Salesforce CRM Implementation Documentation

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1. Project Overview

The *Tours and Travels CRM* is a custom-built Salesforce system developed as part of a capstone internship project, with the objective of modernizing the core business processes of global travel agencies. This Customer Relationship Management (CRM) solution is designed to streamline essential operations such as customer registration, booking coordination, payment tracking, package customization, employee assignment, and post-travel feedback management.

By leveraging Salesforce's powerful cloud infrastructure, the system provides an integrated environment that supports individual, group, and corporate travel arrangements. Through automation, data centralization, and intelligent workflows, the CRM addresses long-standing inefficiencies in manual operations. Its key features—real-time updates, dynamic workflows, robust data security, and insightful reporting—make it a scalable platform capable of supporting organizational growth across diverse geographies.

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2. Objectives

This project was guided by a clear set of business and technical objectives that reflect the operational needs of modern travel service providers:

- **Automate routine processes**: Send automatic booking confirmations, payment reminders, and feedback requests to reduce administrative workload.
- **Enhance customer experience**: Deliver timely, personalized communication to build customer loyalty and ensure satisfaction.
- **Implement secure access controls**: Establish a role-based security model to ensure data privacy, access restrictions, and compliance.
- **Monitor customer journeys**: Track bookings, feedback trends, and lifecycle interactions to identify improvement opportunities.
- **Support decision-making**: Provide stakeholders with real-time analytics through tailored dashboards and reports.

Each of these objectives was achieved by designing and implementing custom Salesforce features with a strong emphasis on scalability, user-friendliness, and automation.

3. Phase 1: Requirement Analysis and Planning

3.1 Understanding Business Requirements

This initial phase focused on identifying the real-world needs and operational challenges of travel agencies. It involved understanding the distinct roles and expectations of all stakeholders:

- **Customers**: Require intuitive access to destination packages, seamless booking flows, and flexible payment options.
- **Travel Agents**: Need tools to manage itineraries, follow up with leads, and monitor client progress.
- **Finance and Admin Teams**: Require clear visibility of bookings, payments, and performance analytics.

Pain points identified included fragmented manual systems, slow communication channels, limited data integration, and poor visibility into customer interactions. Addressing these issues laid the foundation for an end-to-end CRM architecture that aligns with both business and user needs.

3.2 Defining Project Scope and Objectives

To ensure alignment with business goals, a well-defined scope was established. The CRM was designed to:

- Handle bookings across multiple countries, each with their own unique travel packages and regulatory requirements.
- Accommodate a variety of travel types, such as solo travel, family vacations, corporate tours, and group excursions.
- Provide real-time alerts for booking confirmations, payment deadlines, and feedback requests.
- Support scalable user management and secure data access for different business roles.

The objective was not only to digitize existing processes but also to add value through smart automation, increased operational transparency, and data-driven decision-making.

3.3 Designing the Data Model and Security Model

The data model was carefully structured to represent all critical entities and their relationships:

- **Custom Objects**:
  - *Booking__c*: Stores booking information including trip details and customer association.
  - *TravelPackage__c*: Contains information about destinations, pricing, transportation, and guides.
  - *Customer__c*: Represents users who book packages.
  - *BookingPayment__c*: Captures payment transactions for each booking.
  - *Feedback__c*: Gathers post-trip evaluations.
  - *BookingGuest__c*: Represents additional travelers linked to a primary booking.
- **Standard Object**:
  - *Task*: Used for follow-up assignments and agent workflows.

Security implementation followed Salesforce best practices:

- **Profiles**: Define access permissions based on job roles (Admin, Agent, Finance, Customer Service).
- **Permission Sets**: Grant additional privileges for specific tasks without changing profile access.
- **Field-Level Security**: Protect sensitive information (e.g., payment details) from unauthorized users.
- **Sharing Rules**: Ensure that tour guides only see customers assigned to them.

3.4 Creating Project Roadmap and Milestones

A structured project roadmap ensured timely completion and phase-wise focus:

- **Week 1**: Requirement gathering and design of the data model.
- **Week 2**: Backend configuration, including creation of objects, fields, and flow logic.
- **Week 3**: UI development using Lightning App Builder and testing of dynamic forms.
- **Week 4**: Final validation, documentation, and preparation for deployment.

These milestones ensured a logical progression from planning to implementation, enabling effective resource allocation and agile development.

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4. Phase 2: Salesforce Development – Backend and Configurations

4.1 Environment Setup

Development was carried out within a Salesforce Developer Org, using **Google Chrome** as the primary browser for consistent UI rendering and testing. This environment provided all the necessary tools to build, test, and debug CRM components without deployment risk.

4.2 Object Customization and Validation Rules

The following customizations were made to support the business processes:

- Creation of custom objects and fields to store structured data for bookings, packages, and customers.
- Relationships were defined using Master-Detail and Lookup fields for referential integrity.
- Page Layouts were customized to display relevant fields based on the record type and user role.
- **Validation Rule**: Implemented to prevent users from creating bookings with start dates in the past, ensuring data accuracy and avoiding operational conflicts.

4.3 Automation Configuration

Salesforce automation tools were configured to minimize manual tasks:

- **Flows**: Used for record updates, field assignments, and condition-based task creation.
- **Process Builder**: Triggered automated emails and status changes upon booking confirmations.
- **Workflow Rules**: Managed reminders and time-based notifications.
- **Approval Process**: Ensured that high-value or sensitive bookings required management approval before confirmation.

These tools not only accelerated workflows but also improved data consistency and customer communication.

