📄 MediConnect — Phase 2: Org Setup & Configuration

Author: Neha Doddi
Org Alias: MediConnectOrg
Date: 2025-09-23

Table of contents

1. Company Information

2. Business Hours & Holidays

3. Fiscal Year Settings

4. User Setup & Licenses

5. Profiles & Roles

6. Permission Sets

7. Organization-Wide Defaults (OWD)

8. Sharing Rules

9. Login Access Policies

10. Dev Hub / DX Setup

11. Sandbox & Deployment Basics

12. Testing & Verification (Test workflow)

Conventions used in this doc

- Screenshots are stored in `phase2/screenshots/` and named with a two-digit prefix to preserve order (e.g. `01_company_info.png`).

- All commands are run from the project root in VS Code.

- Alt text is provided for each screenshot.

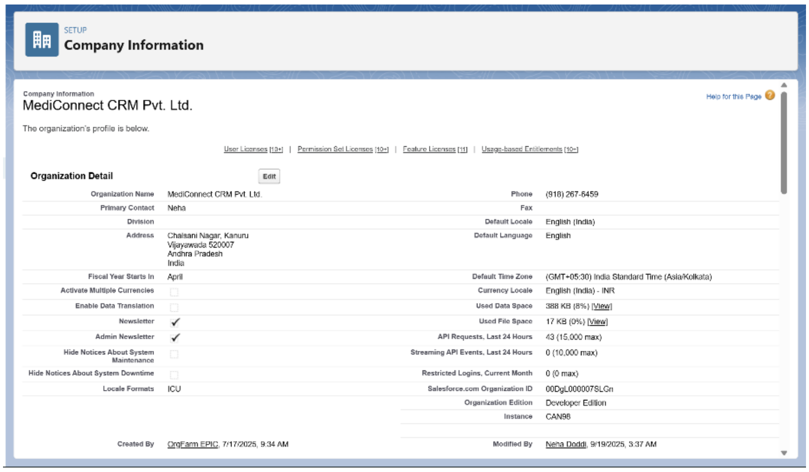
1. Company Information

Goal: Configure company-level details like name, timezone, currency.
Steps:

1. Navigate: Setup → Quick Find → Company Information → Edit.
2. Update:
    - Organization Name: *MediConnect CRM Pvt. Ltd.*
    - Phone & Address: *Sample values*
    - Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

- Currency: INR (₹)

3. Save.



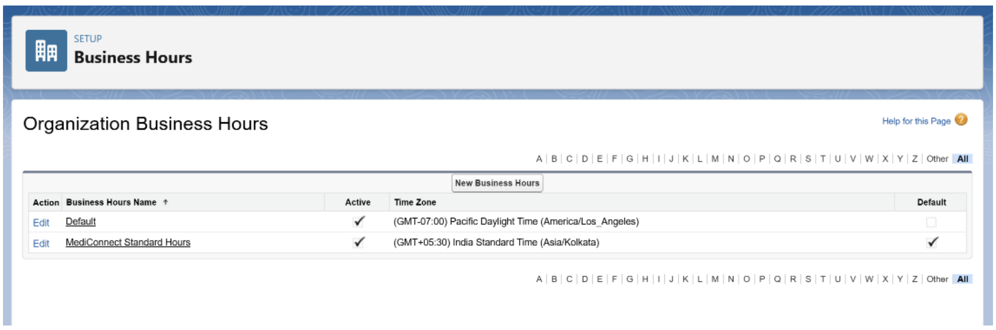
Note:

- Do not enable Multiple Currencies unless required.

2. Business Hours & Holidays

Goal: Define standard working hours for SLAs.
Steps:

1. Setup → Business Hours → New.
2. Name: MediConnect Standard Hours → Time Zone: Asia/Kolkata.
3. Define: Mon–Sat: 09:00 AM to 06:00 PM → Sunday Closed.
4. Add holidays from Setup → Holidays.

