

MediConnect — Phase 2: Org Setup & Configuration

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Date: 2025-09-23

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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.

Company Information

MediConnect CRM Pvt. Ltd.

The organization's profile is below.

[View Licenses \(10\)](#) | [Permissions Set Licenses \(10\)](#) | [Feature Licenses \(1\)](#) | [User-based Profiles \(10\)](#)

Organization Detail [Edit](#)

Organization Name	MediConnect CRM Pvt. Ltd.	Phone	(918) 267-5459
Primary Contact	Neha	Fax	
Division		Default Locale	English (India)
Address	Chakraborty Nagar, Kanuru Vijayawada 520007 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	388 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	43 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00000000000000000000000000000000
		Organization Edition	Developer Edition
		Instance	CAN66

Created By: [Chaitanya EPIC](#) 7/17/2025, 9:34 AM

Modified By: [Neha Dodd](#) 9/19/2025, 3:37 AM

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.

Business Hours

Organization Business Hours

[Help for this Page](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	MediConnect Standard Hours	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

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.

SETUP
Fiscal Year

Setup
Organization Fiscal Year Edit: MediConnect CRM Pvt. Ltd. [Help for this Page](#)

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year [?](#)
☐ Custom Fiscal Year [?](#)

Change Fiscal Year Period [Save](#) [Cancel](#)

Name: MediConnect CRM Pvt. Ltd.

Fiscal Year Start Month: April

Fiscal Year is Based On:
☒ The ending month
☐ The starting month

[Save](#) [Cancel](#)

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.

SETUP

Users

User

Rahul Kumar

[Permission Set Assignments \(1\)](#) | [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 Area \(0\)](#) | [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

Login

Freeze

View Summary

Name	Rahul Kumar	Role	Doctor
Alias	rkuma	User License	Salesforce Platform
Email	rahul.mediconnect@example.com Verify	Profile	Standard Platform User
Username	rahul.doctor@mediconnect.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579434052839191149 i	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	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

SETUP

Users

User

Priya Reddy

[Permission Set Assignments \(1\)](#) | [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 Area \(0\)](#) | [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

Login

Freeze

View Summary

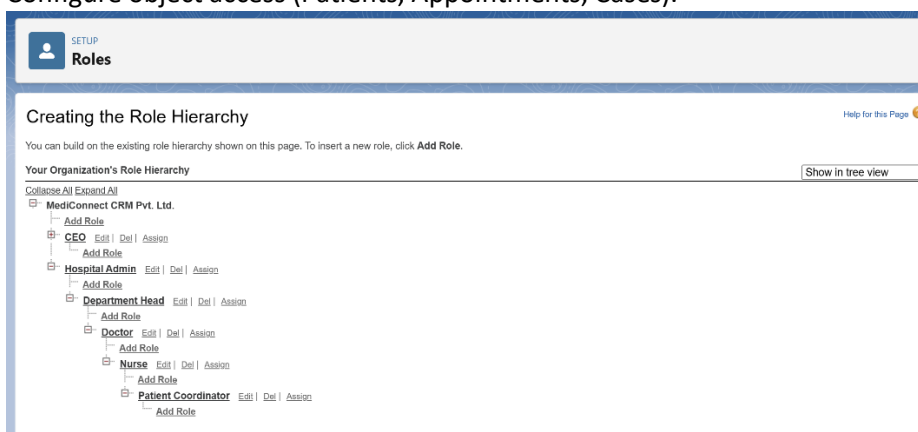
Name	Priya Reddy	Role	Nurse
Alias	predd	User License	Salesforce Platform
Email	priya.mediconnect@example.com Verify	Profile	Standard Platform User
Username	priya.nurse@mediconnect.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579447746071419331 i	Marketing User	<input type="checkbox"/>
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	i

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.

