☐ Phase 2: Org Setup & Configuration – HealthCare360

☐ Salesforce Editions

- Used **Salesforce Developer Edition** for initial setup and customization.
- Enabled core CRM features including custom objects, automation tools, and reporting.

☐ Company Profile Setup

- Organization Name: **HealthCare360**
- Time Zone: `(GMT+05:30) India Standard Time (Asia/Kolkata)`
- Locale: English (India)
- Fiscal Year: Starts in **January**, based on **starting month**
- Warning acknowledged: Changing fiscal year impacts opportunities and forecasts.

SETUP

🏢 Company Information

Organization Detail   [Edit]

Organization Name	HealthCare360	Phone	1234567890
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	482001 Madhya Pradesh India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	Hindi (India) - INR
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL00000BA9BI
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 9/8/2025, 11:14 AM	Modified By	Palak Yadav, 9/18/2025, 10:31 AM

☐ Business Hours & Holidays

- **Business Hours Name**: Standard Business Hours
- Active: ✓
- Default: ✓
- Working Days: Monday to Saturday, 9:00 AM – 6:00 PM
- Sunday: Closed
- Time Zone: `(GMT+05:30) Asia/Kolkata`
- Holidays: (To be configured separately if applicable)

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	Standard business hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday No Hours	Default Business Hours	✓
	Monday 9:00 AM to 6:00 PM		
	Tuesday 9:00 AM to 6:00 PM		
	Wednesday 9:00 AM to 6:00 PM		
	Thursday 9:00 AM to 6:00 PM		
	Friday 9:00 AM to 6:00 PM		
	Saturday 9:00 AM to 6:00 PM		
Active	✓		
Created By	Palak Yadav 9/18/2025, 10:41 AM	Last Modified By	Palak Yadav 9/22/2025, 6:02 AM

[Edit]

Holidays   [Add/Remove]

No records to display

☐ Fiscal Year Settings

- Fiscal Year Start Month: **January**
- Based On: **Starting Month**

- Impact warning reviewed and data backup recommended before changes.

-

☐ User Setup & Licenses

- Created users for:
    - CEO
    - Doctor
    - Nurse
    - Receptionist
- Assigned appropriate **Salesforce User Licenses**
- Linked users to custom profiles and roles

☐ Profiles

- Created **Doctor Profile** with:
    - Access to Patient Records, Appointments, Medical Notes
    - Field-Level Security for sensitive data (e.g., SSN, insurance)

- - Tab visibility configured for clinical workflows
  - No access to Setup or administrative controls
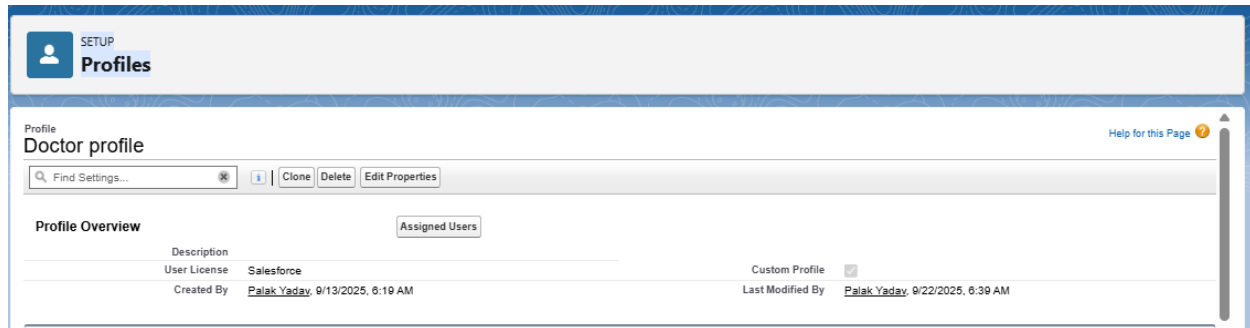
☐ **Roles**

- Role Hierarchy:
  - CEO
    - Doctor
    - Nurse
    - Receptionist
- Roles created and assigned using Salesforce Setup → Role Hierarchy
- Each role includes options to edit, delete, and assign users
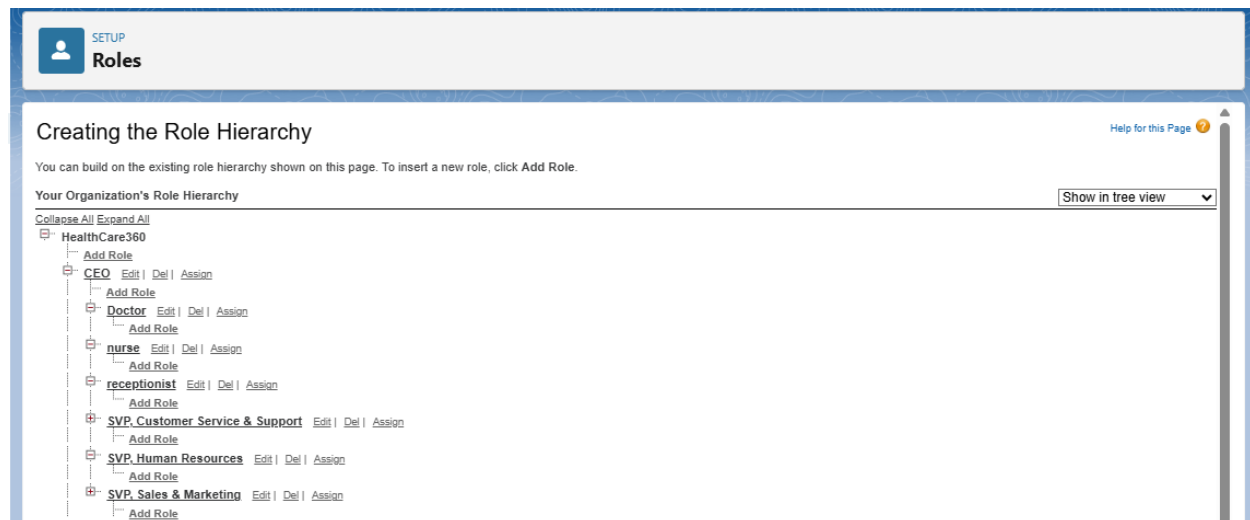
☐ OWD (Organization-Wide Defaults)

- Patient Records: **Private**
- Appointments: **Controlled by Parent**
- Medical Notes: **Private**
- Ensures data confidentiality and compliance with healthcare standards

☐ Sharing Rules

- Configured sharing rules to allow:
  - Doctors to view records of assigned patients
  - Nurses to access appointments linked to their department
  - Receptionists to view scheduling data only
- Based on role hierarchy and record ownership

☐ Login Access Policies

- Enabled **Admin Login Access**: ✓
- Salesforce.com Support: Available to Users ✓
- Ensures secure troubleshooting and support access

☐ Dev Org Setup

- Created Developer Edition Org via developer.salesforce.com
- Configured company profile, users, roles, profiles, business hours, and security settings
- Enabled custom objects, automation tools, and reporting features

☐ Sandbox Usage

- Used **Developer Sandbox** for building and testing features
- Optionally used **Full Sandbox** for simulating production-level scenarios
- All major changes tested in sandbox before deployment

☐ Deployment Basics

- **Change Sets**: Used for simple deployments between orgs
- **Salesforce CLI (SFDX)**:
  - Authenticated org
  - Retrieved and deployed metadata
- **GitHub Integration**:
  - Version control
  - Branch management
  - Collaborative development
- Deployment steps documented and backups maintained