Phase 2

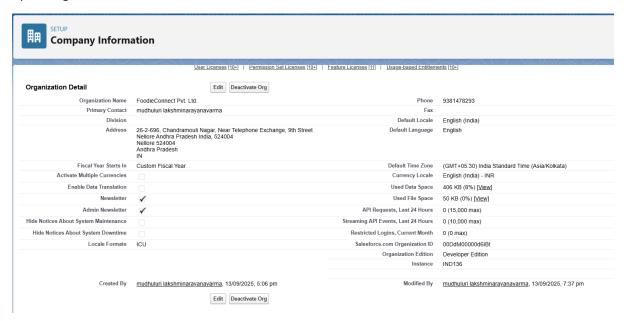
1. FoodieConnect Salesforce CRM - Phase 2 Setup

FoodieConnect Pvt. Ltd. is building a Salesforce-powered CRM tailored for the food delivery industry. This phase covers **organizational setup**, **user management**, **access control**, **and deployment basics** to ensure smooth operations and collaboration.

By configuring company details, business hours, fiscal cycles, user roles, profiles, and sharing rules, the system reflects FoodieConnect's unique operational needs.

2. Company Profile Setup

The company information has been configured to reflect FoodieConnect's business identity and operating details.



• Organization Name: FoodieConnect Pvt. Ltd.

• Primary Contact: Mudhuluri Lakshminarayanavarma

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: India Standard Time (GMT+05:30, Asia/Kolkata)

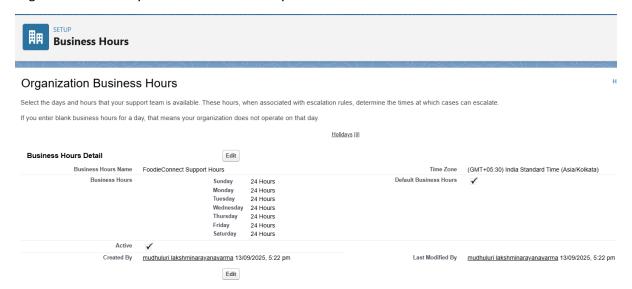
Currency Locale: INR (English - India)

• Multiple Currencies: Not enabled

This setup ensures that all users in the organization experience Salesforce in their local context, with Indian time, currency, and language preferences.

3. Business Hours & Holidays

FoodieConnect has defined 24x7 business hours to ensure that support and operational activities are aligned with its always-available food delivery service.



Business Hours Name: FoodieConnect Support Hours

Schedule: Sunday to Saturday – 24 Hours

• Default Business Hours: Enabled

Active: Yes

• Holidays Configured: None

This configuration reflects the company's commitment to continuous service without holiday restrictions.

4. Fiscal Year Settings

A Custom Fiscal Year has been activated to align financial reporting with FoodieConnect's operational cycle.

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years New			New	
Action	Year	FY Start Date		FY End Date
Edit	2026	01/10/2025		30/09/2026

Fiscal Year 2026:

Start Date: 01-Oct-2025

End Date: 30-Sep-2026

This customization ensures that accounting and business reporting follow the company's specific financial planning needs instead of Salesforce's standard calendar year.

5. Profiles

To control system access and tailor permissions for different user groups, the following profiles have been created under the Salesforce Platform license:

Profiles



- FoodieConnect Admin for system administrators with high-level access.
- FoodieConnect Manager for operational and business managers.
- FoodieConnect Rider for delivery staff with limited access to orders and tasks.
- **FoodieConnect Support** for customer support representatives.

This division ensures that users only access the parts of Salesforce relevant to their responsibilities.

6. Roles

A role hierarchy has been set up to mirror FoodieConnect's organizational structure. This supports reporting visibility and record ownership.



Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

```
Collapse All Expand All
FoodieConnect Pvt. Ltd.
     Add Role
    food connect CEO Edit | Del | Assign
        Add Role
        Operations Manager Edit | Del | Assign
            Add Role
           — Restaurant Manager Edit | Del | Assign
                Add Role
               Ē ... <u>Rider</u> <u>Edit</u> | <u>Del</u> | <u>Assign</u>
                    Add Role
        Support Manager Edit | Del | Assign
             .... Add Role
            Support Agent Edit | Del | Assign
                Add Role
    Edit | Del | Assign
           Add Role
```

- FoodieConnect Pvt. Ltd.
 - o CEO
 - Operations Manager
 - Restaurant Manager
 - Rider
 - Support Manager
 - Support Agent
 - SF Admin

This hierarchy ensures that higher roles (like CEO and Managers) have visibility into the activities of their subordinates, while also providing clear separation of responsibilities.

7. Organization-Wide Defaults (OWD)

The baseline sharing model controls record visibility across the organization.

- 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

This setup ensures collaboration across teams while maintaining parent-controlled access for orders to ensure proper linkage with related records.

8. Sharing Rules

To provide additional record access beyond OWDs, sharing rules have been configured:



- Orders Sharing Rule: Managers and Admins have full access to Orders owned by Riders.
- Payments Sharing Rule: Managers have full access to all Payments for financial tracking.
- **Customer Sharing Rule:** Support Agents have read/write access to all Customer records for better assistance.
- **Restaurant Sharing Rule:** Operations Managers and Admins have full access to Restaurant records for onboarding and updates.

These rules ensure smooth collaboration between departments while keeping sensitive data secured at the right levels.

9. Deployment Basics

A custom Lightning App named **FoodieConnect** has been created. This app centralizes access to the core business objects:

- Restaurants
- Menu Items

•	Customers
_	Orders
•	
•	Deliveries
•	Payments
_	
•	Issues