

## TripAdvisor E-Management

**College:** 7155 - PSG Institute of Technology and Applied Research

**Team ID:** NM2024TMID00621

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### 1. Project Overview

The **TripAdvisor E-Management app** integrates with the **Salesforce platform** to serve as an all-in-one travel companion. This app provides users with the ability to plan, book, and optimize their travel experience, while helping them discover millions of reviews, recommendations, and insights shared by fellow travellers. The application focuses on managing hotels, flights, and food options, making it easier for customers to make informed decisions and streamline their travel planning process. This system also helps businesses automate the data management process related to hotels, food options, and flight schedules while offering customers benefits such as personalized discounts and timely flight reminders.

## 2. Objectives

The primary goals of this project are:

1. **Data Management Efficiency:** Automate the data management processes for hotels, flights, and food options, reducing manual effort and errors.
2. **Personalized Customer Discounts:** Implement a discount system based on the customer's spending, with tiered discount rates for specific spending thresholds.
3. **Timely Flight Reminders:** Automate the process of sending reminders to customers about their flight schedules 24 hours prior to departure.
4. **Real-Time Updates:** Ensure real-time updates to hotel data when food options are added or modified, maintaining accurate counts and availability.

### Business Goals:

1. **Simplify Operations:** Streamline the management of hotel data, flight schedules, and food options, saving time and minimizing errors.
2. **Enhance Customer Experience:** Provide a better customer experience through automatic discounts based on purchase amounts and timely notifications about upcoming flights.
3. **Automate Repetitive Tasks:** Replace manual processes with automated solutions that reduce the administrative burden and improve accuracy.
4. **Improve Data Integrity:** Maintain accurate data relationships across hotel, food, and flight records through Salesforce automation tools like Apex Triggers and Flows.

### Specific Outcomes:

1. **Automated Hotel and Food Option Management:** When food options are added or updated, the system will automatically update the corresponding hotel records, including recalculating the total count of available food options for each hotel.
2. **Customer Discount System:** A flow-based automation will calculate discounts based on the customer's total purchase amount. Discounts are applied in tiers—full, partial, or none—depending on spending.
3. **Flight Schedule Reminders:** A scheduled job will send reminder emails to customers who have booked flights, ensuring they are aware of their flight timing 24 hours before departure.

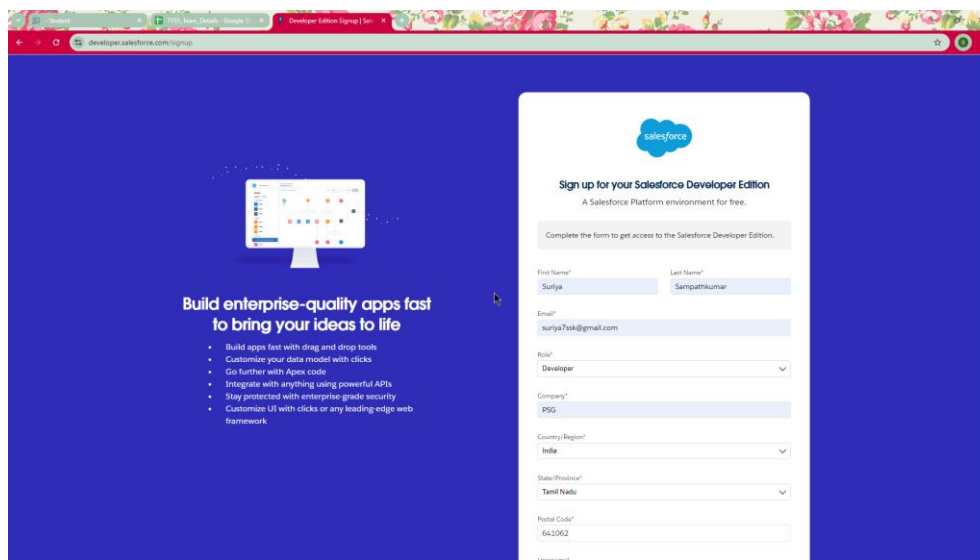
### 3. Salesforce Key Features and Concepts Utilized

1. **Custom Objects:** Custom objects have been created for Hotels, Food Options, Customers, and Flights, each with specific fields that support business processes.
2. **Custom Fields:** Fields such as total food options, food amount, and departure times have been added to store and track relevant data for each object.
3. **Flows:** Flows are used to automate the discount process, triggering different actions based on the customer's total purchase amount.
4. **Apex Triggers:** Triggers are used to update hotel information when food options are modified, ensuring that the hotel's data stays consistent and up-to-date.
5. **Apex Schedulable Classes:** A scheduled class sends timely flight reminders to customers 24 hours before departure, improving customer engagement and reducing the likelihood of missed flights.