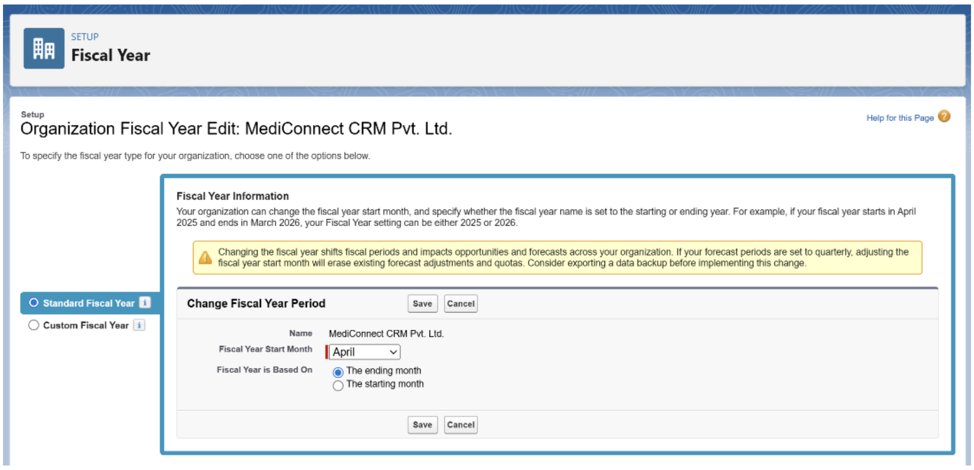


3. Fiscal Year Settings

Goal: Align fiscal year to Indian standard (April–March).
Steps:

1. Setup → Fiscal Year.

2. Select **Standard Fiscal Year**.
3. Start Month = April → Fiscal Year Based on = Ending Month.
4. Save.

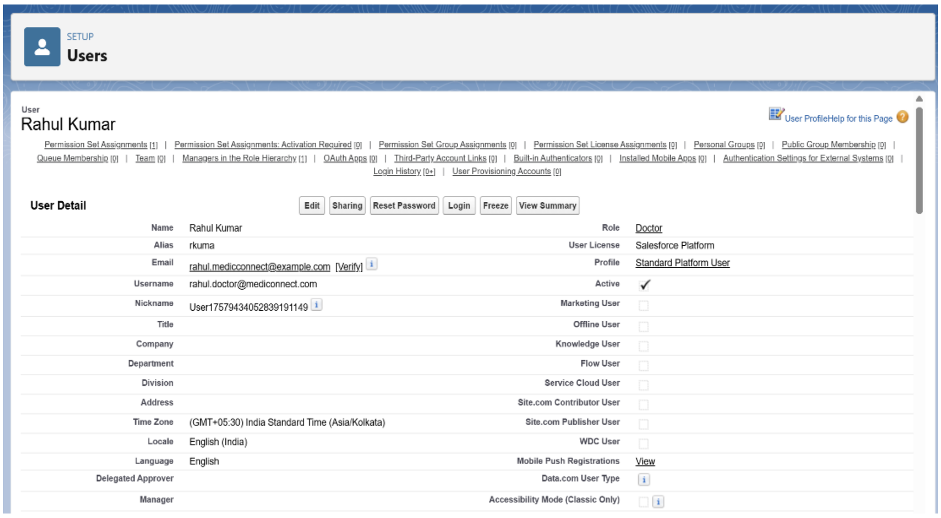


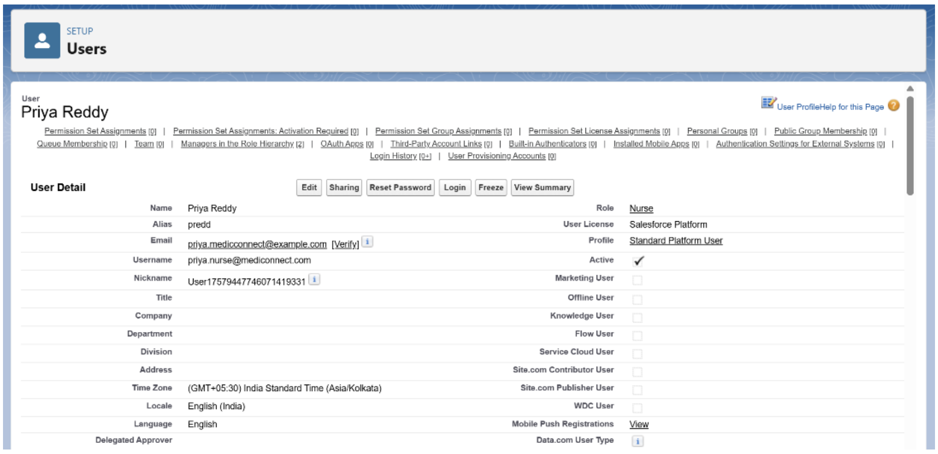
4. User Setup

Goal: Create admin, doctor, nurse, coordinator users and confirm license availability.

