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

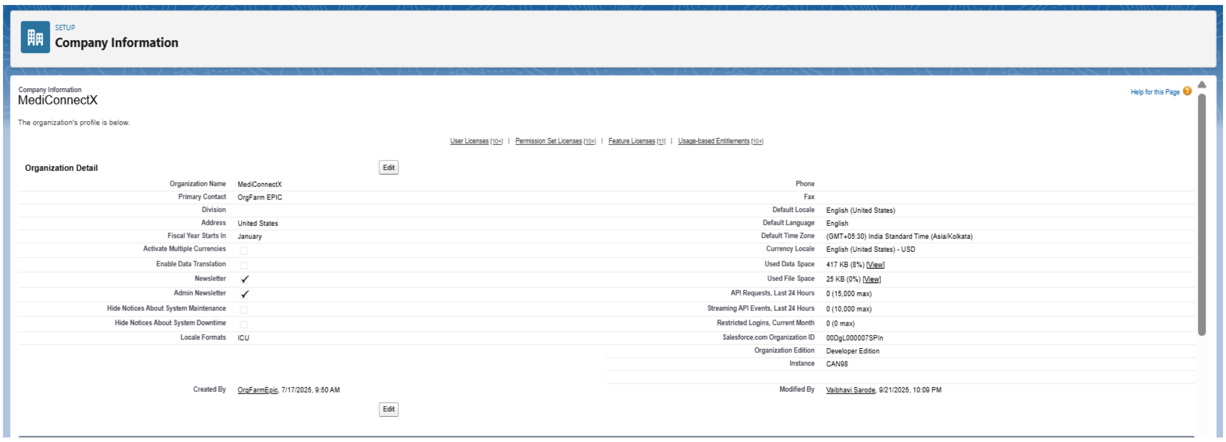
1. Go to **Salesforce Developer → Login → Developer Edition**.
2. Enter your **username/password**.
3. Open **Lightning Home Page**.

Step 2: Open Setup

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

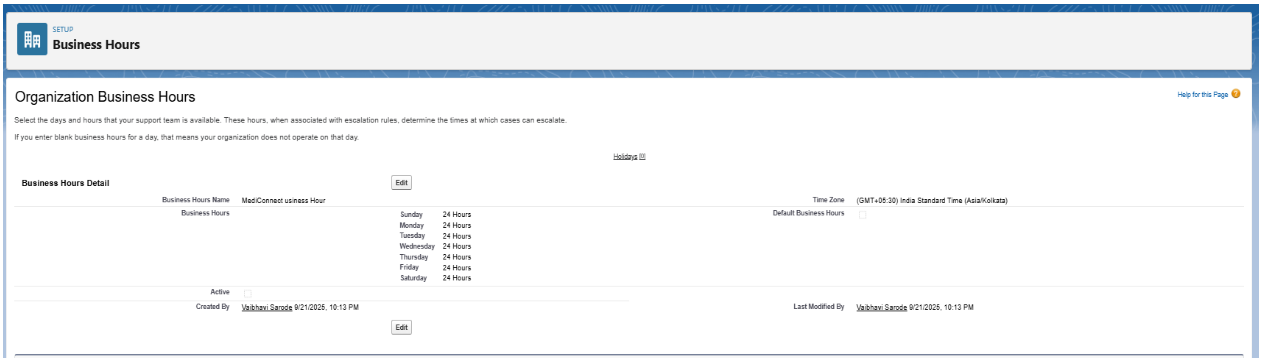
Step 3: Company Information

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**.



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**.