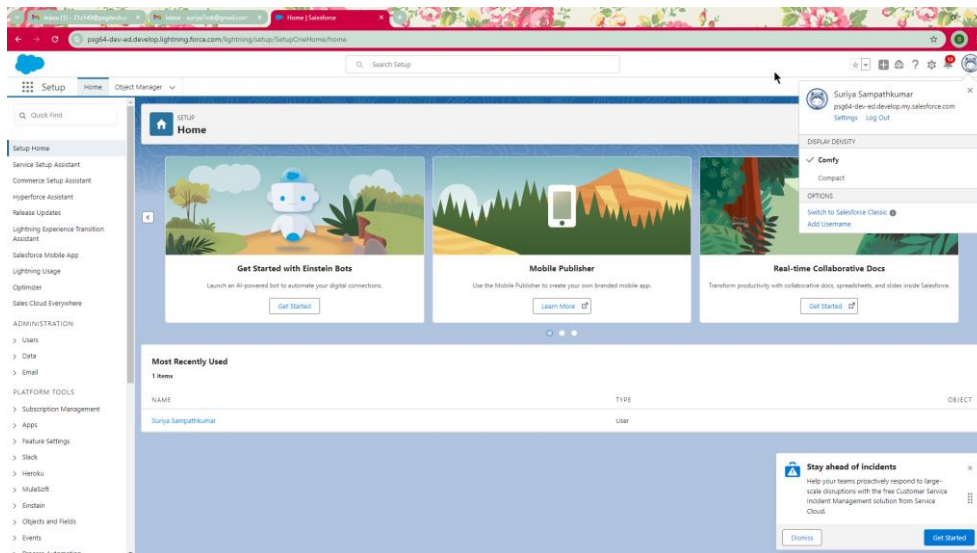
### 4. Detailed Steps to Solution Design

#### Step 1: Setting Up the Salesforce Developer Account

Created a Salesforce Developer Account to access the development tools necessary for building and testing the application. This provided a controlled environment for implementing and refining features.



Creating developer account

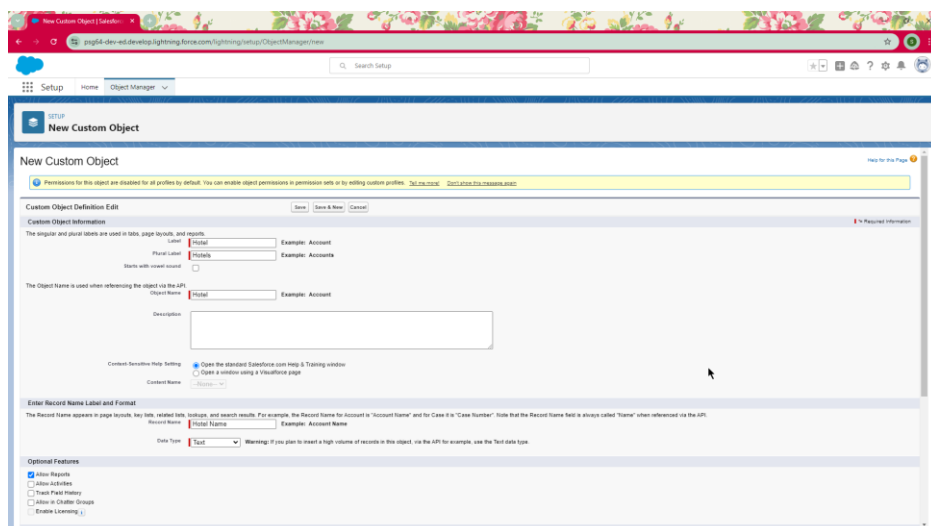


Account activation

## Step 2: Defining Custom Objects

### Hotel Object:

- **Fields:** **Hotel Name** (Text), **Total Food Options** (Number).
- **Purpose:** To store information about hotels and track the availability of meal options.



Creating object Hotel

## Food Option Object:

- **Fields:** **Name** (Text), **Hotel** (Lookup), **Food Amount** (Currency).
- **Purpose:** To catalog food offerings associated with hotels.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser address bar shows 'psg64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page title is 'New Custom Object'. The 'Custom Object Definition Edit' section includes fields for 'Label' (Food Option), 'Plural Label' (Food Options), and 'Object Name' (Food\_Option). The 'Enter Record Name Label and Format' section includes fields for 'Record Name' (Food Option Name), 'Date Type' (Auto Number), 'Display Format' (FL-0000), and 'Starting Number' (1). The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Archives', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Object Classification' section includes a checkbox for 'Allow Sharing'.

## Creating object Food Option

## Flight Object:

- **Fields:** **DepartureDateTime** (Date/Time), **ContactEmail** (Text).
- **Purpose:** To manage flight schedules and send reminders.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser address bar shows 'psg64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page title is 'New Custom Object'. The 'Custom Object Definition Edit' section includes fields for 'Label' (Flight), 'Plural Label' (Flights), and 'Object Name' (Flight). The 'Enter Record Name Label and Format' section includes fields for 'Record Name' (Flight Name), 'Date Type' (Auto Number), 'Display Format' (FL-0000), and 'Starting Number' (1). The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Archives', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Object Classification' section includes a checkbox for 'Allow Sharing'.

## Creating object Flight

## Customer Object:

- **Fields:** **Name** (Text), **Total Spending** (Currency), **Discount** (Percentage).
- **Purpose:** To track customer interactions and calculate eligible discounts.

The screenshot shows the 'New Custom Object' configuration page in Salesforce. The object name is 'Customer'. The label is 'Customer' and the plural label is 'Customers'. The object name is used when referencing the object via the API. The description field is empty. The context-sensitive help setting is set to 'Open the standard Salesforce.com help & Training window'. The record name is 'Customer Name' and the example is 'Account Name'. The date type is 'Text'. The optional features section includes 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (unchecked), and 'Allow in Chatter Groups' (unchecked).

Creating object Customer

## Step 3: Field Definitions

### Hotel Object Fields:

1. **TotalFoodOptions** (Number): Tracks the total number of food options available at each hotel.
2. **Date** (Date): The date of hotel information entry or update.