Steps:

1. Setup → Users → New User.
2. Created users:
   - `Neha Doddi` —Role: Hospital Admin
     - Profile: System Administrator
     - License: Salesforce
   - ‘Rahul Kumar` — Role: Doctor
     - Profile: Doctor Profile (clone Std User)
     - License: Salesforce Platform (if Salesforce not available)
   - `Priya Reddy` — Role: Nurse
     - Profile: Nurse Profile
     - License: Salesforce Platform
   - `John Paul` — Role: Coordinator
     - Profile: Coordinator Profile
     - License: Salesforce Platform
   - Assign each to proper Role & Profile.

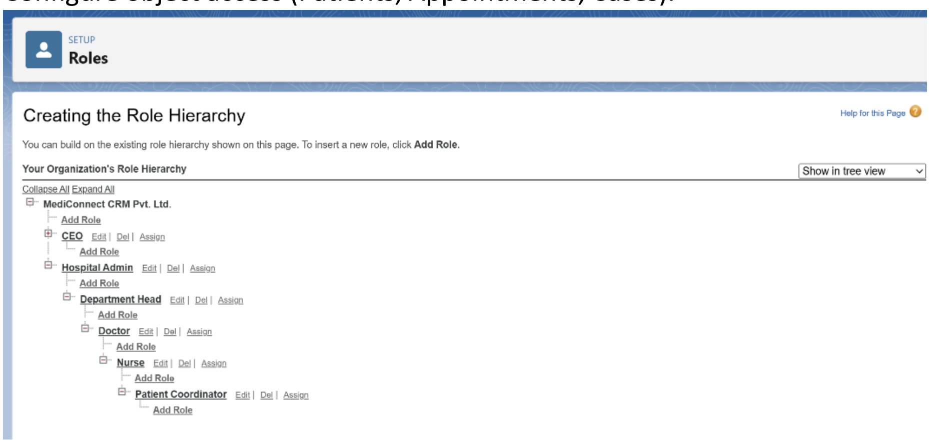




5. Profiles & Roles

Goal: Restrict access by job function.
Steps:

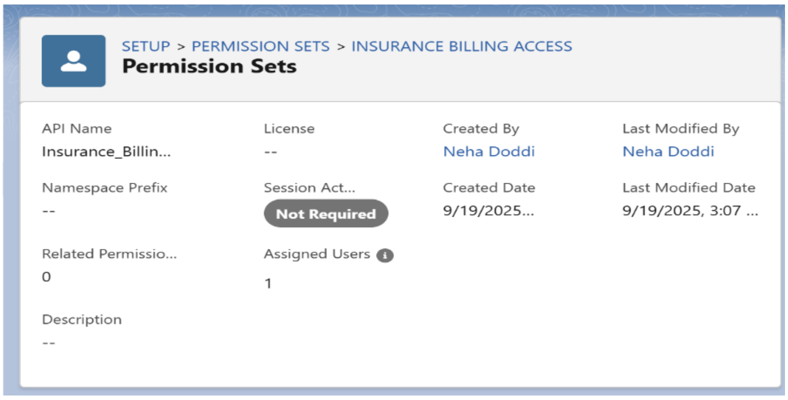
1. Setup → Roles → create hierarchy: Admin → Dept Head → Doctor → Nurse → Coordinator.
2. Clone Standard User Profile → create Doctor Profile, Nurse Profile, Coordinator Profile.
3. Configure object access (Patients, Appointments, Cases).

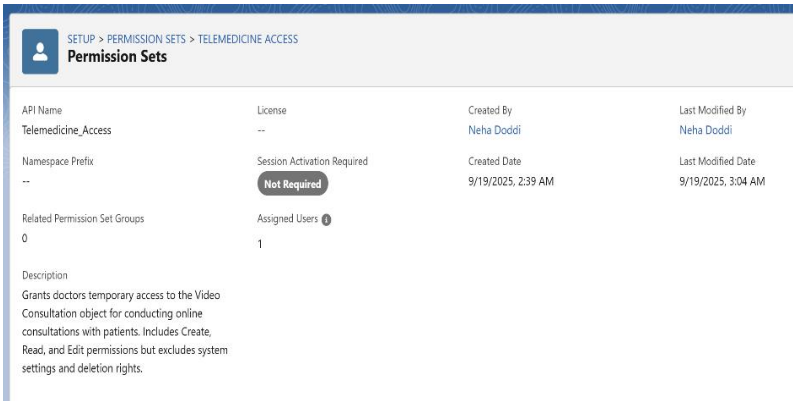


6. Permission Sets

Goal: Provide temporary/extra access.
Steps:

1. Setup → Permission Sets → New.
2. Telemedicine Access → Give **Video Consultation** object Read/Create/Edit.
3. Insurance Billing Access → Give **Billing** object Read/Create/Edit.
4. Assign to Doctor/Coordinator users when needed.



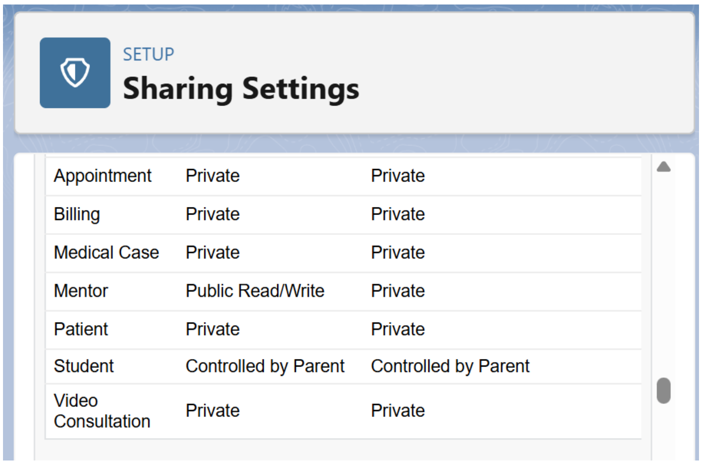


7. Organization-Wide Defaults (OWD)

Goal: Baseline data access for privacy.
Steps:

1. Setup → Sharing Settings → Edit.
2. Set:
   - Patient = Private
   - Appointment = Controlled by Parent or Private (Patient)
   - Medical Case = Private
   - Video Consultation = Private
   - Billing = Private

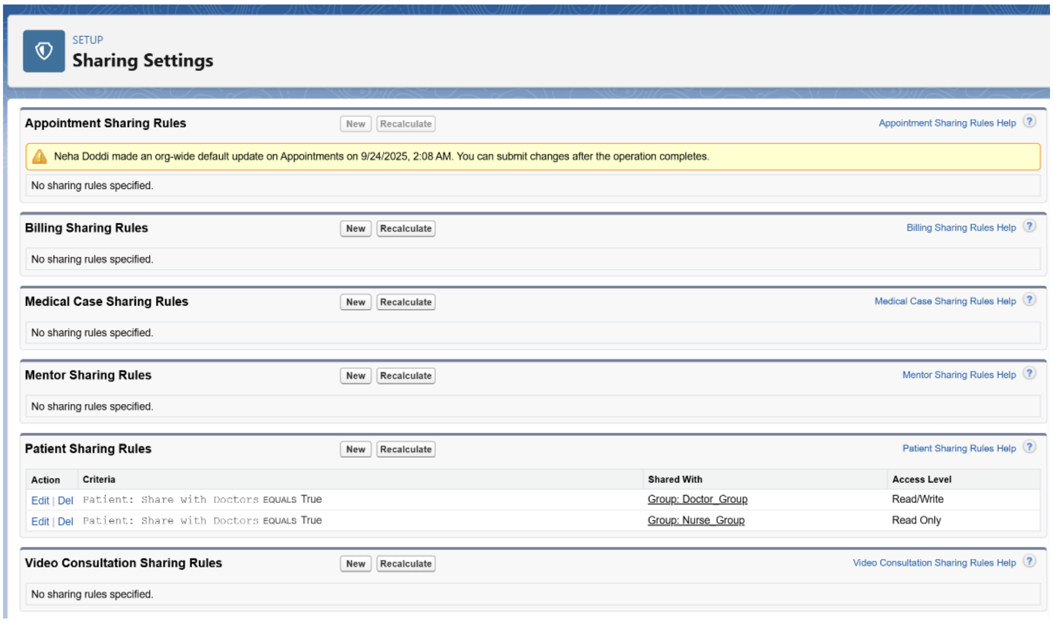
3. Save.



