MedNinja

MedNinja

Installation Guide

Installation

✅ Pre-installation steps:

1. Enable Custom Address Fields in Destination Org

Purpose: Allows usage of Salesforce Custom Address data type on custom objects.

1. Log in to Salesforce
2. Go to the Setup/Quick Find search box, search for **User Interface**.
3. Locate and check the box "**Use custom address fields"**.
4. Click **Save**.

2. Disable State and Country/Territory Picklists

1. Go to Setup/Quick Find search box, search for **State and Country/Territory Picklists**
2. Click **State and Country/Territory Picklists**.
3. On the page, you will see the current status and click **Disable**.
4. Salesforce will show a warning about the impact.
5. Click **Ok**
6. If it is already **enabled,** no need to do anything.

3. Enable Chatter Settings

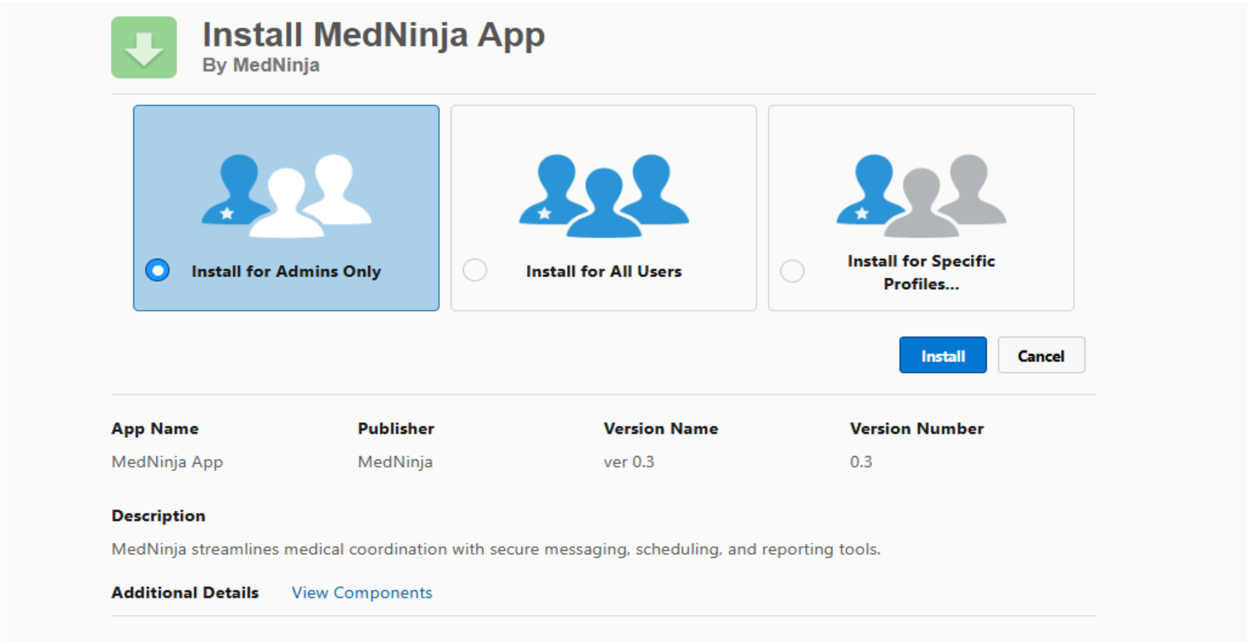
1. In the **Quick Find** search box, type **Chatter Settings**.
2. Select **Chatter Settings** from the list.
3. Click **Edit**.
4. Check the box **Enable Chatter**.
5. Click **Save**.

➢ Package details:

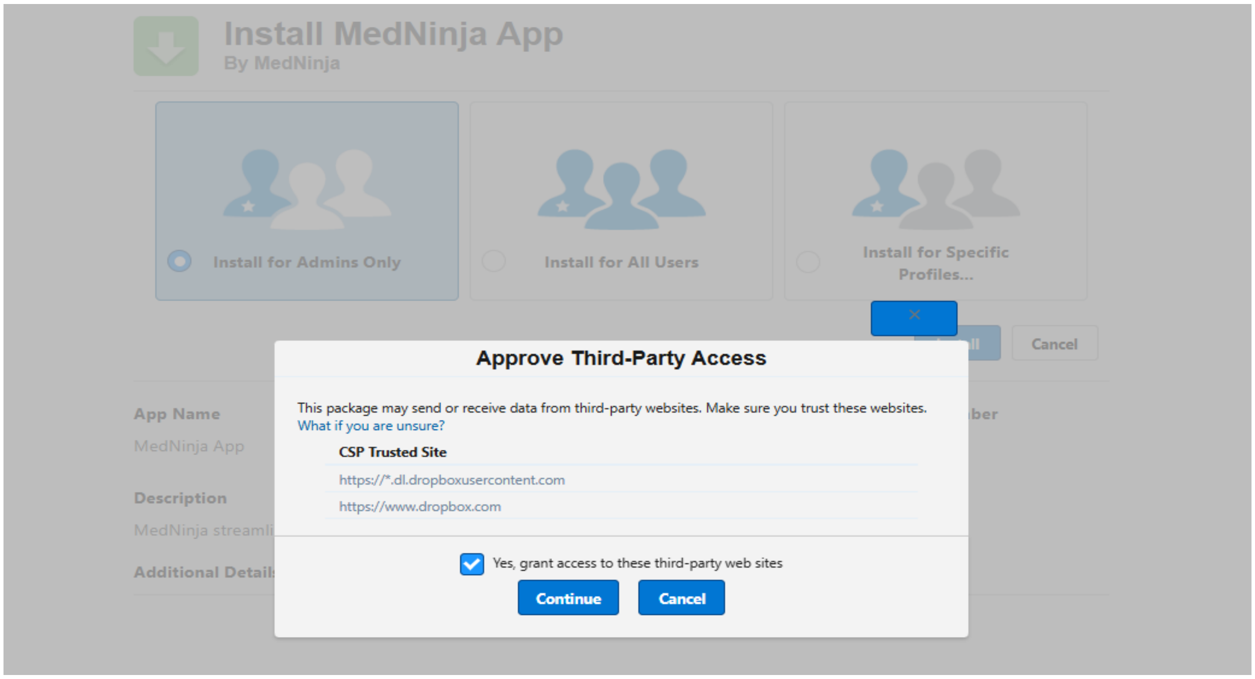
- **Package URL: Will be provided after licensing confirmation.**

➢ Installation steps:

1. Click the Package Link that is given above and log in to Salesforce.
2. Select **Install for Admins Only**
3. Click the **Install** button.



4. A new pop-up window will appear. Select the checkbox **"Yes, grant access to these third-party websites."**
5. Click **Continue**, then wait for the installation to complete.



✅ Post-installation Steps:

3. Assign Page Layout: MedNinja Contact Layout

1. In **Quick Find**, type **Object Manager,** and click **Contact**.
2. Select **Page Layouts** from the left-hand menu.
3. Click the **Page Layout Assignment** button (top right).
4. Click **Edit Assignment**.
5. Select the **System Administration** profiles **and record type** cells.
6. From the **Page Layout** dropdown at the top, choose the **MedNinja Contact Layout**.
7. Click **Save.**

4. Set Field-Level Security: Gender Identity

1. In **Quick Find**, type **Object Manager,** and click **Contact**.
2. In the Contact object settings, click **Fields & Relationships**.
3. Search for **Gender Identity** in the list and click on it.
4. On the **Gender Identity** field detail page, click **Set Field-Level Security**.
5. Check **Visible** for profiles that need to see the field and click **Save**.

5. Assign Lightning Record Page by App, Record Type, and Profile

1. In **Quick Find**, type **Object Manager,** and click **Intake**.
2. In the Intake object settings, click **Lightning Record Pages**.
3. Click **Intake Custom** and then click **View**
4. Click **Activation** in the top-right corner.
5. Select **Assign to Apps, Record Types, and Profiles**.
6. Choose the **MedNinja** App
7. Choose the **Record Type(s)** for the object.
8. Choose the **Profile(s)** that should see this page.
9. Click **Next** and **Save.**
10. Repeat the above steps for the **Contact** object on the **Contact Record Page.**

6. Permission Sets Configuration: MedNinja OEM PS

1. Go to the **Quick Find** search box, and search for **Permission Sets**.
2. Click on **MedNinja OEM PS**.
3. Click the **Manage Assignments** button top. If you don't see a list, then click on **Select a List View** and change it to **Active Users.**
4. Click the **Add Assignment** button on the right side and select the desired user.
5. Click **Next** and then the **Assign** button.

7. Create and Configure Public Site for OEM Portal

Purpose: Enables public access to secure referral request pages.

A. Create Public Site

1. Search **Sites** in Quick Find.
2. If not registered, click Register My Salesforce Site Domain and set your domain.
3. Click New to create a site with the following details:
    - Site Label: **OEM Portal**
    - Active Site Home Page: **InMaintenance**
    - Select the **Active** checkbox
4. Click **Save.**

B. Provide Visualforce Page Access

1. Go to Sites > Click on the site label OEM Portal.
2. Click **Public Access Settings**.
3. Under **Enabled Visualforce Page Access**, click Edit.
4. Move the following pages to the right panel:
    - **AppointmentTimeLinePdf**
    - **FileDownloadPage**
    - **InsuranceTimeLinePdf**
    - **ReferralRequestSecureEmailPage**
    - **ReferralRequestInfoPdf**
5. Click **Save**.

