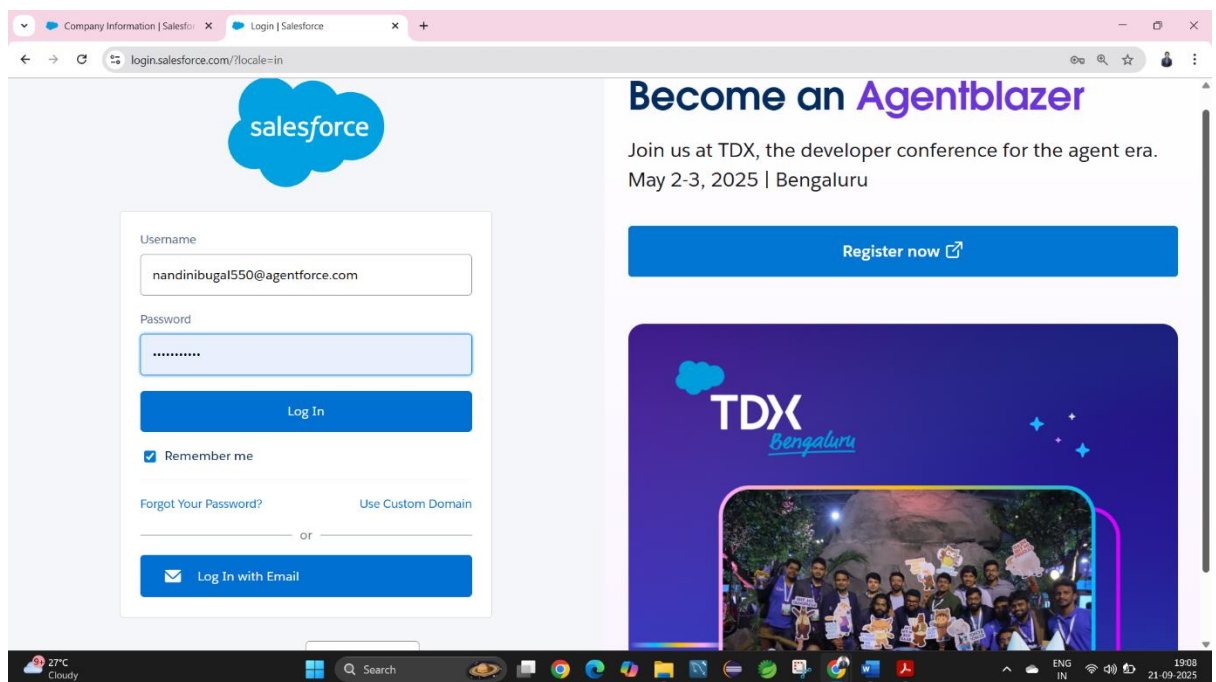


MediAid HealthCare (Medicine Reminder) 🎧

Phase 2: Org Setup & Configuration

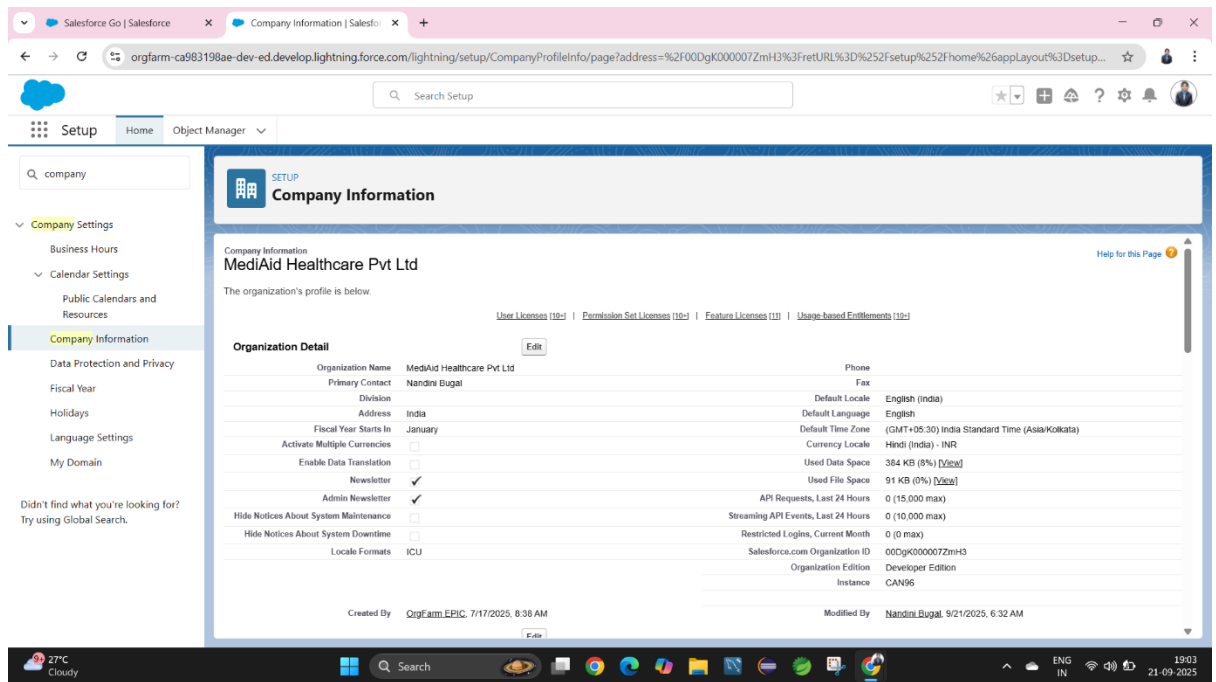
1. Salesforce Editions

- Use **Developer Edition (Free)** for implementation.
- **Enterprise Edition** for real-time projects (advanced security, APIs, integrations).
- For MediAid: **Developer Org** is enough since you'll build, test, and demo.



