

# SALESFORCE CAPSTONE PROJECT

## PHASE - 2: Org Setup & Configuration

### TITLE: Smart Health Appointment & Patient Tracker

#### 1.Salesforce Edition Org

- Use a developer Edition Org
- It provides all the features needed for development and testing.
- This org will serve as the main development environment for the project.

#### 2. Company Profile Setup

- Navigate to setup →company information
- Organization name →Smart Health Clinic
- Default time zone →local time zone (e.g., GMT+05:30 Asia/Kolkata)
- Currency locale →INR or USD
- It ensures data such as currency and time align with business needs.

The screenshot shows the 'Company Information' setup page in Salesforce. The organization name is 'Smart Health Clinic'. The primary contact is 'Org/arm EPIC'. The address is 'United States'. The fiscal year starts in 'January'. The default locale is 'English (India)', the default language is 'English', and the default time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The currency locale is 'English (India) - INR'. The used data space is '342 KB (7%)' and the used file space is '17 KB (0%)'. The API requests, last 24 hours, are '39 (15,000 max)'. The streaming API events, last 24 hours, are '0 (10,000 max)'. The restricted logins, current month, are '0 (0 max)'. The Salesforce.com organization ID is '000gK000000GluN'. The organization edition is 'Developer Edition' and the instance is 'CAN96'.

Organization Detail	
Organization Name	Smart Health Clinic
Primary Contact	Org/arm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletters	<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 (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	39 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000gK000000GluN
Organization Edition	Developer Edition
Instance	CAN96

#### 3.Business Hours & Holidays


- Define business hours: Mon–Sat, 9 AM – 6 PM.
- Add public holidays to avoid scheduling appointments.

The screenshot shows the 'Business Hours' setup page in Salesforce. The organization business hours are defined for 'Smart Health Clinic Business Hours' with a time zone of '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The default business hours are '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'.

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Smart Health Clinic Business Hours	<input type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

## 4.Fiscal Year Settings

- Setup → Company Settings → Fiscal Year
- Use Standard Fiscal Year (April–March for India).
- Create a report and inspect fiscal year grouping.

 Holiday Detail

Help for this Page ?

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours (0)

**Holiday Detail**

EditDelete

Holiday Name	Smart Health Clinic Holidays		
Description			
Date and Time	10/1/2026, 10:00 AM – 1:00 PM		
Recurring Holiday	Occurs every October 1 effective 10/1/2026 from 10:00 AM until 1:00 PM		
Created By	Ojaswini Yadav 10/10/2025, 10:18 AM	Last Modified By	Ojaswini Yadav 10/10/2025, 10:18 AM

EditDelete

**Business Hours**

Add/Remove

Business Hours Help ?

No records to display

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Always show me more records per related list

