

Phase 2: Org Setup & Configuration

This phase involved setting up the Salesforce environment to align with the specific needs of the "Healthcare Appointment & Patient Management System" project. The goal was to configure the org, create user roles, and define permissions to ensure data security and efficient workflows for all hospital staff.

1. Company Profile & Org Defaults

The first step was to configure the basic company information and default settings for the Salesforce org.

- **Company Information:** This was configured to reflect the hospital's name, primary contact information, and address.
- **Default Settings:** We set the default timezone to Asia/Kolkata and the default currency to INR to align with the hospital's operational location.
- **Fiscal Year:** The fiscal year was kept as the standard calendar year, as there was no requirement for a custom fiscal year from the hospital.

2. Business Hours & Holidays

To ensure accurate appointment scheduling and reminders, the hospital's business hours and holidays were defined.

- **Business Hours:** We created a "Hospital Working Hours" schedule from Monday to Saturday, 9:00 AM to 6:00 PM, to prevent appointments from being booked during off-hours.
- **Holidays:** Public holidays, such as Independence Day and Diwali, were added to the holiday list to ensure no appointments are scheduled on these days.

Setup

Home

Object Manager ▾

Q busine

Company Settings

Business Hours

Didn't find what you're looking for?

Try using Global Search.

SETUP

Business Hours

Organization Business Hours

Help for this Page ?

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [0]

Business Hours Detail

Edit

Business Hours Name	Hospital Working Hours	Time Zone
Business Hours	Sunday Monday Tuesday Wednesday Thursday Friday Saturday	No Hours 9:00 am to 6:00 pm 9:00 am to 6:00 pm 9:00 am to 6:00 pm 9:00 am to 6:00 pm 9:00 am to 6:00 pm 9:00 am to 6:00 pm
Default Business Hours		(GMT+05:30) India Standard Time (Asia/Kolkata)

Active

Created By

Saaketh B 24/09/2025, 3:28 pm

Last Modified By

Saaketh B 24/09/2025, 3:30 pm

Edit

Holidays

Add/Remove

No records to display

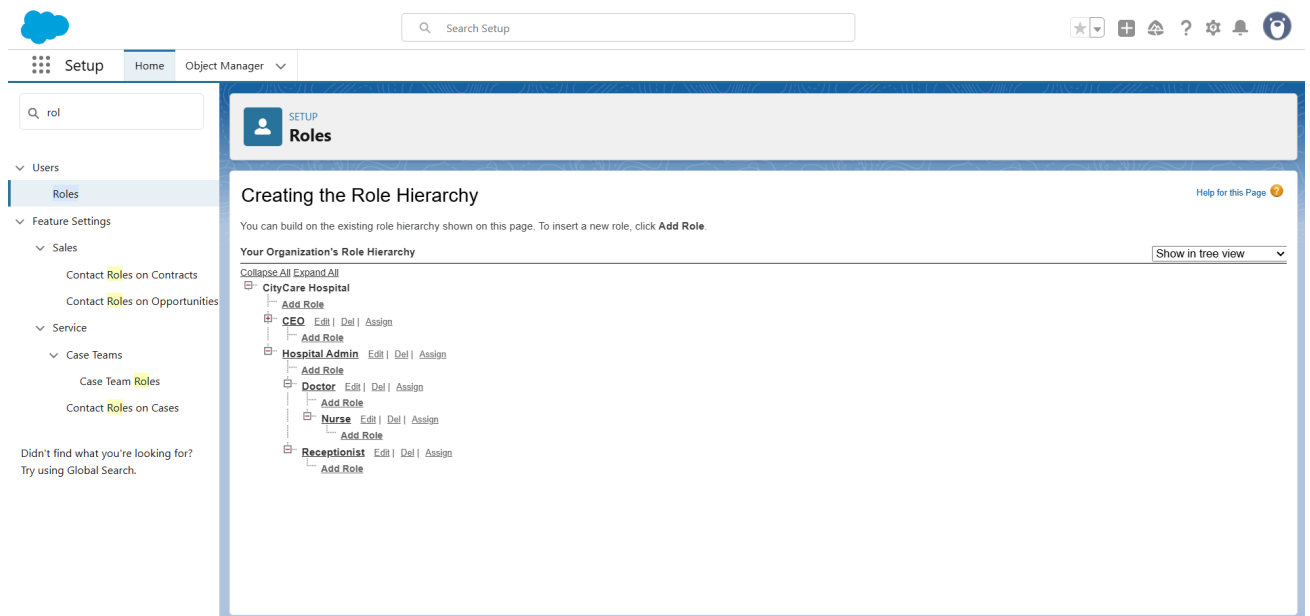
Back To Top

Always show me more records per related list

3. Hospital Hierarchy (Roles)

A role hierarchy was established to reflect the hospital's organizational structure and enforce data visibility.

