

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

The screenshot displays the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: 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, and ADMINISTRATION. The main content area is titled 'Company Information' and shows the organization's profile for 'G.PullaReddy Engineering College'. The profile details include Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, and API Requests. The 'Organization Detail' section is expanded, showing the following information:

Organization Detail	
Organization Name	G.PullaReddy Engineering College
Primary Contact	OrgFam EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	358 KB (7%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)

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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: 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, and Users. The main content area is titled "Business Hours" and includes a "Quick Find" search bar. Below the title, there is a section for "Organization Business Hours" with instructions on how to set business hours and a link to "Holidays". A table titled "Business Hours Detail" shows the default business hours for each day of the week, all set to "24 Hours". The table also includes columns for "Business Hours Name", "Default", "Time Zone", and "Default Business Hours". The "Time Zone" is set to "(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)". The "Default Business Hours" column has a checkmark. At the bottom of the table, there is a section for "Active" with a checkmark, and a "Created By" field showing "OrgFarm.EPIC 7/16/2025, 9:45 PM".

Step 2 — Users

Created 3 sample users with different roles:

The screenshot shows the Salesforce Setup interface for the "Users" section. The left sidebar is the same as in the previous screenshot. The main content area is titled "Users" and includes a "Quick Find" search bar. Below the title, there is a section for "All Users" with instructions on how to create, view, and manage users. A "View" dropdown menu is set to "All Users", and there are links for "Edit" and "Create New View". Below the view controls, there is a table of users. The table has columns for "Action", "Full Name", "Alias", "Username", "Role", "Active", and "Profile". There are three users listed: "Chatter.Expert" (Chatter role), "EPIC_OrgFarm" (System Administrator role), and "Lakshmireddygari_Akshitha" (System Administrator role). Each user has an "Edit" link. At the bottom of the table, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

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

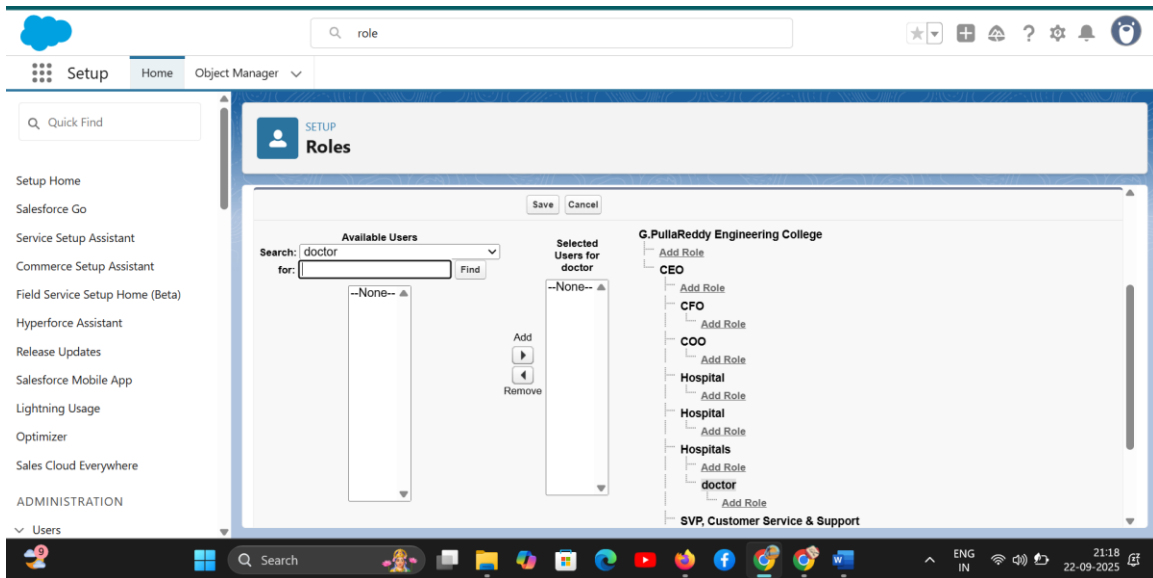
- Patient (Contact) → Create, Read, Edit