C. Provide Apex Class Access

1. On the same Public Access Settings page, find **Enabled Apex Class Access**.

2. Click **Edit**.

3. Move the following class to the right panel:

   - **ReferralRequestSecureEmailApex**

4. Click **Save**.

D. Enable External Credential Principal Access

Purpose: Enables named credential access for the public site user.

1. Go to Sites > Click OEM Portal.

2. Scroll down to **Enabled External Credential Principal Access**.

3. Click **Edit**.

4. Move all available entries from the left to the right panel.

5. Click **Save**.

E. Provide Object Access

Provide the following objects' permission listed below:

1. In **Public Access Settings**, click Edit.

2. Find each of the following objects: **Contact, User External Credentials, Dropbox Documents, Employers, Insurances, Insurance Companies, Intakes, Locations, Requests, Treating Providers**.

3. For each object, enable **Read** and **View All Fields** permissions.

4. Click **Save**.

8. Create Org-Wide Email Address

Purpose: Enables a consistent "From" address for OEM email communications.

1. Search Organization-Wide Addresses in Quick Find.

2. Click **Add**.

3. Enter the required email address and display name, ensuring values match the **Custom Labels** Org_Wide_Email.

4. Click **Save**.

5. Open your email inbox and verify the address via the link sent by Salesforce.

9. Update Custom Label: PortalSiteBaseUrl

Purpose: Stores the base public site URL for OEM functionality.

1. Search **Custom Labels** in Quick Find.
2. Find and open **PortalSiteBaseUrl**.
3. Click **New Local Translations / Overrides.**
3. Select Language **English** and add the created **site** URL in the **Translation Text** box.
4. Click **Save**.

Note: If you're unable to edit the Custom Labels, you may need to enable the Translation Workbench first:

1. Search **Translation Language Settings** in Quick Find.
2. Click Add.
3. Select Language as **English** from the picklist.
4. Check the **Active** checkbox.
5. Assign the Admin user as the Translator from the available list.
6. Click **Save**.

10. Activate Themes and Branding

1. In the Quick Find box, type **Themes and Branding** and select it.

2. Find the **MedNinja** theme in the list.

3. Click the dropdown arrow next to the theme name and select **Activate**.

11. Assign Lightning App Builder: MedNinja Home Page

1. Go to **Setup** → **Lightning App Builder**.
2. Click **View** beside the **MedNinja Home Page.**
3. Click **Activation** and then **App and Profile** Tab.
4. Click **Assign to Apps and Profile** and choose the **MedNinja** App.
5. Choose the **Profile(s)** that should see this page.
6. Click **Next** and **Save.**

12. Cross-Org Doctor Data Sharing Configuration

A. Update Identity Provider and External Credentials

1. In the Source Org (destination org where the package is installed):

○ Navigate to **Named Credentials** > **External Auth Identity Providers**.

○ Open Central Hub Org Auth Provider.

○ Paste the **Client ID** exactly as it is:

```
3MVG9FI[redacted]tAieR9uHWda5b
```

○ and **Client Secret**:

```
DE45[redacted]23F9B7
```

Completed Client ID and Client Secret will be provided after licensing confirmation

2. Go to the External Credentials tab.

○ Open **Central Hub Org External Credentials**.

○ Click the **Authenticate** under the Principals Section dropdown menu

○ It will redirect to the **Central Hub org** login screen and add the login credentials

○ Check the **Authentication Status** is changed to **Configured**.

B. Share and Fetch Doctors

In Central Hub Org (Sharing):

1. Log in to Hub Org.
2. Create an Account with:
    - Record Type = Law Firm
    - Account Name = Law Firm Name
    - Firm Id = Target Org ID
    - Enter other fields' information if required

You can share Doctor records using two methods: individually from the record detail page or in bulk from the list view. The steps are as follows:

Single Record Sharing

1. Open the relevant **Doctor** record.
2. From the upper-right action menu, select **Share Doctor with Law Firm.**
3. Choose the target org to complete the sharing process.

Multiple Record Sharing

1. From the list view, select one or more Doctor records.
2. From the upper-right action menu, select **Share Doctor with Law Firm**.
3. Choose the target org to proceed with sharing.

In Source/Package Deployment Org (Fetching):

1. Log in to the Source Org.
2. Navigate to the **Fetch Doctor Hospital Data** tab.
3. Click the **Fetch Doctor Hospital Data** button from the Hub Org.
4. The **Data Sync Completed** success message will display.

Note: To authenticate with the Central Hub org and share Doctor and Hospital data with the installation org, please contact our support team to complete the required package updates.