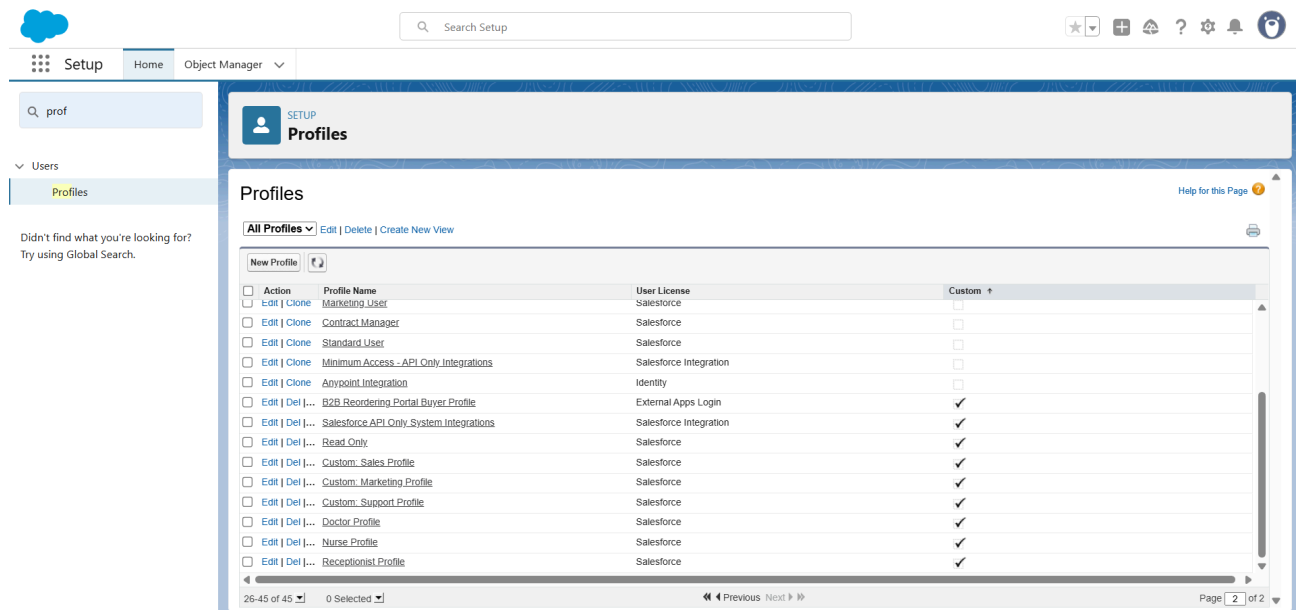
- **Role Creation:** We created a hierarchy with "Hospital Admin" at the top, followed by "Doctor," "Nurse," and "Receptionist."
- **Data Access:** This hierarchy ensures that the Hospital Admin can view data across the entire organization, while a Doctor can only see data for themselves and those who report to them (e.g., Nurses).
- **Purpose:** This provides a foundational layer of data security based on a user's position within the hospital.



4. Profiles (User Permissions)

Custom profiles were created to define what each type of user can do within the system.

- **Customization:** We cloned the standard "Standard User" profile to create a custom profile for each user type: Doctor, Nurse, and Receptionist.
- **Permissions:** Each profile was configured with specific permissions, granting doctors and nurses access to patient and treatment history records while limiting receptionists to creating and managing appointments and patient records.
- **System Admin:** The System Administrator profile was kept for myself to handle all setup and configuration tasks.