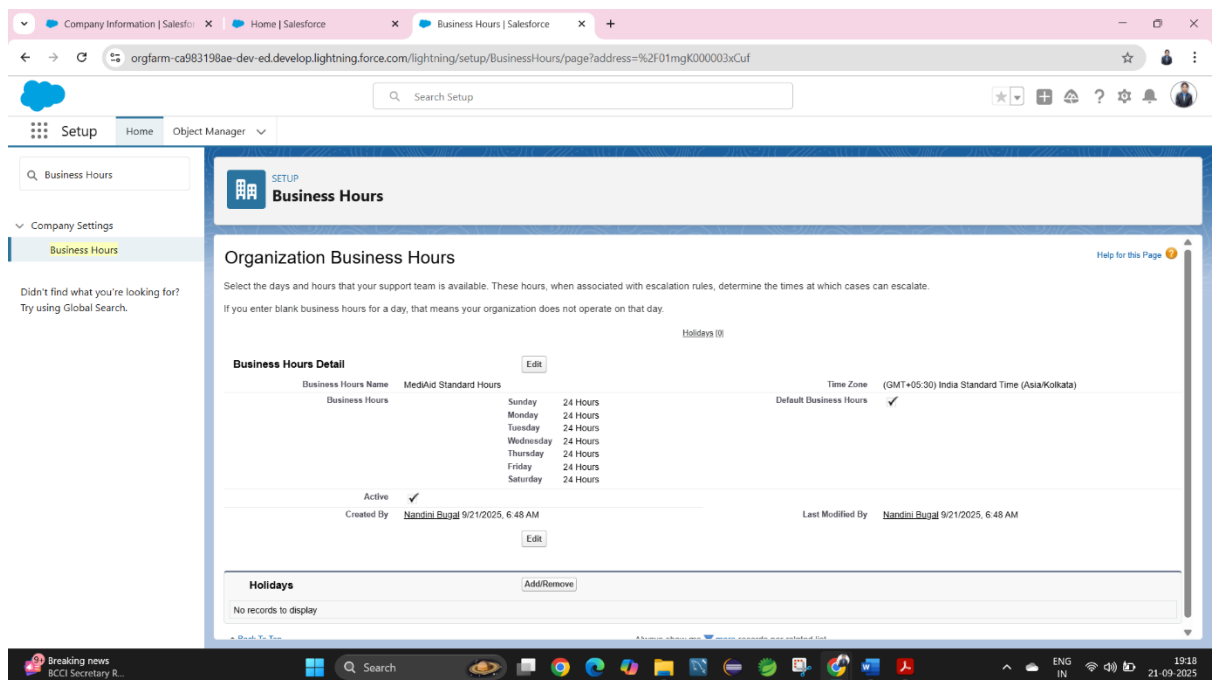
2. Company Profile Setup

- Company Name: **MediAid Healthcare Pvt Ltd**
- Default Locale: **English (India)**
- Time Zone: **Asia/Kolkata**
- Currency: **INR**