8. Sharing Rules

Goal: Give wider access to groups.
Steps:

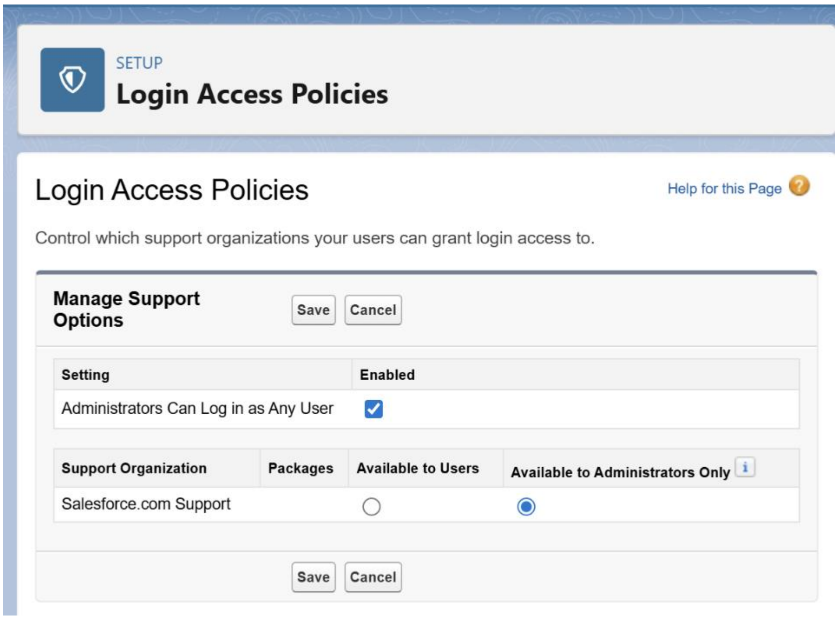
1. Setup → Public Groups → Create: Doctor Group, Nurse Group.
2. Setup → Sharing Rules → Patient object.
3. Rule 1: Share with Doctor Group = Read/Write.
4. Rule 2: Share with Nurse Group = Read Only.



9. Login Access Policies

Goal: Allow admins to log in as other users.
Steps:

1. Setup → Login Access Policies.
2. Enable: **Administrators can log in as any user**.



10. Dev Hub / DX Setup

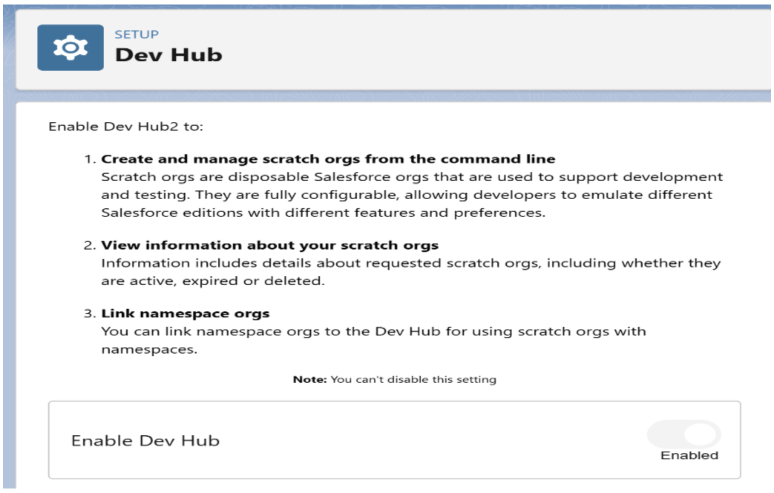
Goal: Enable Dev Hub for scratch orgs and SFDX workflows

Steps:

1. Setup → Dev Hub → Enable Dev Hub.
2. VS Code:
3. Bash:

   sf org login web --alias MediConnectOrg

   sf org open



11. Deployment Basics

Goal: Document deployment steps.
Steps:

1. Use sf project retrieve start to pull metadata.
2. Use sf project deploy start to push metadata.
3. Keep package.xml for tracking.

12. Testing & Verification

Goal: Verify workflow.
Steps:

1. Create a Patient record.
2. Create Appointment → link to Patient & Doctor.
3. Create Medical Case → link to Patient & Doctor.
4. Create Video Consultation → link to Patient & Doctor.
5. Create Billing → link to Patient & Coordinator.