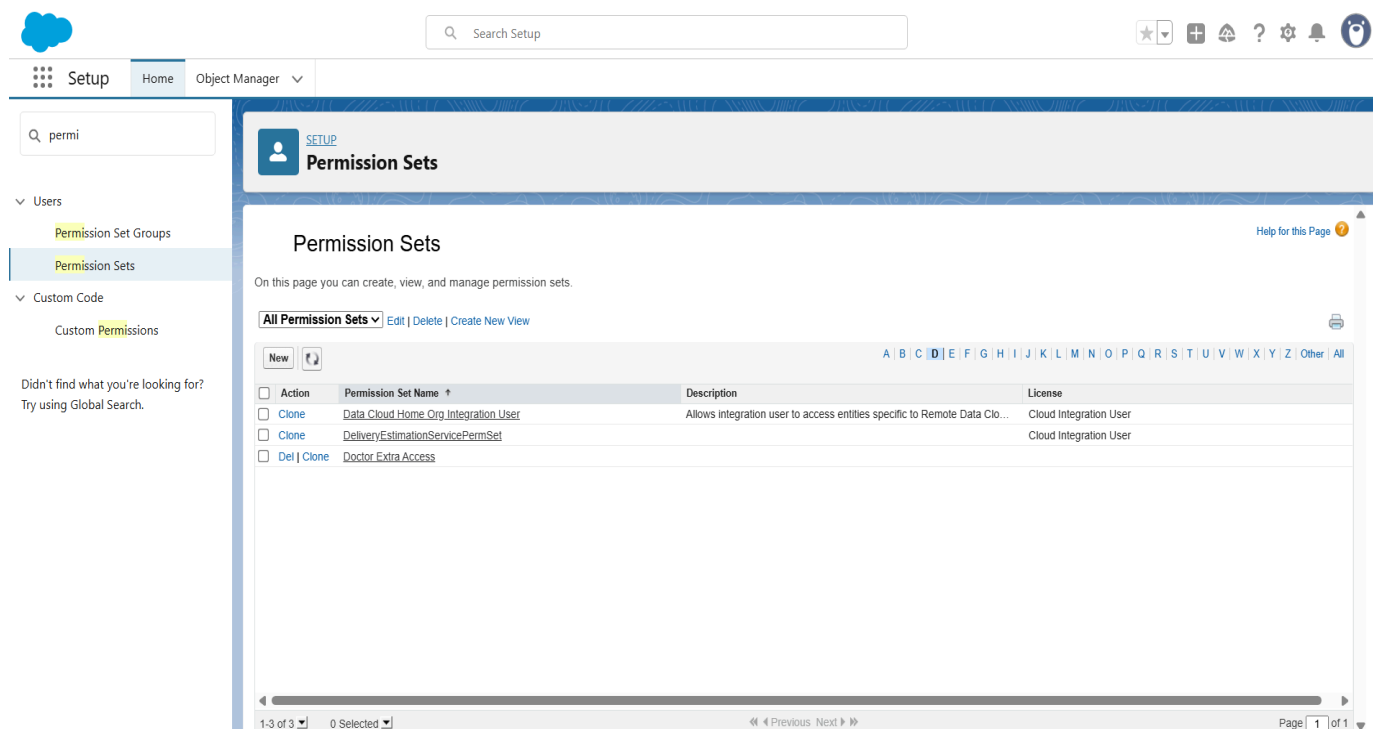


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'prof' and a list of navigation items: 'Users' and 'Profiles' (highlighted). Below the sidebar, a message states: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Profiles' and includes a 'Help for this Page' link. Below the title, there are links for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A 'New Profile' button is also present. The main table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table includes profiles like 'Marketing User', 'Contract Manager', 'Standard User', 'Minimum Access - API Only Integrations', 'Anypoint Integration', 'B2B Reordering Portal Buyer Profile', 'Salesforce API Only System Integrations', 'Read Only', 'Custom: Sales Profile', 'Custom: Marketing Profile', 'Custom: Support Profile', 'Doctor Profile', 'Nurse Profile', and 'Receptionist Profile'. The bottom of the page shows pagination: '26-45 of 45', '0 Selected', and 'Page 2 of 2'.

5. Permission Sets

Permission sets were used to grant additional, specific access rights to users without changing their base profile.

- **Flexibility:** We created permission sets like "Doctor Extra Access" and "Receptionist Scheduler."
- **Granular Control:** This method provides more granular control over user permissions and allows for easier management of access rights, especially as the system grows.



