Phase 2: Org Setup & Configuration — Smart Veterinary Appointment & Health Record Management System

1. Salesforce Edition

* Choose: Salesforce Enterprise Edition + Experience Cloud (for the pet owner portal).
* Why: Supports custom objects, role hierarchy, Flows/Apex, and secure external access.

1. Company Profile Setup

* Company name: “Smart Veterinary Appointment & Health Record Management System” (or your clinic name).
* Set default time zone (e.g., IST), locale, and currency.
* Enable State/Country picklists for accurate addresses.
* Set a clinic support email for notifications.

1. Business Hours & Holidays

* Define clinic hours (e.g., Mon–Sat, 9:00 AM–6:00 PM).
* Add national/clinic holidays to prevent booking on closed days.
* Reference business hours in appointment scheduling and reminder logic.

1. Fiscal Year Settings

* Use Standard Fiscal Year (e.g., April–March, if needed for reporting).
* Align reports/dashboards (appointments, vet utilization, vaccination compliance) to the fiscal year.

1. User Setup & Licenses

* Internal roles/users: Veterinarians, Front Desk Staff, Clinic Manager/Owner, System Administrator.
* External users: Pet Owners (Experience Cloud portal).
* License mapping: Salesforce (Manager/Vet), Salesforce Platform (Staff), Experience Cloud Customer (Pet Owners).
* Security: Enforce MFA for internal users; set email deliverability to “All”.