

Phase 2 Documentation — Org Setup & Configuration

Project: Healthcare Follow-up & Preventive Care CRM

Phase: 2 — Org Setup & Configuration

Objective: Configure Salesforce org basics, security, users, and prepare the environment for data modeling.

Steps Completed

1. Salesforce Edition & Dev Org Setup

- Used **Salesforce Developer Edition Org** for this project.
 - Enabled **My Domain** → deployed successfully
 - Verified login with new domain.
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2. Company Profile Setup

- **Company Name:** CareTrack Healthcare CRM
 - **Default Time Zone:** Asia/Kolkata (IST)
 - **Fiscal Year:** Standard (Jan–Dec)
 - **Business Hours:** 9 AM – 6 PM IST, Mon–Sat
 - **Holidays Configured:** Republic Day, Independence Day
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3. Roles (Role Hierarchy)

Created a role hierarchy to reflect healthcare organization structure:

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CEO
└─ Hospital Admin
   └─ Hospital Director
      └─ Doctor
         └─ Nurse
            └─ Receptionist
```

4. Profiles

Cloned/created profiles to control object and field-level access:

- **Hospital_Admin_Profile** → cloned from System Administrator
- **Doctor_Profile** → cloned from Standard User

- **Nurse_Profile**
 - **Receptionist_Profile**
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5. Permission Sets

Created permission sets for additional security flexibility:

- **PS_Patient_PII_Access** → grants access to sensitive patient fields (for Doctors only).
 - **PS_Bulk_Data_Importer** → API Enabled & Modify All Data (for Admin only).
 - **PS_Experience_User** → access for portal users (patients).
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6. Organization-Wide Defaults (OWD)

- **Patient__c**: Private
- **Appointment__c**: Controlled by Parent (Patient)
- **Treatment_Plan__c**: Controlled by Parent (Patient)
- **FollowUp_Schedule__c**: Controlled by Parent (Patient)

Reason: medical data must be private, opened up only via sharing rules.

7. Public Groups

Created groups for sharing rules and collaboration:

- **All_Doctors** → includes Role: Doctor
 - **All_Receptionists** → includes Role: Receptionist
 - **Care_Management_Team** → includes Hospital Admin + Department Heads
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8. Login Access & Security

- **Session Timeout**: 30 minutes idle
 - **Multi-Factor Authentication (MFA)**: Enabled for internal users
 - **Login Access Policies**: Admin can log in as any user (enabled for testing)
 - **Audit Trail & Login History**: Enabled for monitoring
 - **Login IP Ranges**: Skipped (Dev Org, dynamic IPs)
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9. Dev Org Setup Specifics

- **My Domain:** Enabled and deployed
 - **Experience Cloud:** Enabled → “Patient Portal” site created (left in Draft for Phase 6)
 - **API Access:** Confirmed `API Enabled` for System Administrator profile
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10. Users

Created sample users for testing:

- **Hospital Admin** → `hospital.admin@caretrack.dev` (System Admin profile)
- **Doctor Ravi** → `dr.ravi@caretrack.dev` (Doctor_Profile, Role = Doctor)
- **Nurse Anu** → Planned (skipped due to license limitation)
- **Receptionist Maya** → Planned (skipped due to license limitation)