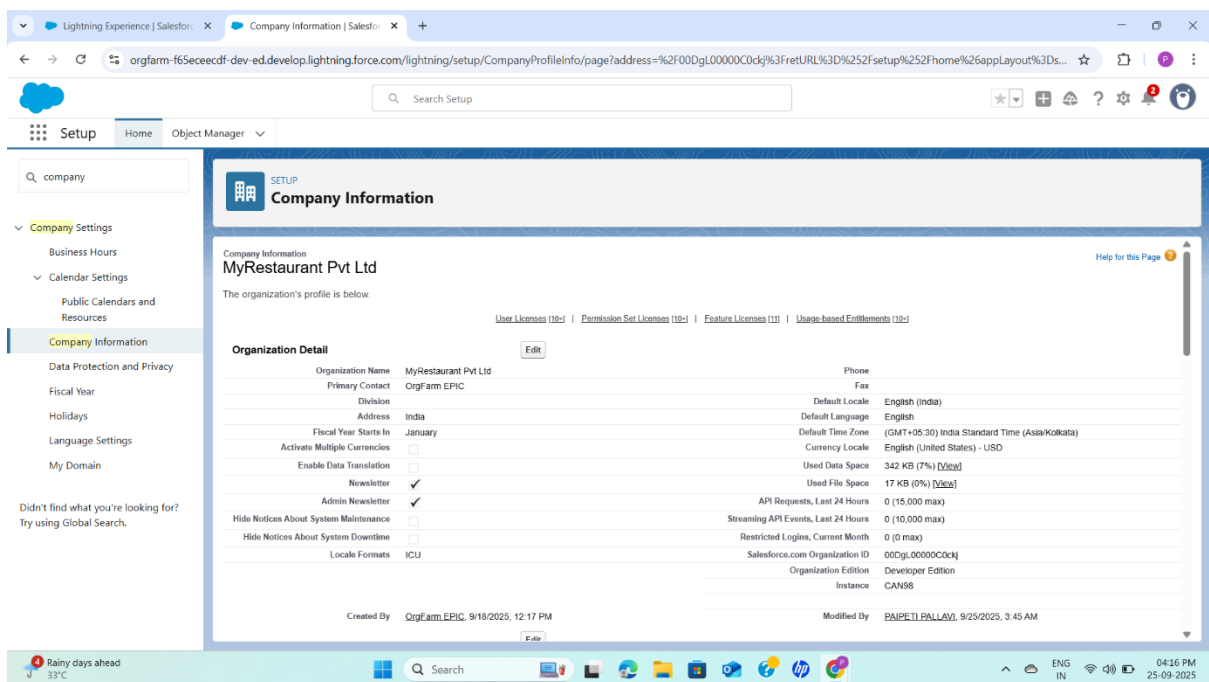# RESTAURANT CRM

Company Information

This is the foundation of any Salesforce organization. The *Company Information* section stores the official details of the business such as the company name, address, time zone, default currency, and fiscal year.

- **Organization Name**: Defines how the system recognizes your company and how it will appear in system headers, licenses, and reports. For example, *Restaurant CRM Pvt Ltd*.
- **Default Time Zone**: Ensures that all date/time stamps, workflows, and automation rules work according to the company's working hours. For India, we use (GMT+05:30) India Standard Time.
- **Default Currency**: Determines the default currency for opportunities, reports, and transactions. Businesses that operate in multiple regions can enable **multi-currency**.
- **Fiscal Year**: Critical for reporting revenue and performance. Salesforce supports both **Standard Fiscal Years** (Jan–Dec) and **Custom Fiscal Years** (e.g., Apr–Mar for Indian businesses).

2. Business Hours

Defining *Business Hours* in Salesforce is vital because many service-related features, like **case escalations, SLA timers, and workflow triggers**, depend on them.

