

# **Project Title**

## **Trip Advisor E- Management**

### **Team leader NM ID:**

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### **Team Members NM ID:**

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34DBDCE70CAEC00B7D245DE98269088F

# **Trip Advisor E- Management**

## **1. Project Overview**

The aim of the project is to create a comprehensive travel management solution by integrating TripAdvisor's extensive database of travel reviews, booking capabilities, and insights with Salesforce's customer relationship management (CRM) tools. This integration provides a seamless experience for users to plan, book, and optimize their trips while empowering travel businesses with actionable insights and customer management capabilities.

## **2. Objectives:**

### **1. For Travelers:**

- Provide an intuitive platform for trip planning and booking with access to millions of verified reviews and insights.
- Enable personalized recommendations based on user preferences and past behavior.
- Centralize trip management for convenience (e.g., itineraries, bookings, reservations).

### **2. For Businesses:**

- Enhance customer engagement and loyalty through Salesforce's CRM features.
- Offer insights into traveler preferences and behavior for data-driven decisions.
- Simplify customer service and communication via automated workflows and AI-powered tools.

## 3. Salesforce Key Features and Concepts Utilized

### Salesforce Integration:

- **CRM Tools:** Enable travel businesses to manage customer relationships effectively by tracking interactions, preferences, and feedback.
- **Analytics and Insights:** Provide businesses with dashboards and reports that analyze customer behavior and preferences for targeted marketing and service improvements.
- **Automation:** Automate communication workflows (e.g., booking confirmations, follow-up surveys, personalized offers).

## 4. Detailed Steps to Solution Design

It requires addressing multiple aspects such as functionality, user experience, technology stack, and security.

### Salesforce CRM (Customer Relationship Management)

- **Customer 360:** Provides a holistic view of customers, including their travel preferences, past bookings, and interactions, enabling personalized experiences and communication.
- **Accounts and Contacts:** Manage information about travel businesses (accounts) and their individual customers (contacts), including personal details, preferences, and history.
- **Opportunities:** Track sales opportunities such as bookings, upsells, or partnerships with travel vendors.

### Salesforce Automation Tools

- **Process Builder:** Automate workflows such as follow-up emails, notifications, or customer surveys based on booking status or other triggers.
- **Flow Builder:** Create automated flows for business processes like onboarding new clients, processing refunds, or managing customer interactions.
- **Workflow Rules:** Automatically assign tasks, update records, or trigger actions when specific conditions are met (e.g., a customer books a trip).

### Salesforce Mobile Solutions

- **Salesforce Mobile App:** Allow travel businesses to access customer data, manage bookings, and communicate with clients on the go.
- **Salesforce Lightning:** Enable a mobile-responsive, intuitive user interface for employees to track leads, opportunities, and customer interactions in realtime.