4.4 Apex Development

Where declarative tools were insufficient, custom logic was implemented using Apex:

- **Apex Triggers**: Executed logic during DML operations (e.g., updating related records on booking confirmation).
- **Future Methods**: Allowed asynchronous processing for tasks like sending confirmation emails.
- **Batch Apex and Queueable Apex**: Used for bulk data processing tasks such as scheduled payment reminders.

- **Test Classes**: Developed to ensure code coverage and maintainability.

5. Phase 3: UI/UX Development and Customization

5.1 Lightning App Configuration

The Lightning App serves as a focused workspace that groups relevant objects, components, and tools to enhance user efficiency. It streamlines the interface for specific roles such as travel agents or finance users. The app is built using the Lightning App Builder and allows navigation through tabs like Bookings, Customers, Reports, and Payments—all customized for easy access.

5.2 Page Layout Customization

Page Layouts were edited to organize how data fields and related lists appear on record pages. This customization ensures that users only see information that is relevant to their role. For example, agents view itinerary and customer fields, while finance staff focus on payment and billing fields.

5.3 Implementation of Dynamic Forms

Dynamic Forms were utilized to control visibility at the field level. Using Lightning App Builder, fields or entire sections can be conditionally displayed based on record type or user profile. This results in a more intelligent, clutter-free, and responsive interface.

5.4 User Setup and Access Configuration

User records were configured with the correct roles, profiles, and permission sets. Role hierarchies were applied to reflect the organization's reporting structure. This ensured data access controls were enforced properly while allowing collaboration.

5.5 Report Development

Reports were created to visualize and track key data points such as bookings by destination, revenue by month, and customer feedback scores. Custom filters and summary fields were added to provide deeper insights. These reports empower users to make informed business decisions and identify performance trends.

5.6 Dashboard Design

Dashboards were built using report components like bar charts, pie charts, and gauges. These visual displays aggregate metrics such as total bookings, revenue trends, and customer satisfaction scores. Dashboards provide executives and team leads with real-time visibility into business performance.

5.7 Lightning Web Components (LWC)

Lightning Web Components were developed to create reusable and high-performance UI elements. Built using modern web standards (JavaScript, HTML, CSS), LWCs enabled the addition of custom features such as dynamic summaries and booking overviews that enhanced user interactivity.

5.8 Lightning App Page Creation

Custom Lightning App Pages were designed to present an intuitive layout of components and data views. These pages serve as centralized hubs for users, allowing access to key information like active bookings, pending payments, and assigned tasks—all from a single screen.

6. Phase 4: Data Access and Security Configuration

6.1 Field History Tracking

Field History Tracking is a vital auditing feature in Salesforce. It allows the system to monitor and log changes to specific fields on both standard and custom objects. By enabling this feature, organizations can:

- Track the old and new values of updated fields
- Identify the user who made the change
- Record the exact date and time of the change

This contributes significantly to data integrity and compliance by ensuring accountability in all record modifications. For example, changes to payment amounts, booking statuses, or customer information are monitored to avoid unauthorized or erroneous edits.

6.2 Duplicate and Matching Rules

Duplicate and Matching Rules serve as Salesforce's primary defense mechanisms against redundant or conflicting data entries. These rules work together to:

- Identify similar or identical records using defined criteria (Matching Rules)
- Alert users or block the action when a duplicate is detected (Duplicate Rules)

Implemented correctly, these rules ensure that entries like duplicate customer names, identical bookings, or repeated email addresses are flagged and resolved, preserving the quality and accuracy of the CRM database.

6.3 Profiles Configuration

Profiles in Salesforce define what users can view, create, edit, or delete within the system. They determine access at the object, field, tab, and application level. Profiles are typically mapped to job functions. Key concepts include:

- **Standard Profiles** (System Administrator, Standard User, Read Only, etc.) – provided by Salesforce and cannot be deleted.
- **Custom Profiles** – created based on organizational needs and can be modified or removed if unused.

Activities Completed:

- Created distinct profiles for Travel Agents, Tour Guides, Finance Officers, and Marketing Executives.
- Assigned field-level and object-level permissions based on real-world access needs.

This setup ensures a principle of least privilege, minimizing the risk of unauthorized access or data manipulation.

6.4 Role Hierarchy Configuration

Roles determine the visibility users have over data records. The role hierarchy allows users at higher levels (e.g., managers or executives) to access records owned by users below them.

Activities Completed:

- Created a Travel Agent Manager Role.
- Added subordinate roles under Travel Agent Manager.
- Built additional roles reporting directly to the CEO, reflecting organizational structure.

Role hierarchies, when combined with OWD (Organization-Wide Defaults), provide a scalable way to manage visibility without compromising security.

6.5 Permission Set Creation

Permission Sets offer a flexible way to extend user privileges without altering their core profile. This is useful when specific users need access to additional features temporarily or on a per-case basis.

Activity:

- Created a new permission set granting temporary access to advanced reporting tools for select users in the Finance department.

6.6 Sharing Settings and Record Access Configuration

Sharing settings define how records are shared among users and teams. Key configurations include:

- **Organization-Wide Defaults (OWD)**: Set to Private or Public Read-Only depending on object sensitivity.
- **Role Hierarchies**: Ensured proper upward data visibility.
- **Manual Sharing**: Enabled for record owners to share on a case-by-case basis.
- **Sharing Rules**: Created automated sharing rules based on criteria (e.g., region or department).

These configurations protect sensitive travel and financial data while allowing controlled collaboration.

6.7 Apex Test Classes

Test Classes are used to validate the behavior of Apex code. Salesforce requires at least 75% code coverage to deploy Apex logic to production. Writing robust tests ensures:

- Code works as intended
- No unhandled exceptions arise during execution
- Business logic behaves consistently under different scenarios

Activity:

- Created a dedicated test class to validate the Booking Confirmation Trigger and Email Notification logic.