- Example: The restaurant operates from **11:00 AM to 11:00 PM** every day.
- Marking them as **default** ensures they apply across customer support cases and automation flows unless overridden.
- Having clear business hours helps track SLA commitments more accurately.
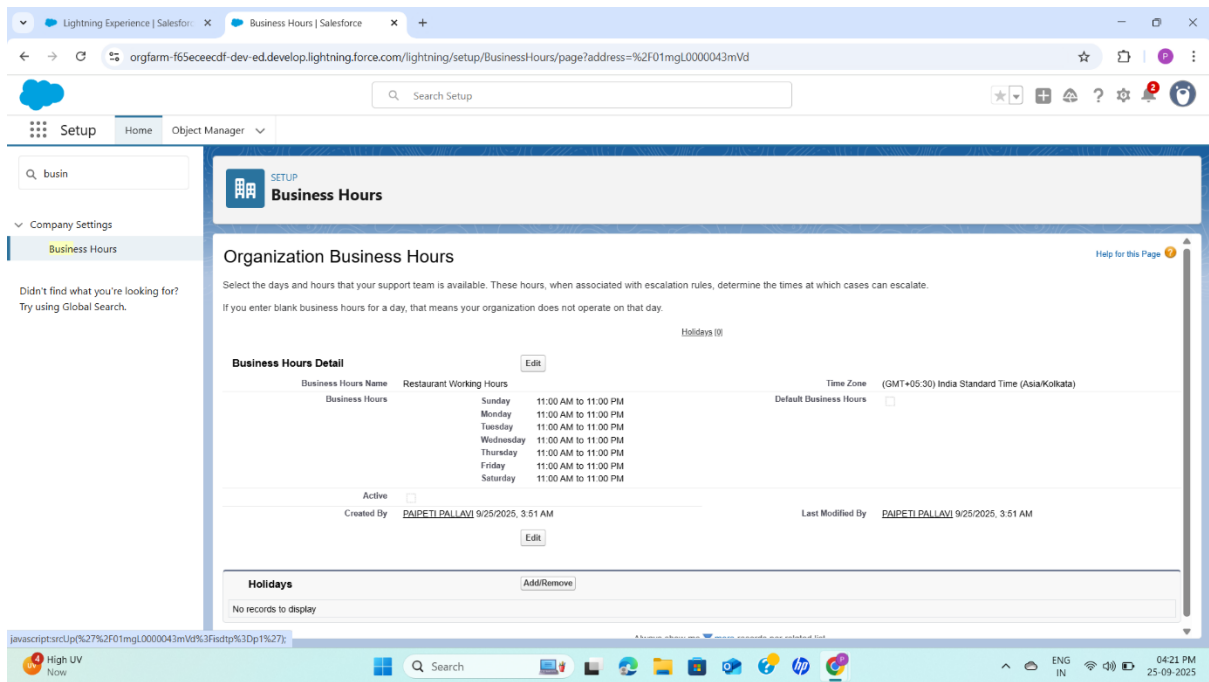
3. Holidays

Holidays allow you to define non-working days in Salesforce. These are linked to business hours to ensure SLA calculations and workflows don't count those days.

- **Example:** *Diwali – Nov 12, 2025*.
- **When a holiday is marked, Salesforce automatically pauses SLA timers and escalations on that day.**
- **This ensures accurate reporting and avoids penalizing the support team during holidays.**
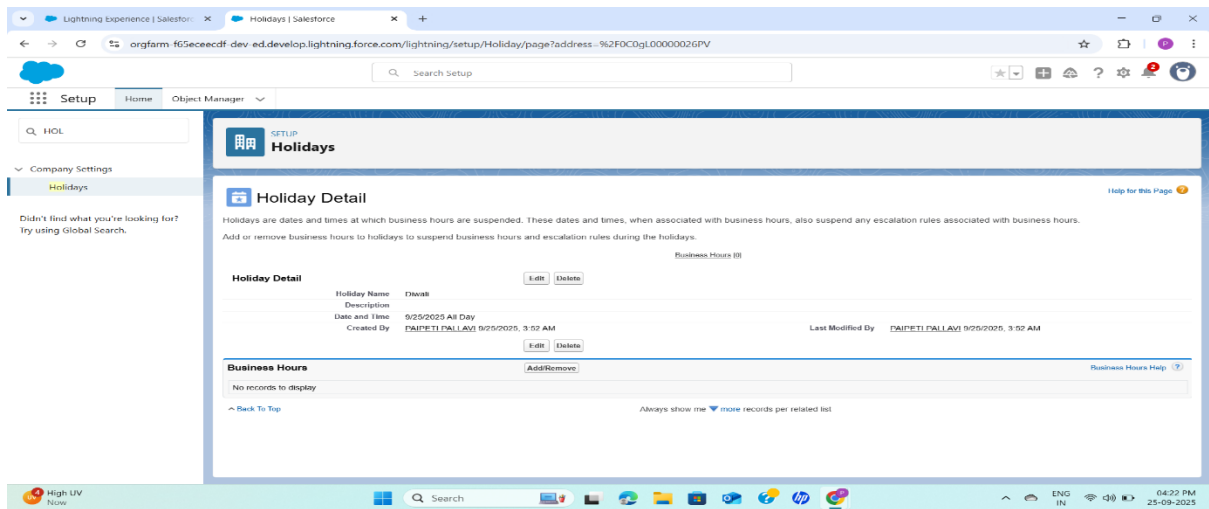
4. Fiscal Year

The *Fiscal Year* setup directly affects **reporting, forecasting, and dashboards**.