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main content area displays the 'Doctor' profile details. At the top, it says 'Profile: Doctor' with a 'Help for this Page' link. Below this, a paragraph explains that users with this profile have specific permissions and page layouts. A list of enabled permissions is shown, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', and 'Enabled Service Presence Status Access'. The 'Profile Detail' section includes buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A table shows the profile's name as 'Doctor', user license as 'Salesforce', and it is marked as a 'Custom Profile'. The 'Description' field is empty. The 'Created By' and 'Modified By' fields both list 'Akshitha Lakshmireddygar' with a timestamp of '9/22/2025, 8:38 AM'. The 'Page Layouts' section shows 'Standard Object Layouts'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main content area displays the 'Receptionist' profile details. At the top, it says 'Profile: Receptionist' with a 'Help for this Page' link. Below this, a paragraph explains that users with this profile have specific permissions and page layouts. A list of enabled permissions is shown, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', and 'Enabled Service Presence Status Access'. The 'Profile Detail' section includes buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A table shows the profile's name as 'Receptionist', user license as 'Salesforce', and it is marked as a 'Custom Profile'. The 'Description' field contains the text 'Profile: Receptionist - Salesforce - Developer Edition'. The 'Created By' and 'Modified By' fields both list 'Akshitha Lakshmireddygar' with a timestamp of '9/22/2025, 8:39 AM'. The 'Page Layouts' section shows 'Standard Object Layouts'.

Step 4 — Role Hierarchy

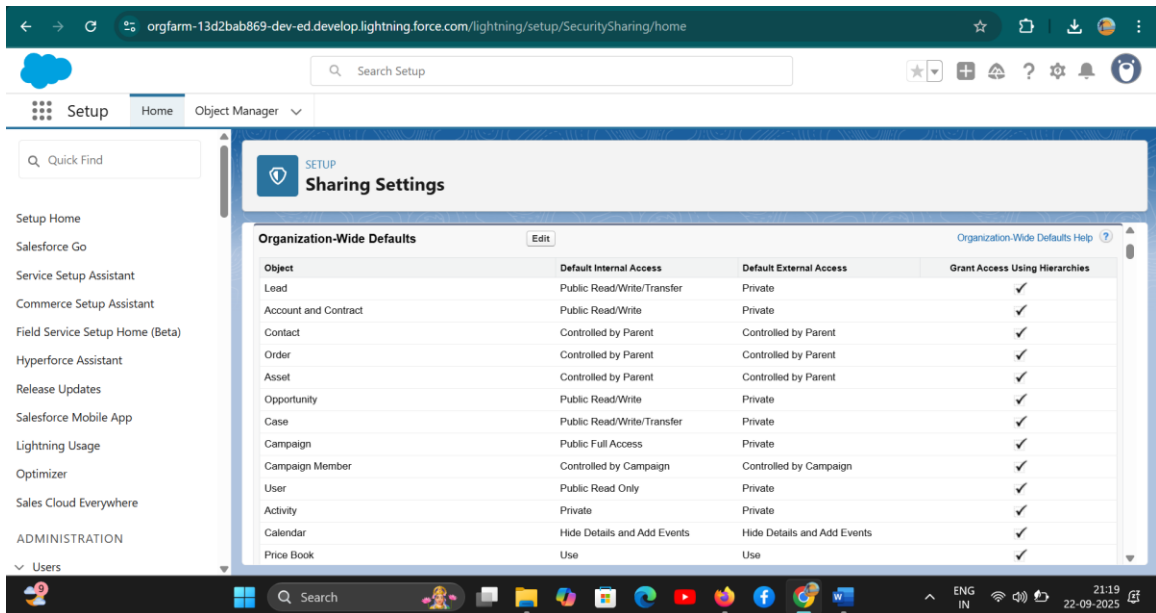
- Clinic Admin (Top)
 - Doctor
 - Receptionist



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.

