SALESFORCE PROJECT IMPLEMENTATION PHASES

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.

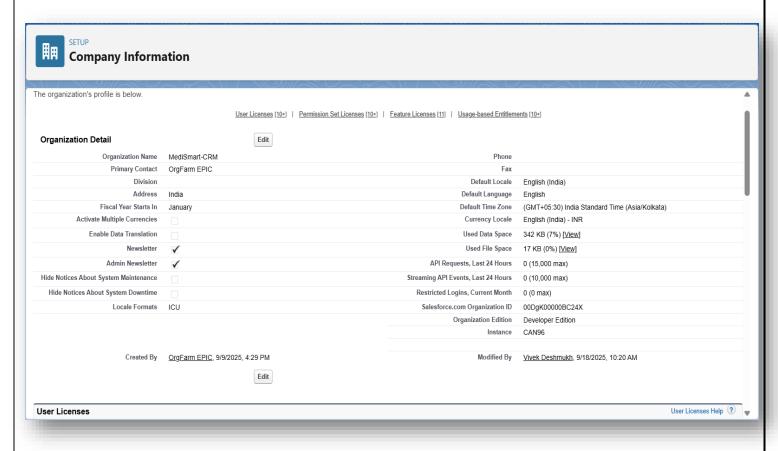


Fig 1: Company Profile Setup

3. Business Hours & Holidays

Set Business Hours:

- Monday to Saturday 9:00 AM to 7:00 PM
- Sunday Closed

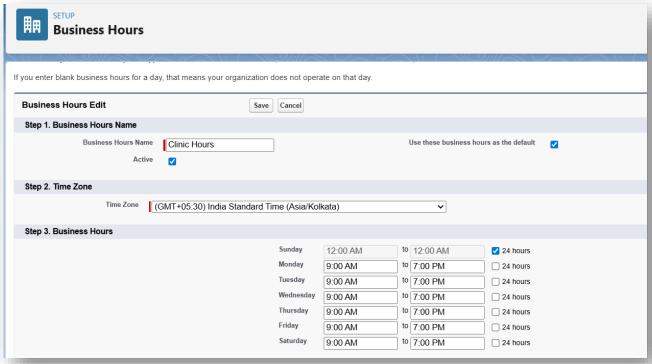


Fig 2: Set Business Hours

Added holidays (public holidays for testing)

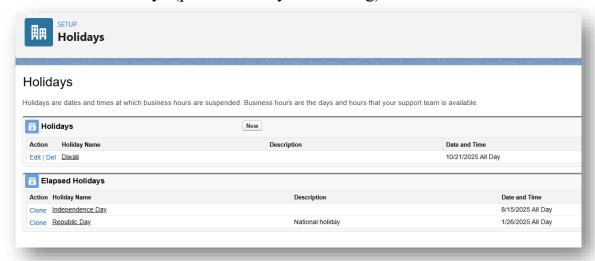
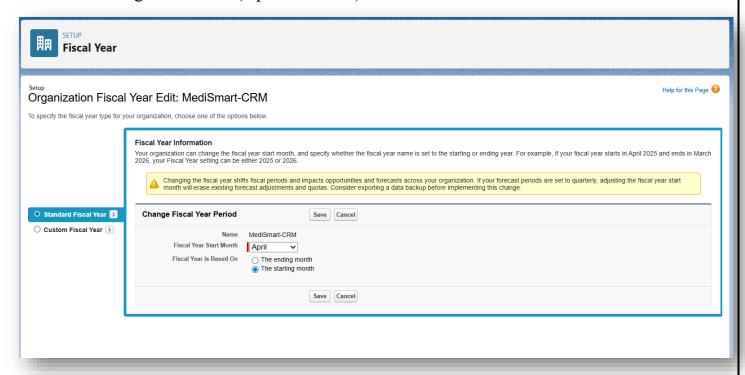


Fig 3: Added Holidays

4. Fiscal Year Settings

• Using Fiscal Year (April to March).



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	Clinic Manager Role

Assigned Salesforce Platform Licenses where needed.