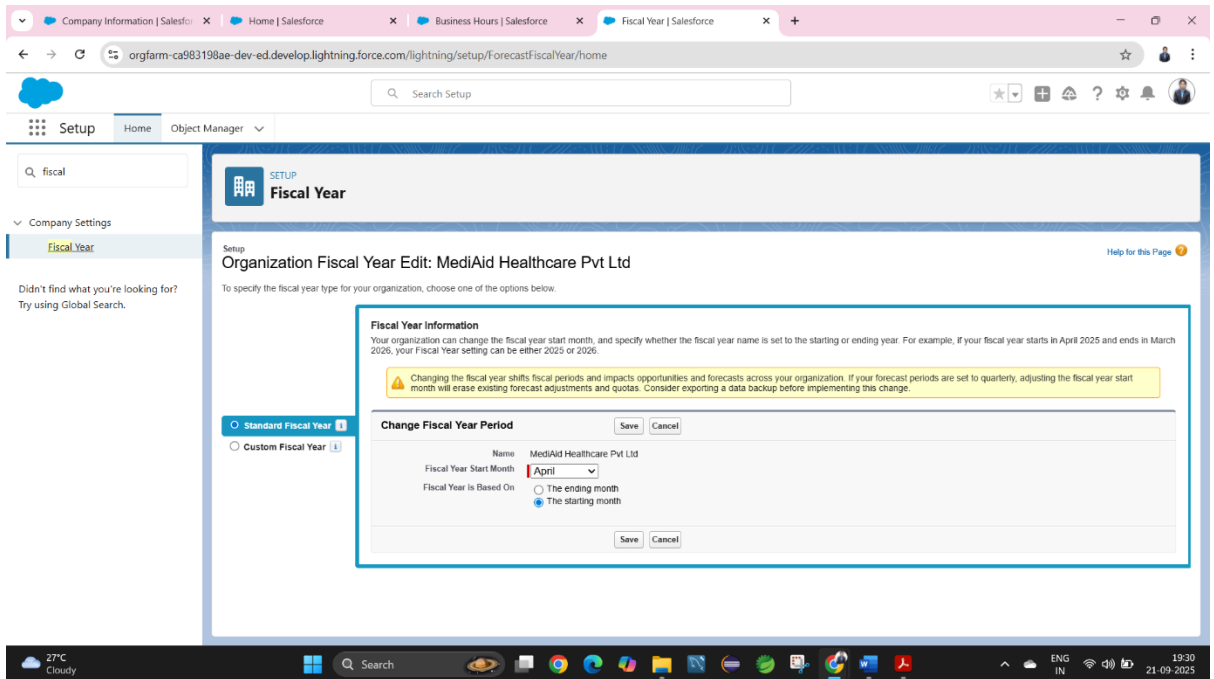
3. Business Hours & Holidays

- **Business Hours:** 9:00 AM – 9:00 PM (All days).
- **Holidays:** Diwali, Christmas, New Year.
- Useful for **scheduling reminder notifications** and **support cases**.



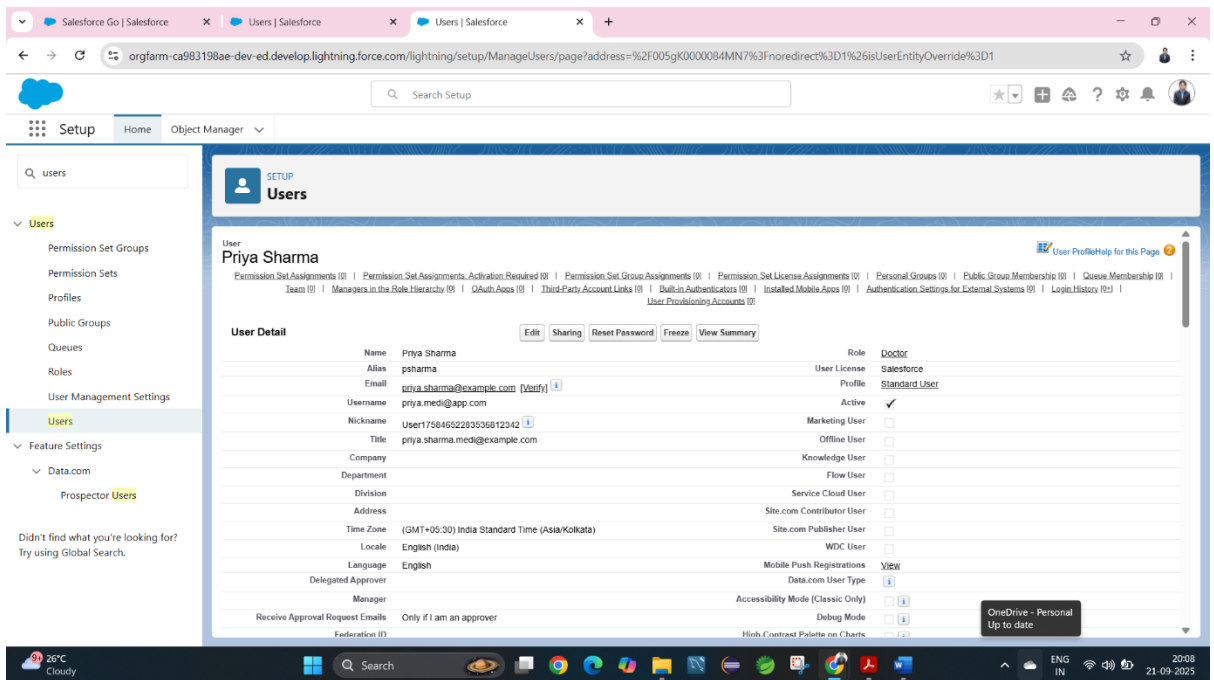
4. Fiscal Year Settings

- Extended Fiscal Year: **Apr–Mar** (India standard).
- Helps analyze **medicine reminder usage reports** quarterly/annually.



5. User Setup & Licenses

- **Doctor** – Standard User license.



- **Patient** – Custom Community User.

Setup Users

User: **Rahul Verma**

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	Rahul Verma	Role	Patent
Alias	rverma	User License	Salesforce
Email	rahul.verma@example.com (Verify)	Profile	Standard User
Username	rahul.verma.medi@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User1756466229971572063	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	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation (0)		High Contrast Palette on Charts	<input type="checkbox"/>