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permi' and a list of navigation items: 'Users', 'Permission Set Groups', 'Permission Sets' (highlighted), and 'Custom Code'. Below the sidebar, a message states: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Permission Sets' and includes a 'Help for this Page' link. Below the title, there are links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A 'New' button is also present. The main table lists various permission sets with columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table includes permission sets like 'Data Cloud Home Org Integration User', 'DeliveryEstimationServicePermSet', and 'Doctor Extra Access'. The bottom of the page shows pagination: '1-3 of 3', '0 Selected', and 'Page 1 of 1'.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below this, the "Setup" menu is expanded, showing "Home" and "Object Manager". On the left sidebar, the "Users" section is expanded, with "Permission Set Groups", "Permission Sets", "Custom Code", and "Custom Permissions" listed. The "Permission Sets" link is highlighted. The main content area is titled "Permission Sets" and includes a sub-header "On this page you can create, view, and manage permission sets." Below this, there are links for "All Permission Sets", "Edit", "Delete", and "Create New View". A table lists the permission sets:

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	BPAC2CPPermSet		Cloud Integration User
<input type="checkbox"/> Del Clone	Receptionist Scheduler		

At the bottom of the table, there is a pagination bar showing "1-2 of 2", "0 Selected", and navigation links for "Previous" and "Next". The page number "Page 1 of 1" is also visible.

6. Sample Users

Sample user accounts were created for testing purposes, representing the key user roles in the hospital system.

- **User Creation:** We created user accounts for a doctor (Dr. Arjun), a nurse (Nurse Asha), and a receptionist (Receptionist Ramesh).
- **Role and Profile Assignment:** Each user was assigned the appropriate custom profile and role to ensure their access to the system was correctly limited.
- **Testing:** These users will be used in later phases to test the functionality of flows, reports, and data security.

Setup Home Object Manager

Global Actions
Publisher Layouts
Lightning App Builder
Lightning Extension
Path Settings
Quick Text Settings
Record Page Settings
Rename Tabs and Labels
Sites and Domains
Custom URLs
Domains
Sites
Tabs
Themes and Branding
Translation Workbench
Export
Import
Translate
Translation Language Settings

Search Setup

SETUP Users

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

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	B. Saalekh	SB	saalekh@citycarehospital.com	Hospital Admin	✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00dms00000bwwv12ag.9e0vslbp68r1@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Dr. Arjun Kumar	arju	doctor1@citycare.dev	Doctor	✓	Doctor Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00dms00000bwwv12ag.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dms00000bwwv12ag.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

7. App Creation

A custom Lightning App named "Hospital Management System" was built to provide a centralized hub for all users.

- **App Manager:** The app was created in the App Manager and configured with all the necessary tabs.
- **User Experience:** This app will provide an intuitive, single-location interface for hospital staff to access the data and tools they need to perform their daily tasks.

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
> Data
> Email
PLATFORM TOOLS
> Subscription Management

