**QuickServe Management System – Order & Loyalty Module**

**Industry**

Food & Beverage / Quick Service Restaurant (QSR)

**Project Type**

B2C Salesforce CRM Implementation

**Target Users**

Restaurant Staff, Managers, Salesforce Administrators

**Problem Statement**

The business currently lacks an automated system to track customer orders and reward loyal customers. The process of calculating and awarding loyalty points is either manual or non-existent, leading to missed engagement opportunities, a lack of real-time data, and a disconnected customer experience. The project aims to automate this process to enhance customer engagement and provide data-driven insights.

**Use Cases**

**1. Order Management**

* Maintain a central record of all customer transactions using a custom Order\_\_c object.
* Track key order details, including the linked customer (Contact), Status\_\_c, Menu\_Item\_\_c, and Total\_Amount\_\_c.

**2. Loyalty Program Management**

* Create and maintain a Loyalty\_Program\_\_c account for each customer to track their points balance.
* Provide a feature for managers to manually adjust points for promotions or service recovery.

**3. Automated Points Calculation & Updates**

* When an Order\_\_c status is updated to **‘Complete’**, the system automatically calculates loyalty points based on the total amount.
* The customer's Points\_Balance\_\_c on their Loyalty\_Program\_\_c record is updated in real-time.

**4. User Interface & External Access**

* Provide staff with a custom Lightning Web Component on the Contact page to view a customer's points and order history.
* Develop a customer-facing portal using Experience Cloud for customers to check their own points balance and order history.
* Integrate with the Point-of-Sale (POS) system via API to automatically create Order\_\_c records in Salesforce.

**5. Reporting & Analytics**

* **Reports:** Generate key reports such as "Top 10 Loyal Customers," "Most Popular Menu Items," and "Points Awarded This Month."
* **Dashboard:** Build a "Manager's Dashboard" to visualize KPIs like daily order volume, average order value, and total active loyalty members.
* **Security:** Configure profiles and permission sets to ensure staff and managers can only access the data relevant to their roles.

**Tech Stack**

* **CRM Platform:** Salesforce CRM (Service Cloud), Experience Cloud
* **Custom Objects:** Order\_\_c, Loyalty\_Program\_\_c, Menu\_Item\_\_c
* **Automation:** Apex Triggers, Apex Classes
* **User Interface:** Lightning Web Components (LWC)
* **Integration:** REST/SOAP APIs
* **Analytics:** Standard Salesforce Reports and Dashboards
* **Deployment:** Change Sets, Apex Unit Tests