

Phase 2: Problem Understanding & Industry Analysis

1. Goal

To configure the Salesforce environment with correct company details, users, roles, security settings, and deployment basics, ensuring a secure and ready foundation for the healthcare project.

2. Salesforce Editions

- This project is implemented on **Salesforce Developer Edition** (free).
- For real-world healthcare orgs, **Enterprise Edition** would be best as it supports advanced features (API, complex sharing, multiple sandboxes).
- For capstone/demo purposes, Developer Edition is sufficient.

3. Company Profile Setup

- Company Name: SmartCare Hospitals Pvt. Ltd.
- Primary Contact: Hospital Admin
- Locale & Currency: English (India) / INR ₹
- Default Time Zone: IST (GMT+5:30)
- Setup Path: Setup → Company Settings → Company Information.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and shows the organization's profile for 'Prof. Ram Meghe Institute of Technology and Research'. The page includes sections for 'Organization Detail' and 'User Licenses'.

Organization Detail

Field	Value
Organization Name	Prof. Ram Meghe Institute of Technology and Research
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	April
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

User Licenses

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date

4. Business Hours & Holidays

Business Hours:

- Name: SmartCare Business Hours
- Working Days: Monday–Saturday
- Timing: 9:00 AM – 9:00 PM
- **Holidays:** Sundays and national holidays (e.g., Independence Day, Republic Day).
- Used in **appointment validations** (no bookings outside working hours).

The screenshot shows the 'Business Hours' configuration page in the SmartCare system. The page is titled 'Organization Business Hours' and includes a 'Help for this Page' link. It contains a 'Business Hours Detail' section with a table of business hours for 'SmartCare Business Hours'. The table shows hours for Sunday (No Hours) and Monday through Saturday (9:00 AM to 9:00 PM). The 'Active' checkbox is checked. The 'Created By' field shows 'Aishwarya Guhane' and the 'Last Modified By' field also shows 'Aishwarya Guhane'. Below the business hours table is a 'Holidays' section with an 'Add/Remove' button and a message 'No records to display'. The page also features a 'Back To Top' link and a note 'Always show me more records per related list'.

Business Hours Name	SmartCare Business Hours	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>No Hours</td></tr><tr><td>Monday</td><td>9:00 AM to 9:00 PM</td></tr><tr><td>Tuesday</td><td>9:00 AM to 9:00 PM</td></tr><tr><td>Wednesday</td><td>9:00 AM to 9:00 PM</td></tr><tr><td>Thursday</td><td>9:00 AM to 9:00 PM</td></tr><tr><td>Friday</td><td>9:00 AM to 9:00 PM</td></tr><tr><td>Saturday</td><td>9:00 AM to 9:00 PM</td></tr></table>	Sunday	No Hours	Monday	9:00 AM to 9:00 PM	Tuesday	9:00 AM to 9:00 PM	Wednesday	9:00 AM to 9:00 PM	Thursday	9:00 AM to 9:00 PM	Friday	9:00 AM to 9:00 PM	Saturday	9:00 AM to 9:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	No Hours															
Monday	9:00 AM to 9:00 PM															
Tuesday	9:00 AM to 9:00 PM															
Wednesday	9:00 AM to 9:00 PM															
Thursday	9:00 AM to 9:00 PM															
Friday	9:00 AM to 9:00 PM															
Saturday	9:00 AM to 9:00 PM															

Fiscal Year Settings

- Standard fiscal year configured: **April 1 – March 31** (India standard).
- This helps admins track **annual patient inflow and consultation revenue**.

5. User Setup & Licenses

Users Created:

- Receptionist (Standard User License)
- Doctor (Salesforce Platform License)
- Admin (System Administrator License)
- System Integration User (API License, for SMS/Email services)
- Each user mapped to correct role & profile for security.

