MediSmart CRM – AI-Powered Healthcare Appointment & Patient Follow-up CRM

Phase 2: Org Setup & Configuration

Objective of Phase 2:

Configure Salesforce Org settings to support CRM operations.

1. **Salesforce Edition Used**

- Created Salesforce Developer Edition Org for MediSmart-CRM.

2. **Company Profile Setup**
- Updated company information with project details.
- Added default time zone, locale, currency.

Fig 1: Company Profile Setup

3. Business Hours & Holidays

Set Business Hours:

- Monday to Saturday – 9:00 AM to 7:00 PM

- Sunday – Closed

Fig 2: Set Business Hours

Added holidays (public holidays for testing)

Fig 3: Added Holidays

4. **Fiscal Year Settings**

- Using Fiscal Year (April to March).

SETUP
Fiscal Year

Setup
Organization Fiscal Year Edit: MediSmart-CRM

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   MediSmart-CRM
Fiscal Year Start Month   April
Fiscal Year is Based On   ○ The ending month
○ The starting month

Save Cancel

5. **User Setup & Licenses**

- Created test users:

Display Name	Username	Profile	Role (Planned)
Doctor Hathi	hathi.doc@gmail.com	Standard Platform User	Doctor Role
XYZ Receptionist	xyz.receptionist@medismartcare.com	Standard User	Receptionist Role
Clinic Manager	clinicmanager@medismart.com	System Administrator	Clinic Manager Role

Assigned Salesforce Platform Licenses where needed.

All Users

Help for this Page ❓

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: [All Users ▾] Edit | Create New View

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**

New User   Reset Password(s)   Add Multiple Users

	Action	Full Name ↑	Alias	Username	Role	Active	Profile
☐	Edit	Chatter Expert	Chatter	chatty.00dgk00000bc24xuat.zhxscmvaeowt@chatter.salesforce.com		✓	Chatter Free User
☐	Edit	Deshmukh, Vivek	des	deshmukhvivek596743@agentforce.com		✓	System Administrator
☐	Edit	EPIC, OrgFarm	OEPIC	epic.f683b5598e15@orgfarm.salesforce.com		✓	System Administrator
● ☐	Edit	Hathi, Doctor	dhath	hathi.doc@gmail.com		✓	Standard Platform User
● ☐	Edit	Manager, Clinic	cmana	clinicmanager@medismart.com		✓	System Administrator
☐	Edit	User, Integration	integ	integration@00dgk00000bc24xuat.com		✓	Analytics Cloud Integration User
☐	Edit	User, Security	sec	insightssecurity@00dgk00000bc24xuat.com		✓	Analytics Cloud Security User
● ☐	Edit	XYZ, Receptionist	rxyz	xyz.receptionist@medismartcare.com		✓	Standard User

New User   Reset Password(s)   Add Multiple Users

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**

Fig : User Setup and Licenses

5. Profiles

• Doctor Profile**:** Read/write access to appointments, patient history, AI recommendations; read-only for admin dashboards.

• Receptionist Profile**:** Full access to appointment scheduling, patient registration, and reminders.

• Clinic Manager: Can be a System Administrator clone or a custom profile with full object and field-level access.

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 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 Setting Definitions Access [0] | Enabled Flow Access [0] |
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail   [Edit] [Clone] [Delete] [View Users]

Name	Doctor		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Vivek Deshmukh, 9/21/2025, 8:31 AM	Modified By	Vivek Deshmukh, 9/21/2025, 8:31 AM

Profile
Clinic Manager

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 Setting Definitions Access [0] | Enabled Flow Access [0] |
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail   [Edit] [Clone] [Delete] [View Users]

Name	Clinic Manager		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Vivek Deshmukh, 9/21/2025, 8:34 AM	Modified By	Vivek Deshmukh, 9/21/2025, 8:34 AM

SETUP
Profiles

Profile
Doctor

Help for this Page ❓

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.