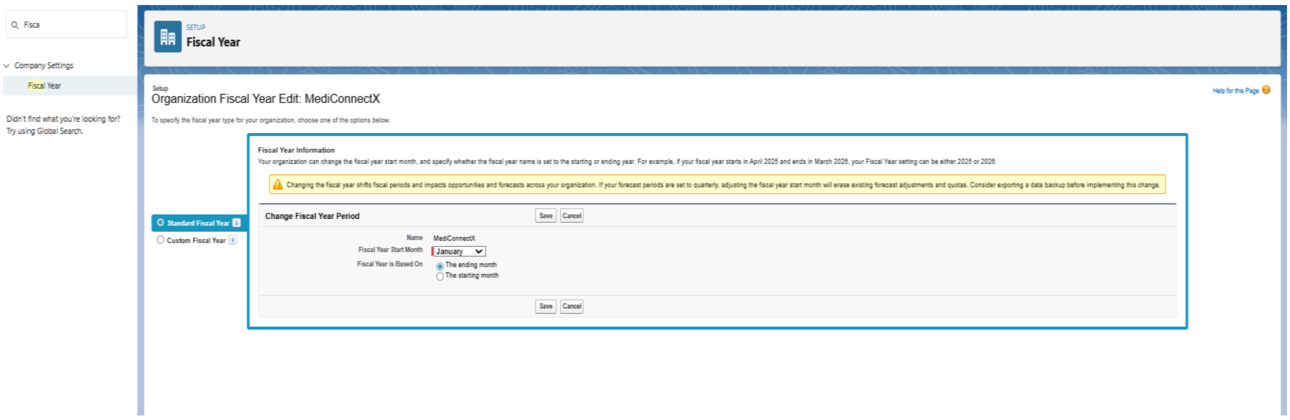


Step 5: Holidays

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

Step 6: Fiscal Year

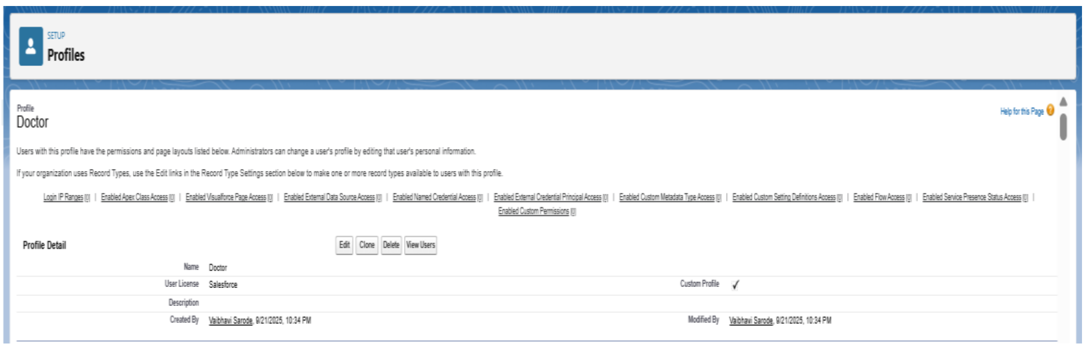
1. Setup → Quick Find → **Fiscal Year** → click **Fiscal Year Settings**.
2. Select **Standard Fiscal Year** → Click **Save**



