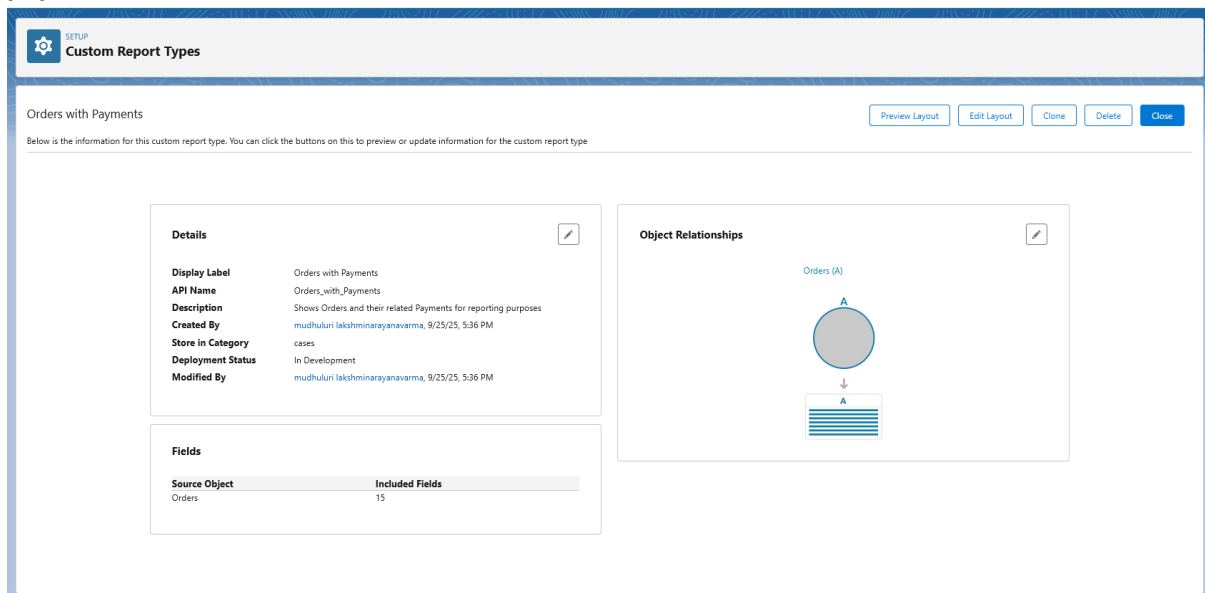


Phase 9

1. Reports

- **Tabular Reports:** Simple lists for Customers, Orders, Payments[reports.png].
- **Summary Reports:** Orders grouped by Status, Deliveries grouped by Rider[reports.png].
- **Matrix Reports:** Orders vs Restaurants matrix with total sales[reports.png].
- **Joined Reports:** Combined Customer & Order reports for cross-object insights[reports.png].

Outcome: Management efficiently tracks performance, deliveries, and payments.



2. Report Types

Custom Report Types were created for advanced cross-object insights:

- Customer with Orders
- Orders with Payments
- Delivery with Orders

Purpose: Enable complex reporting beyond standard Salesforce objects.

Status: Types deployed and available to all users.

3. Dashboards

Custom dashboards provide instant KPIs:

- **FoodieConnect Overview:** Orders, Payments, Customer Growth[reports.png].
- **Delivery Performance:** Deliveries by status and rider[reports.png].

Components: Charts, tables, metrics.

Outcome: Executives and managers get at-a-glance insights.

4. Dynamic Dashboards

- Displays data specific to the logged-in user's role.
- Example: Delivery staff see assigned deliveries; Admin views all data.

Benefit: Personalized, role-specific analytics without duplicating dashboards.

5. Sharing Settings

Organization-Wide Defaults (OWD):

- Customer: Public Read/Write
- Delivery: Public Read/Write
- Issue: Public Read/Write
- Menu Item: Public Read/Write
- Order: Controlled by Parent
- Payment: Public Read/Write
- Restaurant: Public Read/Write

Sharing Rules:

- Customers → Support Agents (Read/Write)
- Orders → Managers & Admins (Full Access)
- Payments → Managers (Full Access)

Outcome: Proper access and security across user roles.

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Rider	Role: food connect CEO	Read Only

6. Field Level Security

- **Admin:** Full field access
- **Support:** Customer & Issue fields
- **Riders:** Delivery and Order fields only
- **Customers:** Own customer record and order history

Sensitive fields (Payment info, Loyalty Points) locked down.

