



# FoodieConnect Salesforce CRM – Comprehensive Project Report



Author: LAKSHMI NARAYANA VARMA MUDHULURI

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# 01

## Project Overview

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# Project Overview

FoodieConnect Pvt. Ltd. is a Salesforce-powered CRM designed for the restaurant food delivery industry. The system streamlines operations including order management, restaurant onboarding, deliveries, payments, customer management, and loyalty programs.

## Key Objective 1

Centralized platform for restaurants, riders, support staff, and management.

## Key Objective 2

Automation of operational workflows: orders, payments, and deliveries.

## Key Objective 3

Enhanced reporting and analytics for performance monitoring.

## Key Objective 4

Ensured data integrity, security, and role-based access control.

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## Organizational Setup

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# Company Profile

Attribute	Value
Organization Name	FoodieConnect Pvt. Ltd.
Primary Contact	Mudhuluri Lakshminarayananvarma
Phone	9381478293
Address	26-2-696, Chandramouli Nagar, Near Telephone Exchange, 9th Street, Nellore, Andhra Pradesh, India – 524004
Default Locale	English (India)
Default Language	English
Time Zone	IST (GMT+05:30)
Currency	INR
Multiple Currencies	Disabled

This ensures Salesforce reflects local context for time, currency, and language.

# Business Hours

Attribute	Value
Business Hours Name	FoodieConnect Support Hours
Schedule	Sunday-Saturday, 24x7
Default	Enabled
Active	Yes
Holidays Configured	None

Continuous support reflects 24x7 food delivery operations.

# Fiscal Year

Fiscal Year	Start Date	End Date
2026	01-Oct-2025	30-Sep-2026

Aligns financial reporting with company-specific operational cycle.

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## User Management

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# Profiles

Profile	Purpose
Admin	Full system access
Manager	Operational & business management
Rider	Limited access to orders and tasks
Support	Customer support access



## Roles Hierarchy

- 1 CEO
- 2 Operations Manager
- 3 Restaurant Manager
- 4 Rider
- 5 Support Manager
- 6 Support Agent
- 7 Salesforce Admin

Higher roles have visibility into subordinates' activities; clear responsibility separation.

# Organization-Wide Defaults (OWD)

Object	Sharing
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
Provider	Public Read/Write
Resource	Public Read/Write
Restaurant	Public Read/Write



## Sharing Rules

1

### Orders

Full access for Managers & Admins to Rider-owned orders.

2

### Payments

Managers have full access.

3

### Customer

Support agents have read/write access.

4

### Restaurant

Operations Managers & Admins have full access.

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## Application Setup

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# Custom Lightning App

FoodieConnect CRM centralizes:



# Objects & Relationships

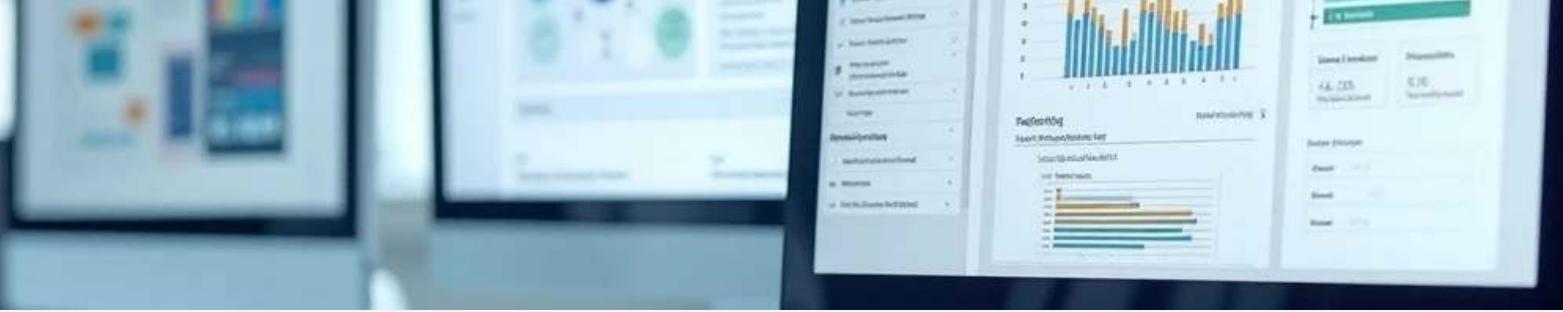
Object	Purpose	Key Fields
Restaurant	Partner restaurant info	Name, Address, Ratings
Menu Item	Food items	Name, Price, Restaurant Lookup
Customer	Customer details & loyalty	Name, Email, Loyalty Points
Order	Track orders	Order Number, Customer, Total Amount, Status
Delivery	Track delivery	Delivery Number, Order, Rider, Status
Payment	Payment info	Amount, Status, Order Lookup
Issue	Customer complaints	Issue Number, Customer, Status, Issue Type

