

Salesforce Project Implementation Phases with Concepts (Admin + Developer)


Problem Statement: Hospitals often struggle to manage patient interactions due to fragmented systems, manual communication, and lack of centralized records. Appointment scheduling, follow-ups, and patient history tracking are typically handled through phone calls, spreadsheets, or outdated systems, which leads to missed appointments, longer wait times, and poor patient experience. This inefficiency also results in reduced hospital revenue and administrative burden.

Proposed Solution : A tailored Hospital CRM solution is needed to centralize patient information, automate appointment scheduling, send reminders, and streamline communication between patients, doctors, and hospital staff. The system will improve efficiency, enhance patient satisfaction, and provide real-time insights for better hospital management

Phase 2: Org Setup & Configuration

1. Company Information Setup

- **Updated Organization Name: PulsePoint**
- **Default Time Zone: Asia/Kolkata**
- **Default Currency: INR – Indian Rupee**
- **Purpose:** A tailored Hospital CRM solution is needed to centralize patient information, automate appointment scheduling, send reminders, and streamline communication between patients, doctors, and hospital staff.



SETUP

Company Information

Company Information

PulsePoint

[Help for this Page](#)

The organization's profile is below.

[User Licenses \(10+\)](#) |
 [Permission Set Licenses \(10+\)](#) |
 [Feature Licenses \(1\)](#) |
 [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	PulsePoint	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	United States	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	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	354 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
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	00DgL00000C2ApD
		Organization Edition	Developer Edition
		Instance	CAN98

2. Business Hours & Holidays

- **Defined PulsePoint Support Hours:** Monday–Saturday, 9:30 AM – 5:30 PM
- **Added Holidays:** Diwali , New Year , Christmas
- **Purpose:** Business Hours define the hospital’s working schedule to ensure accurate case management, SLA tracking, appointment scheduling, and reporting.

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Company Settings', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Business Hours' and includes a section for 'Organization Business Hours'. It provides instructions on selecting days and hours for support team availability and mentions that blank hours indicate non-operation. Below this, there's a 'Business Hours Detail' section with a table for 'PulsePoint Support Hours' showing hours for each day of the week (9:30 AM to 5:30 PM). It also shows the 'Time Zone' as '(GMT+05:30) India Standard Time (Asia/Kolkata)' and 'Default Business Hours' as checked. At the bottom, there's a 'Holidays' section with an 'Add/Remove' button. The bottom status bar shows the user is logged in as 'Dhruv Beotra' on 24-09-2025 at 11:28.

3. Fiscal Year Setup

- Purpose:** Fiscal Year defines the hospital’s financial reporting period, helping align revenue, billing, and performance tracking with organizational goals.

The screenshot shows the Salesforce Setup interface for configuring the Fiscal Year. The left sidebar is similar to the previous screenshot, but the 'Fiscal Year' option under 'Company Settings' is highlighted. The main content area is titled 'Fiscal Year' and includes a section for 'Organization Fiscal Year Edit: PulsePoint'. It instructs users to specify the fiscal year type. A 'Fiscal Year Information' box explains that the organization can change the start month and specify whether the year is starting or ending. A yellow warning box states: '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.' Below this, there's a 'Change Fiscal Year Period' section with a form. The form has a 'Name' field set to 'PulsePoint', a 'Fiscal Year Start Month' dropdown set to 'April', and a 'Fiscal Year is Based On' section with 'The ending month' selected. There are 'Save' and 'Cancel' buttons at the bottom of the form. The bottom status bar shows the user is logged in as 'Dhruv Beotra' on 24-09-2025 at 11:28.

<https://orgfam-93992c810-dev-ed.develop.lightning.force.com/lightning/setup/forecastFiscalYear/home>

4. Role Hierarchy

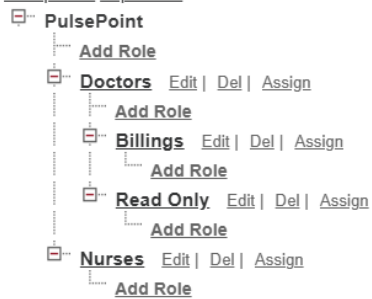
- **Created Roles:**
 1. **Doctors/ Admin** → top of hierarchy
 2. **Billings**
 3. **Read Only**
 4. **Nurses**

