PHASE-2

Salesforce Edition: Used **Developer Edition** as a **development environment,** as it is free to use and practice, if the product would have been in the real world, it would need **Enterprise Edition.**

Company Profile Setup:

Company Information configured with:
- Company Name: Enclave
- Default Locale: English(India)
- Default Time Zone: (GMT +05:30) India Standard Time (Asia/Kokalta)
- Currency Locale: USD (As I have learned that Salesforce only changes the Symbol, it does not do currency rate conversion)

Business Hours & Holidays

Business Hours: Monday - Saturday (8:00 AM - 8:00 PM)
                                Sunday - (8:00 AM - 4:00 PM)
Holidays: National Holidays and any Hospital-specific holidays
Used for **escalations, Service Level Agreement(SLA), and appointment reminders.**

Fiscal Year Settings

Standard Fiscal Year (April – March, aligned with Indian financial year).
Enables reporting on yearly patient engagement and revenue trends.

User Setup & Licenses

User	Licenses	Profiles
Tony Stark	Standard Salesforce User	Front desk staff
Sarah Roger	Salesforce Platform	Care Coordinator Profile
Kevin Joshep	Salesforce Platform	Support Team

Cassie Thompson	**Salesforce**	System Administrator
Henry William	**Salesforce**	Hospital Manager

Roles: Role Hierarchy created as:

- **Hospital Director** (top)
  - **Admin / Managers**
    - **Front Desk Staff**
    - **Care Coordinators / Support**

Ensures **data rolls up** to management for visibility.

OWD

Patient (Contact) → **Private**

Appointment → **Private**

Treatment → **Controlled by Parent (Appointment)**

Feedback → **Controlled by Parent (Appointment)**

Doctor → **Public Read Only**

Clinic (Account) → **Public Read/Write**

Object Access Matrix

User/Objects	Clinic (Account)	Patient (Contact)	Doctor	Appointment	Treatment	Feedback
Cassie Thompson(Sys Admin , Hos Director)	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E
Tony Stark (Front Desk Staff)	Read Only	R/W/E(no delete)	Read Only	R/W/E(no delete)	No access	Read Only
Sarah Roger (Care Team)	Read only	R/W/E(no delete)	Read Only	R/W/E(no delete)	R/W/E(no delete)	Read Only
Kevin Joshep (Support)	Read Only	Read Only	Read Only	Read Only	Read Only	R/W
Henry William	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E

(hospital manager)						

Login Access Policies:

Configured to allow **Admins to log in as users** for troubleshooting.

ROLE HIERARCHY Screenshot

Project Screenshots:

User
Cassie Thompson

User ProfileHelp for this Page

Permission Set Assignments [0] | 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 [1] |
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]

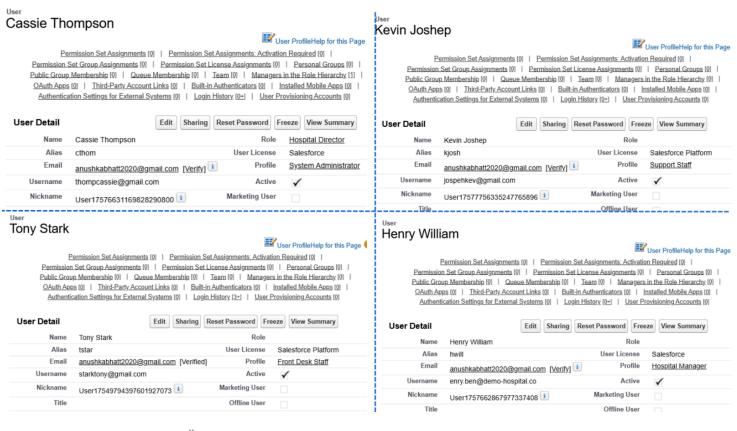|			
Name	Cassie Thompson	Role	Hospital Director
Alias	cthom	User License	Salesforce
Email	anushkabhatt2020@gmail.com [Verify] i	Profile	System Administrator
Username	thompcassie@gmail.com	Active	✓
Nickname	User17576631169828290800 i	Marketing User	☐

User
Kevin Joshep

User ProfileHelp for this Page

Permission Set Assignments [0] | 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	Kevin Joshep	Role	
Alias	kjosh	User License	Salesforce Platform
Email	anushkabhatt2020@gmail.com [Verify] i	Profile	Support Staff
Username	jospehkev@gmail.com	Active	✓
Nickname	User17577756335247765896 i	Marketing User	☐
Title		Offline User	

User
Tony Stark

User ProfileHelp for this Page

Permission Set Assignments [0] | 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 [3+] | User Provisioning Accounts [0]

User Detail

[Edit] [Sharing] [Reset Password] [Freeze] [View Summary]

Name	Tony Stark	Role	
Alias	tstar	User License	Salesforce Platform
Email	anushkabhatt2020@gmail.com [Verified]	Profile	Front Desk Staff
Username	starktony@gmail.com	Active	✓
Nickname	User17549794397601927073 i	Marketing User	☐
Title		Offline User	☐

User
Henry William

User ProfileHelp for this Page

Permission Set Assignments [0] | 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	Henry William	Role	
Alias	hwill	User License	Salesforce
Email	anushkabhatt2020@gmail.com [Verify] i	Profile	Hospital Manager
Username	enry.ben@demo-hospital.co	Active	✓
Nickname	User1757662867977337408 i	Marketing User	☐
Title		Offline User	☐

User
Sarah Roger

User ProfileHelp for this Page

Permission Set Assignments [0] | 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	Sarah Roger	Role	
Alias	sroge	User License	Salesforce Platform
Email	anushkabhatt2020@gmail.com [Verify] i	Profile	Care Team
Username	rogesara@gmail.com	Active	✓
Nickname	User17577753375304642708 i	Marketing User	☐
Title		Offline User	☐