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

**1. Requirement Gathering**

**Functional Requirements**

* The system must automatically calculate loyalty points when an order's status is set to 'Complete'.
* Staff should be able to view a customer's order history and current points balance.
* Managers need a feature to manually adjust points for promotions or customer service reasons.
* The system should be able to track orders, including menu items, quantity, and total amount.
* Notifications (e.g., email) should be configurable for key events like order confirmation.

**Non-Functional Requirements**

* **Data Security:** Only authorized users (staff, managers) should be able to access or modify customer and order data.
* **Performance:** The points calculation and record updates should happen in near real-time without slowing down the user experience.
* **Usability:** The interface for viewing points and order history should be simple and intuitive for restaurant staff.
* **Scalability:** The system must be able to handle a large volume of daily orders and customer records without degradation in performance.

**2. Stakeholder Analysis**

| Stakeholder | Role in the System | Needs/Expectations |
| --- | --- | --- |
| **Restaurant Staff** | End users who manage orders and interact with customers. | Quick access to customer points and order history. |
| **Managers** | Oversee operations and customer satisfaction. | Visibility into loyalty trends, ability to resolve issues, and performance reports. |
| **Customers** | Indirect users who benefit from the loyalty program. | Accurate and timely updates to their loyalty points. |
| **Admin** | Manages the Salesforce platform and configuration. | Control over the automation rules, data, and user permissions. |

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**3. Business Process Mapping**

* **Step 1:** A staff member creates or updates an Order\_\_c record for a customer in Salesforce.
* **Step 2:** The staff member updates the order's status to 'Complete' once the transaction is finished.
* **Step 3:** An automated process (Apex trigger) fires upon the status change.
* **Step 4:** The system calculates loyalty points based on the order's total amount.
* **Step 5:** The calculated points are automatically added to the customer's Loyalty\_Program\_\_c record.
* **Step 6:** The customer's new points balance is immediately visible to staff on the Contact page.
* **Step 7:** Managers can view reports on points awarded and customer loyalty trends.

**4. Industry-Specific Use Case Analysis**

* **QSR/Food & Beverage Industry:** This solution provides a direct way to increase customer retention and engagement through an automated loyalty program, a common strategy in this competitive market.
* **Real Estate Industry:** Property owners get a new market (students) without brokers.

*(Note: This is from the template and less relevant here, but included for structural consistency).*

* **Technology/CRM Industry:** Salesforce serves as a powerful, scalable platform for managing the entire customer lifecycle, from order-taking to loyalty and retention, all in one place.

**5. AppExchange Exploration**

Before building a custom solution, we explored the Salesforce AppExchange for existing loyalty management packages:

* **Large-Scale Loyalty Apps:** Many are designed for enterprise-level, multi-channel marketing campaigns and are too complex and expensive for this specific use case.
* **Order Management Apps:** These focus heavily on inventory and fulfillment rather than the post-purchase loyalty calculation.
* **Point-of-Sale (POS) Apps:** While some have loyalty features, they often don't integrate as deeply or flexibly into the Salesforce Contact record as a custom solution can.