Project HealthConnect 360

Phase 2: Org Setup & Configuration

A Unified Patient Relationship & Clinic Management System

Prepared by: Harsh Raj Mishra

Phase 2: Org Setup & Configuration

Salesforce Editions

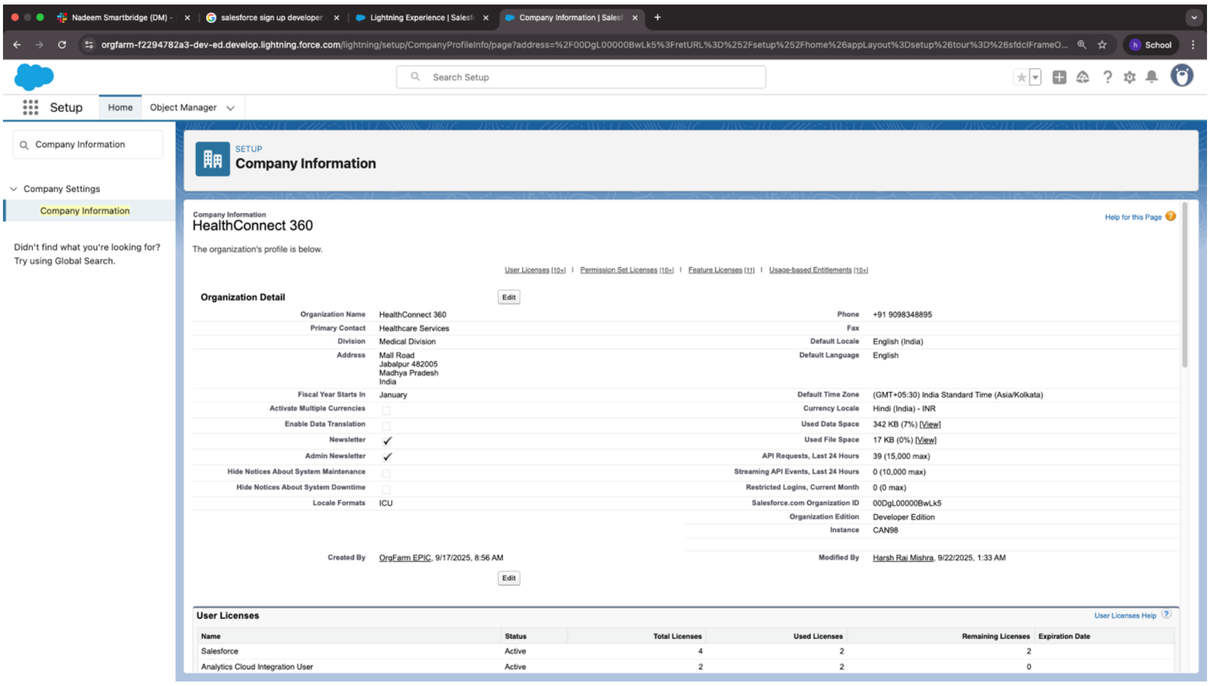
We used **Salesforce Developer Edition** for HealthConnect 360. This free edition gives unlimited access to build and test without time limits. It's perfect for our prototype because it includes all Salesforce features like custom objects, flows, and reports. The Developer Edition lets us create the patient management system without any restrictions, making it ideal for learning and demonstration.

Company Profile Setup

The company profile was set up as **HealthConnect 360**, a mid-sized medical clinic in Jabalpur, Madhya Pradesh. Key settings include:

- **Location**: Mall Road, Jabalpur, MP 482005, India
- **Contact**: +91 909384885
- **Time Zone**: (GMT+05:30) India Standard Time
- **Currency**: Indian Rupee (INR)
- **Language**: English (India)

This setup ensures all appointments show correct Indian time and billing uses INR. The Jabalpur location makes it realistic for our demo.