The screenshot shows the 'New Custom Field' configuration page in Salesforce. The field label is 'TotalFoodOptions'. The length is set to 11 and the decimal places are set to 0. The field name is 'TotalFoodOptions'. The description is empty. The help text is empty. The required checkbox is checked. The unique checkbox is unchecked. The allow in chatter groups checkbox is unchecked. The default value is set to '0'. The field is set to be visible in all report types.

Creating field TotalFoodOptions

Hotel | Salesforce

pgs4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Q000018H67FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

Hotel

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 2: Enter the details

Field Label: Date

Field Name: Date

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: [DateFormulaEditor](#)

Previous Next Cancel

Creating field Date

## Food Option Fields:

1. **Name (Text):** The name of the food option.
2. **Hotel (Lookup):** A lookup field linking each food option to the respective hotel.
3. **Food Amount (Currency):** The price of the food option.

Food Option | Salesforce

pgs4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Q000018H67FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

Food Option

Details

Fields & Relationships

Page Layouts

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List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

New Custom Field

Step 2: Enter the details

Field Label: Name

Field Name: Name

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: [NameFormulaEditor](#)

Previous Next Cancel

Creating field Name

Food Option

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Flow Triggers

Validation Rules

Food Option

New Relationship

Step 1: Enter the label and name for the lookup field

Field Label: Hotel

Field Name: Hotel

Description:

Help Text:

Choose Relationship Name: Food\_Options

What to do if the lookup record is deleted?

☒ Check the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Show Filter Settings](#)

Previous Next Cancel

Creating field Hotel

Food Option

Details

Fields & Relationships

Page Layouts

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Compact Layouts

Field Sets

Object Limits

Record Types

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Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Food Option

New Custom Field

Step 2: Enter the details

Field Label: Food Amount

Length: 10

Decimal Places: 0

Field Name: Food\_Amount

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record.

☒ Add this field to existing custom report types that contain this entity.

Default Value: [Show Formula Editor](#)

Previous Next Cancel

Creating field Food Amount



## Flight Object Fields:

1. **Name (Text):** A name or code identifying the flight.
2. **DepartureDateTime (Date/Time):** The date and time of flight departure.

The screenshot shows the Salesforce Setup interface for the 'Flight' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Flight' and shows the 'Fields & Relationships' section. It includes fields for 'Field Label' (Name), 'Field Name' (Name), 'Description', and 'Help Text'. There are checkboxes for 'Required' (Always require a value in this field in order to save a record) and 'Auto add to custom report type' (Add this field to existing custom report types that contain this entity). A 'Default Value' section with a 'Show Formula Editor' link is also present. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 15:39 on 12-10-2024.

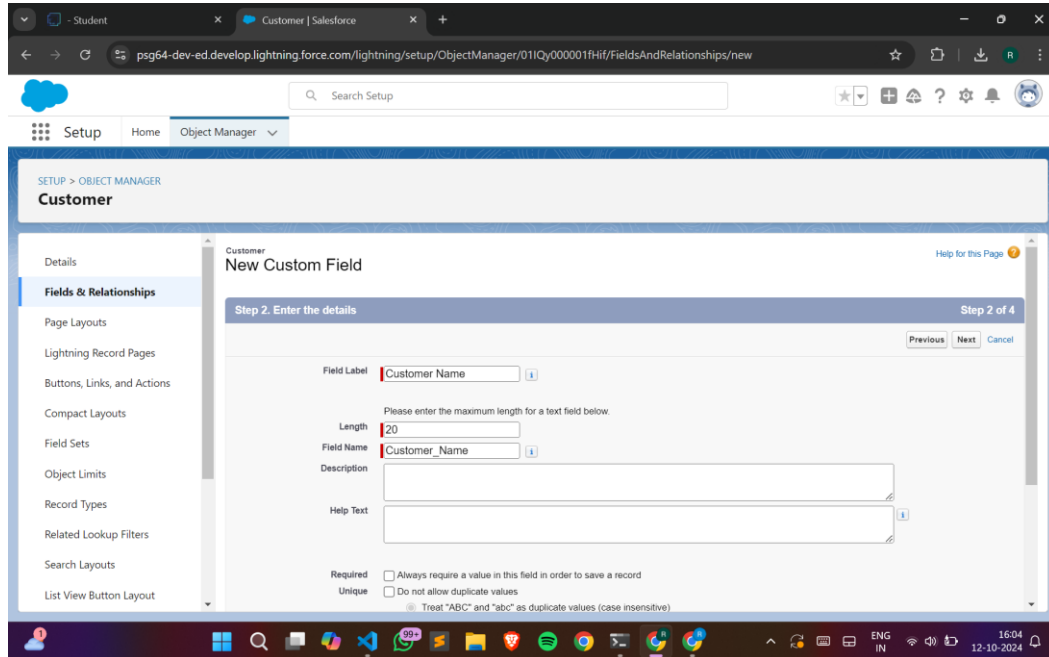
Creating field Name

The screenshot shows the Salesforce Setup interface for the 'Flight' object, specifically the 'New Relationship' page. The left sidebar is the same as the previous screenshot. The main content area is titled 'Flight' and shows the 'New Relationship' section. It includes fields for 'Field Label' (DepartureDateTime), 'Field Name' (DepartureDateTime), 'Description', and 'Help Text'. There is a 'Child Relationship Name' field with the value 'Flights'. There are checkboxes for 'Required' (Always require a value in this field in order to save a record) and 'What to do if the lookup record is deleted?' (Clear the value of this field. You can't choose this option if you make this field required). The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 15:56 on 12-10-2024.