- **Pharmacist – Standard User license.**

Setup Users

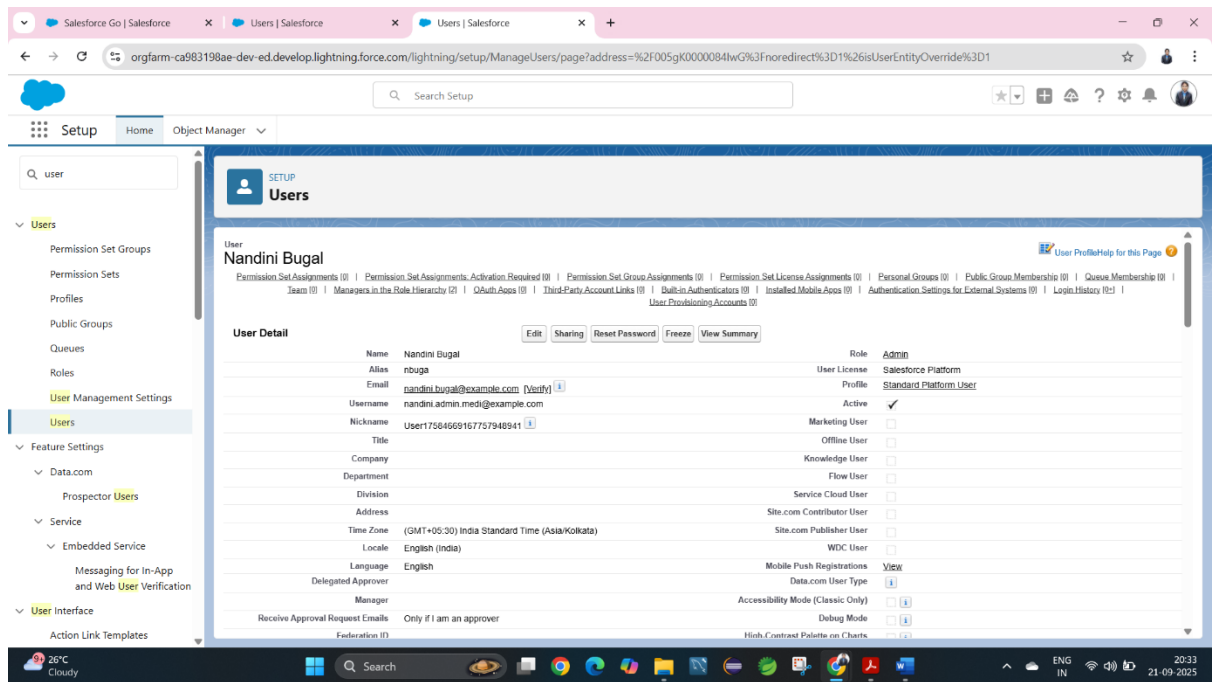
User: **Ankit Mehta**

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]

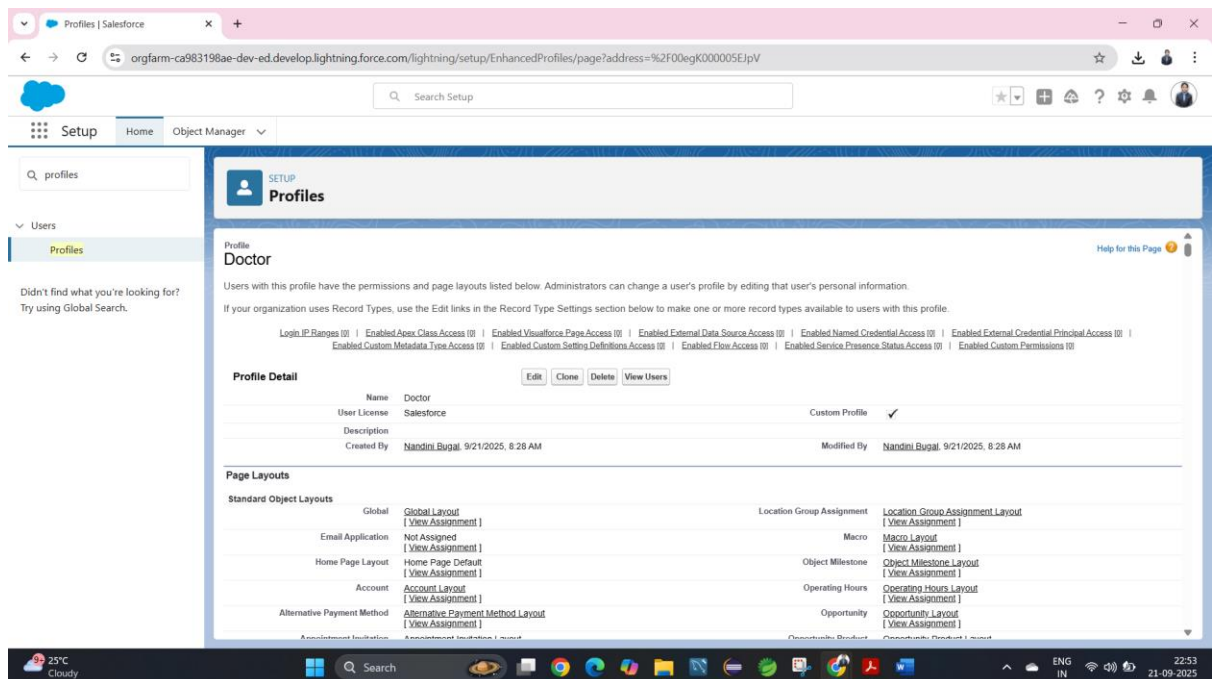
Name	Ankit Mehta	Role	Pharmacist
Alias	amehta	User License	Force.com - Free
Email	ankit.mehta@example.com (Verify)	Profile	Force.com - Free User
Username	ankit.mehta.medi@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User17564667330766492790	Marketing User	<input type="checkbox"/>
Title		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	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation (0)		High Contrast Palette on Charts	<input type="checkbox"/>

- **Admin – System Administrator.**



6. Profiles

- **Doctor Profile** → Access patient records, prescriptions.