6.8 Preparing Test Cases and Defect Fixing

This critical milestone focused on quality assurance. A series of test cases were written to validate each module. Defects found were fixed through iterative debugging. Example test cases:

- **Customer Creation**: Verified all mandatory fields and validation logic.
- **Booking Creation**: Tested field dependencies and automated status updates.
- **Payment Updates**: Checked if payment changes triggered correct email notifications.
- **Additional Cases**: Covered edge conditions such as invalid dates and missing traveler details.

6.9 Data Import Wizard Configuration

The Data Import Wizard allows non-technical users to import structured data into Salesforce using a simple step-by-step interface. This tool was used to:

- Import customer records
- Upload travel packages and employee details
- Map columns from CSV files to Salesforce fields

The wizard also supports basic de-duplication and error checking, making it ideal for onboarding historical data and testing records in bulk.

7. Phase 5: Deployment, Documentation, and Maintenance

7.1 Deployment Strategy

In the context of the Tours and Travels Salesforce CRM implementation, the deployment phase serves as a theoretical exercise that mimics real-world deployment practices even though practical execution is limited due to the use of a Developer Edition Org. Understanding deployment frameworks is essential for any Salesforce professional as it ensures the project lifecycle aligns with enterprise delivery expectations.

Salesforce Developer Orgs are not connected to production instances, which means the following tools and practices are discussed but not implemented:

- **Sandbox Environments**: Used to isolate and test features before production rollout. Types include Developer Sandbox, Partial Copy Sandbox, and Full Sandbox.
- **Change Sets**: Salesforce-native deployment mechanism allowing migration of metadata components (objects, fields, flows, validation rules, etc.) from sandbox to production.
- **Source Control Tools**: Git repositories (e.g., GitHub, Bitbucket) are used to track version history and manage collaboration across teams.
- **CI/CD Pipelines**: Tools such as Salesforce DX, Jenkins, Azure DevOps, and GitHub Actions automate the deployment and validation processes, ensuring faster and safer rollouts.

Even though the actual deployment wasn't conducted, these elements are introduced to develop familiarity with enterprise-grade delivery processes.

7.2 Maintenance, Monitoring, and Troubleshooting

Effective maintenance and system health monitoring are vital for ensuring that any CRM remains functional, secure, and scalable. In real-world Salesforce deployments, this phase is continuous and includes both proactive and reactive strategies.

For the Tours and Travels CRM Project, maintenance focuses on the following key responsibilities:

- **Data Integrity**: Frequent audits are performed to verify the accuracy of customer profiles, bookings, employee records, and transaction data. Outdated or duplicate entries are identified and corrected.
- **Error Logging and Debugging**: Tools like Debug Logs, Apex Exception Emails, and Flow Error Logs are configured to detect runtime issues. These logs help isolate problems quickly and implement corrective measures.
- **System Monitoring**: The Salesforce Setup menu provides system overview insights including API usage, storage limits, and scheduled jobs which are monitored regularly.
- **User Support**: Documented guides, FAQs, and training manuals are provided to support users. Issues encountered by users are logged and analyzed for future prevention.
- **Adaptive Enhancements**: Based on user feedback or business changes, configurations are adjusted—such as modifying field accessibility, creating new reports, or updating approval criteria.

Even within the Developer Org scope, embedding these practices prepares the system for transition into production-ready conditions.

7.3 Documentation Creation

Comprehensive documentation is a cornerstone of successful system implementation. It facilitates onboarding, enhances maintainability, and ensures transparency in project execution. For this CRM project, the documentation effort includes the following categories:

- **System Design Documentation**:
    - Custom Objects (e.g., TravelPackage, CustomerInfo, Bookings, Payments, Employee).
    - Field-level definitions and validation rules.
    - Flowcharts for automations (Flows, Approval Processes, Triggers).
    - Relationship models and schema diagrams.
- **Security Configuration Summary**:
    - Roles and Role Hierarchy Tree.
    - Profile Permissions and Object Access Settings.

    - Permission Sets (e.g., Additional access for Marketing or Finance roles).
    - Sharing Settings using Organization-Wide Defaults, Manual Sharing, and Sharing Rules.
- **Testing Documentation**:
    - Test cases for Flows, Triggers, Validation Rules, and Approval Processes.
    - Expected vs. Actual Results for each test.
    - Screenshots of UI before and after automation.
    - Code coverage metrics and apex test class outputs.
- **Troubleshooting and Resolution Logs**:
    - A table of common issues encountered (e.g., flow failures, validation errors).
    - Step-by-step resolutions.
    - Error messages and system logs linked to corrective actions.
- **Future Enhancements**:
    - Implementation of Einstein Chatbots for instant customer interaction.
    - Introduction of AI-driven recommendations for travel packages.
    - Integration with third-party APIs for flight and hotel bookings.

All documentation is structured to support version control, compliance audits, and cross-functional training within a business setting.