Business Hours & Holidays

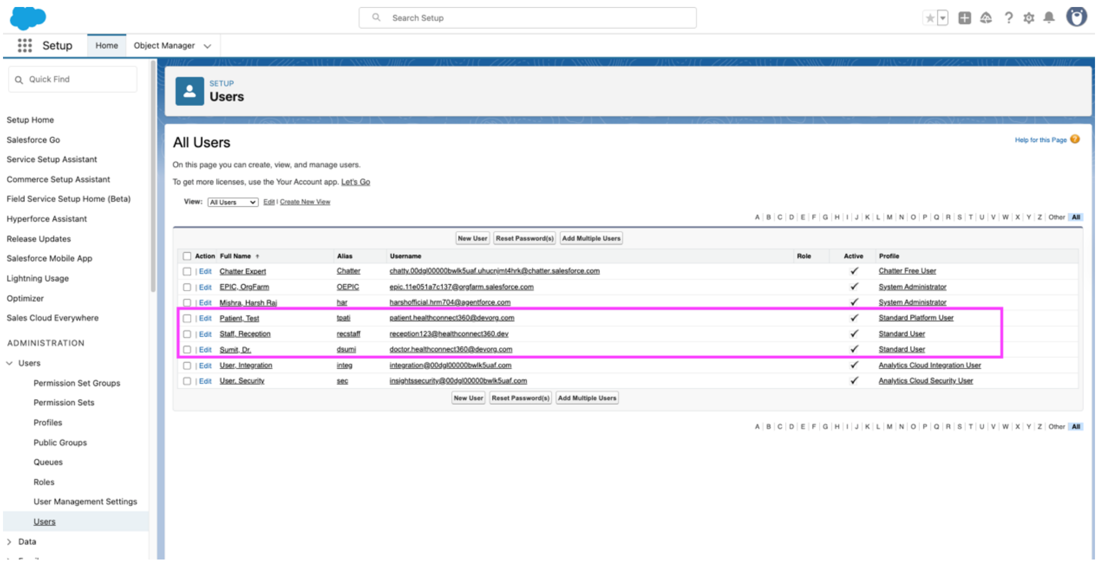
We set **Business Hours** for the clinic from **9:00 AM to 6:00 PM, Monday to Saturday**. No holidays were configured for the project, but the system is ready to add them later. This helps with appointment scheduling - the system knows when doctors are available.

<u>User Setup & Licenses</u>

Created **3 test users** representing clinic roles:

User	Role	License	Purpose
Reception Staff	Receptionist	Salesforce	Manages appointments
Dr. Smith	Doctor	Salesforce	Views patient records
Test Patient	None	Salesforce Platform	Patient portal access

All users got unique emails and passwords. The Salesforce license gives full access for staff, while Platform license limits patient to read-only.



Profiles

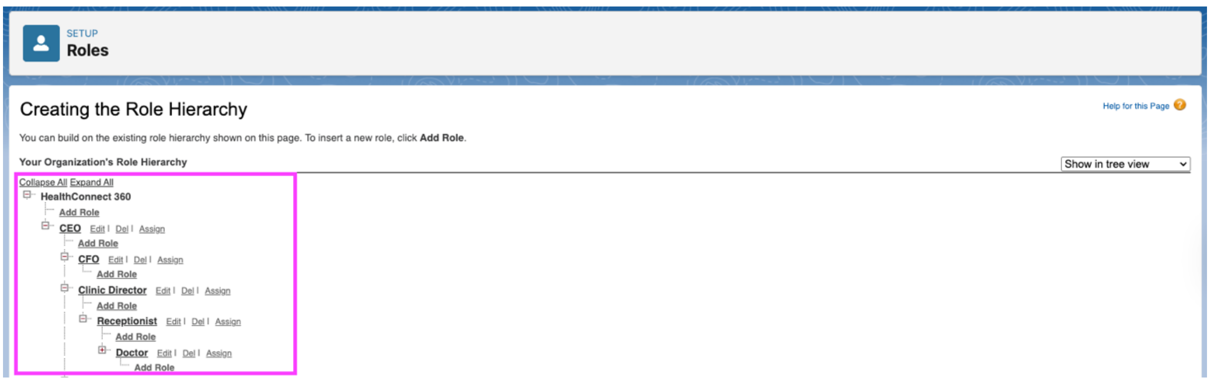
Used **Standard User profile** for Reception Staff and Dr. Smith (full access to create/edit patient records). **Standard Platform User profile** for Test Patient (read-only access only). This ensures doctors can update medical notes while patients can't change their information.

Roles

Created **3-level role hierarchy**:

1. **Clinic Director** (manages entire clinic)
2. **Receptionist** (under Director, manages patients)
3. **Doctor** (under Receptionist, sees their patients)

This structure lets the Director see all data, Receptionist manage all patients, and Doctor see only their assigned patients.

