

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.

SETUP

Company Information

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	MediSmart-CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BC24X
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/9/2025, 4:29 PM	Modified By	Vivek Deshmukh, 9/18/2025, 10:20 AM

Edit

User Licenses

User Licenses Help

Fig 1: Company Profile Setup

3. Business Hours & Holidays

Set Business Hours:

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

Business Hours Edit Save Cancel

Step 1. Business Hours Name

Business Hours Name Use these business hours as the default ☒

Active ☒

Step 2. Time Zone

Time Zone

Step 3. Business Hours

Day	Start Time	End Time	24 hours
Sunday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>
Monday	9:00 AM	7:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	7:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	7:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	7:00 PM	<input type="checkbox"/>
Friday	9:00 AM	7:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	7:00 PM	<input type="checkbox"/>

Fig 2: Set Business Hours

Added holidays (public holidays for testing)

Holidays New

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Action	Holiday Name	Description	Date and Time
Edit Del	Diwali		10/21/2025 All Day


Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Independence Day		8/15/2025 All Day
Clone	Republic Day	National holiday	1/26/2025 All Day

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.

SETUP

Users

All Users

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

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d9k00000bc24xuat.zhxscmvaeowt@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Deshmukh_Vivek	des	deshmukhvivek596743@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIE	epic.f683b5598e15@orgfarm.salesforce.com		✓	System Administrator
<input checked="" type="checkbox"/> Edit	Hathi_Doctor	dhath	hathi.doc@gmail.com		✓	Standard Platform User
<input checked="" type="checkbox"/> Edit	Manager_Clinic	cmana	clinicmanager@medismart.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k00000bc24xuat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k00000bc24xuat.com		✓	Analytics Cloud Security User
<input checked="" type="checkbox"/> Edit	XYZ_Receptionist	xyz	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.



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.

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	<input checked="" type="checkbox"/>
Description			
Created By	Vivek Deshmukh , 9/21/2025, 8:31 AM	Modified By	Vivek Deshmukh , 9/21/2025, 8:31 AM



SETUP

Profiles

Profile

Clinic Manager

[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.


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	<input checked="" type="checkbox"/>
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.

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 Platform	Custom Profile	<input checked="" type="checkbox"/>
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.



SETUP Roles

Role

Doctors

[Help for this Page](#) ?

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



SETUP Roles

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		



SETUP Roles

Role

Receptionist

[Help for this Page](#) ?

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



SETUP Users

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](#)

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d9k00000bc24xuat.zhxscmvaeowl@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Deshmukh_Vivek	des	deshmukhvivek596743@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIG	epic.f683b5598e15@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Hathi_Doctor	dhath	hathi.doc@gmail.com	Doctors	✓	Doctor
<input type="checkbox"/> Edit Login	Manager_Clinic	cmna	clinicmanager@medismart.com	Clinic Manager	✓	Clinic Manager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k00000bc24xuat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k00000bc24xuat.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit Login	XYZ_Receptionist	xyz	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.

The screenshot shows the 'Permission Set' configuration page for 'Reports Access' in Salesforce. The page includes a 'Permission Set Overview' section with fields for Description, License, Session Activation Required, and Permission Set Groups Added To. It also displays the API Name, Namespace Prefix, Created By, and Last Modified By. Below this, there is a section for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

Permission Set Overview

Description	API Name
Reports Access	Reports_Access

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

The screenshot shows the 'Manage Assignments' page for the 'Reports Access' permission set. It displays an 'Assignment Summary' table with columns for Full Name, User License, Expires On, Time Zone, and Status. The table shows one assignment for 'Clinic Manager' with a 'Salesforce' license and a 'Success' status.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Clinic Manager	Salesforce			Success

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.

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

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. At the top, there's a 'Manage sharing settings for:' dropdown set to 'Appointment'. Below this is a 'Disable External Sharing Model' button. The 'Default Sharing Settings' section includes 'Organization-Wide Defaults' with an 'Edit' button and a table of default access levels. The 'Other Settings' section has checkboxes for 'Manager Groups', 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields'. The 'Sharing Rules' section shows 'Appointment Sharing Rules' with 'New' and 'Recalculate' buttons, and a table of existing rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Appointment	Private	Private	✓

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Doctors	Role: Clinic Manager	Read/Write

11. Login Access Policies

Enabled Administrators Can Log as Any User

The screenshot shows the 'Login Access Policies' page in Salesforce Setup. It features a 'Manage Support Options' section with 'Save' and 'Cancel' buttons. Below this is a table of settings. A yellow banner at the top indicates 'Changes Saved'. The 'Setting' table shows 'Administrators Can Log in as Any User' is enabled. The 'Support Organization' table shows 'Salesforce.com Support' is available to users but not to administrators only.

Setting	Enabled
Administrators Can Log in as Any User	✓

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		●	○

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.

