**TourEase-Salesforce-CRM**

Prepared By: T.Chidwila

Roll No: 22B81A1271

Email: chidwilatedla@gmail.com

Institution: CVR College Of Engineering

Problem statement :

Travel agencies face challenges in managing bookings, cancellations, payments, and itineraries. Customers often lack real-time updates, while agencies struggle with manual processes, delayed refunds, and poor visibility into revenue and customer trends. A centralized Salesforce-based Travel CRM is needed to automate bookings, improve communication, integrate with external systems, and provide real-time insights.

**1. Requirement Gathering**

* **Customers:**
  + Want to search for travel packages.
  + Book trips and pay securely.
  + View itineraries and receive reminders.
  + Cancel bookings and request refunds.
* **Travel Agents:**
  + Need to manage packages (create, update, delete).
  + Track bookings and cancellations.
  + Communicate with customers (emails, SMS).
* **Finance Team:**
  + Manage payments and refunds.
  + Generate revenue reports.
* **Admin:**
  + Ensure security and data access control.
  + Manage users, roles, and system configurations.

**2. Stakeholder Analysis**

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | Responsibility | Salesforce Needs |
| Customer | Book packages, view itinerary, payments | Community/Portal access |
| Travel Agent | Manage packages & bookings | Access to packages, bookings |
| Finance Officer | Handle payments, refunds | Access to payment objects & reports |
| Admin | Manage org, users, security | Full Salesforce access |

3. Business Process Mapping

Document the workflow of a typical travel booking.

1. Customer searches for travel packages.
2. Customer books a package → Booking record created.
3. Payment is processed → Payment record linked to booking.
4. Itinerary is auto-generated based on package details.
5. Customer receives confirmation email + reminders.
6. If customer cancels → Refund process initiated.
7. Admin & Finance monitor dashboards for performance.

**4. Industry-Specific Use Case Analysis**

* The **Travel & Tourism industry** relies heavily on:
  + Customer Experience → Needs quick updates & self-service portal.
  + Automation → Reduce manual errors in booking & cancellations.
  + Integrations → Airline & hotel APIs for real-time updates.
  + Reporting → Revenue per package, top destinations, customer trends.
* Current **pain points** in the industry:
  + Manual booking management.
  + Delays in refund processing.
  + Lack of real-time itinerary & package availability.
  + Poor visibility for management.

5. AppExchange Exploration

Before building from scratch, check AppExchange for inspiration:

* Search for “Travel CRM” or “Booking System” apps.
* Ex: *Rezdy Connector* for travel bookings , *Booking and Reservation Management Apps*.

**Phase 2: Org Setup & Configuration**

*(Travel & Tourism Booking System in Salesforce)*

**1. Salesforce Edition**

* Use a **Salesforce Developer Org** (free, Enterprise Edition features).
* If working in a team → create **Sandboxes** for testing.

**2. Company Profile Setup**

* Set **Company Information**: Travel Agency name, address, primary contact.
* Configure **Default Currency** = INR / USD (based on requirement).
* Enable **Multiple Currencies** if customers come from different countries.

**3. Business Hours & Holidays**

* Business Hours: Mon–Sat, 9:00 AM – 9:00 PM.
* Add public holidays (e.g., Christmas, New Year) → prevents bookings on those days.

**4. Fiscal Year Settings**

* Standard Fiscal Year (Jan–Dec).
* If reporting follows April–March (common in India) → set Custom Fiscal Year.

**5. User Setup & Licenses**

* Create users:
  + Travel Admin (System Administrator License).
  + Travel Agent (Salesforce Platform License).
  + Finance Officer (Salesforce Platform License).
  + Customer (Community/Experience Cloud License for portal).

**6. Profiles**

* **Travel Admin Profile** → Full access to all objects.
* **Travel Agent Profile** → Read/Create/Edit on Packages & Bookings.
* **Finance Profile** → Access to Payments, Reports.
* **Customer Profile** → Read-only access to their Bookings & Itineraries.

**7. Roles**

* Travel Agency CEO → Admin → Agents → Finance → Customers.
* Role hierarchy ensures data rolls up properly for reporting.

**8. Permission Sets**

* Create a **Payment Management Permission Set** → assign only to Finance Officers.
* Create a **Discount Approval Permission Set** → assign to Admin.

**9. Organization-Wide Defaults (OWD)**

* **Trip Package\_\_c** → Public Read Only (customers can browse).
* **Booking\_\_c** → Private (customer sees only their bookings).
* **Payment\_\_c** → Private (finance only).

**10. Sharing Rules**

* Share Bookings with related Customers automatically.
* Share Payments with Finance role only.

**11. Login Access Policies**

* Restrict login IP ranges for Admins & Agents.
* Enable **Two-Factor Authentication** for Finance users.

**12. Developer Org Setup**

* Enable **Lightning Experience**.
* Enable **Experience Cloud Sites** (for customer booking portal).
* Install Salesforce CLI (SFDX) + VS Code for development.

**13. Sandbox Usage**

* Use **Developer Sandbox** → for testing automation and Apex.
* Deploy to **Production Org** after successful testing.

**14. Deployment Basics**

* Use **Change Sets** for Admin configurations.
* Use  **VS Code** for Developer components (Apex, LWC).