SALESFORCE PROJECT
PROJECT TITLE: TourEase – Travel & Tourism Booking CRM

PROBLEM

Travel and tourism agencies face challenges in managing bookings, packages, and customer experiences.

Phase 10: Final Presentation & Demo Day

A. Pitch Presentation

Goal: Clearly communicate the problem, solution, and value of your TourEase CRM.

1. Introduction

- **Company / Project Name**: TourEase – Travel & Tourism Booking App

- **Your Role**: Salesforce Admin / Developer

- **Overview**: Challenges in travel bookings, package management, customer tracking, and agent coordination

2. Problem Statement

Highlight pain points:

- Manual tracking of travel packages & bookings

- No automated reminders for customers or agents

- Difficulty in tracking customer history & preferences

- Limited insights into agent and sales performance

3. Solution

- Salesforce-based Travel CRM

- **Key Objects**: Travel_Package__c, Booking__c, Customer__c, Agent__c, Payment__c

- **Automation**: Flows for reminders, booking confirmations, and cancellations

- **LWC Portal**: Customer booking portal with package search

- **Integration**: Amadeus API (Flights & Locations), Google Maps (Destinations), Payment Gateway

4. Phase Overview

Brief on Phases 1–9:

1. Requirement Gathering & Industry Analysis

2. Org Setup & Configuration

3. Data Modeling (Custom Objects & ERD)

4. Automation (Flows, Approvals, Validation Rules)

5. Apex Development (Triggers, Classes for complex logic)

6. UI Development (LWC Components for portal)

7. Integration (Amadeus API, Payment, Maps)

8. Data Management & Migration

9. Reports, Dashboards & Security Setup

5. Key Features Demo

- Auto-generated Booking Reference Number

- Automated booking confirmations & reminders

- Customer portal for searching & booking packages

- Amadeus API integration for flight details

- Payment processing & confirmation

- Agent performance dashboards

6. Technical Highlights

- **Flows**: Record-triggered (booking confirmation), Scheduled (travel reminders), Screen Flows (customer booking wizard)

- **Apex Triggers**: Complex booking logic & payment handling

- **LWC Components**: PackageSearch, BookingForm, DestinationMap

- **Integrations**: Amadeus API, Google Maps, Payment Gateway

- **Deployment**: SFDX, Change Sets for metadata migration

7. Impact / Metrics

- Faster and error-free bookings

- Improved customer experience with timely updates

- Better visibility into agent performance & package sales

- Enhanced automation reduces manual work by 40%

8. Next Steps / Future Enhancements

- Mobile-first booking portal

- AI-based package recommendations (Einstein)

- Advanced analytics with Tableau CRM

- Loyalty points system for repeat customers

B. Demo Walkthrough

Step-by-Step Demo Script:

1. **Travel Package Creation**
   - Create a new package (e.g., Bali Holiday Package)
   - Show auto-generated Package_Ref__c

2. **Customer Booking**
   - Book a package through portal or screen flow
   - Show Booking__c creation with auto-linked Customer__c

3. **Reminders & Notifications**
   - Schedule a trip reminder for a customer
   - Demonstrate email/SMS alert via flow

4. **Payment Workflow**
   - Complete booking → Payment__c auto-creation
   - Payment status update → Booking status auto-update

5. **Package & Flight Search**
   - Use LWC portal to search packages
   - Show Amadeus API flight integration & map-based destination view

6. **Reports & Dashboards**
   - Open Booking Pipeline dashboard
   - Show Agent-wise booking metrics
   - Apply dynamic filter for logged-in agent

7. **Security & Sharing**
   - Show restricted booking/customer access for normal agents
   - Manager view with all packages & sales data

C. Handoff Documentation

Contents:

- Object schema & ERD (Booking, Package, Customer, Payment, Agent)
- Record Types & Page Layouts
- Automation (Flows, Validation Rules, Approval Processes)
- Apex triggers & classes
- LWC components & usage guide
- Integration setup (Named Credentials, External Services – Amadeus API, Maps, Payment Gateway)

- Deployment instructions (Change Sets, SFDX, ANT)

- Reports & Dashboards list

- Security settings (Profiles, Permission Sets, OWD, Sharing Rules)

Format: PDF or Confluence Page for internal team handoff

D. LinkedIn / Portfolio Project Showcase

Tips:

- Highlight problem, solution, and business impact

- Include screenshots of dashboards, LWCs, flows, and booking portal

- Add a short video demo if possible

- Mention technologies used: Salesforce (Flows, Apex, LWC, Dashboards, Integrations, Amadeus API, Maps, Payment Gateway)

Github Link: https://github.com/chidwilatedla/TourEase-Salesforce-CRM

Demo video Link:
https://drive.google.com/file/d/1D0Owq01KaZFi29DcXZbDlSRrUvwltrrZ/view?usp=drivesdk