Creating field DepartureDateTime

## Customer Object Fields:

1. **Customer Name (Text):** The name of the customer.
2. **Discount Amount (Formula - Currency):** A formula that calculates the discount based on customer criteria.
3. **Discount Percent (Percentage):** The percentage discount applied to the customer.

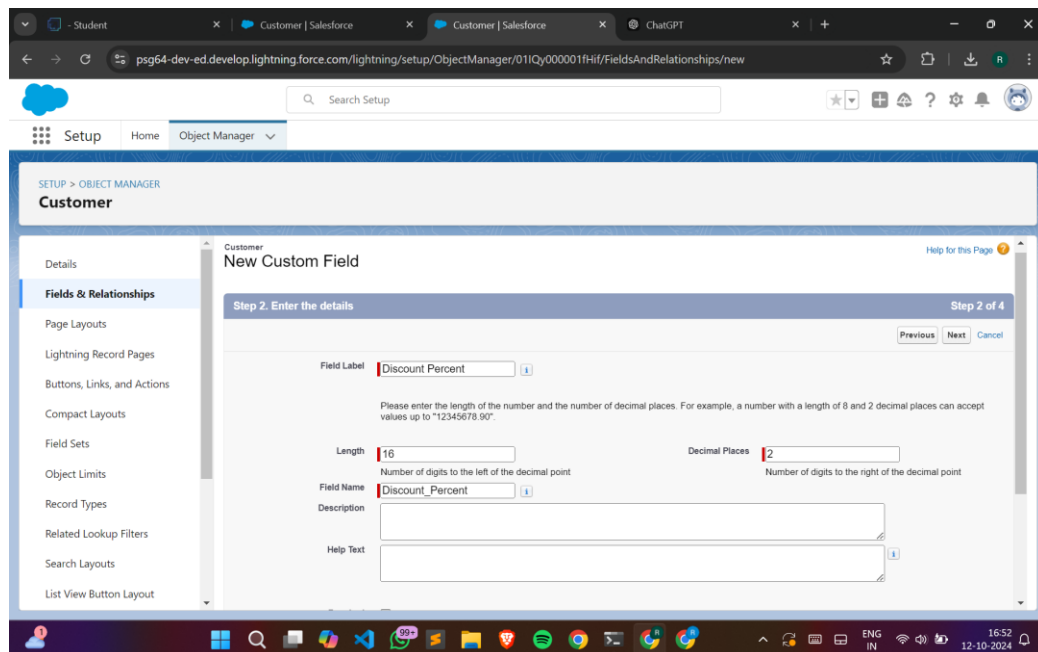


The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Customer' object. The page is titled 'New Custom Field' and is at 'Step 2 of 4: Enter the details'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main form contains the following fields:

- Field Label:** Customer Name
- Length:** 20
- Field Name:** Customer\_Name
- Description:** (empty text area)
- Help Text:** (empty text area)
- Required:** ☐ Always require a value in this field in order to save a record
- Unique:** ☐ Do not allow duplicate values
- Treat "ABC" and "abc" as duplicate values (case insensitive)

Navigation buttons at the top right include 'Previous', 'Next', and 'Cancel'. A 'Help for this Page' link is also present.

Creating field Customer Name



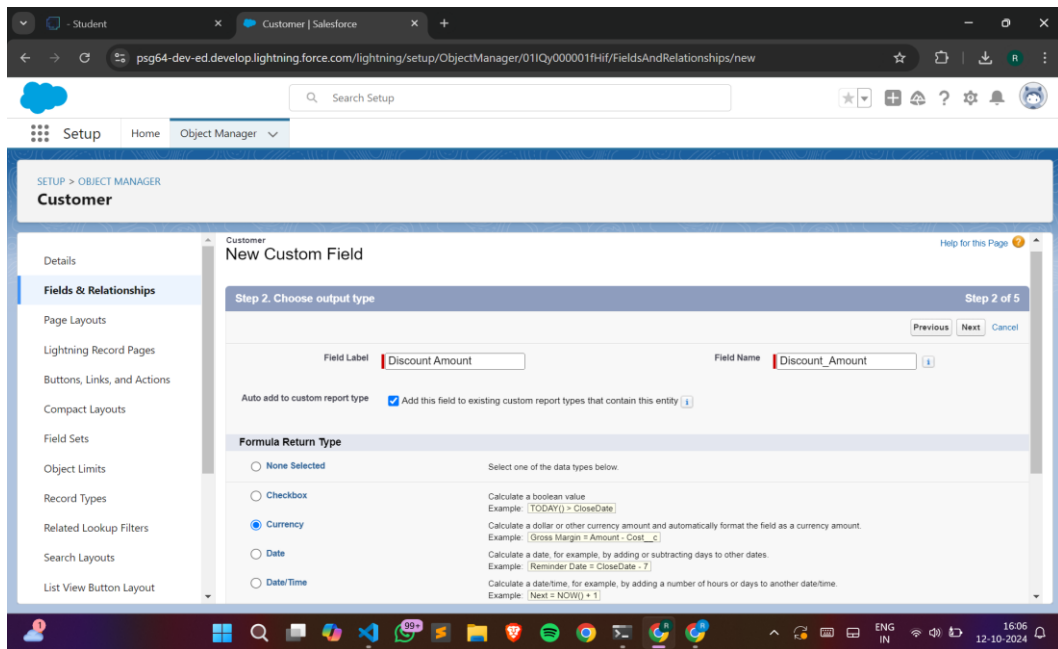
The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Customer' object. The page is titled 'New Custom Field' and is at 'Step 2 of 4: Enter the details'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main form contains the following fields:

- Field Label:** Discount Percent
- Length:** 16
- Decimal Places:** 2
- Field Name:** Discount\_Percent
- Description:** (empty text area)
- Help Text:** (empty text area)

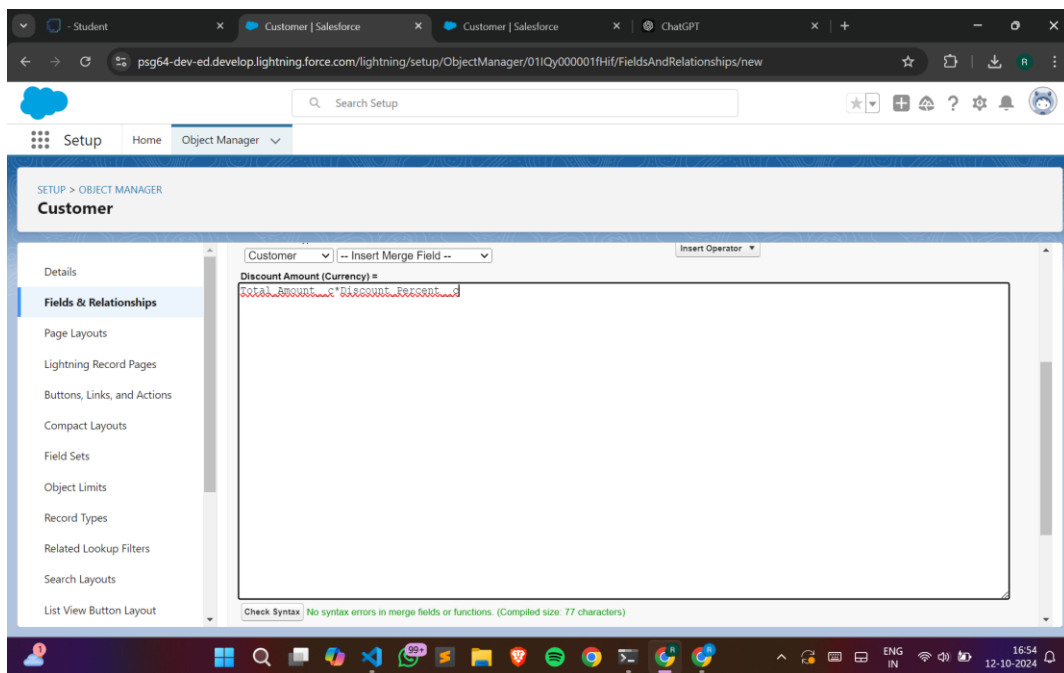
Instructions for the Length and Decimal Places fields are provided: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90"'. Below the Length field, it says 'Number of digits to the left of the decimal point'. Below the Decimal Places field, it says 'Number of digits to the right of the decimal point'.

Navigation buttons at the top right include 'Previous', 'Next', and 'Cancel'. A 'Help for this Page' link is also present.