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8. Conclusion

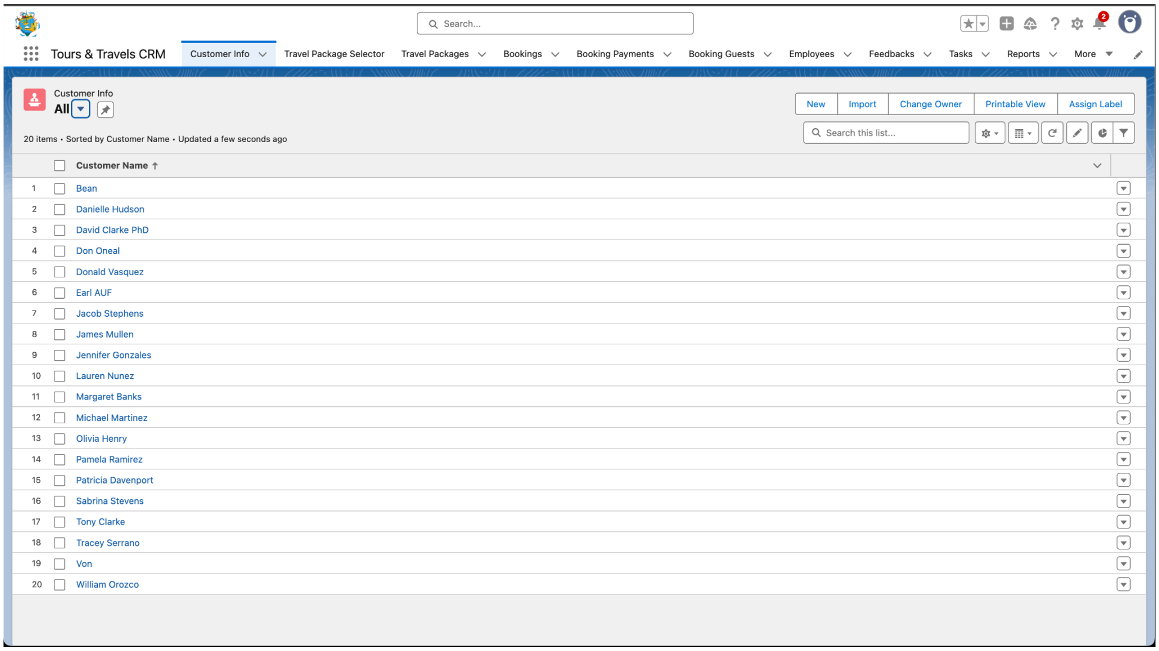
The Tours and Travels Salesforce CRM project illustrates a comprehensive, structured approach to CRM implementation. From initial requirement analysis and backend configuration to data modeling, security design, testing, and documentation, the process mirrors industry best practices within the Salesforce ecosystem.

Key highlights include:

- Development of a scalable data model tailored for the travel industry.
- Automation of core processes like booking, email alerts, and approvals.
- Enforcement of strong security and access controls via roles, profiles, and permission sets.
- Rigorous testing of workflows, validation rules, and Apex logic.
- Thorough documentation that supports long-term maintenance and scalability.

Though constrained to a Salesforce Developer Org, the depth of configuration and discipline in implementation prepare the CRM for a seamless transition into a production environment. This capstone experience not only strengthened technical capabilities but also cultivated project management skills, bridging academic theory with enterprise application.

9. Screenshots

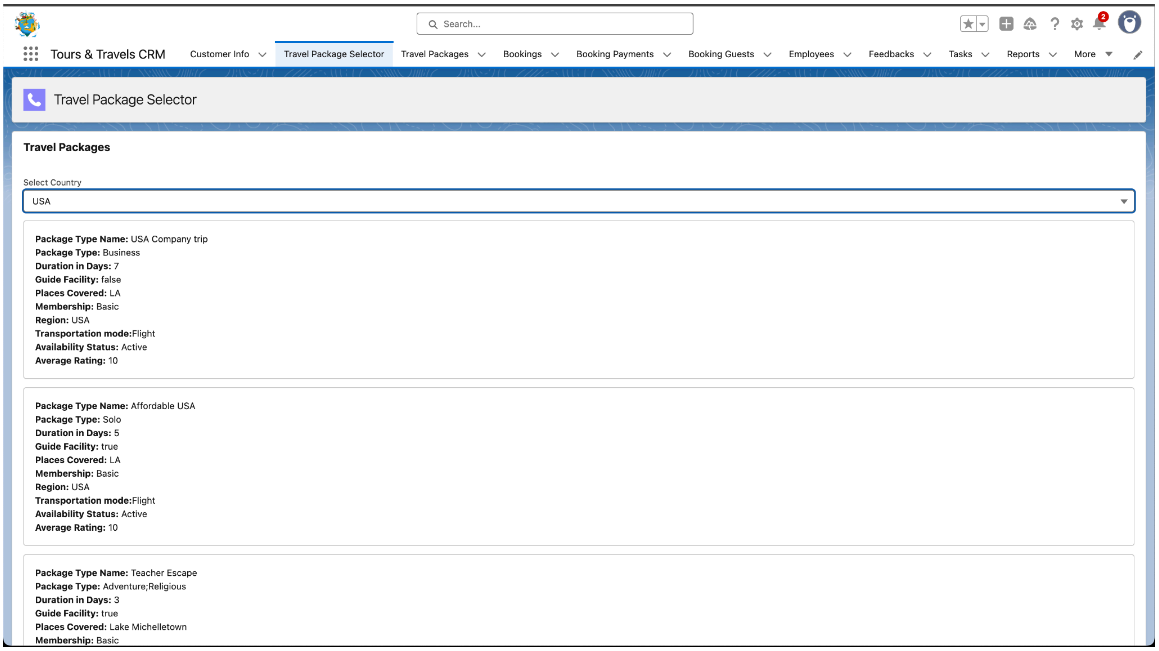


Customer Info
All

20 items • Sorted by Customer Name • Updated a few seconds ago

	Customer Name
1	Bean
2	Danielle Hudson
3	David Clarke PhD
4	Don Oneal
5	Donald Vasquez
6	Earl AUF
7	Jacob Stephens
8	James Mullen
9	Jennifer Gonzales
10	Lauren Nunez
11	Margaret Banks
12	Michael Martinez
13	Olivia Henry
14	Pamela Ramirez
15	Patricia Davenport
16	Sabrina Stevens
17	Tony Clarke
18	Tracey Serrano
19	Von
20	William Orozco

Customer info page: where you can create new customers or edit existing customers.