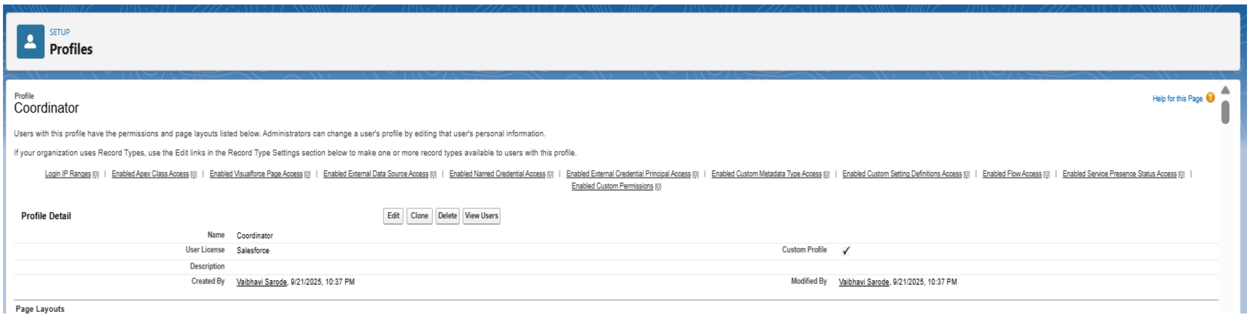
Step 7: Create the Custom Profiles

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**

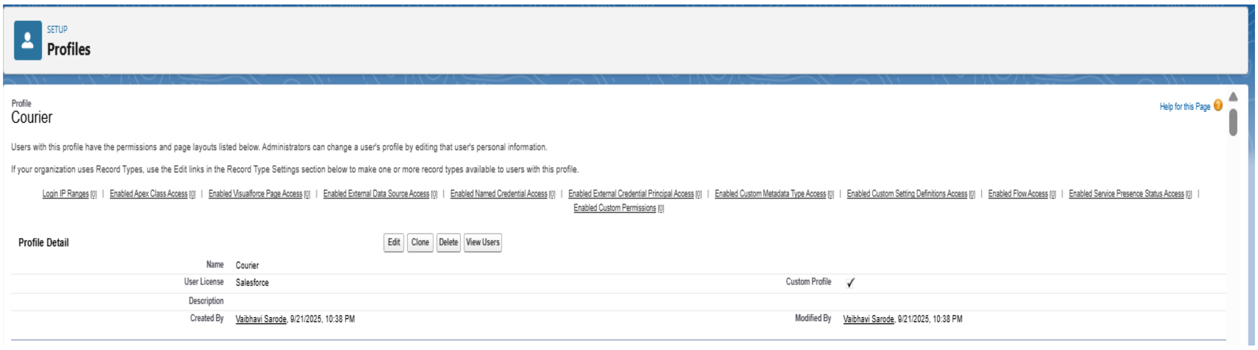
i)Doctor



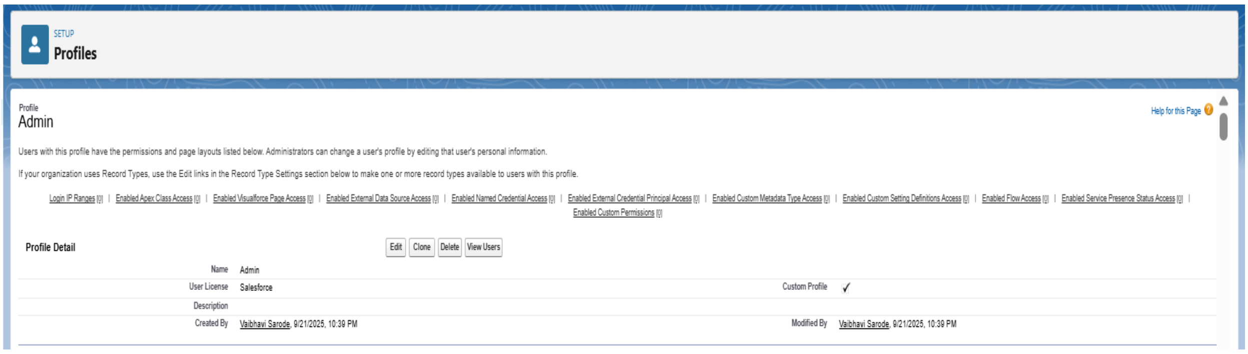
ii) Coordinator



iii) Courier

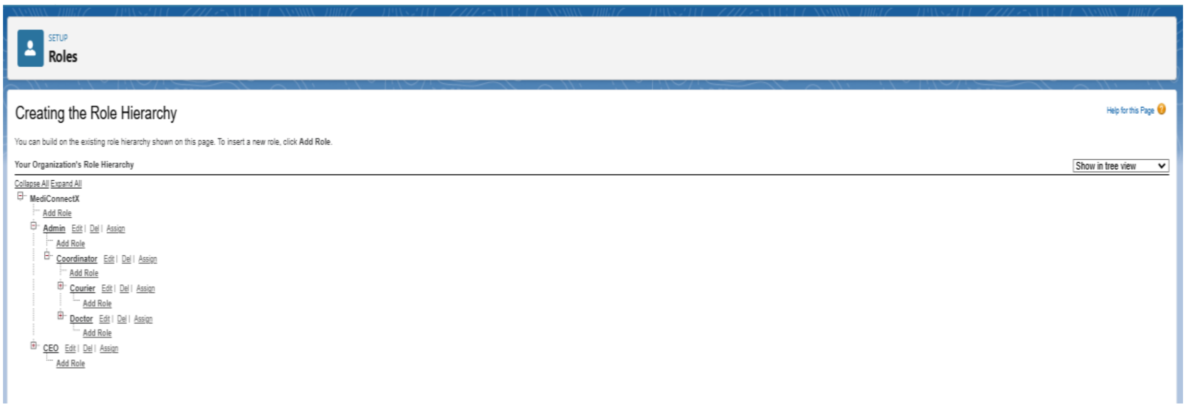


iv) Admin



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**.



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.

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.

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.