## 5.User Setup & Licenses

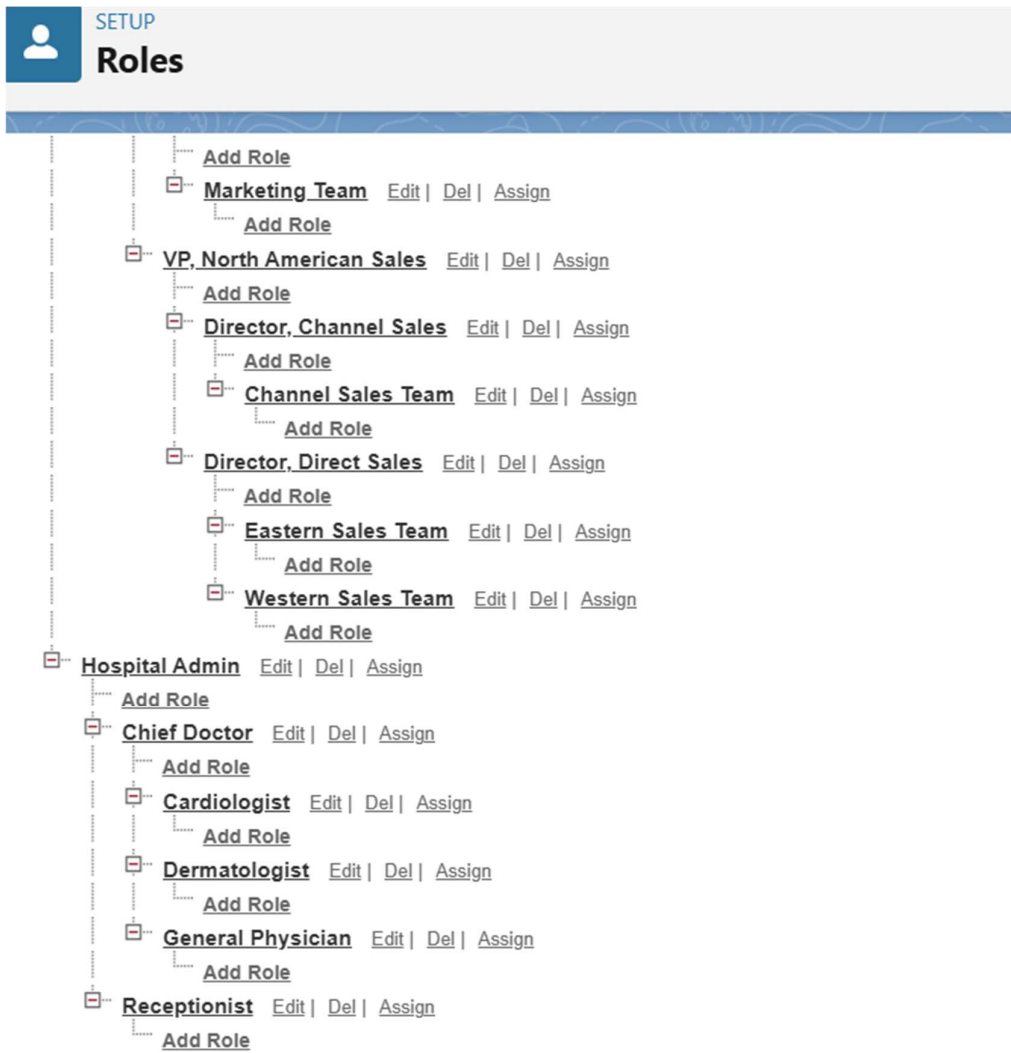
- Setup → Users → Users → New User
- Patients as Experience Cloud users — they need a Contact and a Customer Community / Customer Community Plus license.
- Doctors / Admins use standard Salesforce licenses.

## 6.Profiles

- Create/clone Profiles for each person: Admin, Doctor, Receptionist, Patient.
- Setup → Users → Profiles → Clone Standard profile.
- Patient Profile (external/community): Read/Edit only.
- Doctor Profile: Read/Write for Appointment.
- Admin Profile: Full access.

## 7. Roles

- Hospital Admin → Top of hierarchy.
- Doctors → Report to Admin.
- Patients → External users (not in hierarchy).



## 8. Permission Sets

- Setup → Permission Sets → New
- Appointment\_\_Manager — Create/Edit/Delete Appointments.
- Doctor\_\_Report\_\_Access — View certain Reports/Dashboards.
- Patient\_\_Medical History\_\_View — view Medical History field.

## 9.OWD (Organization-Wide Defaults)

- Set base sharing model for custom objects.
- Setup → Security → Sharing Settings.
- Patient\_\_c → **Private**
- Appointment\_\_c → **Controlled by Parent.**
- Doctor\_\_c → **Public Read Only.**

 **SETUP**  
**Organization-Wide Addresses**

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### Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

WARNING: A VERIFIED email address is needed for: Default No-Reply Address

**Organization-Wide Email Addresses for User Selection and Default No-Reply Use** [Add](#) [Previous Page](#) [Next Page](#)

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
<a href="#">Edit</a>   <a href="#">Del</a>	Smart Health Clinic	<a href="mailto:ojaswinivadari@gmail.com">ojaswinivadari@gmail.com</a>	All Profiles	Verification Request Sent 10/11/2025 <a href="#">[Resend]</a>	10/11/2025	User Selection

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## 10.Sharing Rules

- Setup → Security → Sharing Settings → Create Sharing Rules
- Share Appointments with assigned Doctors.
- Share Patient Records with related Doctors.

## 11. Login Access Policies

- Setup → Session Settings
- Setup → Profiles → Edit (for login hours & IP ranges)
- Setup → Identity → Login Access Policies (if you use delegated login)

## 12. Dev Org Setup

- Sign up for Salesforce Developer Org.
- Load sample healthcare data if needed.

## 13. Sandbox Usage

- Use Sandbox for testing automation flows and email notifications.
- Setup → Sandboxes → New Sandbox
- Deploy a small change to sandbox

## 14. Deployment Basics

- Use Change Sets for deployment from Sandbox to Production.
- Change Sets: Setup → Deploy → Outbound Change Sets.
- Document deployment steps.