Travel Package Selector

Travel Packages

Select Country

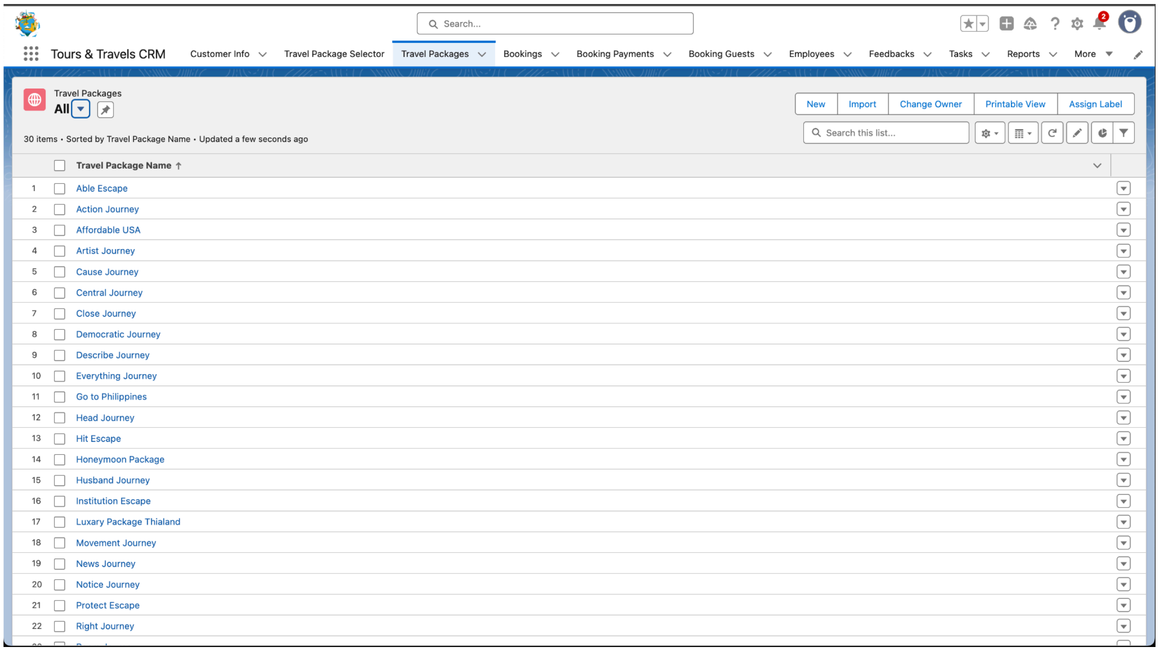
USA

Package Type Name: USA Company trip
Package Type: Business
Duration in Days: 7
Guide Facility: false
Places Covered: LA
Membership: Basic
Region: USA
Transportation mode: Flight
Availability Status: Active
Average Rating: 10

Package Type Name: Affordable USA
Package Type: Solo
Duration in Days: 5
Guide Facility: true
Places Covered: LA
Membership: Basic
Region: USA
Transportation mode: Flight
Availability Status: Active
Average Rating: 10

Package Type Name: Teacher Escape
Package Type: Adventure;Religious
Duration in Days: 3
Guide Facility: true
Places Covered: Lake Michelletown
Membership: Basic

Travel Package Selector page: where you can see all the available travel packages.