Relationships:

Lookup: Menu Item → Restaurant

Master-Detail: Orders → Menu Items

Orders → Issues (for problem tracking)



# Layouts

Record Types & Page Layouts: Role-specific views.

Compact Layouts: Quick mobile access.

Schema Builder: Visual mapping of relationships.

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## Automation & Business Rules

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# Automation & Business Rules

## 1 Validation Rules

- Order\_Total\_Positive: Prevent orders with zero/negative amounts.
- Payment & Menu Item rules: Ensure data integrity.

## 3 Flows

- Payment Confirmation Flow: Updates order status and sends email alert.

## 5 Custom Notifications

- Delivery\_Assigned Notification: Notifies Rider on new delivery assignments.

## 2 Email Alerts

- Payment Received Alert: Sends automated emails to customers on successful payment.

## 4 Approval Processes

- Payment Approval: Routed to Operations Manager automatically before processing.

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## Apex & Trigger Implementation

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# Apex & Trigger Implementation

Class / Trigger	Purpose
RestaurantService	Fetch active restaurants & menu items, update ratings
OrderHandle	Manage order lifecycle, delivery creation, loyalty points
PaymentHandler	Synchronize payment status with orders
FoodieConnectUtility	Generate unique order numbers
OrderTrigger	Delegates logic to handler classes (Before Insert, After Insert, Before Update, After Update)

SOQL Queries: Fetch records efficiently for Orders, Customers, Restaurants.

Collections & Control Statements: Lists, Sets, Maps, loops, if statements, and exception handling for bulk operations.

Test Classes: OrderHandlerTest ensures functional and bulk test coverage with System.assert() validations.

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## Integration & API Setup

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# Integration & API Setup

Component	Implementation
Named Credentials	FoodConnectAPI for secure API calls
External Credentials	Configured for enhanced authentication
Web Services	REST & SOAP endpoints implemented for Orders
Callouts	HTTP callouts configured using Named Credentials
Platform Events	OrderEvent__e for real-time notifications
Change Data Capture	Enabled for Order__c object
OAuth & Authentication	OAuth 2.0 configured via FoodConnectOAuth
Remote Site Settings	Configured for external API endpoints

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## Data Management

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# Data Management

Tool	Purpose	Outcome
Data Import Wizard	CSV import for Customers	Accurate data population
Data Loader	Bulk insert/update for Orders & Payments	Efficient handling of large datasets
Duplicate Rules	Prevent duplicate Customer records	High data quality
Data Export	Scheduled backups	Disaster recovery & compliance
Change Sets	Optional deployment method	Single-org development; future use possible
Unmanaged Package	Bundle CRM components	Dependency management required for deployment

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## Reports & Dashboards

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# Reports & Dashboards

Type	Purpose
Tabular	Lists of Customers, Orders, Payments
Summary	Orders by Status, Deliveries by Rider
Matrix	Orders vs Restaurants with sales totals
Joined	Customer & Orders combined

Dashboards:

1 Overview: Orders, Payments,  
Customer Growth

2 Delivery Performance: Rider & status  
metrics

3 Dynamic Dashboards: Role-specific  
data view (e.g., Riders see assigned  
deliveries).

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## Security & Audit

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# Security & Audit

Feature	Details
Field Level Security	Admin: full access, Support: limited, Rider: only delivery/order fields
Session Settings	Timeout: 2 hours, Forced logout, Multi-factor for Admin & Managers
Login IP Ranges	Admin: restricted, Others: mobile access allowed
Audit Trail	Tracks all setup changes, object creation, sharing rules, login IP changes

The background of the slide features a subtle, abstract design. It consists of several large, semi-transparent circles in shades of light blue and white, which overlap each other. Small, bright white dots are scattered across the surface, some located within the circles and others between them, creating a sense of depth and motion.

Thank You