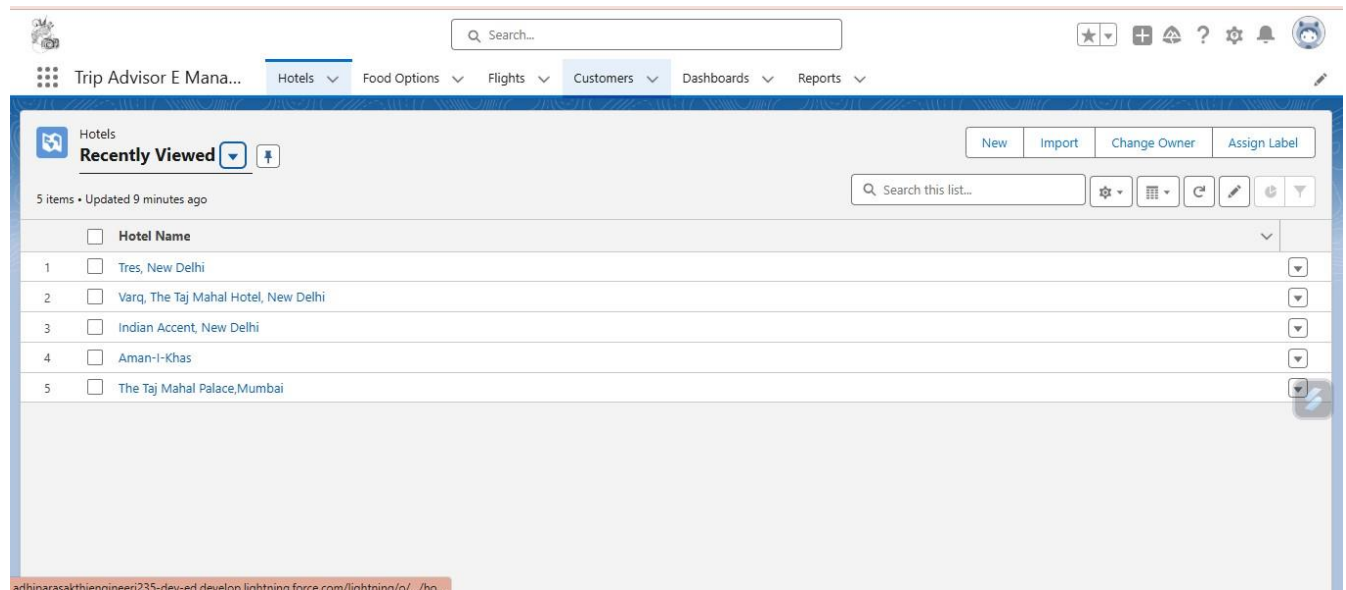
### Salesforce AppExchange

- **Pre-built Apps:** Leverage travel-specific applications or integrations on AppExchange to enhance CRM, reporting, or booking capabilities, reducing custom development

### Salesforce Integration Tools

- **Salesforce APIs (REST/SOAP):** Integrate TripAdvisor's data and booking functionality with Salesforce, enabling real-time data exchange and synchronized information.
- **MuleSoft (part of Salesforce):** Use for connecting Salesforce with external systems like TripAdvisor through APIs for data transformation and orchestration.

## Design:



**Hotels**

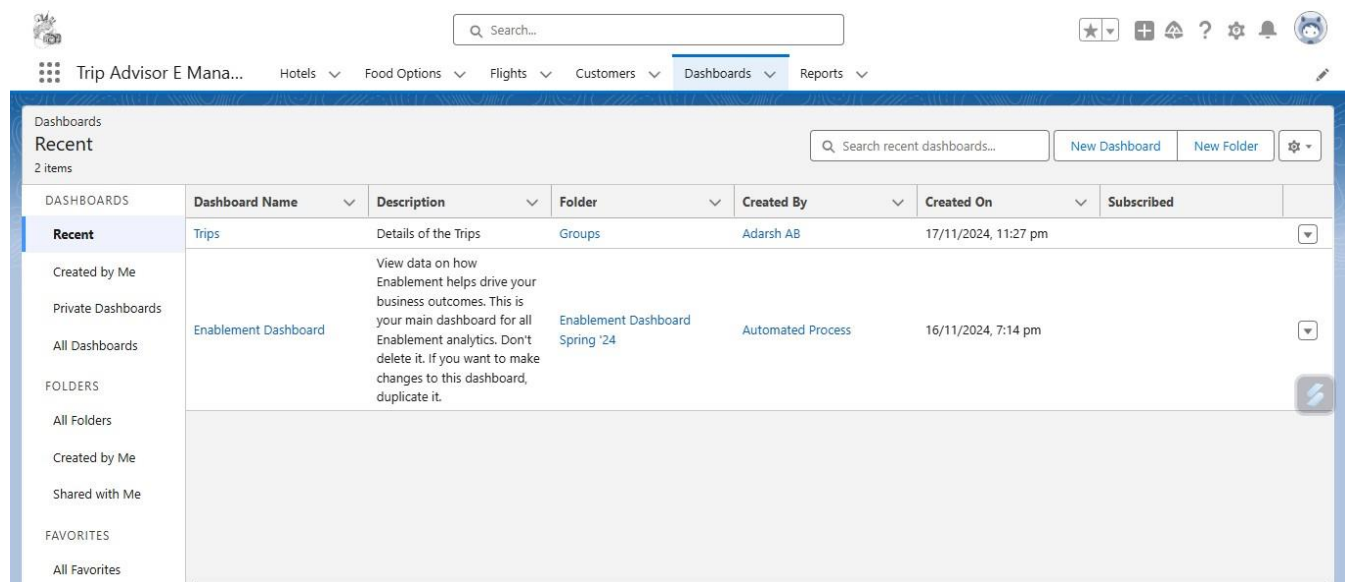
**Recently Viewed** ▼ 📌

5 items • Updated 9 minutes ago

Search this list...

