**Salesforce CRM Project Documentation & Demo Video**

**Project Title: Restaurant Management CRM**

**Project Documentation**

**Project Overview**

The Restaurant Management CRM is designed to streamline restaurant operations, manage customer reservations, track orders, and optimize staff allocation. The system enables restaurants to efficiently handle table bookings, order tracking, payment processing, customer feedback, and loyalty programs. Key features include automation of booking confirmations, real-time table availability, customer communication, and detailed reporting for decision-making.

**Objectives**

* Automate restaurant booking and order management.
* Improve customer service by reducing errors in reservations and orders.
* Provide real-time visibility of table occupancy and staff schedules.
* Enable managers to monitor business performance via dashboards and reports.
* Enhance customer engagement through loyalty programs and personalized offers.

**Phase 1: Problem Understanding & Industry Analysis**

* **Requirement Gathering:** Need to manage tables, bookings, customers, and payments.
* **Stakeholder Analysis:** Restaurant manager, waitstaff, customers.
* **Business Process Mapping:** From booking → seating → ordering → billing → feedback.
* **Industry-Specific Use Case:** High-volume restaurants often face double-booking issues → solved with automated table allocation.
* **AppExchange Exploration:** Table Reservation Apps, POS integrations.

**Phase 2: Org Setup & Configuration**

* **Salesforce Edition:** Enterprise Edition.
* **Company Profile:** Restaurant working hours set (10 AM – 11 PM).
* **Business Hours & Holidays:** Configured for weekends/holidays.
* **Users Setup:** Roles for Manager, Waiter, Chef, Cashier.
* **Sandbox Usage:** For testing booking flows and table management.

**Phase 3: Data Modeling & Relationships**

* **Custom Objects:**
  + Customer\_\_c (Stores customer info).
  + Booking\_\_c (Table reservation).
  + Order\_\_c (Food/drink orders).
  + Menu\_Item\_\_c (Menu management).
  + Payment\_\_c (Transactions).
* **Relationships:**
  + One Customer → Many Bookings.
  + One Booking → Many Orders.
  + Orders linked to Menu Items.
* **Schema Builder:** Used to visualize relationships.

**Phase 4: Process Automation (Admin)**

* **Validation Rules:** Prevent booking with past dates.
* **Workflow Rule:** Auto-send booking confirmation email to customer.
* **Approval Process:** Discount >20% needs Manager approval.
* **Flow Builder:**
  + Screen Flow for new booking.
  + Record-Triggered Flow to auto-create a Task for waiter after booking is confirmed.

**Phase 5: Apex Programming (Developer)**

* **Apex Trigger:** On Booking\_\_c → Prevent double-booking for the same table & time.
* **Batch Apex:** Nightly cleanup of old booking data.
* **Queueable Apex:** Send bulk promotional emails to customers.
* **Future Methods:** Notify staff on urgent booking changes.
* **Test Classes:** For trigger testing (80%+ coverage).

**Phase 6: User Interface Development**

* **Lightning App Builder:** Custom Restaurant App with tabs (Bookings, Orders, Menu, Payments).
* **Record Pages:** Booking record shows related Orders & Payment.
* **Utility Bar:** Quick access to "Check Table Availability."
* **LWC Components:**
  + TableAvailability → shows real-time table status.
  + MenuSelection → interactive menu for order selection.

**Phase 7: Integration & External Access**

* **Named Credentials & Remote Site Settings:** For integrating with external payment gateway (Stripe/PayPal).
* **REST API Callout:** Fetch daily specials from external POS.
* **Platform Events:** Notify kitchen when a new order is placed.
* **Salesforce Connect:** Link external supplier inventory database.

**Phase 8: Data Management & Deployment**

* **Data Import Wizard:** Import initial customer & menu data.
* **Data Loader:** Bulk upload bookings for migration.
* **Duplicate Rules:** Prevent duplicate customer records.
* **Change Sets:** Move from Sandbox → Production.
* **VS Code + SFDX:** Source tracking for development.

**Phase 9: Reporting, Dashboards & Security Review**

* **Reports:**
  + Tabular → Daily Reservations.
  + Summary → Sales by Menu Item.
  + Matrix → Bookings by Day vs Time.
* **Dashboards:**
  + Occupancy Dashboard → Table occupancy rate.
  + Revenue Dashboard → Daily/Monthly sales.
* **Security:**
  + Profiles: Manager vs Waiter access.
  + Roles: Hierarchy from Admin → Manager → Staff.
  + Permission Sets: For special features (discount approval).  
    *(Screenshot Example: Restaurant Dashboard with occupancy & revenue KPIs.)*

**Phase 10: Quality Assurance Testing**

| **Use Case** | **Test Steps** | **Expected Result** | **Actual Result** |  |
| --- | --- | --- | --- | --- |
| Booking | Create booking for past date | Error shown | Error displayed | ✔ |
| Discount Approval | Apply 30% discount | Manager approval triggered | Approval request sent | ✔ |
| Order | Add 3 orders to 1 booking | Orders linked correctly | Orders saved under booking | ✔ |

**Conclusion**

The Restaurant CRM successfully automated table reservations, order management, payments, and customer tracking. Reports and dashboards help management monitor sales trends and occupancy rates. With flows, Apex, and LWC, the CRM provides scalability and real-time updates, improving both operations and customer experience.

**Future Enhancements:**

* AI-powered recommendations for upselling menu items.
* Chatbot for reservations.
* Mobile app for staff to take orders on the go.

**Salesforce CRM Project Demo Video (Restaurant)**

[**https://drive.google.com/file/d/13xX6U35qaWeglibXg85WD\_20QjxsP8Ll/view?usp=sharing**](https://drive.google.com/file/d/13xX6U35qaWeglibXg85WD_20QjxsP8Ll/view?usp=sharing)

**Git Hub link:**

[**https://github.com/Ambica29/restaurant-crm**](https://github.com/Ambica29/restaurant-crm)