- **Patient Profile** → Limited to own reminders, history.

The screenshot shows the Salesforce Setup interface for the 'Patient Community Profile'. The left sidebar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'Profiles' and shows the 'Patient Community Profile' details. The profile is a 'Custom Profile' created by Nandini Bugal on 9/21/2025 at 8:20 AM. The 'Page Layouts' section lists various layouts assigned to the profile, including Global Layout, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The bottom of the screen shows a Windows taskbar with the date 21-09-2025 and time 22:54.

Admin Profile → Full access.

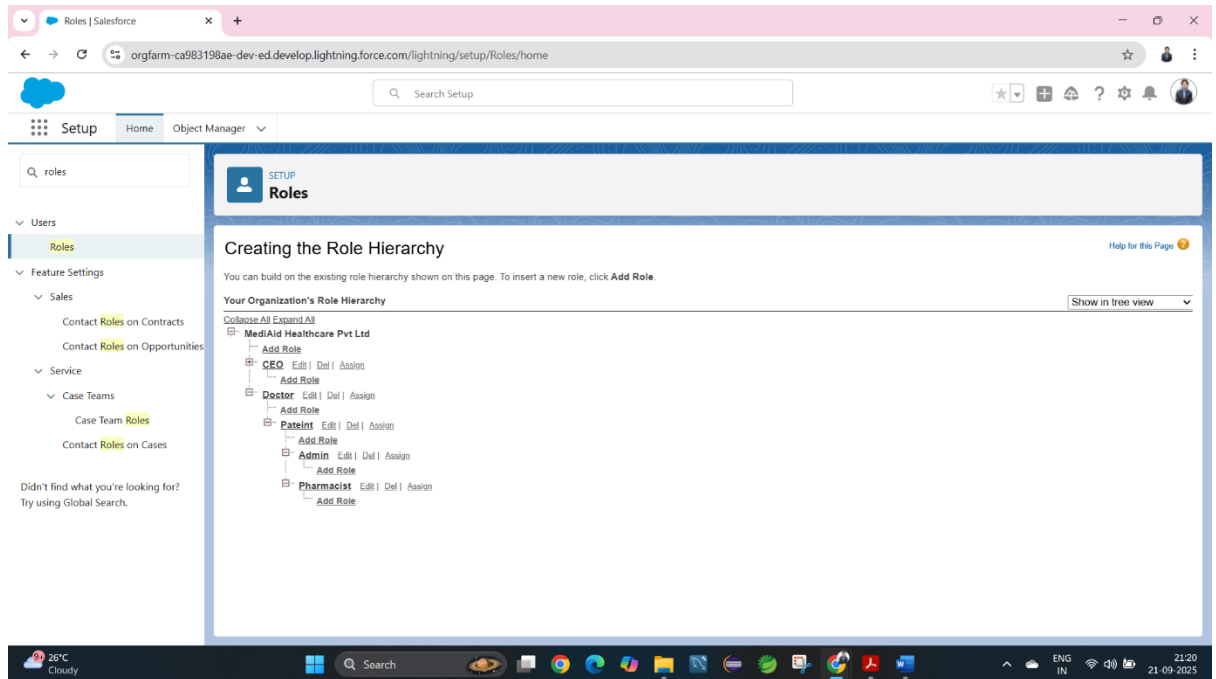
The screenshot shows the Salesforce Setup interface for the 'Admin' profile. The left sidebar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'Profiles' and shows the 'Admin' profile details. The profile is a 'Custom Profile' created by Nandini Bugal on 9/21/2025 at 10:25 AM. The 'Page Layouts' section lists various layouts assigned to the profile, including Standard Object Layouts, Location Group Assignment, Macro, Object Milestone, Operating Hours, Opportunity, and Opportunity Product. The bottom of the screen shows a Windows taskbar with the date 21-09-2025 and time 22:56.

