**Phase 2: Org Setup & Configuration**

1. **Introduction**

This document describes the steps taken during Phase 2 for the **CareConnect: Government Health Camp CRM** project. The focus in this phase is to configure the Salesforce org with company settings, user management, security, and basic environment setup required to implement the project.

**2. Salesforce Edition Selection**

* Selected **Salesforce Developer Edition** for flexible development and testing.
* Ensured availability of necessary features for healthcare management like Custom Objects, Profiles, Role Hierarchy, Process Automation.

**3. Company Profile Setup**

* Accessed **Setup → Company Information**.
* Updated organization name to “CareConnect Health Camp CRM”.
* Configured default locale as Indian Locale (English – India).
* Set currency to INR (Indian Rupee).
* Populated other basic details as per project requirements.

**4. Business Hours & Public Holidays**

* Defined **Business Hours** to match health camp operational timings (9 AM – 5 PM, Monday to Saturday).
* Added relevant **Holidays** to block inactive days during which no camps operate.

**5. User Setup & Licenses**

* Created users for roles:
  + Health Camp Coordinator
  + Medical Staff
  + Government Supervisor
* Assigned relevant **Salesforce Licenses** (Salesforce Platform License or Salesforce License).

**6. Profile Management**

* Cloned **Standard User Profile** to create custom profiles tailored for:
  + **Health Camp Coordinator**: Full access to camp and appointment data.
  + **Medical Staff**: Limited access to assigned appointments and patient records.
  + **Government Supervisor**: Read-only access to all data for monitoring.

**7. Role Hierarchy**

* Created role hierarchy for data visibility:
  + **Government Supervisor** at the top.
  + **Health Camp Coordinator** midway.
  + **Medical Staff** at the bottom.
* This hierarchy ensures supervisors see all records, coordinators see their camps, and staff see their tasks.

**8. Permission Sets**

* Defined permission sets when additional privileges were required beyond profile permissions.
* Examples include access to reports, special admin tasks, or custom app features.

**9. Organization-Wide Defaults (OWD) and Sharing Rules**

* Set **OWD** for sensitive records (like Contacts/Patients) to **Private** for privacy.
* Created **Sharing Rules**:
  + Open access to Health Camp Coordinators for their own camps.
  + Restricted sharing for Medical Staff to only their records.

**10. Login Access & Security Policies**

* Configured **Login IP Ranges** for users as per organizational policy.
* Set **Session Timeout** and **Login Hours** as appropriate for security.

**11. Development Environment Setup**

* Configured **Developer Org** and **Sandbox** for development and testing.
* Established deployment strategy using **Change Sets** and source control tools.
* Enabled developer tools like **Salesforce DX** and **VS Code** for code management.

**12. Summary**

Phase 2 establishes a secure and well-structured Salesforce environment ready for custom development and automation. All critical users, roles, and permissions are in place aligning with CareConnect project requirements.