

***Salesforce Project***

***Topic***

**Dine Track – Restaurant Management CRM**

**By**

**Tanmay Mahesh Khule**

***Batch-4***

***TCS-LAST-MILE***

**Mentor**

**Mr. Abhishek**



**Student of**

**Department of Computer Science & Engineering,**

**Prof. Ram Meghe Institute of Technology & Research,**

**Badnera - Amravati**

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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 reservation confirmations and reminders**
- Maintains customer profiles & preferences**
- Manages staff scheduling and workload**
- Tracks billing and payments**
- Provides dashboards for revenue, customer satisfaction, and staff performance**

# Overview

**DineTrack** is a Salesforce CRM solution designed to help restaurants manage reservations, customer relationships, staff schedules, and billing in one centralized platform.

It enhances customer satisfaction by automating booking confirmations, storing dining preferences, and enabling loyalty programs. Managers can monitor revenue, peak hours, and staff performance through real-time dashboards.

## 1) Industry

**Food & Hospitality / Restaurant Management**

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## 2) Project Type

### **B2C Salesforce CRM Implementation**

- **B2C** → Customers make reservations, receive confirmations, and provide feedback.
  - **Internal (Staff & Management)** → Staff manage schedules, managers analyze performance, and admins configure CRM.
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## 3) Target Users

- **Customers** → Book tables, receive confirmations, share feedback.
  - **Restaurant Staff (Waiters/Chefs)** → Manage schedules and service.
  - **Managers/Owners** → Track reservations, revenue, staff workload.
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- **Admins** → Configure CRM, manage dashboards, maintain data

## Objectives

- Centralize restaurant operations in Salesforce
  - Automate booking confirmations & reminders
  - Store customer dining preferences for personalization
  - Manage staff scheduling & workload
  - Track billing and payments digitally
  - Provide dashboards for sales trends and staff performance
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## Features

- Reservation Management
  - Customer Profiles & Preferences
  - Staff Scheduling & Management
  - Billing & Payment Tracking
  - Feedback & Loyalty Programs
  - Reports & Dashboards
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## ✓ Use Cases

1. Reservation Management
  - Customers book tables online or via staff entry
  - System checks table availability
  - SMS/email confirmation sent automatically
2. Customer Relationship Management
  - Store profiles (favorite dishes, allergies, order history)
  - Offer loyalty discounts to frequent diners
3. Staff & Shift Management
  - Manage chef/waiter schedules
  - Assign staff to tables & shifts
4. Billing & Payments
  - Generate bills for dine-in or takeaway orders
  - Track payment status (Paid/Pending)
5. Feedback & Loyalty
  - Collect customer reviews post-dining
  - Assign loyalty points or coupons
6. Reporting & Dashboards
  - Sales trends (daily/weekly/monthly)
  - Peak dining hours and popular menu items
  - Staff performance reports

## Tech Stack

- Salesforce (Admin + Developer)
- Custom Objects (Reservation\_\_c, Customer\_\_c, Staff\_\_c, Bill\_\_c)
- Flows (automated confirmations & reminders)
- Validation Rules (avoid duplicate bookings, enforce table capacity)
- Apex Triggers (auto-mark missed reservations)
- Reports & Dashboards
- (Optional) Lightning Web Components for custom booking form

## What To Build

### 1. Custom Objects:

- Reservation\_\_c (fields: Table No., Date, Time, Guests, Status)
- Customer\_\_c (fields: Name, Contact, Preferences, Allergies, Visit History)
- Staff\_\_c (fields: Name, Role, Shift, Assigned Tables)
- Bill\_\_c (fields: Amount, Payment Status, Order Details)

### 2. Automation:

- **Flow** → When a reservation is created, send confirmation email/SMS.
- **Flow** → Reminder notification before reservation time.
- **Flow** → Loyalty points assigned when billing is completed.

### 3. UI & LWC (Optional but adds “WOW” factor):

- LWC-based reservation form for customers.
- Dashboard view showing live table availability & peak hours.

### 4. Reports & Dashboards:

- Pie chart: % of reservations by time slot.
- Bar chart: Daily/Monthly Sales.
- Leaderboard: Top customers (based on visits).
- Line chart: Peak dining hours trend.