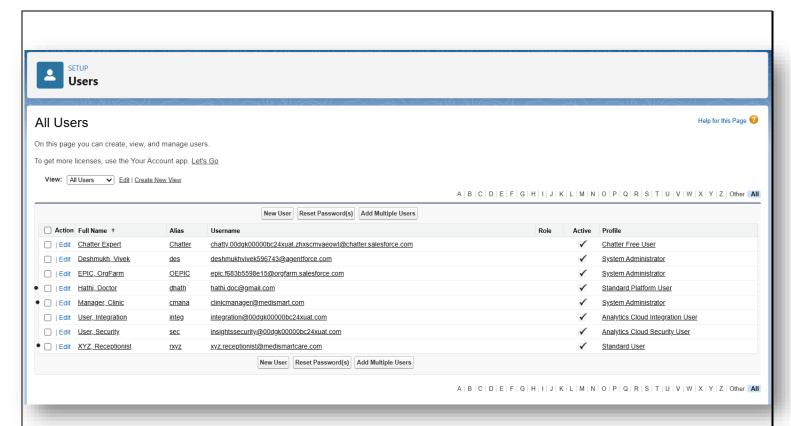
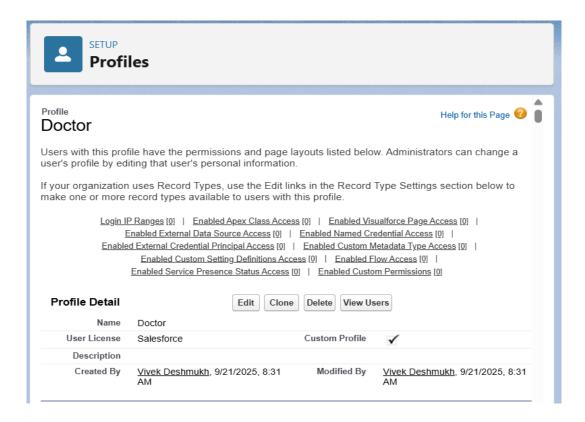
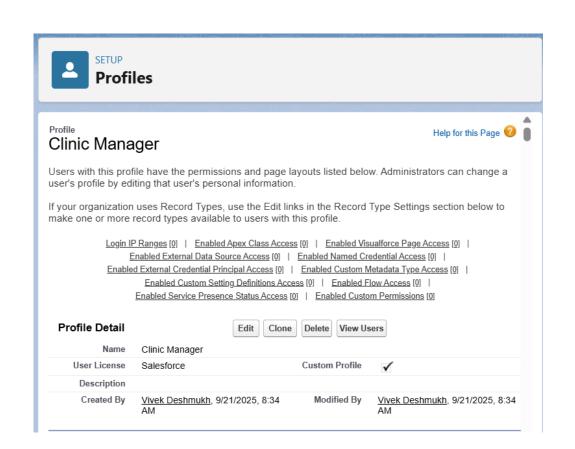


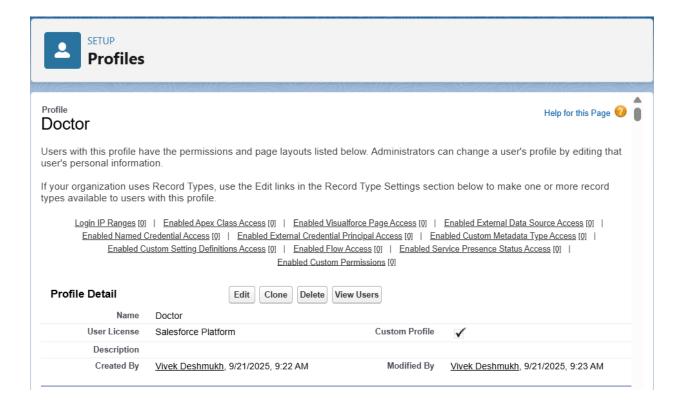
Fig: User Setup and Licenses

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.







7. Roles

Navigation: Setup \rightarrow Roles \rightarrow Set Up Roles

Hierarchy:

- Clinic Manager (top)
 - Doctors
 - Receptionists

Assign each user their corresponding role to control data visibility.



Role

Help for this Page 🕜



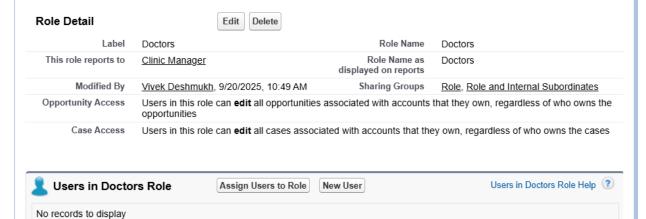
Doctors

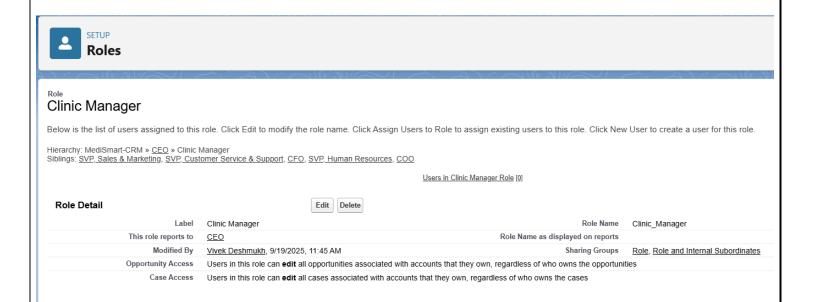
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