Creating field Discount Percent



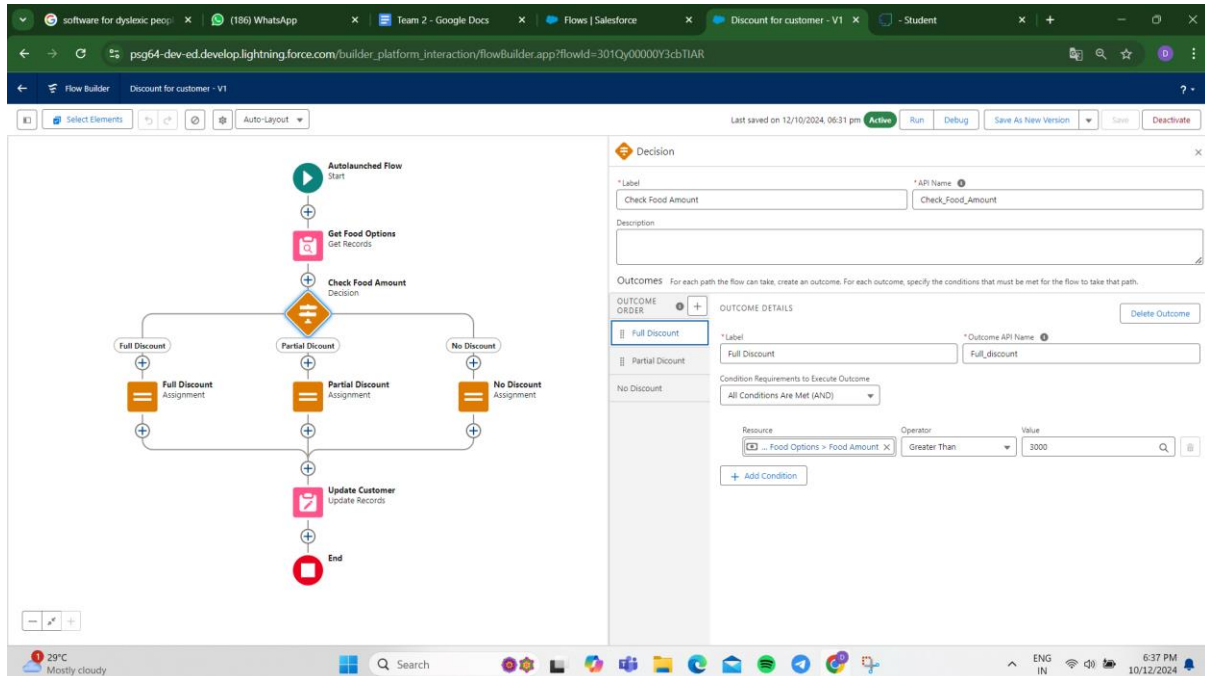
Creating field Discount Amount



Creating field Discount Amount

## Step 4: Create flow for Customer Discounts

- **Variables:**
  - **foId (Text)** - Available for Input
  - **csId (Text)** - Available for Input
  - **discount (Number)**
- **Flow Steps:**
  - **Get Records:** Retrieve customer data based on purchase history.
  - **Decision Element:** Add decision outcomes for different discount thresholds:
    - **Full Discount:** For customers with amounts greater than 3000.
    - **Partial Discount:** For customers with amounts between 1500 and 3000.
    - **No Discount:** For customers below 1500.
  - **Assignments:** Assign appropriate discounts based on decisions made above.
- **Flow Outcome:**
  - Apply the correct discount to the customer's account based on the flow's logic.



software for dyslexic peop... (186) WhatsApp Team 2 - Google Docs Flows | Salesforce Discount for customer - V1 - Student

psg64-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flow/builder.app?flowId=301Qy00000Y3cbT1AR

Flow Builder Discount for customer - V1

Last saved on 12/10/2024, 06:31 pm Active Run Debug Save As New Version Save Deactivate

Decision

\*Label Check Food Amount \*API Name Check\_Food\_Amount

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER +

OUTCOME DETAILS

Full Discount \*Label Partial Discount \*Outcome API Name Partial\_Discount

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

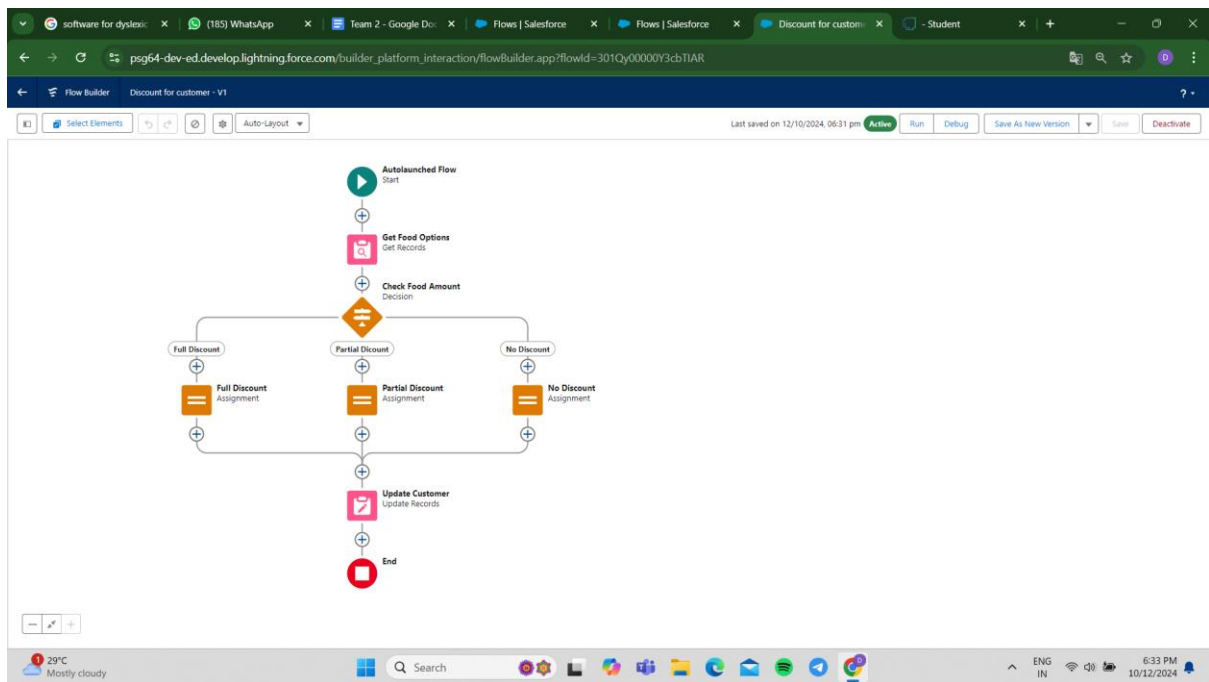
Resource Food Options > Food Amount Operator Greater Than or Equal Value 1500

AND Resource Food Options > Food Amount Operator Less Than or Equal Value 3000

+ Add Condition

29°C Mostly cloudy Search 6:38 PM 10/12/2024

Condition for full discount and partial discount



Flow created for discount approval

## Step 5: Apex Trigger and Handler for Updating Hotel Food Option Counts

### Variables:

- newFoodOptions (List of Food\_Option\_\_c) - List of new or updated food options passed to the handler.
- oldFoodOptions (List of Food\_Option\_\_c) - List of old food options (used only if required for comparisons).
- operation (TriggerOperation) - Type of trigger operation (e.g., insert, update, delete).
- hotelIdsToUpdate (Set of Id) - Set of unique Hotel IDs affected by the changes to the food options.
- hotelsToUpdate (List of Hotel\_\_c) - List of hotel records that need to be updated.

### Apex Trigger Steps:

1. Trigger Setup:
  - Define a trigger on the Food\_Option\_\_c object.
  - The trigger is set to run after insert, after update, and after delete to handle changes in food options.
2. Trigger Conditions:
  - Check if the trigger is running after insert to ensure updates happen after new food options are created.
3. Call Handler Method:
  - If the trigger is after insert, invoke updateHotelInformation from FoodOptionTriggerHandler to update hotel details based on the new food options.
  - Pass trigger.new to the handler to retrieve the list of newly inserted food options.