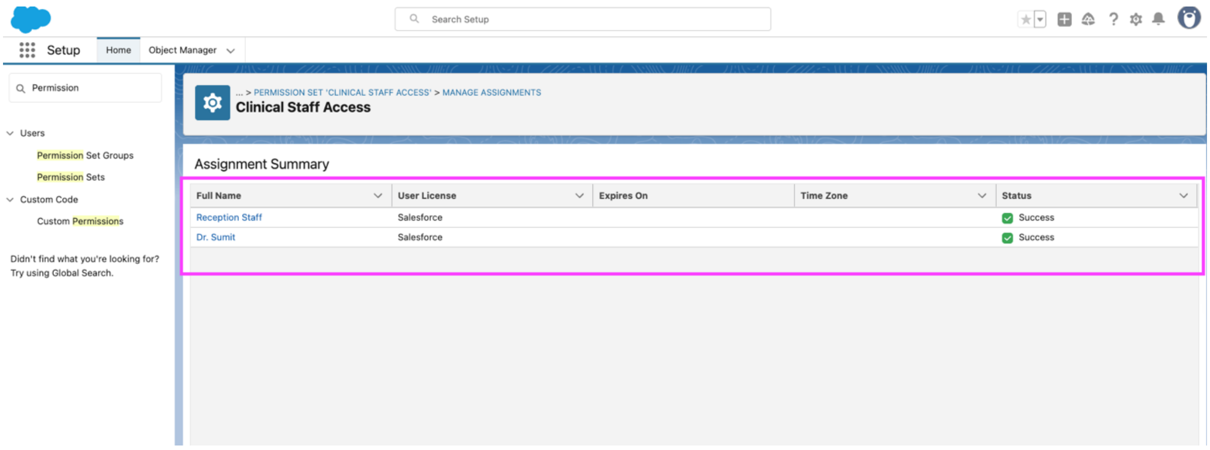


Permission Sets

Created **"Clinical Staff Access" permission set** assigned to Reception Staff and Dr. Smith. This gives them:

- **Accounts** (Patients): Create, Read, Edit, Delete, View All, Modify All
- **Contacts**: Create, Read, Edit, Delete

Patients don't get this permission set, so they can only view their own information.



Login Access Policies

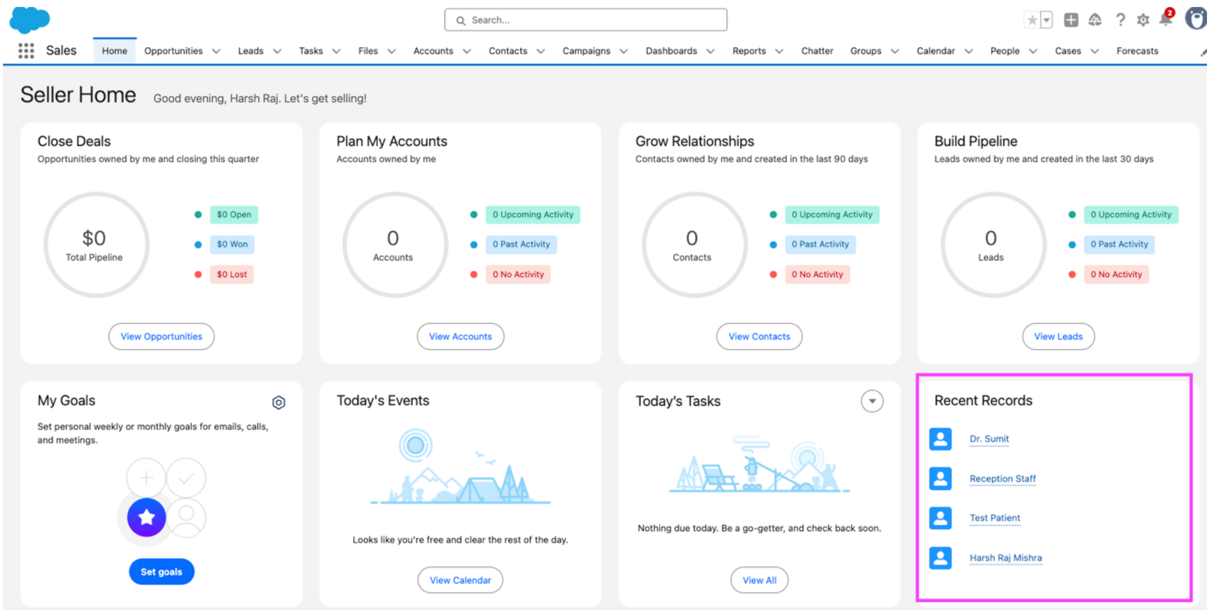
Default login policies used:

- **Password Policy**: 8 characters minimum, expires every 90 days
- **Session Settings**: Standard session timeout
- **Network Access**: Open (for demo purposes)

These can be tightened for production with IP restrictions and MFA.

Dev Org Setup

Developer Edition org is fully active with Organization ID starting with 00D. All features available for building custom objects and flows.



Deployment Basics

Used **point-and-click configuration** for rapid deployment. All changes made directly in the Developer Edition. For production, we would use **Change Sets** to move configurations from sandbox to production org.

Business Alignment

This configuration supports our Phase 1 goals:

- **Receptionists** can create patient records and book appointments
- **Doctors** can view and update patient medical history
- **Patients** can see their own information but can't edit anything
- **Management** can see all clinic data for reporting

The role hierarchy makes data sharing automatic - when Receptionist creates a patient, the Doctor can see it immediately.