<input type="checkbox"/>	Hotel Name	<span>▼</span>
<input type="checkbox"/>	Tres, New Delhi	<span>▼</span>
<input type="checkbox"/>	Varq, The Taj Mahal Hotel, New Delhi	<span>▼</span>
<input type="checkbox"/>	Indian Accent, New Delhi	<span>▼</span>
<input type="checkbox"/>	Aman-i-Khas	<span>▼</span>
<input type="checkbox"/>	The Taj Mahal Palace, Mumbai	<span>▼</span>

## DashBoard:



**Dashboards**

**Recent**

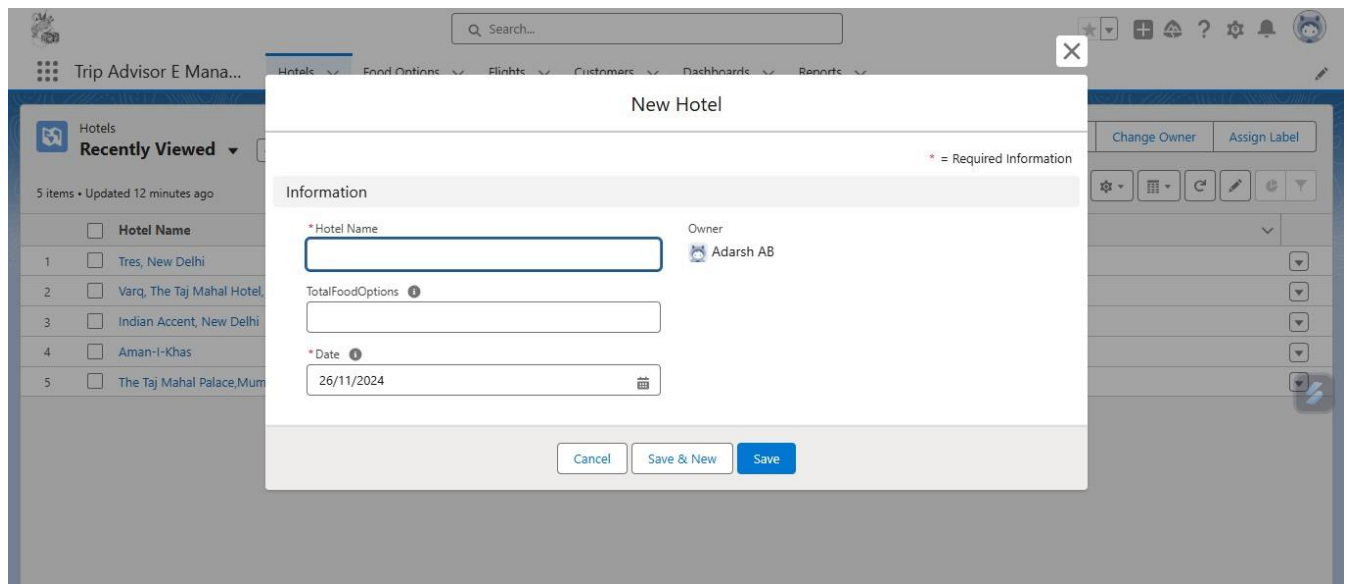
2 items

Search recent dashboards...

[New Dashboard](#) [New Folder](#) ⚙️

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	Trips	Details of the Trips	Groups	Adarsh AB	17/11/2024, 11:27 pm	<span>▼</span>
Created by Me	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	16/11/2024, 7:14 pm	<span>▼</span>
Private Dashboards						
All Dashboards						
<b>FOLDERS</b>						
All Folders						
Created by Me						
Shared with Me						
<b>FAVORITES</b>						
All Favorites						

## Hotel Field:



The screenshot shows the 'New Hotel' form in the Trip Advisor E Manager application. The form is titled 'New Hotel' and includes a close button (X) in the top right corner. The form is divided into an 'Information' section and a 'Required Information' section. The 'Information' section contains the following fields:

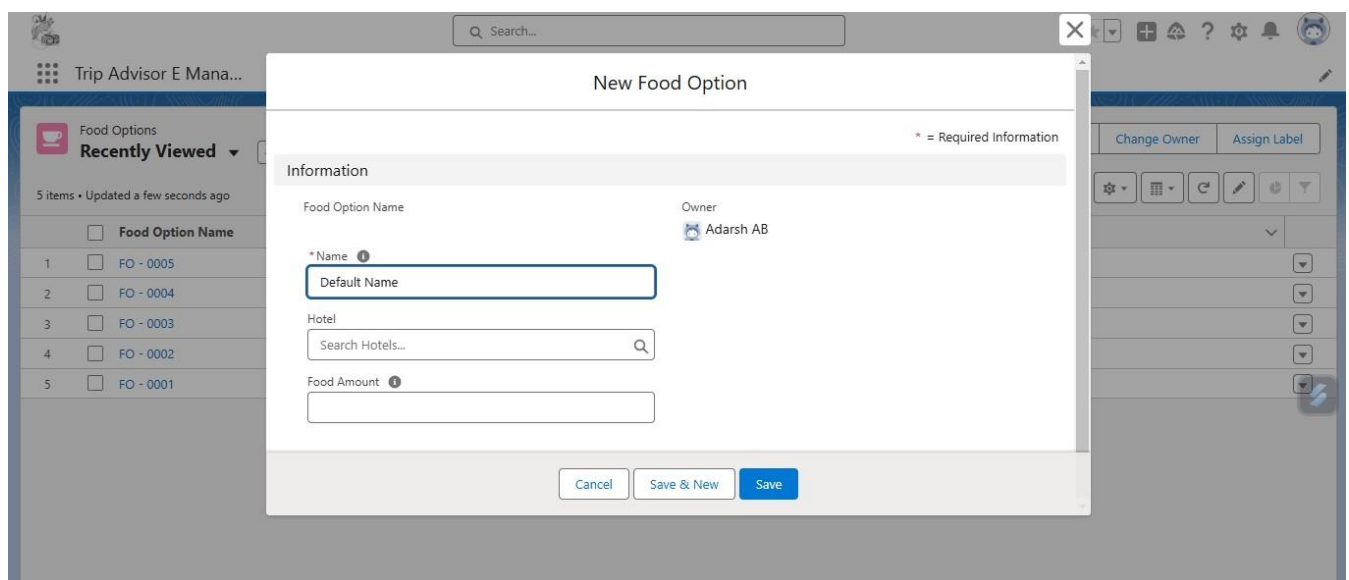
- \*Hotel Name**: A text input field with a blue border.
- Owner**: A dropdown menu showing 'Adarsh AB'.
- TotalFoodOptions**: A text input field with a blue border.
- \*Date**: A date input field showing '26/11/2024'.

The 'Required Information' section contains the following fields:

- \*Hotel Name**: A text input field with a blue border.
- \*Date**: A date input field showing '26/11/2024'.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

## FoodOption:



The screenshot shows the 'New Food Option' form in the Trip Advisor E Manager application. The form is titled 'New Food Option' and includes a close button (X) in the top right corner. The form is divided into an 'Information' section and a 'Required Information' section. The 'Information' section contains the following fields:

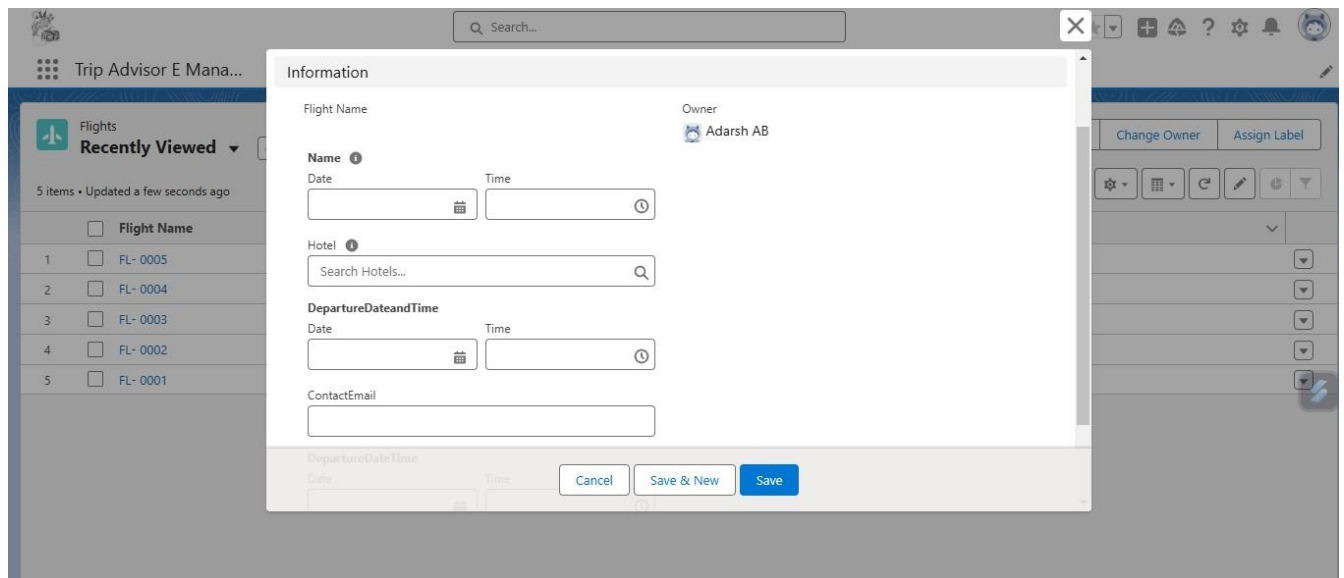
- Food Option Name**: A text input field with a blue border.
- Owner**: A dropdown menu showing 'Adarsh AB'.
- \*Name**: A text input field with a blue border, containing the text 'Default Name'.
- Hotel**: A text input field with a blue border, containing the text 'Search Hotels...' and a search icon.
- Food Amount**: A text input field with a blue border.

