

## MediConnectX Project – Phase 2: Org Setup & Configuration

### Project: MediConnectX – Healthcare Connectivity Platform

#### Phase 2

The goal of Phase 2 is to set up the foundational Salesforce environment for **MediConnectX**. This includes configuring company settings, creating users, defining roles and profiles, and establishing security policies.

#### Phase 2 Implementation Steps

##### Step 1: Login to Salesforce

1. Go to **Salesforce Developer** → **Login** → **Developer Edition**.
2. Enter your **username/password**.
3. Open **Lightning Home Page**.

##### Step 2: Open Setup

1. Click **Gear Icon** (⚙️) → **Setup**.
2. You are now in **Salesforce Setup**.

##### Step 3: Company Information

1. **Quick Find** → **Company Information** → click it.
2. Check **Organization Name : MediConnectX**
3. Click **Edit**:
  - **Default Time Zone** → (GMT+05:30) India Standard Time (*or your local time zone*)
  - **Default Currency** → INR or USD
  - **Default Language** → English
4. Click **Save**.

The screenshot shows the 'Company Information' setup page in Salesforce. The organization name is 'MediConnectX'. The primary contact is 'OrgFam EPIC'. The address is 'United States'. The default language is 'English'. The default time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The default currency is 'English (United States) - USD'. The default locale is 'English (United States)'. The organization ID is '000g.000007SPin'. The organization edition is 'Developer Edition'. The instance is 'CAN005'. The page is created by 'OrgFamEpic' on 7/17/2025 at 9:50 AM and modified by 'Vaibhav Sarode' on 9/21/2025 at 10:09 PM.

Organization Detail	
Organization Name	MediConnectX
Primary Contact	OrgFam EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (United States) - USD
Used Data Space	417 KB (8%) <a href="#">View</a>
Used File Space	25 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000g.000007SPin
Organization Edition	Developer Edition
Instance	CAN005

Created By: OrgFamEpic 7/17/2025, 9:50 AM

Modified By: Vaibhav Sarode 9/21/2025, 10:09 PM

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## Step 4: Business Hours

1. **Setup** → Quick Find → **Business Hours** → click **New Business Hours**.
2. Fill the form:
  - **Name:** *MediConnectX Business Hours*
  - **Time Zone:** your local timezone
  - **Days & Hours:** 24/7
3. Click **Save**.

The screenshot shows the 'Business Hours' setup page. At the top, there's a header with 'SETUP' and 'Business Hours'. Below this, the section is titled 'Organization Business Hours' with a 'Help for this Page' link. A descriptive text explains that these hours determine when support is available and when escalation rules apply. A link 'Holidays III' is visible. The main form area is titled 'Business Hours Detail' and contains an 'Edit' button. The form fields include: 'Business Hours Name' (MediConnect usiness Hour), 'Time Zone' ((GMT+05:30) India Standard Time (Asia/Kolkata)), 'Default Business Hours' (a checkbox), and a table for 'Business Hours' with columns for the day of the week and the number of hours (all set to 24). Below the table, there's an 'Active' checkbox, 'Created By' (Vaibhavi Sarode 9/21/2025, 10:13 PM), and 'Last Modified By' (Vaibhavi Sarode 9/21/2025, 10:13 PM). An 'Edit' button is at the bottom right of the form.

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## Step 5: Holidays

1. **Setup** → Quick Find → **Holidays** → click **New Holiday**.
2. Fill fields:
  - **Holiday Name:** Maintenance Day (example)
  - **Date** → select
3. Click **Save**.

The screenshot shows the 'Holidays' setup page. At the top, there's a header with 'SETUP' and 'Holidays'. Below this, the section is titled 'Holiday Detail' with a 'Help for this Page' link. A descriptive text explains that holidays are dates when business hours are suspended. A link 'Business Hours III' is visible. The main form area is titled 'Holiday Detail' and contains 'Edit' and 'Delete' buttons. The form fields include: 'Holiday Name' (MediConnect Maintenance Day), 'Description', 'Date and Time' (9/21/2025 All Day), 'Created By' (Vaibhavi Sarode 9/21/2025, 10:15 PM), and 'Last Modified By' (Vaibhavi Sarode 9/21/2025, 10:15 PM). 'Edit' and 'Delete' buttons are at the bottom right of the form.

## Step 6: Fiscal Year

1. Setup → Quick Find → **Fiscal Year** → click **Fiscal Year Settings**.
2. Select **Standard Fiscal Year** → Click **Save**

Q. Fiscal

Company Settings

Fiscal Year

Didn't find what you're looking for? Try using Global Search.

