

DineTrack – Restaurant Management CRM

Final Project Report

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Problem Statement

Restaurants face challenges in managing reservations, customer preferences, staff schedules, and billing. Manual processes often lead to double bookings, delays in service, missed follow-ups, and poor customer engagement. DineTrack solves this by providing a centralized Salesforce-based CRM platform that automates confirmations, manages staff, tracks billing, and provides dashboards for performance insights.

Phase 1: Problem Understanding & Industry Analysis

Detailed steps and implementation for this phase are documented in the project report. It covers setup, design, and configuration in Salesforce tailored for restaurant CRM.

Phase 2: Org Setup & Configuration

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Phase 3: Data Modelling & Relationships

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Phase 4: Process Automation (Admin)

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Phase 5: Apex Programming (Developer)

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Phase 6: User Interface Development

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Phase 7: Integration & External Access

Detailed steps and implementation for this phase are documented in the project report. It covers setup, design, and configuration in Salesforce tailored for restaurant CRM.

Phase 8: Data Management & Deployment

Detailed steps and implementation for this phase are documented in the project report. It covers setup, design, and configuration in Salesforce tailored for restaurant CRM.

Phase 9: Reporting, Dashboards & Security Review

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Phase 10: Final Presentation & Demo Day

1. Executive Summary

DineTrack is a Salesforce CRM solution built for restaurant management. It centralizes reservations, customer data, staff schedules, billing, and reporting into one platform. This ensures streamlined operations, reduced manual errors, and enhanced customer satisfaction.

2. Demo Flow

The demo showcases the end-to-end functionality of DineTrack:

- A customer makes a reservation online or via staff entry.
- The system auto-confirms and sends a notification.
- On dining, billing is generated and payments tracked.
- Reports and dashboards reflect revenue, peak hours, and staff performance.

This walkthrough demonstrates real-world application and automation benefits.

3. Outcomes & Key Learnings

- Reservations managed seamlessly with automation.
- Improved customer engagement with profiles, preferences, and loyalty points.

- Staff efficiency tracked through schedules and dashboards.
- Revenue insights through automated reporting.
- Hands-on exposure to Salesforce Admin & Developer capabilities.

4. Handoff Documentation

The final deliverables include:

- Object schema and entity relationship diagrams.
- Flow diagrams for automation.
- Apex code repository with test classes.
- Reports and dashboards configured in Salesforce.
- Deployment guide and GitHub repository link.

5. Showcase & Future Scope

This project can be showcased on LinkedIn and professional portfolios as a Salesforce Capstone Project. Future scope includes integration with food delivery platforms, advanced AI-driven recommendations, and mobile app extensions for customer self-service.