### Apex Handler Steps (updateHotelInformation method):

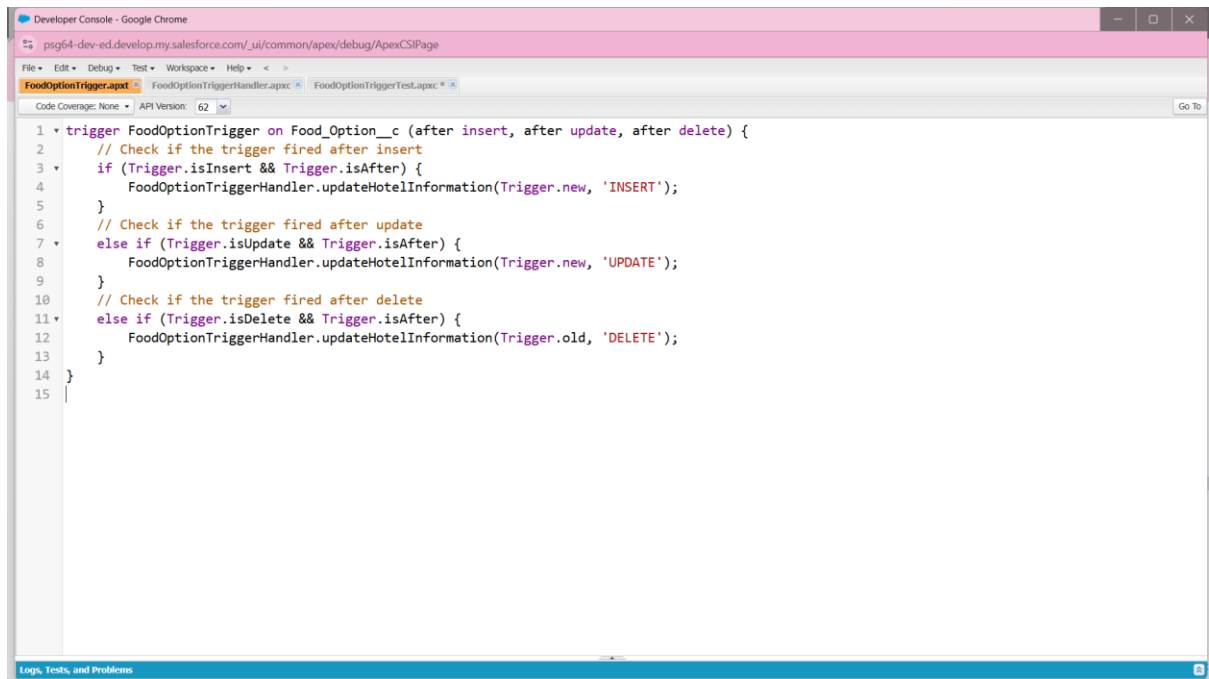
1. Collect Hotel IDs:
  - Loop through each record in newFoodOptions.
  - Add the Hotel\_\_c (Hotel ID) from each food option to hotelIdsToUpdate to collect unique hotel IDs affected by the changes.
2. Retrieve Hotels to Update:
  - Query the Hotel\_\_c object for records with IDs in hotelIdsToUpdate.
  - Retrieve fields Id, Name, and TotalFoodOptions\_\_c to calculate and update the total food options for each hotel.

### 3. Recalculate Total Food Options:

- Loop through each hotel record in hotelsToUpdate.
- Run a query to count the total food options linked to each hotel using COUNT().
- Assign the result to the TotalFoodOptions\_\_c field on the Hotel\_\_c record.

### 4. Update Hotel Records:

- Perform an update on hotelsToUpdate to save the recalculated TotalFoodOptions\_\_c values.



```
1 trigger FoodOptionTrigger on Food_Option__c (after insert, after update, after delete) {  
2     // Check if the trigger fired after insert  
3     if (Trigger.isInsert && Trigger.isAfter) {  
4         FoodOptionTriggerHandler.updateHotelInformation(Trigger.new, 'INSERT');  
5     }  
6     // Check if the trigger fired after update  
7     else if (Trigger.isUpdate && Trigger.isAfter) {  
8         FoodOptionTriggerHandler.updateHotelInformation(Trigger.new, 'UPDATE');  
9     }  
10    // Check if the trigger fired after delete  
11    else if (Trigger.isDelete && Trigger.isAfter) {  
12        FoodOptionTriggerHandler.updateHotelInformation(Trigger.old, 'DELETE');  
13    }  
14 }  
15
```

Trigger Code (FoodOptionTrigger)





## Step 6: Scheduled Apex Class for Automated Flight Reminder Emails

### Variables:

- `DepartureDateTime__c` (DateTime) - Custom field on the `Flight__c` object representing the flight's departure date and time.
- `ContactEmail__c` (Email) - Custom field on the `Flight__c` object holding the customer's contact email address for sending reminders.