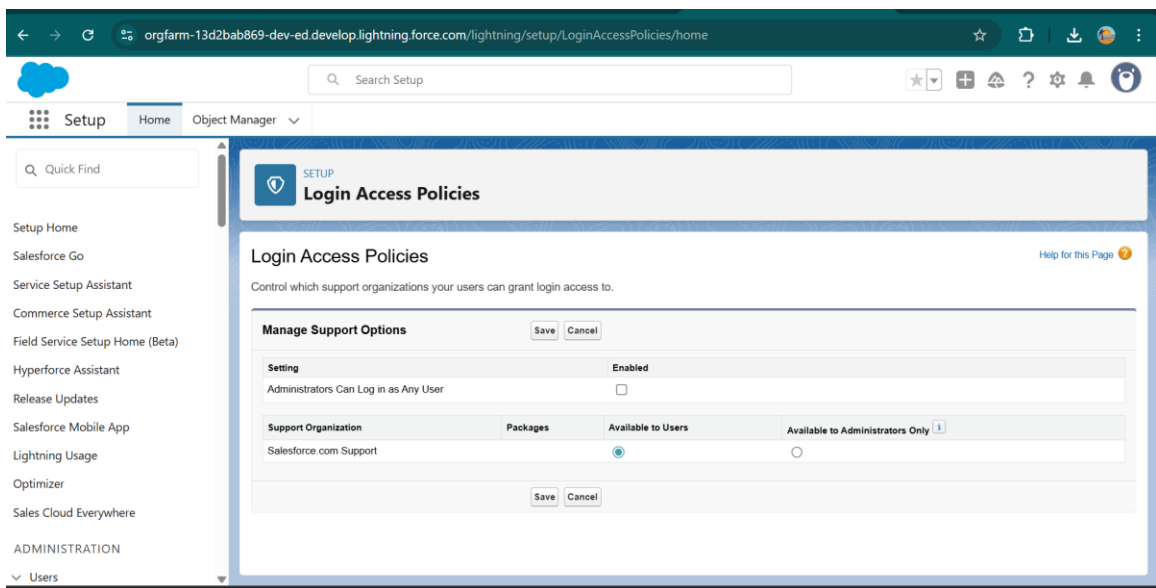


Step 6 — Sharing Rules

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

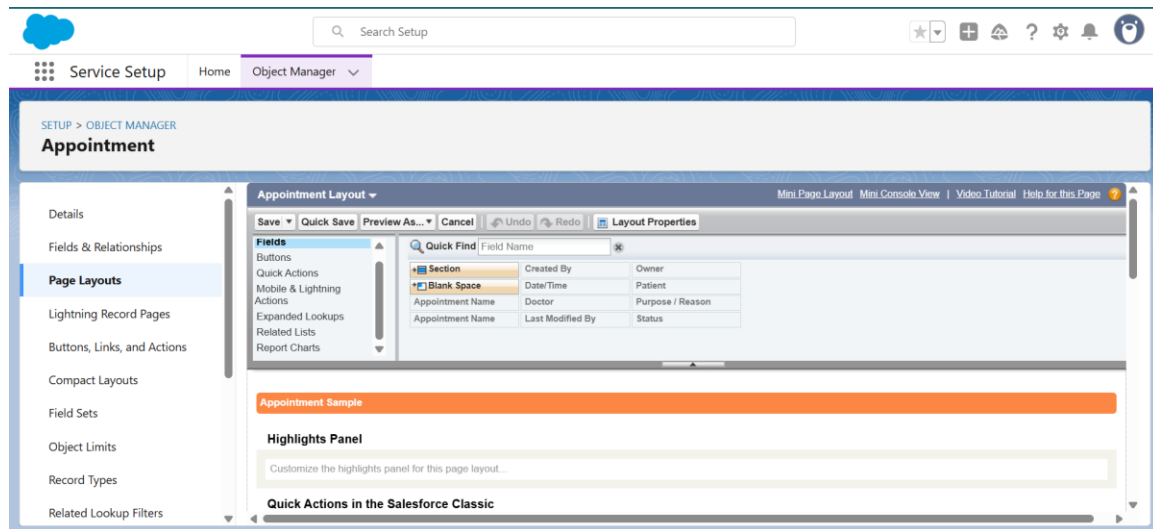
Step 7 — Login Access Policies

- 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.

The screenshot displays a Salesforce Lightning interface for an appointment record. The browser address bar shows the URL: `orgfarm-13d2bab869-dev-ed.develop.lightning.force.com/lightning/r/Appointment__c/a02gL000006zQq9QAE/view`. The page header includes a search bar and navigation tabs: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Appointments, and More. The main content area is titled 'Appointment regular chechup' and includes buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing fields for Appointment Name, Date/Time, Purpose / Reason, Status, Patient, and Doctor. The 'Activity' tab is also visible, showing filters and a section for 'Upcoming & Overdue' tasks.

Related	Details
Appointment Name	regular chechup
Appointment Name	APP-0001
Date/Time	9/19/2025, 12:00 PM
Purpose / Reason	stomach pain
Status	Scheduled
Patient	Arjun
Doctor	

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).