

Cafe Management System – Salesforce Project Report

1. Project Overview

The Cafe Management System aims to streamline operations in a café environment using Salesforce. It helps manage orders, inventory, billing, and customer interactions in one centralized system. Salesforce provides automation, data analytics, and customer relationship management capabilities to improve efficiency and customer satisfaction.

2. Requirement Gathering

Functional Requirements:

- Order Management – Taking, updating, and tracking orders.
- Billing and Payment Integration – Automated bill generation and secure transactions.
- Inventory Management – Real-time tracking of stock levels for ingredients and supplies.
- Customer Management – Maintaining records, loyalty points, and preferences.
- Feedback and Review – Collecting and analyzing customer feedback through Salesforce forms.

Non-Functional Requirements:

- Scalability – The system should handle multiple branches and large customer data.
- Security – Data protection using Salesforce Shield and role-based access.
- Usability – Simple and intuitive interface for staff and administrators.
- Performance – Quick data retrieval and smooth integration with POS systems.

3. Stakeholder Analysis

- **Admin:** Manages user roles, permissions, and data configuration.
- **Café Manager:** Oversees daily operations, sales reports, and performance tracking.
- **Barista/Staff:** Handles orders, updates order status, and manages inventory records.
- **Customer:** Places orders, provides feedback, and earns loyalty points.
- **Supplier:** Updates stock and delivers supplies based on café inventory needs.

4. Business Process Mapping

The café process begins with customers placing an order. Salesforce captures order details, generates a digital receipt, and triggers inventory updates automatically. The order is prepared by staff and marked as complete in the system. Once delivered, Salesforce records the sale, updates analytics dashboards, and sends a feedback link to the customer. Automation is implemented using Salesforce Flows for notifications and approvals.

5. Industry Use Case Analysis

A café chain with multiple outlets uses Salesforce to manage centralized customer data, inventory, and marketing campaigns. Salesforce Service Cloud helps handle customer queries efficiently. Einstein Analytics tracks sales trends, while Marketing Cloud automates promotions and loyalty rewards. This helps improve customer retention and revenue growth.

6. Salesforce Implementation Details

- **Custom Objects:** Orders, Menu Items, Inventory, Customers, and Suppliers.
- **Flows:** Automate order approval, stock level updates, and feedback collection.
- **Reports & Dashboards:** Visualize daily sales, best-selling items, and customer trends.
- **Data Relationships:** Lookup and Master-Detail relationships between Orders, Menu Items, and Customers.
- **Automation Tools:** Salesforce Flow, Process Builder, and Approval Processes for streamlining operations.

7. Benefits and Conclusion

The Salesforce-based Café Management System centralizes operations, reduces manual errors, and enhances the customer experience. Managers gain real-time insights into sales and inventory through reports and dashboards. Customers enjoy personalized services and loyalty benefits. The system is scalable, secure, and helps build a data-driven café business model.