7. Roles

- Role Hierarchy:
 - Admin
 - Doctor
 - Pharmacist

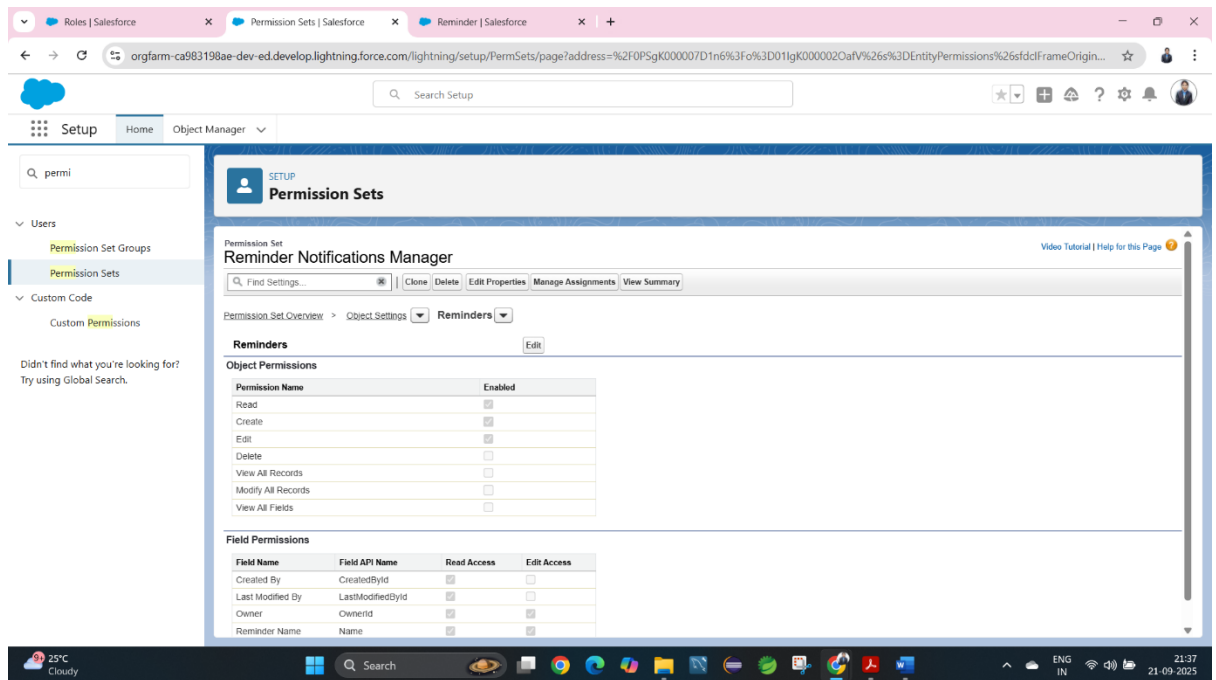
- Patient

- Enables **record visibility** (e.g., doctor can see patient reminders).

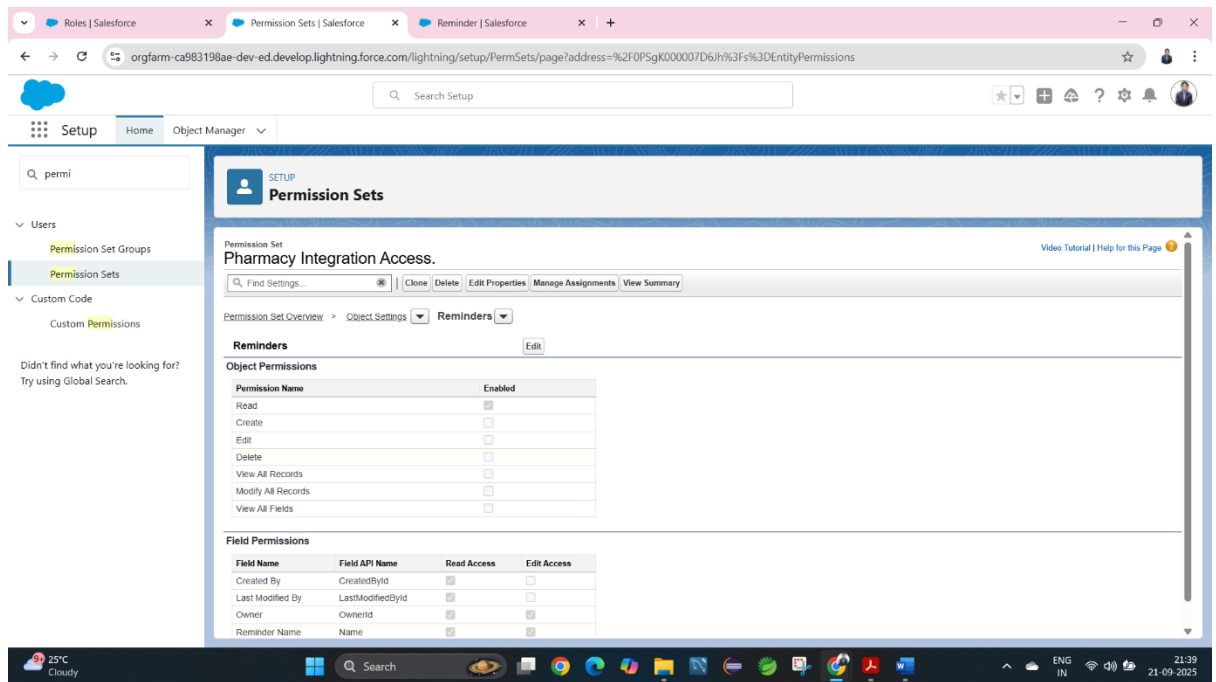


8. Permission Sets

- **Reminder Notifications Manager** → Allows creating/editing reminders.