- **Standard Fiscal Year**: Runs Jan–Dec. Recommended for global organizations unless specified otherwise.
- **Custom Fiscal Year**: Can follow any 12-month pattern (e.g., Apr–Mar for Indian businesses). This is useful for aligning Salesforce reporting with statutory accounting requirements.

Once a fiscal year type is enabled, it affects all company reports, so the decision must be made carefully.
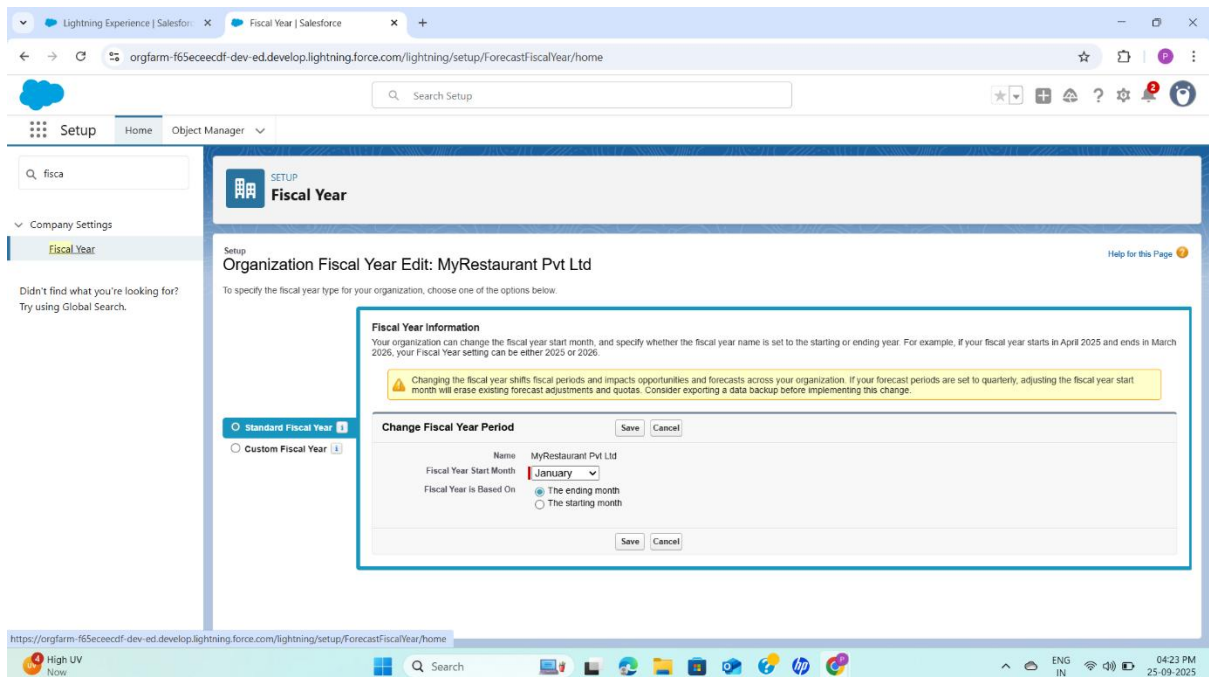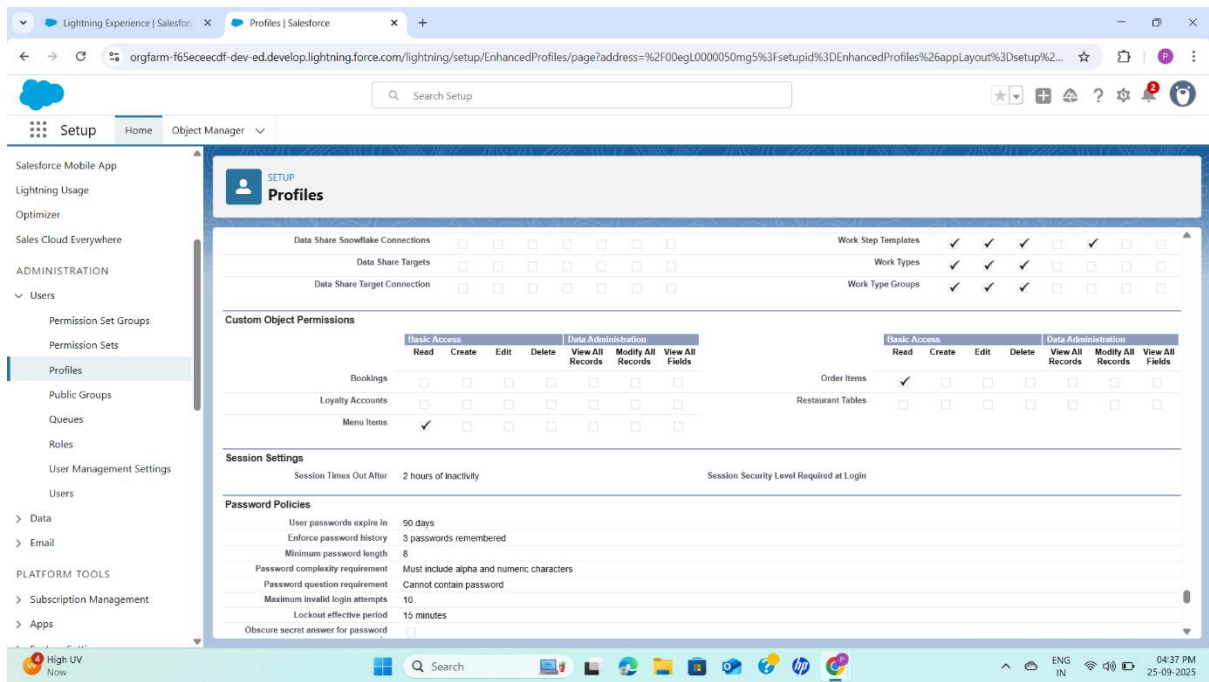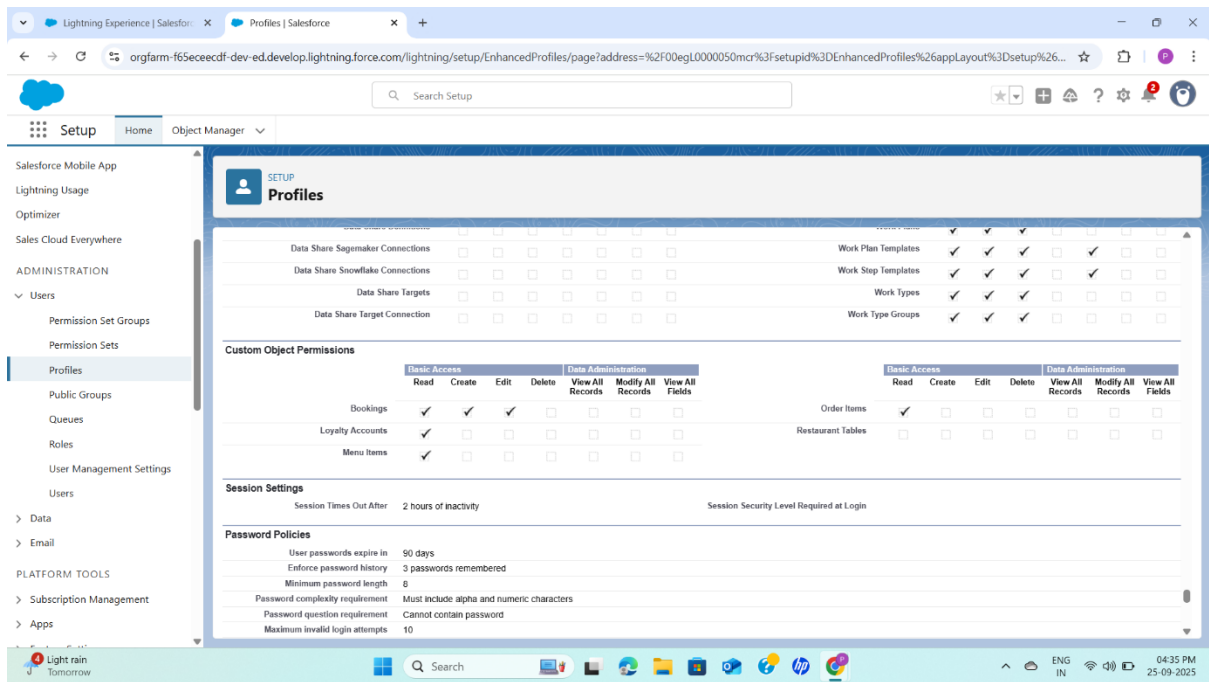
5. Profiles