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



5. User Creation

- **Doctor User:**
 - Salesforce license, Doctor profile
 - Assigned to **Doctor role**
- **Nurses User:**
 - Salesforce Platform license, Nurses profile
 - Assigned to Nurses **role**
- **Billings User:**
 - Salesforce platform license, billing profile
 - Assigned to **Billing role**
- **Read only user:**
 - Salesforce Platform license, read only profile
 - Assigned to **read only role**

User

Sahil Lamba

User ProfileHelp for this Page

Permission Set Assignments (1) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Sahil Lamba	Role	Doctors
Alias	slamb	User License	Salesforce
Email	sahillam@example.com <div>Verify</div>	Profile	PulsePoint_Doctor_Profile
Username	sahillam@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User17586598902723540657 <div></div>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<div>View</div>
Delegated Approver		Data.com User Type	<div></div>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <div></div>

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Saanch Pasricha	Role	Nurses
Alias	bpasr	User License	Salesforce Platform
Email	bpasr@example.com <div>Verify</div>	Profile	PulsePoint_Nurse_Profile
Username	bpasr@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User1758659676636267477 <div></div>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>

User Detail		<a>Edit <a>Sharing <a>Reset Password <a>Freeze <a>View Summary	
Name	Sakshi Pagaria	Role	Billings
Alias	spaga	User License	Salesforce Platform
Email	sakshi@test.com <a>[Verify] <a>i	Profile	PulsePoint_Billing_Profile
Username	sakshi1@test.com	Active	<input checked="" type="checkbox"/>
Nickname	User17586600123736162196 <a>i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>

User Detail		<a>Edit <a>Sharing <a>Reset Password <a>Freeze <a>View Summary	
Name	Akshat Kumar	User License	Chatter Free
Alias	akuma	Profile	Chatter Free User
Email	akshat@example.com <a>[Verify] <a>i	Active	<input checked="" type="checkbox"/>
Username	akshat@example.com	Marketing User	<input type="checkbox"/>
Nickname	User17586620670349221828 <a>i	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>

6. Organization Wise Default

1. Invoice (Doctor Sharing)

Purpose: Doctors can access invoice of patients.

2.Accounts (Billings Sharing)

Purpose: Accounts and contacts to be shared with Billings

SETUP

Sharing Settings

Manage sharing settings for: Invoice

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Object

Default Internal Access

Default External Access

Grant Access Using Hierarchies

Invoice	Private	Private	✓
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Other Settings

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

Sharing Rules

Invoice Sharing Rules

Action

Criteria

Shared With

Access Level

Edit Del	Owner in Group: PulsePoint_Billing	Group: PulsePoint_Doctors	Read/Write
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SETUP

Sharing Settings

Manage sharing settings for: Accounts

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Object

Default Internal Access

Default External Access

Grant Access Using Hierarchies

Account and Contract	Private	Private	✓
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Other Settings

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

Sharing Rules

Account Sharing Rules

Action

Criteria

Shared With

Account and Contract

Opportunity

Case

Edit Del	Owner in Role: Read Only	Group: PulsePoint_Billing	Read/Write	Private	Private
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7. Permission Set and Profiles


- **Verified user profiles:** Doctors , Nurses, Billings, Read Only
- **Created Permission Sets:**


1. View Reports

- Allow users to run/create/subscribe/export reports and view dashboards.

2. Billing access

- Grants CRUD access to Opportunities and billing-related objects and fields for finance users.



SETUP > PERMISSION SETS > PULSEPOINT_VIEWREPORTS
Permission Sets

API Name	License	Created By	Last Modified By
PulsePoint_ViewReports	--	Dhruv Beotra	Dhruv Beotra
Namespace Prefix	Session Activation Required	Created Date	Last Modified Date
--	Not Required	9/23/2025, 2:20 PM	9/23/2025, 2:29 PM
Related Permission Set Groups	Assigned Users 		
0	2		
Description			
Allow users to run/create/subscribe/export reports and view dashboards.			


Permission Set Information
 See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups **User Permissions** Object Permissions Field Permissions Custom Permissions Tabs

8+ items
 Add
Remove



... > PERMISSION SET 'PULSEPOINT_BILLINGACCESS' > MANAGE ASSIGNMENTS
PulsePoint_BillingAccess

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sakshi Pagaria	Salesforce Platform			 Success

8. Login Access Policies

- **Admins Can Log in as Any User:** Enabled
- **Users Can Grant Login Access:** Enabled (optional for support or troubleshooting)

 **SETUP**
Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.


✓ Changes Saved

Manage Support Options

Save

Cancel

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"/>

Save

Cancel