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Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] |
Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] |
Enabled Custom Permissions [0]

Profile Detail   [Edit] [Clone] [Delete] [View Users]

Name	Doctor		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Vivek Deshmukh, 9/21/2025, 9:22 AM	Modified By	Vivek Deshmukh, 9/21/2025, 9:23 AM

7. Roles

Navigation: Setup → Roles → Set Up Roles

Hierarchy:

- Clinic Manager (top)
  - Doctors
    - Receptionists

Assign each user their corresponding role to control data visibility.

Role
Doctors

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: MediSmart-CRM » Clinic Manager » Doctors
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO

Users in Doctors Role [0]

Role Detail   Edit   Delete

Label	Doctors	Role Name	Doctors
This role reports to	Clinic Manager	Role Name as displayed on reports	Doctors
Modified By	Vivek Deshmukh, 9/20/2025, 10:49 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

👤 **Users in Doctors Role**   Assign Users to Role   New User   Users in Doctors Role Help ❓

No records to display

Role
Clinic Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: MediSmart-CRM » CEO » Clinic Manager
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO

Users in Clinic Manager Role [0]

Role Detail   Edit   Delete

Label	Clinic Manager	Role Name	Clinic_Manager
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Vivek Deshmukh, 9/19/2025, 11:45 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

Role
Receptionist

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: MediSmart-CRM » Clinic Manager » Doctors » Receptionist

Users in Receptionist Role [0]

Role Detail   [Edit] [Delete]

Label	Receptionist	Role Name	Receptionist
This role reports to	Doctors	Role Name as displayed on reports	Receptionist
Modified By	Vivek Deshmukh, 9/20/2025, 10:54 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

👤 **Users in Receptionist Role**   [Assign Users to Role] [New User]   Users in Receptionist Role Help ❓

No records to display

Assign Roles and Profile to User

All Users

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[New User] [Reset Password(s)] [Add Multiple Users]

☐ Action	Full Name ↑	Alias	Username	Role	Active	Profile
☐ | Edit	Chatter Expert	Chatter	chatty.00dgk00000bc24xuat.zhxscmvaeowt@chatter.salesforce.com		✔	Chatter Free User
☐ | Edit	Deshmukh, Vivek	des	deshmukhvivek596743@agentforce.com		✔	System Administrator
☐ | Edit | Login	EPIC, OrgFarm	OEPIC	epic.f683b5598e15@orgfarm.salesforce.com		✔	System Administrator
☐ | Edit | Login	Hathi, Doctor	dhath	hathi.doc@gmail.com	Doctors	✔	Doctor
☐ | Edit | Login	Manager, Clinic	cmana	clinicmanager@medismart.com	Clinic Manager	✔	Clinic Manager
☐ | Edit	User, Integration	integ	integration@00dgk00000bc24xuat.com		✔	Analytics Cloud Integration User
☐ | Edit	User, Security	sec	insightssecurity@00dgk00000bc24xuat.com		✔	Analytics Cloud Security User
☐ | Edit | Login	XYZ, Receptionist	rxyz	xyz.receptionist@medismartcare.com	Receptionist	✔	Receptionist

[New User] [Reset Password(s)] [Add Multiple Users]

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**

8. Permission Sets

- Concept: Grant additional permissions to users beyond profiles for specific functions.

9. Organization-Wide Defaults (OWD)

- Concept: Define default record-level access across the org.

- Implementation:

  - Patient Object: Private (doctors can see assigned patients; others cannot)

  - Appointment Object: Controlled by parent (linked to Patient)

10. Sharing Rules

Setup → Sharing Rules.

- o New → For Appointments → Share with "Assigned Doctor Role".
- o Manager Role → Full access to all records.

11. Login Access Policies

Enabled Administrators Can Log as Any User

12. Dev Org Setup

- Install VS Code + Salesforce CLI.
- In VS Code Terminal:
  sfdx force:auth:web:login -a myOrgAlias
- This connects your org for deployments.