[Back to Customer](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Phone	Object Name	Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	mudhuluri lakshminarayanavarma, 13/09/2025, 7:06 pm		
Modified By	mudhuluri lakshminarayanavarma, 13/09/2025, 7:06 pm		

7. Session Settings

- Session Timeout: 2 hours
- Force logout on timeout: Enabled
- Lock sessions to domain/IP: Admins only
- Lightning Web Security: Enabled
- Multi-Factor Authentication: Admin & Managers (high assurance)

Benefit: Secures logins and prevents unauthorized access.



SETUP

Session Management

User Session Information

[Help for this Page](#)

View information about or delete active user sessions. Location shows the approximate location of the IP address from where the user logged in. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

View: [All](#) [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](#)

	Username	Session ID	Parent Session ID	Session Type	User Type	Login Type	Created	Updated	Valid Until	Source IP	Location
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x00Ak		UI	Standard	Application	26/09/2025, 12:33 pm	26/09/2025, 12:39 pm	26/09/2025, 2:39 pm	103.168.80.48	India
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x0HXv	0AkdM00000x00Ak	Content	Standard	Application	26/09/2025, 12:33 pm	26/09/2025, 12:33 pm	26/09/2025, 2:33 pm	103.168.80.48	India
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x0RL2	0AkdM00000x0TjB	InternalServiceCall	Standard	Application	26/09/2025, 12:23 pm	26/09/2025, 12:23 pm	26/09/2025, 2:23 pm	103.168.80.48	India
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x0TjB		UI	Standard	Application	26/09/2025, 12:23 pm	26/09/2025, 12:30 pm	26/09/2025, 2:30 pm	103.168.80.48	India
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x0TjX	0AkdM00000x00Ak	InternalServiceCall	Standard	Application	26/09/2025, 12:34 pm	26/09/2025, 12:33 pm	26/09/2025, 2:33 pm	103.168.80.48	India
<input type="checkbox"/>	foodieconnect@food.com	0AkdM00000x0WPP	0AkdM00000x00Ak	Aura	Standard	Application	26/09/2025, 12:33 pm	26/09/2025, 12:33 pm	26/09/2025, 2:33 pm	103.168.80.48	India

8. Login IP Ranges

- **Admins:** Restricted to office IP range (e.g., 103.168.80.48)
- **Delivery & Customers:** No IP restrictions (mobile access supported)

Admin logins protected; other users can access anywhere.

Login IP Ranges

[New](#)

[Login IP Ranges Help](#)

Action	IP Start Address	IP End Address	Description
Edit Del	0.0.0.0	255.255.255.255	

9. Audit Trail

- Tracks changes across all setup activities:
 - Object creation (Customer, Order, Payment, Delivery, Issue)
 - Validation, Sharing, Duplicate Rules
 - Login IP range updates
- Audit Trail export available in CSV for reporting.

Full transparency of config changes and user actions.

	A	B	C	D	E	F
1	Date	User	Source Na	Action	Section	Delegate Use
2	26/09/202	foodieconnect@food		Added Log	Manage Users	
3	26/09/202	foodieconnect@food		Changed welcome email template		
4	26/09/202	foodieconnect@food		Session Se	Session Settings	
5	26/09/202	foodieconnect@food		Session Se	Session Settings	
6	26/09/202	foodieconnect@food		Session Se	Session Settings	
7	26/09/202	foodieconnect@food		Session Se	Session Settings	
8	26/09/202	foodieconnect@food		Session Se	Session Settings	
9	26/09/202	foodieconnect@food		Session Se	Session Settings	
10	26/09/202	foodieconnect@food		Session Se	Session Settings	
11	26/09/202	foodieconnect@food		Completed	Sharing Rules	
12	26/09/202	foodieconnect@food		Created C	Sharing Rules	
13	26/09/202	foodieconnect@food		Initiated C	Sharing Rules	
14	25/09/202	foodieconnect@food		Requested	Data Export	
15	25/09/202	foodieconnect@food		For matchi	Matching Rule	
16	25/09/202	foodieconnect@food		For matchi	Matching Rule	
17	25/09/202	foodieconnect@food		For matchi	Matching Rule	
18	25/09/202	foodieconnect@food		For matchi	Matching Rule	
19	25/09/202	foodieconnect@food		For matchi	Matching Rule	
20	25/09/202	foodieconnect@food		For matchi	Matching Rule	
21	25/09/202	foodieconnect@food		For matchi	Matching Rule	
22	25/09/202	foodieconnect@food		Created ne	Matching Rule	
23	25/09/202	foodieconnect@food		Created ne	Duplicate Rule	
24	25/09/202	foodieconnect@food		Remote Pr	Security Controls	
25	25/09/202	foodieconnect@food		Created A	Auth. Providers	
26	25/09/202	foodieconnect@food		Added Cha	Change Data Capture	
27	25/09/202	foodieconnect@food		Added Cha	Change Data Capture	