Phase 10: Final Presentation & Demo Day

Objective:
Demonstrate the end-to-end functionality of the Smart TravelConnect CRM, highlight project outcomes, and provide documentation for users and stakeholders.

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1. Project Pitch

- **Goal:** Showcase how Smart TravelConnect CRM improves lead conversions, enhances customer satisfaction, and increases business efficiency.

- **Key Points to Present:**

  1. Streamlined lead management.

  2. Automated booking and payment tracking.

  3. Real-time updates for agents and customers.

  4. Analytics through reports and dashboards.

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2. Demo Flow (Click-by-Click Navigation)

1. **Login & Access App:**

   - Open Salesforce → Go to **Smart TravelConnect** Lightning App.

2. **Lead Creation:**

   - Navigate to **Leads Tab → New Lead**.

   - Fill in lead details (Name, Email, Phone, Source).

   - Save → System auto-assigns lead to agent (if automation enabled).

3. **Package Selection:**

   - Navigate to **Travel Packages Tab → Select Package**.

   - Create Booking for the customer by selecting package, travel dates, and number of pax.

4. **Booking & Payment:**

   - Navigate to **Bookings Tab → New Booking**.

- o Fill in required fields (Customer, Travel Dates, Booking Type).

- o Navigate to **Payments Tab → New Payment** to record payment.

- o Trigger updates Booking Status automatically.

5. **Confirmation & Feedback:**

   - o Confirm booking → Customer receives confirmation (demo simulated without actual emails).

   - o Navigate to **Feedback Tab → New Feedback** to record post-trip feedback.

6. **Dashboard Update:**

   - o Navigate to **Dashboards → Travel Agency Overview**.

   - o Verify that new bookings, payments, and leads appear correctly.

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3. Handoff Documentation

- **Setup Guide:** Step-by-step instructions to deploy the CRM in Salesforce Org.

- **User Manuals:**

   - o **Agents:** How to manage leads, create bookings, record payments, and track performance.

   - o **Customers (Demo Purpose):** How their bookings and feedback are managed in the system.

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4. LinkedIn Showcase

- Tag the project as **Smart TravelConnect CRM**.

- Highlight Salesforce implementation skills, including:

   - o Custom Objects & Relationships

   - o Apex Triggers

   - o Reports & Dashboards

   - o Data Management & Deployment

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5. Demo Video

- Recorded **without audio**.

Demo Video Link:
https://drive.google.com/file/d/1B96EnWgjcngBmjXOyYfGzqVGMp-4eMz6/view?usp=sharing

- Highlights:

  1. Lead creation → Auto-assignment

  2. Package selection → Booking → Payment

  3. Booking confirmation and feedback

  4. Dashboard reflecting updated metrics

Outcome:

- Clear demonstration of the end-to-end CRM process.

- Project is ready for presentation, review, and documentation handoff.