SETUP  
Fiscal Year

Setup  
Organization Fiscal Year Edit: MediConnectX

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 quotes. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Standard Fiscal Year

Custom Fiscal Year

Name: MediConnectX

Fiscal Year Start Month: January

Fiscal Year is Based On: The ending month

Save Cancel

## Step 7: Create the Custom Profiles

1. In **Setup**, use Quick Find and type **Profiles**.
2. Click on **Profiles**.
3. You will see a list of standard profiles. **Do not edit** these.
4. Instead, **clone the standard “Standard User” profile** for each MediConnectX role.
5. Click on the **Standard User** profile.
6. Click the **Clone** button.
7. **Profile Name:** Enter **Doctor** → Click **Save**.
8. Repeat steps 5–7 three more times to create the following profiles:
  - **Coordinator**
  - **Courier**
  - **Admin**

### i) Doctor

SETUP  
Profiles

Profile  
Doctor

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Settings | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit Clone Delete View Users

Name: Doctor

User License: Salesforce

Description:

Created By: Vishal Sarma 9/21/2025, 10:34 PM

Modified By: Vishal Sarma 9/21/2025, 10:34 PM

Custom Profile: ✓

## ii) Coordinator

SETUP

Profiles

Profile

Coordinator

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

EditCloneDeleteView Users

Name	Coordinator	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Vaibhavi Sarode, 9/21/2025, 10:37 PM	Modified By Vaibhavi Sarode, 9/21/2025, 10:37 PM

Page Layouts

## iii) Courier

SETUP

Profiles

Profile

Courier

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

EditCloneDeleteView Users

Name	Courier	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Vaibhavi Sarode, 9/21/2025, 10:38 PM	Modified By Vaibhavi Sarode, 9/21/2025, 10:38 PM

## iv) Admin

SETUP

Profiles

Profile

Admin

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

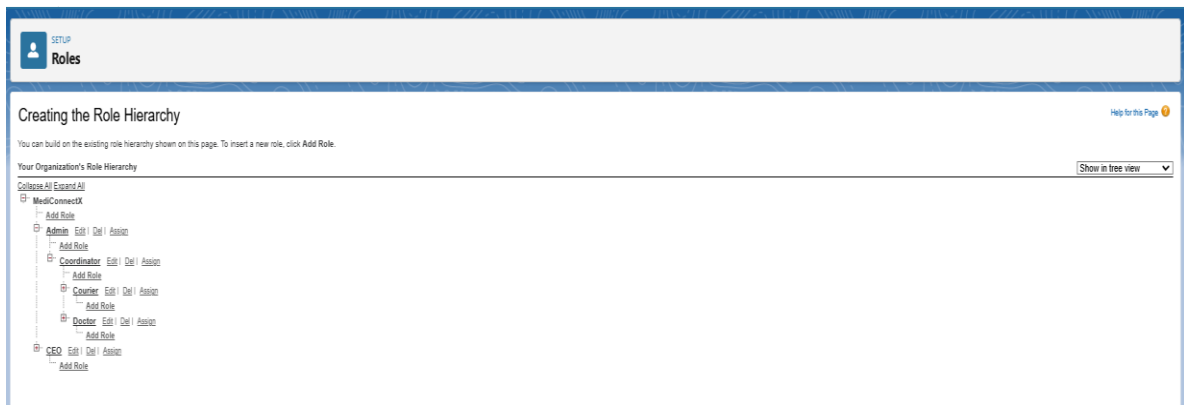
Profile Detail

EditCloneDeleteView Users

Name	Admin	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Vaibhavi Sarode, 9/21/2025, 10:38 PM	Modified By Vaibhavi Sarode, 9/21/2025, 10:38 PM

## Step 8: Roles

1. **Setup** → Quick Find → **Roles** → click **Set Up Roles**.
2. Create hierarchy:
  - **Admin** (top)
  - **Coordinator** → reports to Admin
  - **Doctor** → reports to Coordinator
  - **Courier** → reports to Coordinator
3. Click **Save**.



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## Step 9: Permission Sets

1. **Setup** → Quick Find → **Permission Sets** → click **New**.
2. **Name:** *Alert Manager*
3. Assign object permissions → e.g., *Edit Alerts*.
4. Assign users (**Admin** + **Coordinator**) → **Save**.

**Expected Outcome:** Extra permissions granted without changing profiles.

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## Step 10: Organization-Wide Defaults (OWD)

**Note:** Cannot configure yet.

OWD requires custom objects to exist.

Will be done after Phase 3 (Data Modeling & Relationships) once objects like Patient, Appointment, Alerts are created.

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## Step 11: Sharing Rules

**Note:** Cannot configure yet.

Sharing Rules depend on custom objects.

Will be configured after Phase 3, based on roles and object criteria.

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