**TourEase-Salesforce-CRM**

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**

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| --- | --- | --- |
| **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*.