Search Setup

SETUP Lightning Experience App Manager

New Lightning App New External Client App

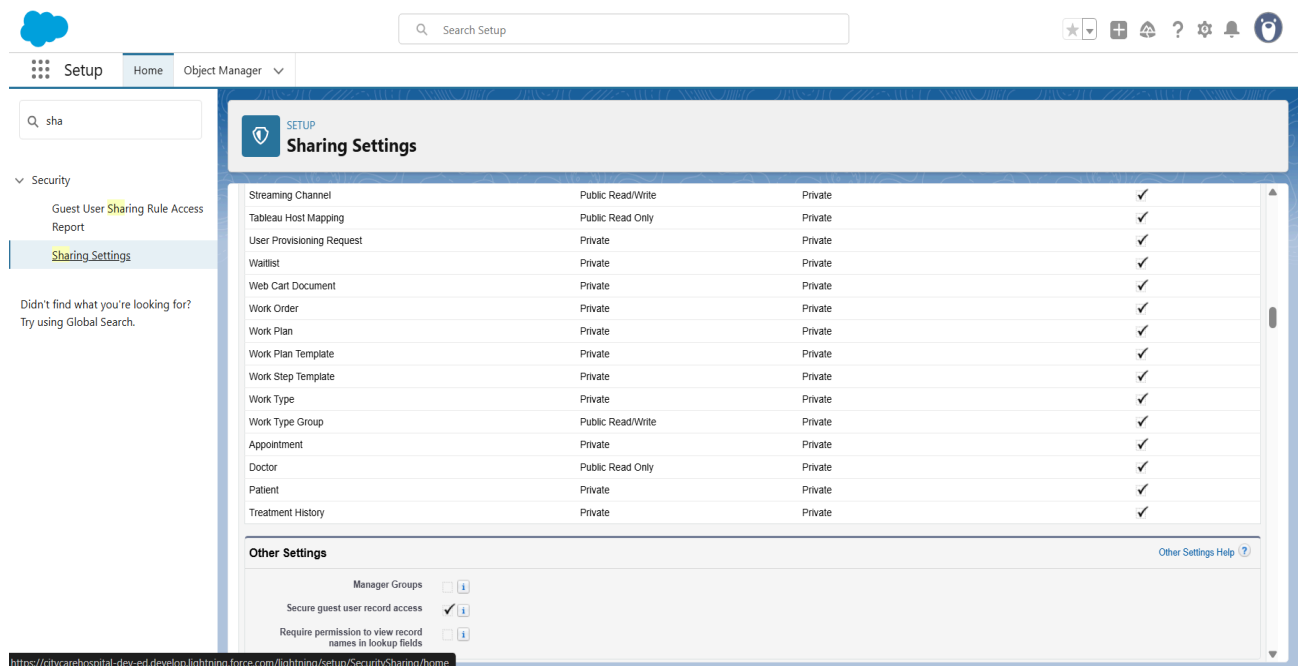
26 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1	Hospital Management	Hospital_Management		24/09/2025, 4:40 pm	Lightning	✓
2	Automation	FlowsApp	Automate business processes and repetitive tasks.	24/09/2025, 12:34 pm	Lightning	✓
3	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	24/09/2025, 12:30 pm	Lightning	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/09/2025, 12:27 pm	Lightning	✓
5	My Service Journey	MSJApp	Discover new customer service capabilities.	24/09/2025, 12:27 pm	Lightning	✓
6	Approvals	Approvals	Manage approvals and approval flows	24/09/2025, 12:27 pm	Lightning	✓
7	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	24/09/2025, 12:27 pm	Lightning	✓
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/09/2025, 12:27 pm	Lightning	✓
9	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/09/2025, 12:27 pm	Classic	✓
10	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	24/09/2025, 12:27 pm	Lightning	✓
11	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	24/09/2025, 12:27 pm	Lightning	✓
12	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer ...	24/09/2025, 12:27 pm	Lightning	✓
13	Content	Content	Salesforce CRM Content	24/09/2025, 12:27 pm	Classic	✓
14	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	24/09/2025, 12:27 pm	Classic	✓

8. Org-Wide Defaults (OWD) & Sharing

Organization-Wide Defaults (OWD) were configured to set the base level of data visibility.

- **OWD Settings:** We set the OWD for Patient, Appointment, and Treatment History objects to "Private" to ensure that patient data is not visible to all users by default.
- **Sharing Rules:** This was done to ensure a high level of patient data privacy. Sharing rules can be created later to grant specific access when needed (e.g., a group of doctors sharing patient data).



The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The main content area is titled 'Sharing Settings' and displays a table of sharing settings for various objects. The table has three columns: 'Object', 'Default Sharing Method', and 'Default Access Mode'. The 'Object' column lists objects such as Streaming Channel, Tableau Host Mapping, User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Appointment, Doctor, Patient, and Treatment History. The 'Default Sharing Method' column shows values like 'Public Read/Write', 'Public Read Only', and 'Private'. The 'Default Access Mode' column shows 'Private' for most objects and 'Public Read/Write' for Streaming Channel and Work Type Group. Checkmarks are visible in the rightmost column for most rows. Below the table, there is an 'Other Settings' section with checkboxes for 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. The 'Secure guest user record access' checkbox is checked. A URL bar at the bottom shows the address: <https://citycarehospital-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home>.

Object	Default Sharing Method	Default Access Mode
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Provisioning Request	Private	Private
Waitlist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Appointment	Private	Private
Doctor	Public Read Only	Private
Patient	Private	Private
Treatment History	Private	Private


Other Settings

- Manager Groups ☐
- Secure guest user record access ☒
- Require permission to view record names in lookup fields ☐








9. Email Deliverability

The email deliverability settings were set to "All email" to ensure that automated reminders and confirmations can be sent.

- **Purpose:** This setting is crucial for the automated workflows in Phase 4, as it ensures that appointment confirmations and reminders are successfully delivered to patients.



Search Setup



SetupHomeObject Manager

Q deliv

Email

Deliverability

Email Delivery Settings

Email Domain Filters

Email Relays

Test Deliverability

Feature Settings


Salesforce Files

Content Deliveries and Public Links

Notification Builder

Notification Delivery Settings

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

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

Save

Access to Send Email (All Email Services)

Access levelAll 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)