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.

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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.

SETUP
Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [0]

Business Hours Detail	Edit		
Business Hours Name	FoodieConnect Support Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday 24 Hours	Default Business Hours	✓
	Monday 24 Hours		
	Tuesday 24 Hours		
	Wednesday 24 Hours		
	Thursday 24 Hours		
	Friday 24 Hours		
	Saturday 24 Hours		
Active	✓		
Created By	mudhuluri lakshminarayanavarma 13/09/2025, 5:22 pm	Last Modified By	mudhuluri lakshminarayanavarma 13/09/2025, 5:22 pm
	Edit		

- **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		
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.

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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

All Profiles ⌄ Edit | Delete | Create New View

			A	B	C	D	E	**F**	G	H	I	J

New Profile ↻

	Action	Profile Name ↑	User License	Custom
☐	Edit | Del |...	FoodieConnect Admin	Salesforce Platform	✓
☐	Edit | Del |...	FoodieConnect Manager	Salesforce Platform	✓
☐	Edit | Del |...	FoodieConnect Rider	Salesforce Platform	✓
☐	Edit | Del |...	FoodieConnect Support	Salesforce Platform	✓

- **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.

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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
        - Rider Edit | Del | Assign
          - Add Role
    - Support Manager Edit | Del | Assign
      - Add Role
      - Support Agent Edit | Del | Assign
        - Add Role
  - SF Admin Edit | Del | Assign
    - Add Role

- **FoodieConnect Pvt. Ltd.**
  - 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.

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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.

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8. Sharing Rules

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

	SETUP			
Sharing Settings				
AppLog	Public Read/Write	Private		✓
Customer	Public Read/Write	Private		✓
Delivery	Public Read/Write	Private		☐
Issue	Public Read/Write	Private		✓
Menu Item	Public Read/Write	Private		✓
Order	Controlled by Parent	Controlled by Parent		
Payment	Public Read/Write	Private		✓
Provider	Public Read/Write	Private		✓
Resource	Public Read/Write	Private		✓
Restaurant	Public Read/Write	Private		✓

- **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.

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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