SETUP > PERMISSION SETS > INSURANCE BILLING ACCESS

Permission Sets

API Name	License	Created By	Last Modified By
Insurance_Billin...	--	Neha Doddi	Neha Doddi
Namespace Prefix	Session Act...	Created Date	Last Modified Date
--	Not Required	9/19/2025...	9/19/2025, 3:07 ...
Related Permissio...	Assigned Users		
0	1		
Description			
--			

SETUP > PERMISSION SETS > TELEMEDICINE ACCESS

Permission Sets

API Name	License	Created By	Last Modified By
Telemedicine_Access	--	Neha Doddi	Neha Doddi
Namespace Prefix	Session Activation Required	Created Date	Last Modified Date
--	Not Required	9/19/2025, 2:39 AM	9/19/2025, 3:04 AM
Related Permission Set Groups	Assigned Users		
0	1		
Description			
Grants doctors temporary access to the Video Consultation object for conducting online consultations with patients. Includes Create, Read, and Edit permissions but excludes system settings and deletion rights.			

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.


SETUP Sharing Settings		
Appointment	Private	Private
Billing	Private	Private
Medical Case	Private	Private
Mentor	Public Read/Write	Private
Patient	Private	Private
Student	Controlled by Parent	Controlled by Parent
Video Consultation	Private	Private

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.

SETUP Sharing Settings		
Appointment Sharing Rules New Recalculate Appointment Sharing Rules Help		
<div> Neha Doddi made an org-wide default update on Appointments on 9/24/2025, 2:08 AM. You can submit changes after the operation completes.</div> <div>No sharing rules specified.</div>		
Billing Sharing Rules New Recalculate Billing Sharing Rules Help		
<div>No sharing rules specified.</div>		
Medical Case Sharing Rules New Recalculate Medical Case Sharing Rules Help		
<div>No sharing rules specified.</div>		
Mentor Sharing Rules New Recalculate Mentor Sharing Rules Help		
<div>No sharing rules specified.</div>		
Patient Sharing Rules New Recalculate Patient Sharing Rules Help		
Action	Criteria	Shared With
Edit Del	Patient: Share with Doctors EQUALS True	Group: Doctor_Group
Edit Del	Patient: Share with Doctors EQUALS True	Group: Nurse_Group
		Access Level
		Read/Write
		Read Only
Video Consultation Sharing Rules New Recalculate Video Consultation Sharing Rules Help		
<div>No sharing rules specified.</div>		

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.**

SETUP
Login Access Policies

Help for this Page ?

Control which support organizations your users can grant login access to.

Manage Support Options Save Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input type="radio"/>	<input checked="" type="radio"/>

Save Cancel

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`

SETUP
Dev Hub

Enable Dev Hub2 to:

- 1. Create and manage scratch orgs from the command line**
Scratch orgs are disposable Salesforce orgs that are used to support development and testing. They are fully configurable, allowing developers to emulate different Salesforce editions with different features and preferences.
- 2. View information about your scratch orgs**
Information includes details about requested scratch orgs, including whether they are active, expired or deleted.
- 3. Link namespace orgs**
You can link namespace orgs to the Dev Hub for using scratch orgs with namespaces.

Note: You can't disable this setting

Enable Dev Hub Enabled

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.

The screenshot displays the 'Patient Ravi' interface in the TCS LM SF system. The top navigation bar includes links for Home, Accounts, Contacts, Students, Mentors, Reports, Dashboards, Appointments, Medical Cases, Patients, and More. The main content area is divided into two sections: 'Related' and 'Activity'.

Related Section:

- Appointments (1):** Shows a list of appointments with columns for Appointment Name and Appointment ID. A 'New' button is visible.
- Medical Cases (1):** Shows a list of medical cases with columns for Medical Case Name and Medical Case ID. A 'New' button is visible.
- Notes & Attachments (0):** Shows a list of notes and attachments with columns for Note Name and Note ID. A 'New' button is visible.

Activity Section:

- Upcoming & Overdue:** Shows a list of upcoming and overdue activities with columns for Activity Name and Activity ID. A 'New' button is visible.

Notes & Attachments (0):

- Shows a list of notes and attachments with columns for Note Name and Note ID. A 'New' button is visible.

Video Consultations (1):

- Shows a list of video consultations with columns for Video Consultation Name and Video Consultation ID. A 'New' button is visible.

Billings (1):

- Shows a list of billings with columns for Billing Name and Billing ID. A 'New' button is visible.