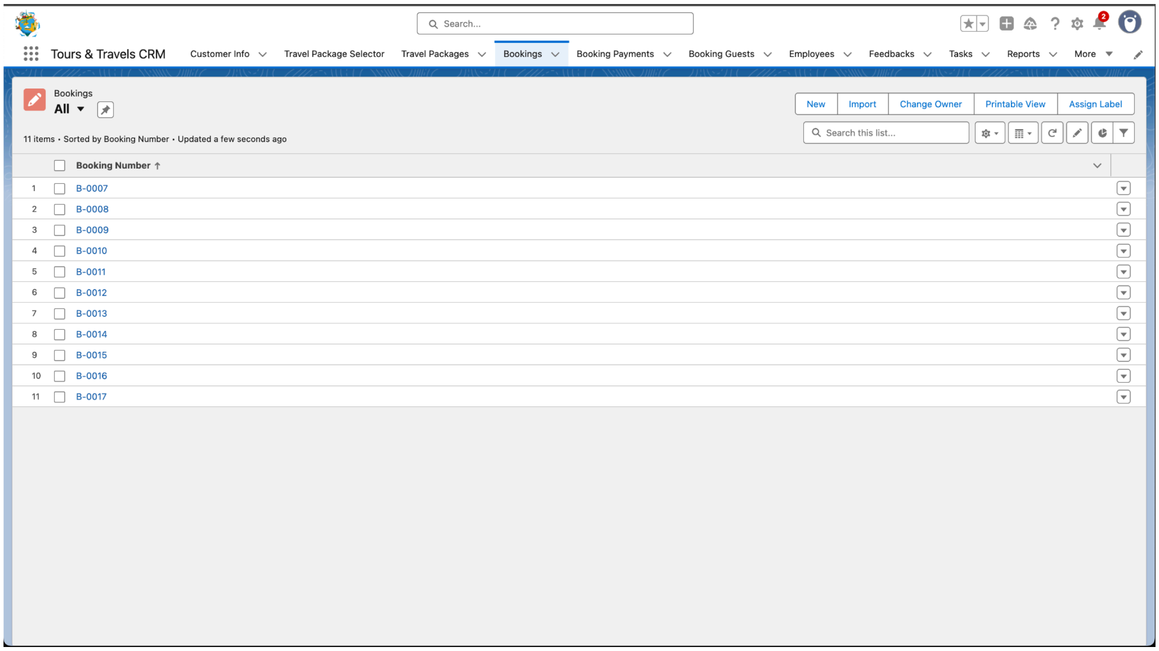


Travel Packages
All

30 items • Sorted by Travel Package Name • Updated a few seconds ago

	Travel Package Name ↑
1	Able Escape
2	Action Journey
3	Affordable USA
4	Artist Journey
5	Cause Journey
6	Central Journey
7	Close Journey
8	Democratic Journey
9	Describe Journey
10	Everything Journey
11	Go to Philippines
12	Head Journey
13	Hit Escape
14	Honeymoon Package
15	Husband Journey
16	Institution Escape
17	Luxary Package Thialand
18	Movement Journey
19	News Journey
20	Notice Journey
21	Protect Escape
22	Right Journey

Travel Packages page: where you can access all of the created Travel Packages and create new and edit existing packages.

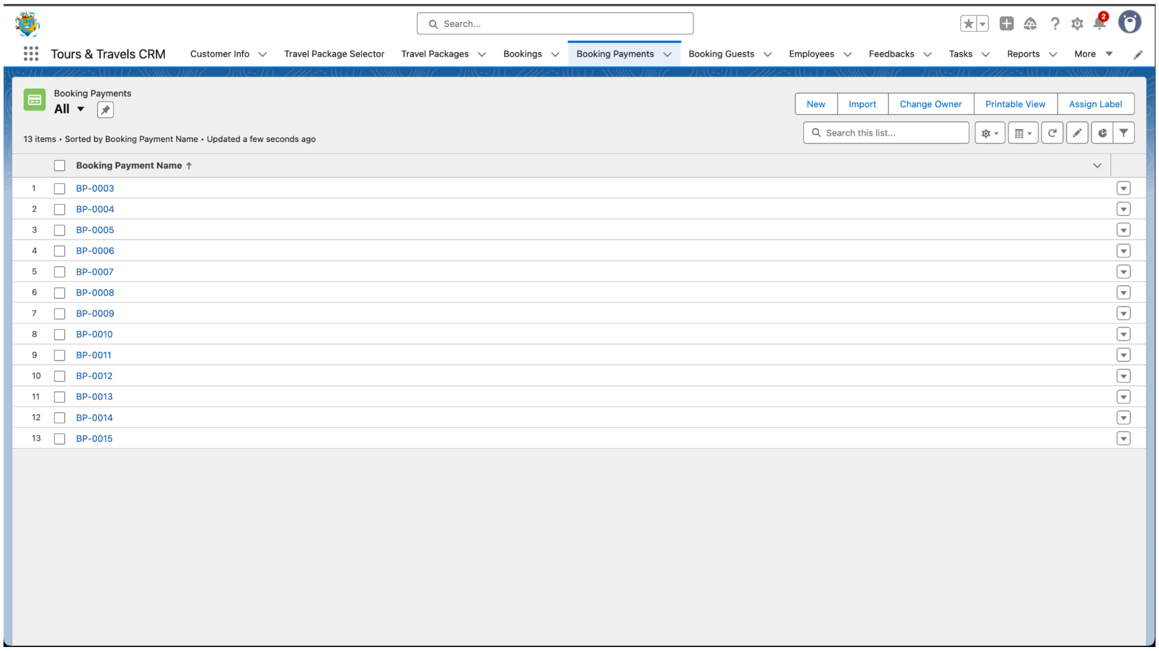


Bookings
All

11 items • Sorted by Booking Number • Updated a few seconds ago

	Booking Number ↑
1	B-0007
2	B-0008
3	B-0009
4	B-0010
5	B-0011
6	B-0012
7	B-0013
8	B-0014
9	B-0015
10	B-0016
11	B-0017

Booking page: where you can access all of the created Bookings and create new and edit existing Bookings.