Profiles are the backbone of Salesforce's **security model**. They define **object permissions, field-level access, page layouts, and app visibility**.

- **Manager Profile** → Full CRUD (Create, Read, Update, Delete) on Orders, Bookings, and Loyalty objects.
- **Host Profile** → Can create and manage bookings/orders but has limited edit access.
- **Kitchen Profile** → Read-only access to orders and related order items.

6. Permission Sets

Permission Sets allow granting **additional access on top of profiles** without changing the base profile.

- Example: *Order_Manager* permission set → Grants full access (Read, Create, Edit, Delete) on the Order__c object.
- Assignable to any user when temporary or extended access is required.
- This provides flexibility in managing security without cloning multiple profiles.
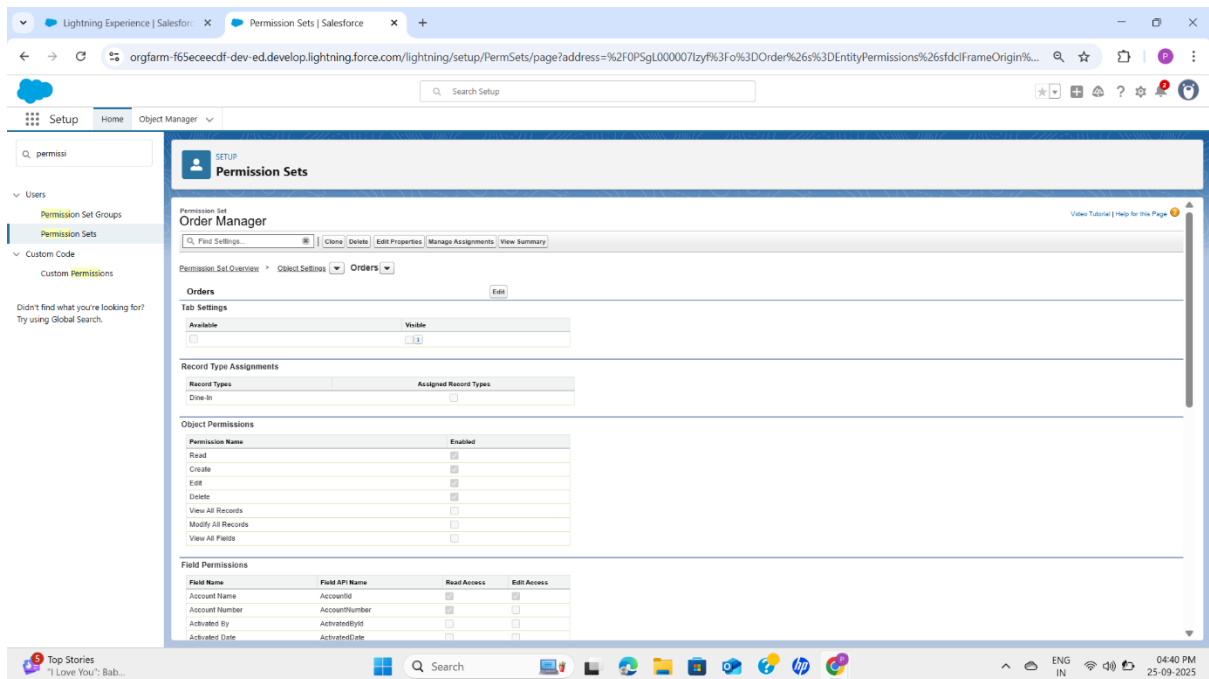
7. Users

Users represent real people who log in to Salesforce. Each user must be assigned a **profile** and optionally **permission sets**.

- Example: *Manager User* with Manager Profile.
- Each user consumes a license, which defines the type of functionality they can access (e.g., Sales Cloud, Service Cloud, or Platform license).