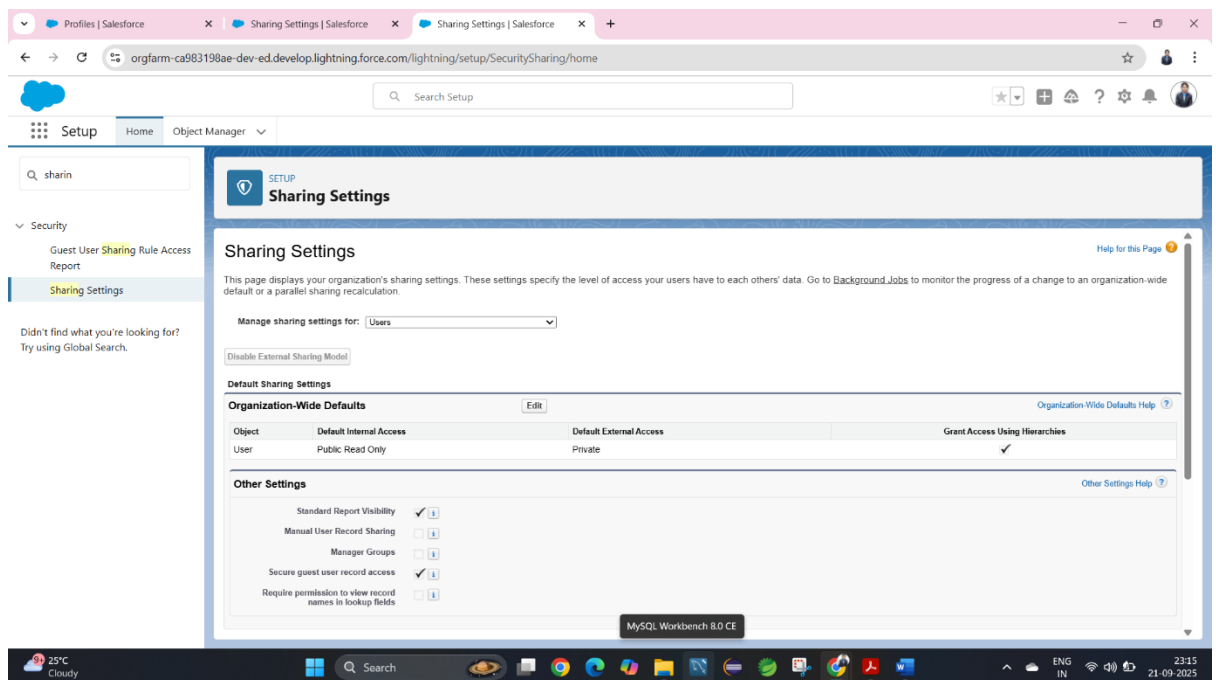


- **Pharmacy Integration Access** → Allows connecting with external APIs.



9. OWD (Organization-Wide Defaults)

- **Patient Data** → Private.
- **Prescription Records** → Controlled by Parent (Patient).
- **Reminder Logs** → Private.



10. Sharing Rules

- Doctors can view patient reminders assigned to them.

The screenshot shows the Salesforce Setup interface for creating a new sharing rule. The left sidebar shows the navigation menu with 'Sharing Settings' selected under the 'Security' section. The main content area is titled 'Reminder Sharing Rule' and includes a description: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users. Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.'

The rule configuration steps are as follows:

- Step 1: Rule Name**
 - Label: Doctors_View_Reminders
 - Rule Name: Doctors_View_Reminders
 - Description: (empty)
- Step 2: Select your rule type**
 - Rule Type: Based on record owner (selected)
- Step 3: Select which records to be shared**
 - Reminder: owned by members of Public Groups
- Step 4: Select the users to share with**
 - Share with: Roles
 - Doctor
- Step 5: Select the level of access for the users**
 - (empty)

- Pharmacists can see prescriptions created by doctors.

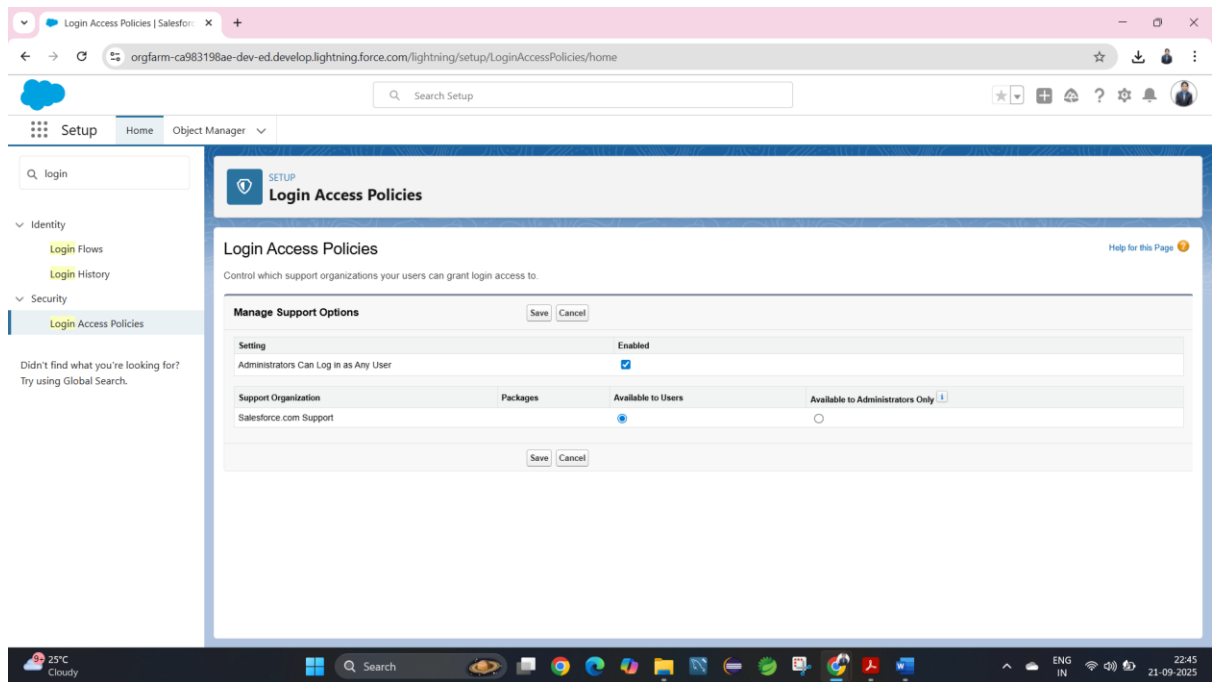
The screenshot shows the Salesforce Setup interface for creating a new sharing rule. The left sidebar shows the navigation menu with 'Sharing Settings' selected under the 'Security' section. The main content area is titled 'Reminder Sharing Rule' and includes a description: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users. Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.'