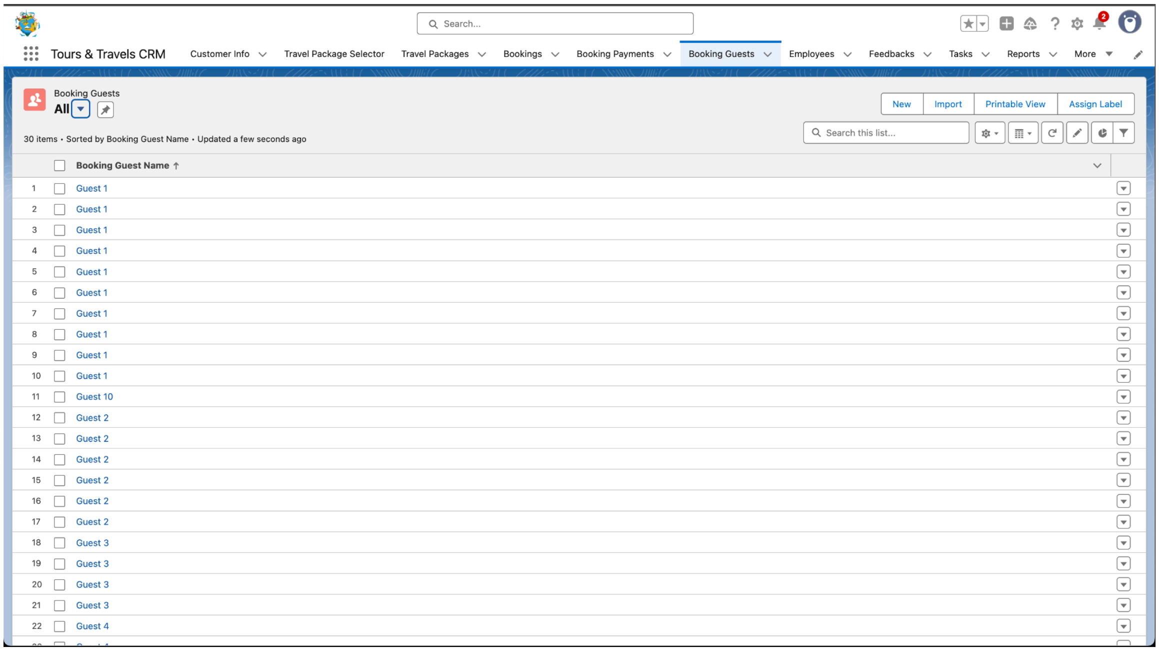


Booking Payments
All

13 items • Sorted by Booking Payment Name • Updated a few seconds ago

	Booking Payment Name ↑
1	BP-0003
2	BP-0004
3	BP-0005
4	BP-0006
5	BP-0007
6	BP-0008
7	BP-0009
8	BP-0010
9	BP-0011
10	BP-0012
11	BP-0013
12	BP-0014
13	BP-0015

Booking Payments page: where you can access all of the created Booking Payments and edit existing Booking Payments.

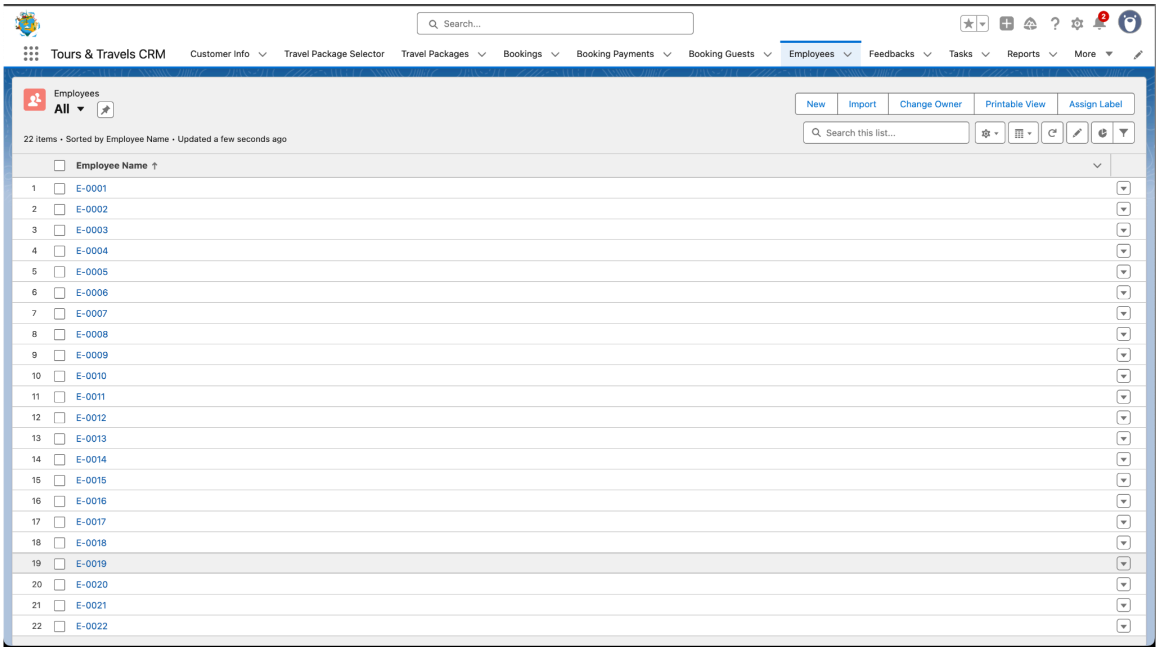


Booking Guests
All

30 items • Sorted by Booking Guest Name • Updated a few seconds ago

	Booking Guest Name ↑
1	Guest 1
2	Guest 1
3	Guest 1
4	Guest 1
5	Guest 1
6	Guest 1
7	Guest 1
8	Guest 1
9	Guest 1
10	Guest 1
11	Guest 10
12	Guest 2
13	Guest 2
14	Guest 2
15	Guest 2
16	Guest 2
17	Guest 2
18	Guest 3
19	Guest 3
20	Guest 3
21	Guest 3
22	Guest 4

Booking Guest page: where you can access all of the created Booking Guest and edit existing Booking Guest.

