

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.