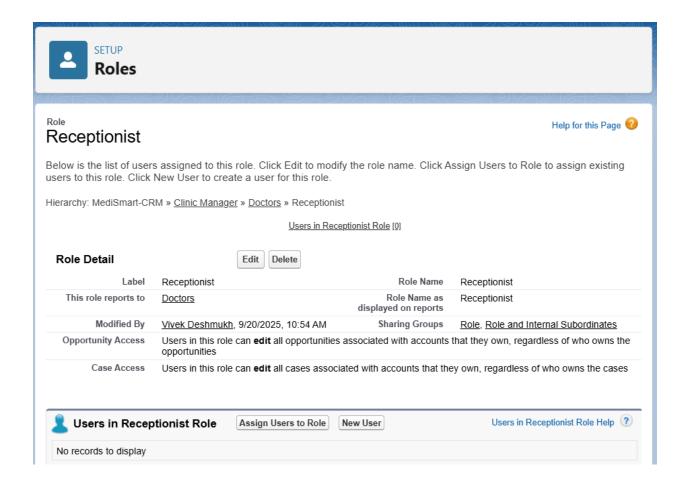
Hierarchy: MediSmart-CRM » Clinic Manager » Doctors

Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO

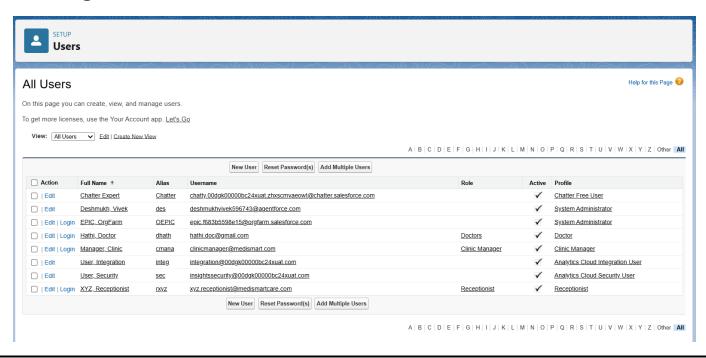
Users in Doctors Role [0]





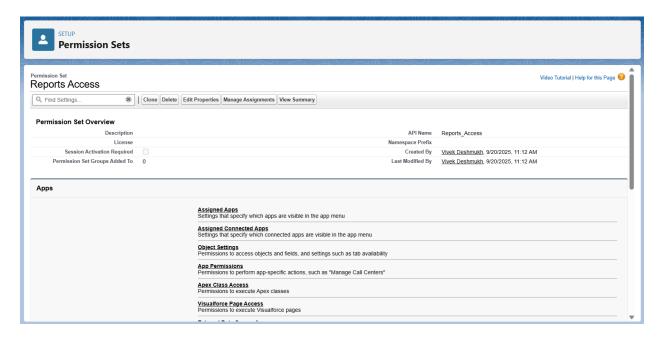


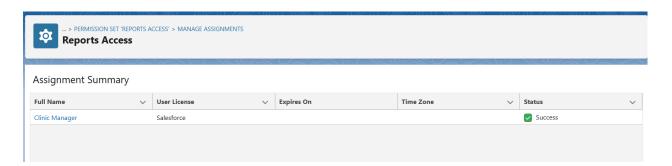
Assign Roles and Profile to User



8. Permission Sets

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





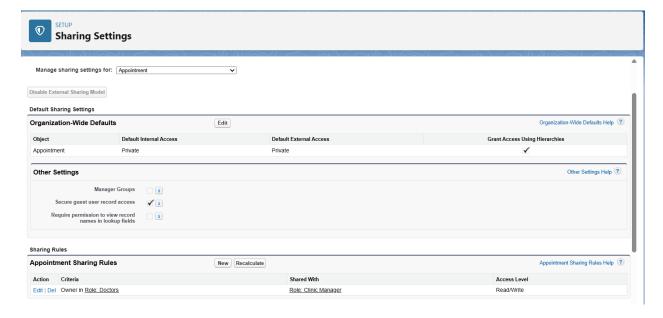
9. Organization-Wide Defaults (OWD)

- 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

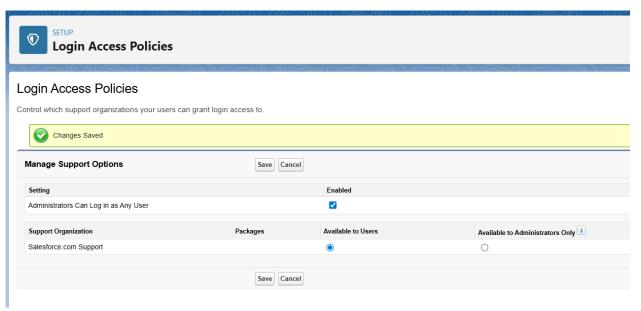
Setup \rightarrow Sharing Rules.

- o New → For Appointments → Share with "Assigned Doctor Role".
- 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.