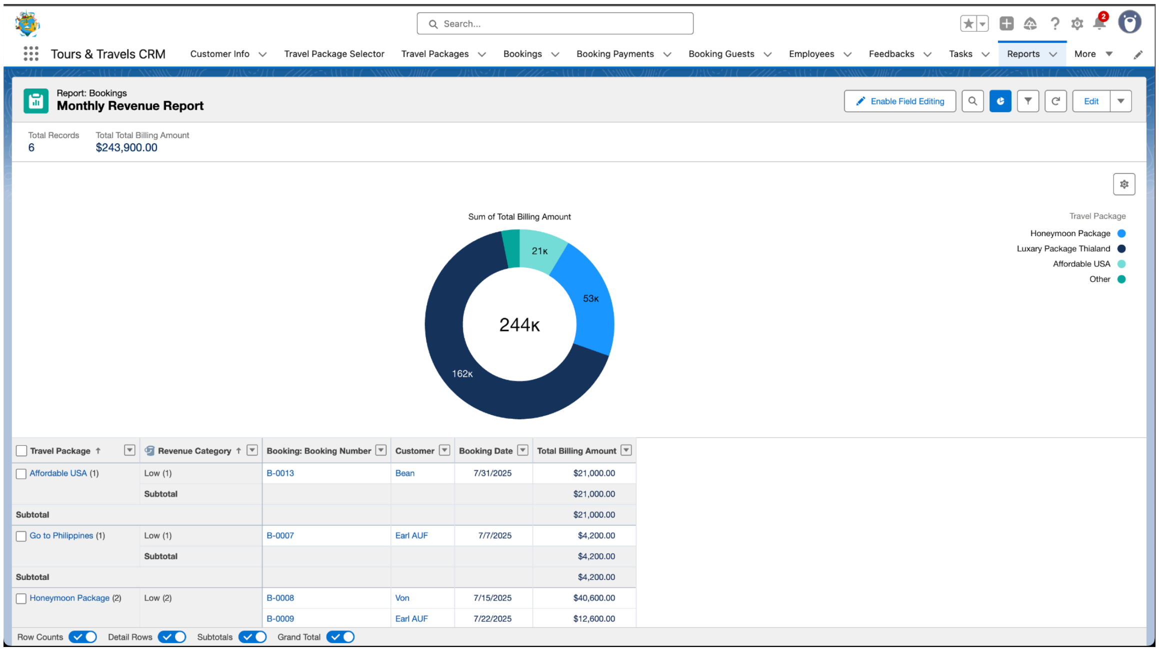


Employees
All

22 items • Sorted by Employee Name • Updated a few seconds ago

	Employee Name ↑
1	E-0001
2	E-0002
3	E-0003
4	E-0004
5	E-0005
6	E-0006
7	E-0007
8	E-0008
9	E-0009
10	E-0010
11	E-0011
12	E-0012
13	E-0013
14	E-0014
15	E-0015
16	E-0016
17	E-0017
18	E-0018
19	E-0019
20	E-0020
21	E-0021
22	E-0022

Employees page: where you can access all of the created Employees and edit existing Employees.



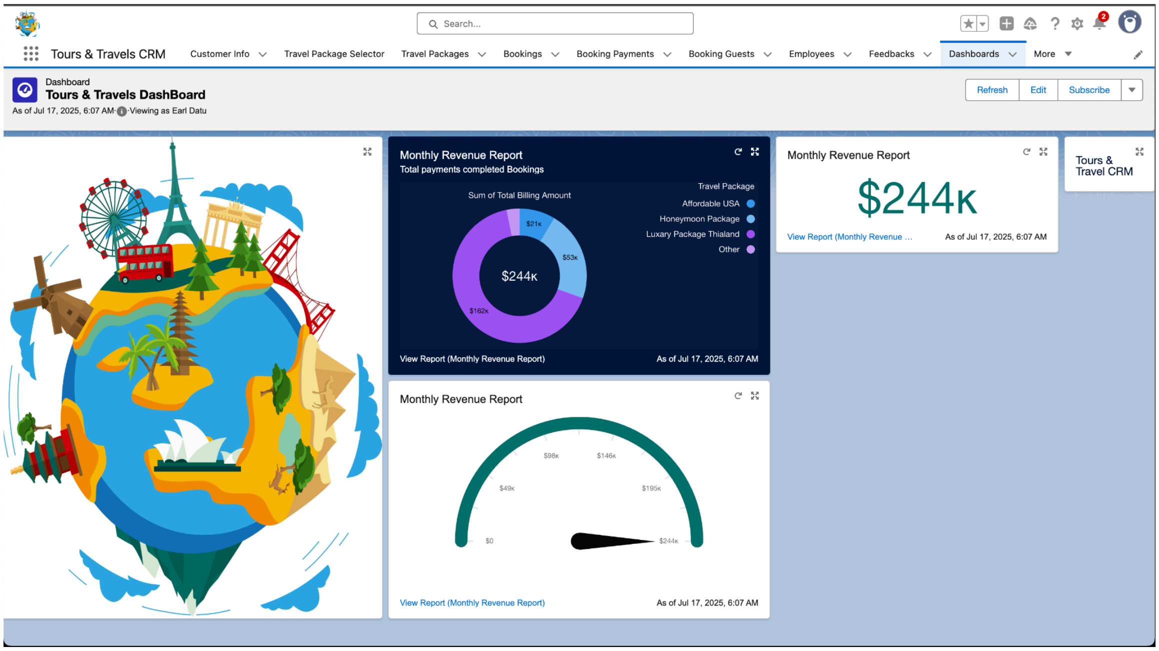
Report: Bookings
Monthly Revenue Report

Total Records: 6

Total Total Billing Amount: $243,900.00

Travel Package ↑	Revenue Category ↑	Booking: Booking Number	Customer	Booking Date	Total Billing Amount
Affordable USA (1)	Low (1)	B-0013	Bean	7/31/2025	$21,000.00
	Subtotal				$21,000.00
Subtotal					$21,000.00
Go to Philippines (1)	Low (1)	B-0007	Earl AUF	7/7/2025	$4,200.00
	Subtotal				$4,200.00
Subtotal					$4,200.00
Honeymoon Package (2)	Low (2)	B-0008	Von	7/15/2025	$40,600.00
		B-0009	Earl AUF	7/22/2025	$12,600.00

Reports page: where we can see created reports by the employees.



Dashboard
Tours & Travels DashBoard
As of Jul 17, 2025, 6:07 AM · Viewing as Earl Datu

Monthly Revenue Report
Total payments completed Bookings
View Report (Monthly Revenue Report) As of Jul 17, 2025, 6:07 AM

Monthly Revenue Report
$244K
View Report (Monthly Revenue ... As of Jul 17, 2025, 6:07 AM

Tours & Travel CRM

Monthly Revenue Report
View Report (Monthly Revenue Report) As of Jul 17, 2025, 6:07 AM

Dashboard page: here we can see the analytics that we need to see about the system.