6. Profiles

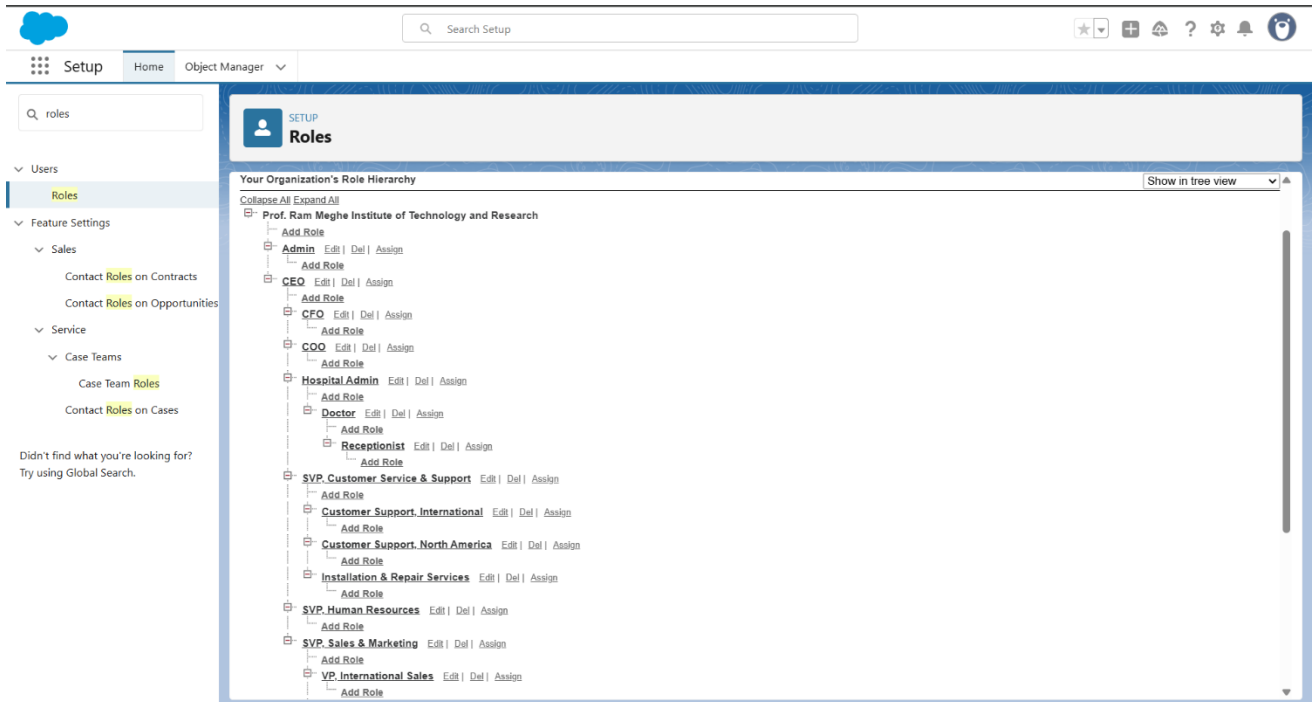
- **Receptionist Profile:** Can create/edit patients & appointments, read doctors, no access to prescriptions.
- **Doctor Profile:** Can read patients, create/edit prescriptions, view only their appointments.
- **Admin Profile:** Full CRUD access, reports, dashboards, setup access.
- Profiles cloned from **Standard User** and customized.

The screenshot displays the Salesforce Setup interface for Profiles. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Profiles' and includes a search bar and a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'SC-Receptionist' profile is highlighted in blue. The table also includes a 'New Profile' button and a 'Help for this Page' link. The bottom of the page shows pagination information: '1-46 of 46', '0 Selected', and 'Page 1 of 1'.

Action	Profile Name	User License	Custom
Edit Clone	Identity User	Identity	<input type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Del ...	SC-Admin	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	SC-Doctor	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	SC-Receptionist	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>

7. Roles

- **Hospital Admin** (top of hierarchy) → Can see all records.
- **Doctor** → Sees only their assigned appointments and patients.
- **Receptionist** → Sees appointments and patients they create.
- Role hierarchy ensures **Admin > Doctor > Receptionist** visibility flow.



8. Permission Sets

- **Prescription Access** → Assigned only to Doctors.
- **Analytics Access** → Assigned to Admin for reports/dashboards.
- **Integration Access** → Assigned to System User for API callouts.
- Used for *extra permissions* instead of bloating profiles.

9. OWD (Organization-Wide Defaults)

- **Patient:** Private (only owner + role hierarchy can see).
- **Appointment:** Private (only related doctor + receptionist + admin).
- **Prescription:** Controlled by Parent (inherits Appointment sharing).

- Ensures **sensitive data security**.

10.Sharing Rules

- **Appointment Sharing Rule** → Automatically shares appointment with related doctor.
- **Patient Sharing Rule** → If a doctor is assigned as primary physician, grant read access.
- **Admin “View All”** → Admin can override to see all.

11.Login Access Policies

- Enable “Administrators Can Log In as Any User” (for testing).
- Configure **IP Restrictions** so doctors and receptionists log in only from hospital network.
- Session timeout: 30 minutes idle time.

12.Dev Org Setup

Developer Org configured with:

- Custom domain (e.g., `smartcare-dev-ed.my.salesforce.com`).
- App → “SmartCare Healthcare CRM”.
- Tabs for Patients, Doctors, Appointments, Prescriptions.
- All configuration tested with sample data.

13.Deployment Basics

Deployment methods used:

- **Change Sets** → For simple metadata moves between orgs.

- **Salesforce DX (SFDX)** → For GitHub integration and version control.
- **Data Loader** → For importing/exporting sample Patients, Doctors, Appointments.
- This ensures project can be migrated from dev → test → final demo org