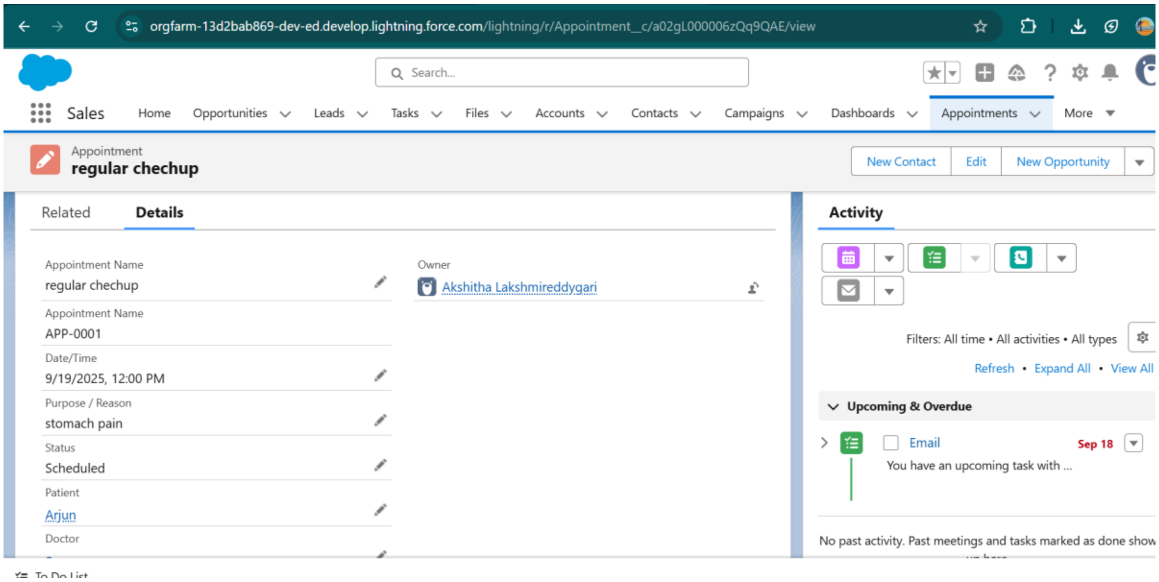
• Setup → App Manager → created Lightning App 'Health Clinic'.
• Added Tabs:
  - Patients (Contacts)
  - Appointments
  - Prescriptions
  - Reports
  - Dashboards



Step 9 — Testing

• Logged in as Receptionist Meera → created an appointment for Dr. Rohan.
• Logged in as Dr. Rohan → verified he can view and edit the appointment, then added a prescription.
• Verified:
  - Receptionist can create appointments but not edit prescriptions.
  - Doctor can edit prescriptions and see assigned appointments.

- Admin has complete access.



4. Results / Observations

- Receptionist successfully creates and manages appointments.
- Doctor gains access to appointments and prescriptions via Sharing Rules.
- Clinic Admin sees all records.
- OWD = Private ensures a secure baseline for patient data.

5. Next Steps (Optional Enhancements)

- Automate appointment reminders via Flow (Email/SMS).

- Create dashboards for appointment analytics and doctor workload.

- Add file upload feature to prescriptions (e.g., attach test reports).