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## Project Phases for DineTrack

### Phase 1: Problem Understanding & Industry Analysis

- Requirement Gathering → Need to track reservations, customers, staff, and billing.
- Stakeholder Analysis → Customers, Staff (waiters/chefs), Managers, Admin.
- Business Process Mapping → Manual reservations → Centralized CRM solution.

- Industry-Specific Use Case → Restaurant Management / Hospitality.
  - AppExchange Exploration → Look for add-ons (SMS alerts, loyalty mgmt).
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## **Phase 2: Org Setup & Configuration**

- Salesforce Developer Org setup.
  - Company Profile → “DineTrack Restaurant Portal.”
  - Business Hours → Define restaurant opening/closing times.
  - User Setup → Managers, Staff, Admin.
  - Profiles & Roles → Customer Service Staff, Manager, Admin.
  - Permission Sets → Reservation management, billing access.
  - OWD & Sharing Rules → Reservations visible to staff & managers.
  - Sandbox Setup → For testing flows.
  - Deployment Basics → Change sets for production.
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## **Phase 3: Data Modelling & Relationships**

- Custom Objects → Reservation, Customer, Staff, Bill.
  - Fields → Table No., Preferences, Payment Status, etc.
  - Record Types → Reservation Types (Dine-In, Takeaway).
  - Page Layouts → Reservation form, Customer profile, Staff shift planner.
  - Compact Layouts → Quick mobile booking view.
  - Schema Builder → Visualize Reservation ↔ Customer ↔ Bill relationships.
  - Relationships →
    - Customer ↔ Reservation (Lookup)
    - Reservation ↔ Bill (Master-Detail)
    - Staff ↔ Reservation (Lookup)
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## **Phase 4: Process Automation (Admin)**

- Validation Rules → Prevent double booking of the same table.
  - Flow Builder →
    - Auto-confirm reservation via email/SMS.
    - Send reminder 1 hour before booking.
    - Assign loyalty points when bill is paid.
  - Email Alerts → Payment receipt & offers.
  - Custom Notifications → Manager notified if customer cancels.
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## **Phase 5: Apex Programming (Developer)**

*(Optional but adds strength)*

- Apex Trigger → Auto-mark reservations as “Missed” if no check-in after booking time.
  - Batch Apex → Generate monthly revenue reports.
  - Queueable Apex → Update loyalty points in bulk.
  - Exception Handling & Test Classes → Ensure smooth deployment.
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## **Phase 6: User Interface Development**

- Lightning App Builder → Create “DineTrack Console.”
  - Record Pages → Custom layouts for Reservations & Customers.
  - Tabs → Reservations, Customers, Staff, Bills.
  - LWC (optional) → Online booking form, Live dashboard for managers.
  - Navigation Service → Quick access to reports & dashboards.
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## **Phase 7: Integration & External Access**

- Named Credentials → For SMS/Email services.
  - REST Callouts → Optional integration with food delivery apps (Swiggy/Zomato).
  - Remote Site Settings → Enable external APIs for offers/loyalty sync.
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## **Phase 8: Data Management & Deployment**

- Data Import Wizard → Upload sample reservations/customers.
  - Data Loader → Bulk staff & billing data.
  - Data Backup → Export reports weekly.
  - Change Sets → Migrate metadata between sandbox and production.
  - GitHub Repository → Store project metadata & docs.
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## **Phase 9: Reporting, Dashboards & Security Review**

- Reports →
    - Total Revenue (Summary).
    - Reservations by Time Slot (Matrix).
    - Top Customers (Tabular).
  - Dashboards →
    - Monthly Revenue Trends.
    - Peak Dining Hours.
    - Staff Performance Reports.
  - Sharing Settings → Limit reports access to managers/admin.
  - Field Level Security → Hide sensitive billing fields from staff.
  - Audit Trail → Monitor system configuration changes.
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## **Phase 10: Final Presentation & Demo Day**

- Pitch Presentation → Problem, Solution, Demo, Outcomes.
  - Demo Walkthrough → Customer booking → Auto confirmation → Billing → Reports.
  - Handoff Documentation → Object schema, flow diagrams, repo link.
  - LinkedIn/Portfolio Showcase → Showcase DineTrack as Salesforce Capstone Project.
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