

Smart Travel Agency CRM – Full Explanation

■ Problem Statement

Travel agencies often struggle with managing leads, handling multiple booking requests, and coordinating between agents, customers, and vendors. Customers lose trust when they don't receive timely updates about bookings, cancellations, or personalized recommendations. Agents find it hard to manage multiple leads manually, and management lacks real-time insights into sales performance.

The solution: A Salesforce-based CRM system called “**Smart TravelConnect CRM**” that manages **leads, travel packages, bookings, payments, agents, and customer engagement** in real-time. It ensures transparency, personalized customer experience, faster lead conversions, and accurate reporting to boost business growth.

Phase 1: Problem Understanding & Industry Analysis

- **Requirement Gathering:** Travel agencies need a system to capture leads (website/social media/walk-ins), manage travel packages (flights, hotels, activities), automate booking confirmations, and keep customers updated via email/SMS/WhatsApp.
 - **Stakeholder Analysis:**
 - **Admin:** Setup, configuration, and full access.
 - **Sales Agent:** Convert leads into bookings, manage customer relations.
 - **Customer:** Browse packages, request booking, receive updates.
 - **Finance Manager:** Track payments, refunds, invoices.
 - **Marketing Manager:** Run promotional campaigns.
 - **Business Process Mapping:** Lead Capture → Qualification → Travel Package Selection → Booking → Payment → Confirmation → Customer Update → Post-Trip Feedback → Reporting.
 - **Industry Use Case:** Large travel companies like MakeMyTrip, Yatra, and Thomas Cook use CRMs to automate lead tracking and customer engagement; this project creates a **lightweight solution** for mid-sized agencies.
 - **AppExchange Exploration:** Review Salesforce **Travel & Hospitality Cloud** but build a simplified custom solution for travel agencies.
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Phase 2: Org Setup & Configuration

- **Setup Developer Org:** Smart TravelConnect CRM.
- **Company Profile:** Smart Travel Agency Pvt. Ltd., 24x7 business hours.
- **Users:** Admin, Sales Agent, Marketing Manager, Finance Manager.
- **Profiles & Roles:**

- Sales Agent → Lead & Booking access.
 - Finance Manager → Payment access.
 - Marketing Manager → Campaign & Lead access.
 - Admin → Full access.
 - **OWD & Sharing:**
 - Leads → Private.
 - Bookings → Sales Agent & Finance Manager.
 - Customers → Their own data.
 - **Sandbox:** Test workflows, Apex, and LWC before deployment.
 - **Deployment:** Use **Change Sets** for flows, reports, and dashboards.
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Phase 3: Data Modeling & Relationships

- **Objects:** Lead, Customer, Travel Package, Booking, Payment, Loyalty Points, Feedback.
 - **Fields:** Destination, Travel Dates, Budget, Package Type (Flight/Hotel/Full Trip), Booking Status, Payment Mode, Loyalty Balance.
 - **Relationships:**
 - Customer → Booking (1:M).
 - Booking → Payment (1:M).
 - Travel Package ↔ Booking (M:M).
 - **Record Types:**
 - Packages → Standard / Premium / Customized.
 - Payments → Full / Partial / EMI.
 - **Schema Builder:** Used to visualize all relationships.
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Phase 4: Process Automation (Admin)

- **Validation Rule:** Budget must be greater than 0, Travel Date ≥ Today.
- **Workflow:** Auto-send **welcome email** when lead is created.
- **Approval Process:** High-value bookings (> ₹5L) need Admin approval.
- **Flow Builder:**
 - Auto-assign leads to agents based on region (pincode).
 - Auto-create loyalty points after payment.

- Update booking status once payment is confirmed.
 - **Custom Notification:** Alert agent if lead is pending for more than 48 hours.
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Phase 5: Apex Programming (Developer)

- **Trigger:** Update booking status when payment is received.
 - **SOQL Queries:** Fetch top destinations booked in the last 6 months.
 - **Batch Apex:** Send **monthly travel recommendations** to customers.
 - **Queueable Apex:** Handle bulk lead imports from campaigns.
 - **Scheduled Apex:** Daily report of unassigned leads sent to Admin.
 - **Future Methods:** Send WhatsApp/SMS confirmation to customers.
 - **Test Classes:** Cover triggers, batch jobs, and flows.
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Phase 6: User Interface Development

- **Lightning App:** Smart TravelConnect.
 - **Home Page:** Show pending leads, active bookings, top packages.
 - **Record Pages:** Customer travel history, Booking details, Agent performance.
 - **Tabs:** Leads, Customers, Packages, Bookings, Payments, Feedback.
 - **LWC Components:**
 - *Top Destinations Dashboard*
 - *Booking Tracker* (live updates for customers)
 - *Agent Performance Widget*
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Phase 7: Integration & External Access

- **Flight & Hotel API Integration (Optional):** Fetch live availability.
 - **Google Maps API:** Show nearest travel offices/branches.
 - **Payment Gateway Integration:** Razorpay/PayPal for demo.
 - **Platform Events:** Notify agents when high-priority leads are created.
 - **Experience Cloud:** Customer portal for browsing & booking packages.
 - **OAuth:** Secure login for customers.
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Phase 8: Data Management & Deployment

- **Data Import Wizard:** Import leads from CSV.
 - **Data Loader:** Bulk travel package uploads.
 - **Duplicate Rules:** Prevent duplicate customer records.
 - **Data Export:** Weekly backups for customer and booking records.
 - **Change Sets:** Move configurations from Sandbox → Production.
 - **VS Code + SFDX:** Deploy Apex classes, triggers, and LWCs.
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Phase 9: Reporting, Dashboards & Security Review

- **Reports:**
 - Leads by Region.
 - Packages by Popularity.
 - Revenue by Month.
 - Agent Conversion Rate.
 - **Dashboards:**
 - *Travel Agency Business Overview.*
 - *Top Destinations Heatmap.*
 - *Customer Loyalty Tracker.*
 - **Dynamic Dashboards:** Agents see only their leads & bookings.
 - **Security:**
 - OWD applied (Leads private, Bookings controlled by role).
 - Audit Trail enabled for tracking changes.
 - Donors restricted to their records only.
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Phase 10: Final Presentation & Demo Day

- **Pitch:** Smart TravelConnect CRM improves **lead conversions, customer satisfaction, and business efficiency.**
- **Demo Flow:** Lead creation → Auto-assign to Agent → Package selection → Booking & Payment → Confirmation email → Feedback collection → Dashboard update.
- **Handoff Docs:** Setup guide + User manuals for Agents & Customers.
- **LinkedIn Showcase:** Tag project as *Smart Travel Agency CRM* to highlight Salesforce implementation skills.