Proper user setup ensures accountability and controlled access to the system.
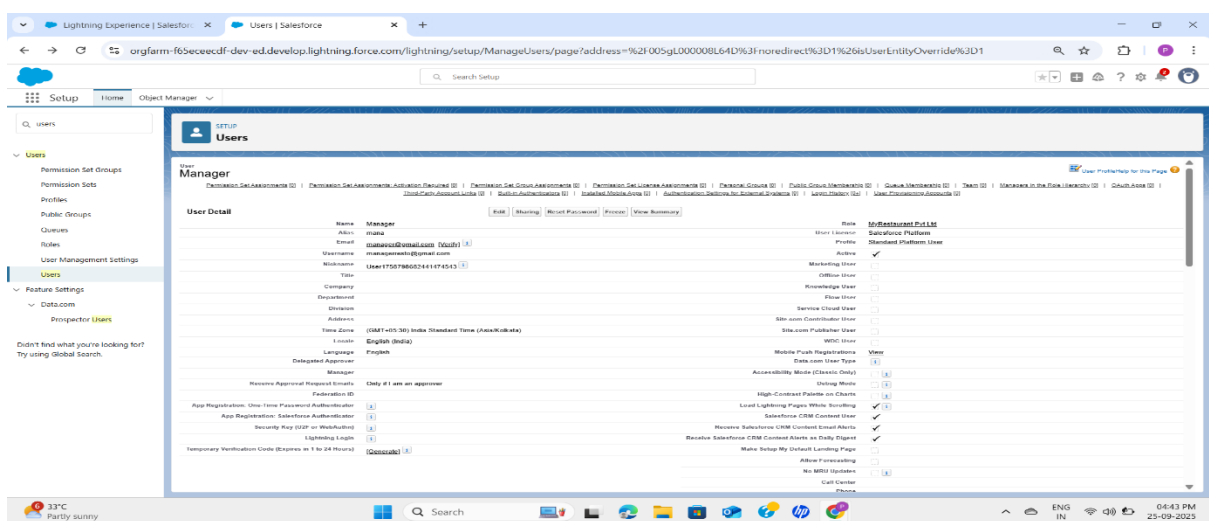
8. Role Hierarchy

Roles control **record visibility** and define how data rolls up in the organization.

- Top role: **Restaurant Manager** → Can view and manage all subordinate data.
- Under: **Host** → Handles bookings.
- Under: **Kitchen** → Sees order details only.

The role hierarchy supports Salesforce's **"record sharing up the hierarchy"** rule, meaning managers can automatically see the records owned by their subordinates.
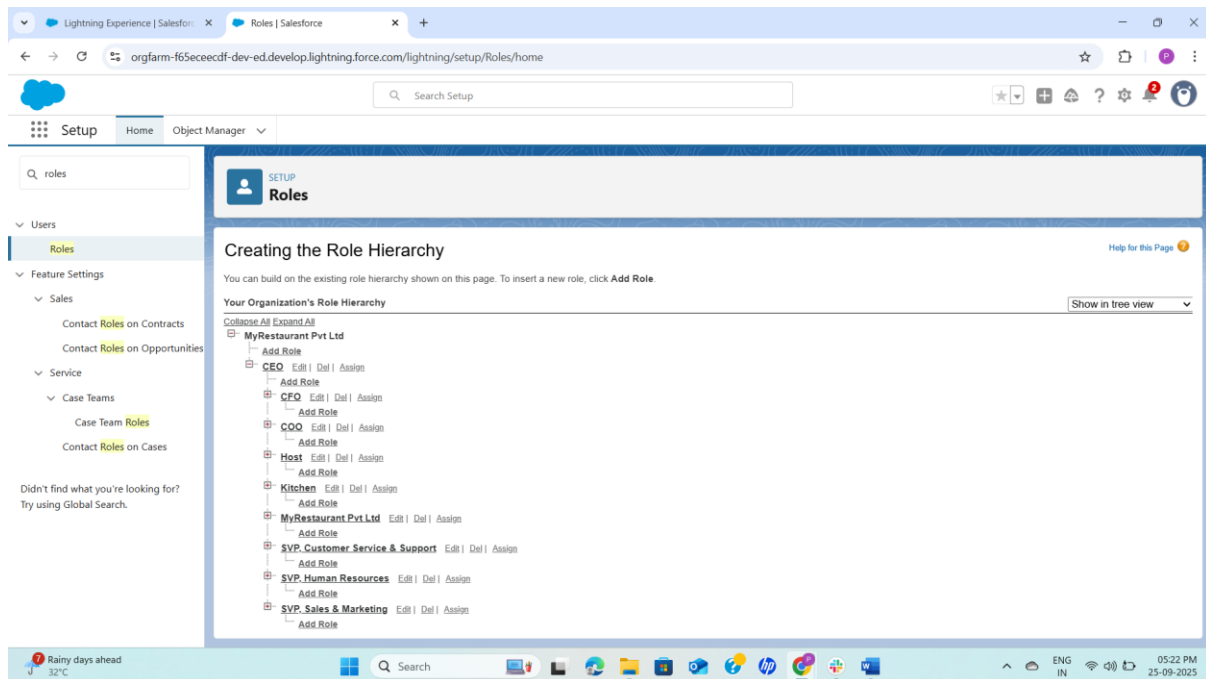