### Apex Schedule Steps:

1. Define Apex Schedule Class:
  - Create a class named `FlightReminderScheduledJob` that implements the `Schedulable` interface, allowing it to be scheduled to run at specified times.
2. Schedulable Interface Implementation:
  - Implement the `execute` method from the `Schedulable` interface.
  - Inside `execute`, call the `sendFlightReminders` method to handle the logic for querying flights and sending reminders.
3. Query Upcoming Flights:
  - In the `sendFlightReminders` method, query the `Flight__c` records where `DepartureDateTime__c` is within the next 24 hours (`>= DateTime.now()` and `<= DateTime.now().addDays(1)`).
  - Retrieve fields `Id`, `Name`, `DepartureDateTime__c`, and `ContactEmail__c`.
4. Send Reminder Email:
  - For each flight in `upcomingFlights`, create an email message using `Messaging.SingleEmailMessage`.
  - Set the `ToAddresses`, `Subject`, and `PlainTextBody` of the email to include flight details and departure time.
  - Send the email using `Messaging.sendEmail()`.

### Anonymous Apex Code for Scheduling:

1. Define Cron Expression:
  - Set a cron expression to schedule the job daily at 6 AM.
2. Schedule the Job:
  - Use `System.schedule` to run `FlightReminderScheduledJob` with the cron expression.

```
File • Edit • Debug • Test • Workspace • Help • < >
FlightReminderScheduledJob.apex
Code Coverage: None • API Version: 62 • Go To

1 public class FlightReminderScheduledJob implements Schedulable {
2     public void execute(SchedulableContext sc) {
3
4         sendFlightReminders();
5     }
6     private void sendFlightReminders() {
7
8         // Query for flights departing within the next 24 hours
9         List<Flight__c> upcomingFlights = [SELECT Id, Name__c, DepartureDateTime__c FROM Flight__c
10            WHERE DepartureDateTime__c >= :DateTime.now()
11            AND DepartureDateTime__c <= :DateTime.now().addDays(1)];
12
13         for (Flight__c flight : upcomingFlights) {
14
15             // Customize the logic to send reminder emails
16             // For this example, we'll print a log message; replace this with your email sending logic.
17             System.debug('Sending reminder email for Flight ' + flight.Name + ' to ' + flight.ContactEmail__c);
18
19             // Example: Send email using Messaging.SingleEmailMessage
20             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
21             email.setToAddresses(new List<String>{ flight.ContactEmail__c });
22             email.setSubject('Flight Reminder: ' + flight.Name);
23             email.setPlainTextBody('This is a reminder for your upcoming flight ' + flight.Name +
24                 ' departing on ' + flight.DepartureDateTime__c);
25             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{ email });
26         }
27     }
28 }
```

## Flight Reminder Schedule Class Code

```
File • Edit • Debug • Test • Workspace • Help • < >
FlightReminderScheduledJob.apex
Code Coverage: None • API Version: 62 • Go To

1 public class FlightReminderScheduledJob implements Schedulable {
2     public void execute(SchedulableContext sc) {
3
4         sendFlightReminders();
5     }
6 }
7
8 private void sendFlightReminders() {
9
10     // Query for flights departing within the next 24 hours
11     List<Flight__c> upcomingFlights = [SELECT Id, Name__c, DepartureDateTime__c FROM Flight__c
12        WHERE DepartureDateTime__c >= :DateTime.now()
13        AND DepartureDateTime__c <= :DateTime.now().addDays(1)];
14
15     for (Flight__c flight : upcomingFlights) {
16
17         // Customize the logic to send reminder emails
18         // For this example, we'll print a log message; replace this with your email sending logic.
19         System.debug('Sending reminder email for Flight ' + flight.Name + ' to ' + flight.ContactEmail__c);
20
21         // Example: Send email using Messaging.SingleEmailMessage
22         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
23         email.setToAddresses(new List<String>{ flight.ContactEmail__c });
24         email.setSubject('Flight Reminder: ' + flight.Name);
25         email.setPlainTextBody('This is a reminder for your upcoming flight ' + flight.Name +
26             ' departing on ' + flight.DepartureDateTime__c);
27         Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{ email });
28     }
29 }
```

Enter Apex Code

```
1 // Schedule the job to run every day at a specific time (e.g., 6 AM)
2
3 String cronExp = '0 0 6 * * ?';
4
5 System.schedule('FlightReminderJob', cronExp, new FlightReminderScheduledJob());
6
7
8
9
```

Open Log Execute Execute Highlighted

## Scheduling Job to run at Specific Time

## 5. Conclusion

### Summary of Achievements:

The TripAdvisor E-Management Project successfully streamlined and automated various processes related to hotel management, flight bookings, food options, and customer notifications, significantly enhancing both operational workflows and the overall customer experience. Key accomplishments include:

- **Optimized Operational Workflow:** Implemented an integrated system for managing hotel requirements, food options, and flight bookings, ensuring seamless coordination and reducing the need for manual intervention in the TripAdvisor platform.
- **Automated Customer Notifications:** Developed a schedulable Apex class to send timely flight reminders to customers 24 hours before departure, improving customer service by ensuring customers are well-informed and prepared for their travels.
- **Real-Time Data Synchronization:** Designed and deployed Apex triggers and flows to automatically update and synchronize hotel and food option data in real-time, ensuring that customers have access to accurate and up-to-date information.
- **Dynamic Discount Allocation:** Created automated processes to apply personalized discounts for customers based on their purchasing behavior, offering a tailored experience that enhances customer satisfaction and loyalty.
- **Improved Efficiency and Customer Experience:** Leveraged Salesforce's automation tools to reduce manual processes, allowing for quicker updates, more accurate data, and a smoother experience for customers booking hotels, flights, and food options.

This project demonstrates how Salesforce automation can effectively improve the efficiency of business operations and enhance the customer experience in the travel and hospitality industry, particularly for platforms like TripAdvisor. By integrating key processes into a single, automated system, the project helps streamline workflows, reduce manual effort, and provide a superior service to customers.