The rule configuration steps are as follows:

- Step 1: Rule Name**
 - Label: Pharmacists_View_Prescrip
 - Rule Name: Pharmacists_View_Prescrip
 - Description: Allows pharmacists to view all prescriptions created by doctors
- Step 2: Select your rule type**
 - Rule Type: Based on record owner (selected)
- Step 3: Select which records to be shared**
 - Reminder: owned by members of Roles
 - Doctor
- Step 4: Select the users to share with**
 - Share with: Roles
 - Pharmacist
- Step 5: Select the level of access for the users**
 - (empty)

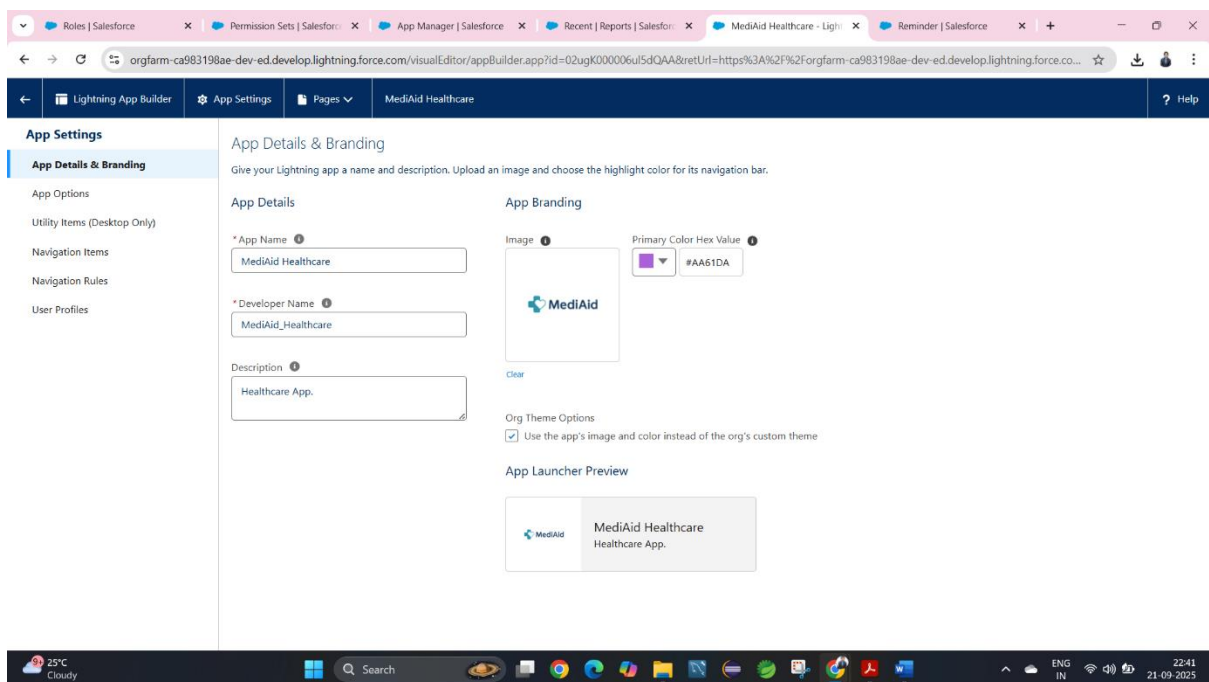
11. Login Access Policies

- Enable “Administrators Can Log in as Any User” for troubleshooting.



12. Dev Org Setup

- Installed Personal **MediAid HealthCare App** (custom app with Health Log tab).
- Configured Page Layouts, Compact Layouts, and Record Types.
- Added custom branding (app logo + color).



13. Sandbox Usage

- **Developer Sandbox** → for testing new features.
-

14. Deployment Basics

- Use **Change Sets** (Sandbox → Production) in real projects.
- For Dev Org project: use **SFDX CLI or GitHub** for version control.