9. Session Settings

Session settings define the **security rules** for how long users remain logged in and how sessions are handled.

- **Force re-login after logout**: Prevents unauthorized re-entry.
- **Timeout (2 hours)**: Ensures inactive sessions automatically log out for security.
- **Lock sessions to IP address**: Optional, prevents session hijacking but may inconvenience mobile/remote workers.

This setup balances **security with usability**.
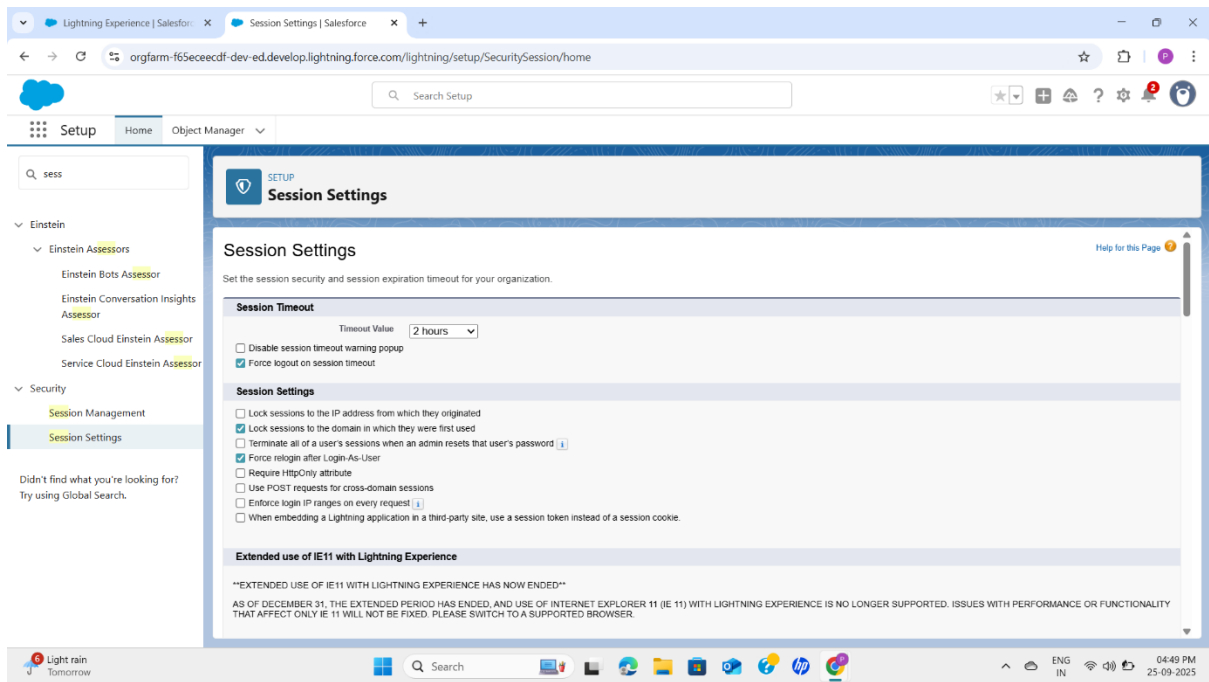
10. Login Access Policies

This feature allows admins to log in as other users (with permission) for **troubleshooting, testing, and training**.

- Example: The admin can log in as a Kitchen User to verify if permissions and page layouts are working correctly.
- This is critical during testing before going live.