

Person	Acceptance Status
Shimoli Shenoy	Confirmed ▾
Sharon Tesorero	Confirmed ▾
Harinie Sutharson	Confirmed ▾

Purpose of the MVP CRM

The CRM module's primary goal is to act as a structured memory of guest interactions, particularly around **reservations** and **orders**.

- It ensures that every guest's preference, past behaviors, and important details are easily accessible to staff.
- By providing staff with this visibility, the module enables personalized service—for example, knowing a guest's favorite dish or that they prefer a window seat.
- Over time, this record-keeping helps improve the overall dining experience and builds stronger guest relationships.

Core Features for MVP – Customer Profile

The MVP version focuses on a basic but functional customer profile system.

1. Basic Information

- Stores essential details like name and contact information (email, phone number).
- Acts as the foundation for identifying each guest.

2. Special Dates / Occasions: Records key personal dates such as birthdays and anniversaries which are useful for personalized greetings, offers, or special arrangements. (Can be used for marketing and push offers later)

3. Reservation History

- Captures the entire log of past reservations, including:
 - Restaurant
 - Table reserved
 - Party size
 - Date and time
 - Status of the last reservation (completed, cancelled, no-show, etc.)
- This gives staff quick insight into the frequency and pattern of a guest's visits. (Can build on trend analysis later)

4. Dietary and Taste Preferences

Captures guest food-related details for tailoring their dining experience:

- Food preference: Vegetarian, Vegan, or Non-Vegetarian.
- Allergies: Specifically, gluten, nuts, lactose.
- Spice tolerance: Mild, medium, or high.
- Beverage preferences: Alcoholic or non-alcoholic, as well as coffee/tea choice.

5. Automatic Tagging (Basic)

- Staff can manually assign simple tags to customers, such as: "Regular", "VIP"
- These tags act as quick identifiers for staff to recognize guest categories.

6. Notes from Customer

- Allows the customer to provide any additional notes beyond allergies or dietary preferences.
- For example, personal likes/dislikes, seating preferences, or expectations.

7. Staff Notes / Logs

- Staff can log observations **after interactions** or reservations, such as:
 - Preferred seating location (quiet corner, window seat).
 - Favorite dishes.
 - Special celebrations (e.g., came for an anniversary).
- Helps staff personalize future visits based on the notes

Note – Feedback and review system can be integrated here on both sides later but for now to be used as this mechanism.

8. Post-Reservation Spend Entry

- After a reservation, staff can record the amount spent by the guest.
- Though basic now, this lays the foundation for future analytics around spend behaviour.

Note- When the staff move to confirmed status we can prompt them on point 7 and 8 before completing the reservation.

OTHER SPECIFIC REQUIREMENTS

1. CRM Overview Page

- A dedicated CRM section must be available in the Tenant Dashboard, alongside existing sections for Restaurants and Reservations.
- The CRM overview should provide a search function to quickly locate customers by name, phone number, email, or tags.

2. Customer Profile Management

- Each customer should have a detailed profile page containing personal details, preferences and tags later with the AI Summary
- Profile Editing: Authorized staff must be able to update customer information directly from this profile.
- Printable Profile:
 - A standard print format must be defined.
 - When selecting "Print Profile," the system must generate a clean, formatted document containing all customer details and tags.
 - The print view must exclude reservation history, since this feature is mainly for fine dining staff (who often cannot carry devices).

3. Reservation History Integration

- Within the customer profile, the Reservation History should be displayed as a section.

- Each entry in the reservation history must be clickable, opening a non editable, detailed view of the specific reservation.

ADDITIONAL NOTES ON THE ROADMAP OF THE CRM FOR THE FUTURE

eMenu Integration Features and Future Scope with POS Systems

In future phases, when the CRM integrates with eMenu or other POS systems, the module will expand to:

- Order Tracking and Behaviour
 - Store frequently ordered items,
 - calculate average spend per visit,
 - build a complete order history.
- Upselling: Use past orders to suggest complementary or higher-value items.
- Analytics & Trends: Understand dining and ordering habits, seasonal preferences, and customer value over time.

Looking beyond the MVP and Integrations

1. Advanced Analytics & Trends – Combined insights from reservations and orders to identify guest behaviour patterns.
2. AI-driven Recommendations – Use historical transactions to suggest dishes, seating, or promotions tailored to each guest.