## **Meeting: Discovery — Functional Requirements Deep Dive**

**Date:** 2025-11-12  
 **Duration:** 1 hr 45 min  
 **Location:** Horizon Travel Group HQ — Conference Room C  
 **Attendees:**

* **Martin Keller** – COO, Project Sponsor
* **Priya Menon** – GM, Corporate Housing
* **Angela Brooks** – Head of Transportation
* **David Lee** – CRM Champion, Travel Concierge
* **Karan Gadani** – Project Manager
* **Dhruv Mehta** – Salesforce Consultant
* **Ananya Rao** – Technical Architect

### **Opening**

**Karan (PM):** Welcome back, everyone. Today’s goal is to refine requirements — particularly around user journeys, automation, and reporting. The design is mostly set, but we want to ensure no business rule or process nuance gets missed before Dhruv’s team finalizes the configuration plan.

**Dhruv (Consultant):** Right. The earlier meetings gave us a solid structure — modules and workflows — but now we’ll drill into the *rules, exceptions, and wish-list items* that may affect how we build.

**Martin (COO):** Exactly. We can’t have surprises later where the system doesn’t reflect reality.

### **Corporate Housing Enhancements**

**Dhruv:** Priya, let’s start with Housing. In the system, once an *Accommodation Request* is approved, should it automatically generate a *QuickBooks client record* or should finance confirm before that happens?

**Priya:** Ideally, we’d like an approval from finance first. Sometimes the billing name differs from the contact name.

**Ananya (Architect):** Got it — we can add a validation step that checks for finance approval before pushing data to QuickBooks.

**Karan:** That also means a notification to the finance team.

**Dhruv:** Yes, we’ll configure that via approval flow.

**Priya:** Another thing — for long-term corporate clients, we reuse the same template with updated dates. Can Salesforce clone previous records?

**Dhruv:** Definitely. You’ll have a “Clone Record” quick action. It’ll carry forward data like service type, location, and pricing but reset the agreement date and status.

**Martin:** Excellent — that’ll save tons of manual entry.

### **Transportation Workflow Nuances**

**Dhruv:** Angela, let’s revisit your process. Do you assign vehicles manually, or should Salesforce handle auto-assignment based on availability?

**Angela (Transport Head):** For now, I prefer manual assignment. Automatic might cause issues if two managers edit at once.

**Ananya:** We can still prepare for automation in Phase 2 — just capture data like driver availability and vehicle capacity now.

**Angela:** Yes, please capture it now. It’ll be helpful for later reporting.

**Karan:** What about cancellations and reassignments?

**Angela:** We need a cancellation reason field and an automatic alert if a request is cancelled within two hours of pickup.

**Dhruv:** Perfect. That’ll be part of workflow automation — we’ll add email + SMS alerts for last-minute cancellations.

**Martin:** Good — that also helps track service reliability KPIs.

### **Travel Module Refinement**

**Dhruv:** David, you mentioned wanting better quote tracking. Can we clarify the approval flow there?

**David (Travel):** Right now, agents send quotes directly. We’d like a manager to review if the quote value exceeds a threshold, say ₹2,00,000.

**Ananya:** We can handle that with a conditional approval rule — if quote > 200000, it routes to a manager.

**David:** Great. Also, we want to tag leads as *B2B* or *B2C* automatically based on the contact type.

**Dhruv:** That’s simple — we’ll add a formula field to detect whether the parent Account is corporate or individual.

**Martin:** That’ll help with reporting segmentation later.

### **Cross-BU Reporting and Dashboards**

**Dhruv:** Let’s discuss dashboards. Each BU will get its own dashboard — but Martin, you also wanted a consolidated executive view, right?

**Martin:** Yes, one screen showing overall revenue pipeline, active clients, and average turnaround time per BU.

**Ananya:** We’ll create a “Management Dashboard” combining KPIs from all three modules.

**Priya:** Can we also track open service requests by aging — like 0-3 days, 4-7 days, and so on?

**Dhruv:** Yes, we’ll use conditional highlights to show that.

**Angela:** And for Transport, I’d like a dashboard showing trips by region — city or zone.

**Dhruv:** That can be added easily once we standardize location fields.

### **Automation and Alerts**

**Karan:** Let’s reconfirm automation rules.

**Dhruv:** Sure. Here’s what we’ve configured so far:

* 24-, 48-, and 72-hour lead follow-up alerts.
* Cancellation alerts within two hours of pickup.
* Contract renewal reminders 30 days before expiry.
* Inactive client alerts if no engagement for 60 days.

**Martin:** Excellent. That’s the kind of proactive system we want.

### **Security & Access**

**Ananya:** On security — each BU will have its own data visibility group. Managers see all records, Agents see only theirs. Corporate clients via portal see only their requests and invoices.

**Martin:** That’s good. Just ensure vendors don’t see client data.

**Dhruv:** They won’t. Vendors will only have object-level access to their own price lists.

### **Wrap-Up**

**Dhruv:** I’ll consolidate today’s details into a *Functional Requirements Specification (FRS)*. Our next session will focus on non-functional aspects — performance, compliance, and data governance.

**Martin:** Perfect. We’re making great progress.