


# 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	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	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

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](#)

**Business Hours Detail** [Edit](#)

Business Hours Name	Standard 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 6:00 PM</td></tr><tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr></table>	Sunday	No 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	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	No 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															
Default Business Hours		✓														
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.

SETUP  
Fiscal Year

Setup  
Organization Fiscal Year Edit: HealthCare360 [Help for this Page](#)

To specify the fiscal year type for your organization, choose one of the options below.

**Fiscal Year Information**  
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year ⓘ  
☐ Custom Fiscal Year ⓘ

**Change Fiscal Year Period** [Save] [Cancel]

Name	HealthCare360
Fiscal Year Start Month	January
Fiscal Year is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month

[Save] [Cancel]

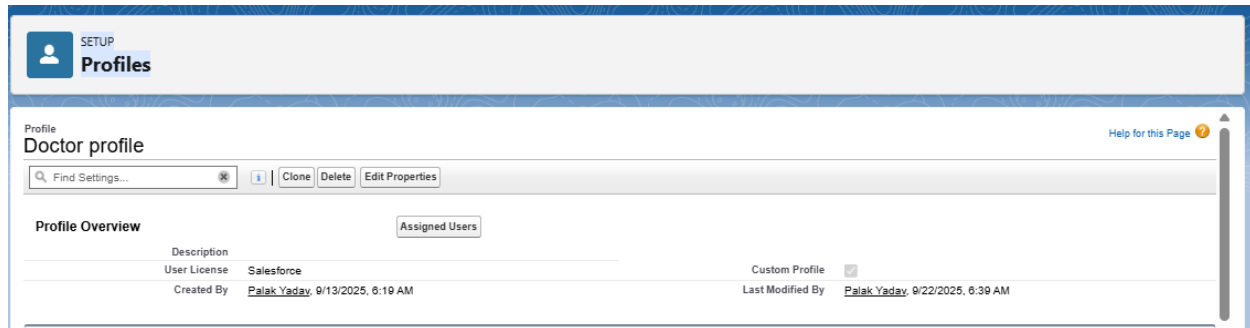
## • □ User Setup & Licenses

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

## □ Profiles

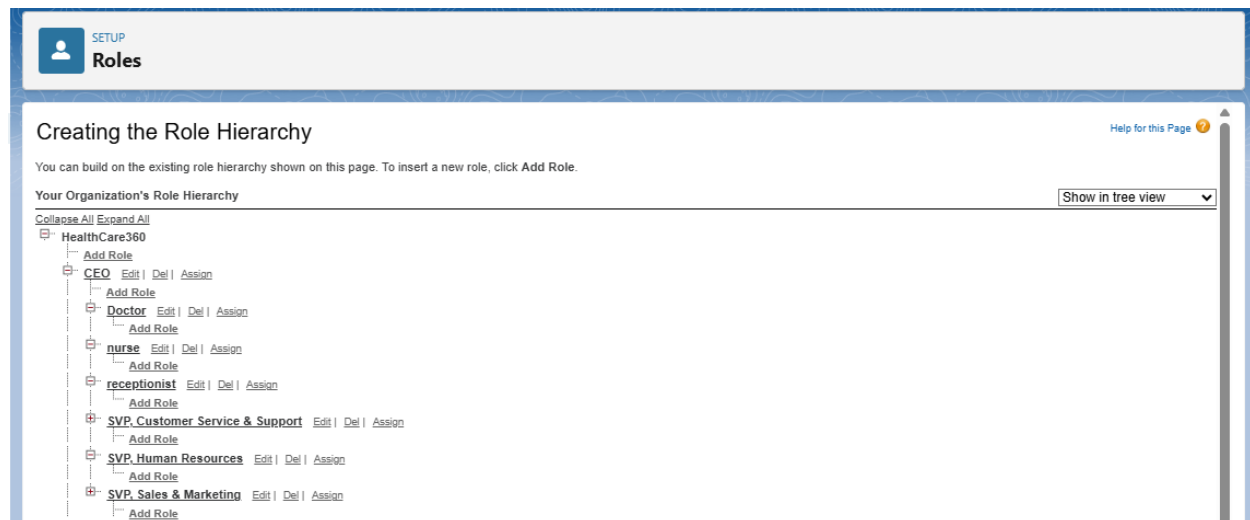
- Created **Doctor Profile** with:
  - Access to Patient Records, Appointments, Medical Notes
  - Field-Level Security for sensitive data (e.g., SSN, insurance)

- 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

The screenshot shows the 'Login Access Policies' setup page in Salesforce. The page title is 'Login Access Policies' with a 'Help for this Page' link. Below the title is a description: 'Control which support organizations your users can grant login access to.' The main section is 'Manage Support Options', which contains a table with settings for login access. The table has columns for 'Setting', 'Enabled', 'Support Organization', 'Packages', 'Available to Users', and 'Available to Administrators Only'. The 'Administrators Can Log in as Any User' setting is enabled. The 'Salesforce.com Support' support organization is listed with 'Available to Users' selected and 'Available to Administrators Only' unselected. There are 'Save' and 'Cancel' buttons at the top and bottom of the table.

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

## □ Dev Org Setup

- Created Developer Edition Org via [developer.salesforce.com](https://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