The 'Required Information' section contains the following fields:

- \*Name**: A text input field with a blue border, containing the text 'Default Name'.
- \*Food Amount**: A text input field with a blue border.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

## For Flightbooking:

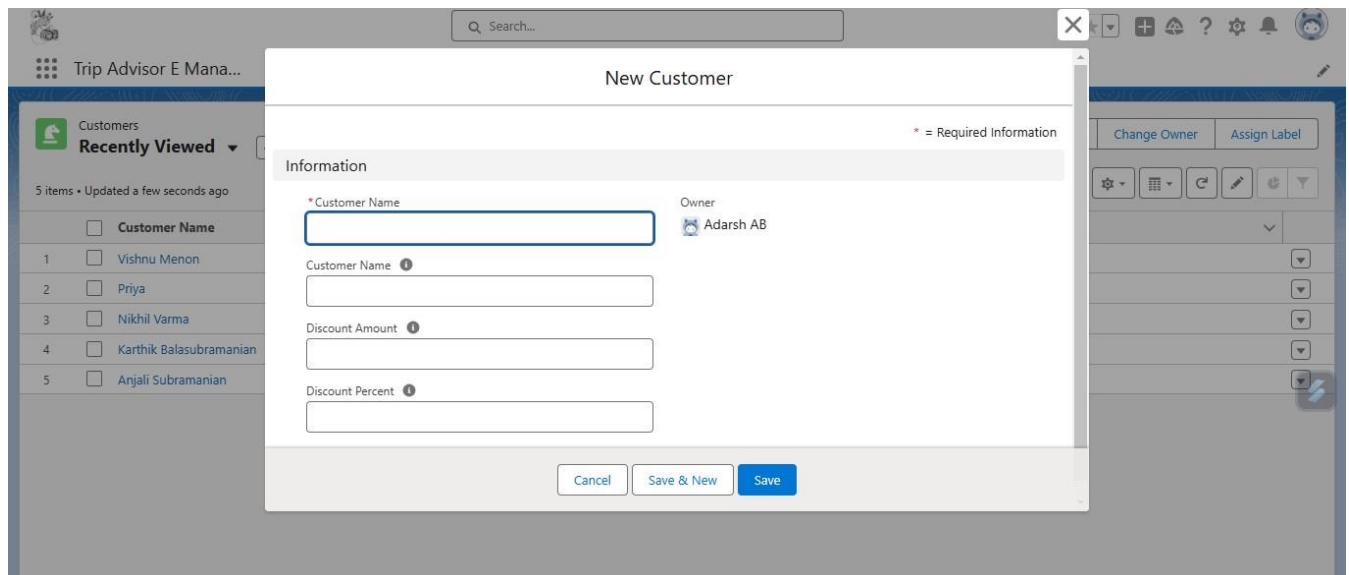


The screenshot shows the 'Flight Name' form in the Trip Advisor E Manager application. The form is titled 'Information' and includes the following fields:

- Flight Name:** A text input field.
- Owner:** A dropdown menu showing 'Adarsh AB'.
- Name:** A text input field.
- Date:** A date picker.
- Time:** A time picker.
- Hotel:** A text input field with a search icon.
- DepartureDateandTime:** A text input field.
- ContactEmail:** A text input field.
- Buttons:** 'Cancel', 'Save & New', and 'Save'.

The background shows a sidebar with 'Recently Viewed' flights and a list of flight items.

## For CustomerField:





The screenshot shows the 'New Customer' form in the Trip Advisor E Manager application. The form is titled 'Information' and includes the following fields:

- \* Customer Name:** A text input field.
- Customer Name:** A text input field.
- Discount Amount:** A text input field.
- Discount Percent:** A text input field.
- Owner:** A dropdown menu showing 'Adarsh AB'.
- Buttons:** 'Cancel', 'Save & New', and 'Save'.

The background shows a sidebar with 'Recently Viewed' customers and a list of customer items.

## Report:




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Trip Advisor E Mana...
Hotels ▾
Food Options ▾
Flights ▾
Customers ▾
Dashboards ▾
Reports ▾

Reports

Recent

5 items

New Report
New Folder
⚙️

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	New Flights Report		Private Reports	Adarsh AB	17/11/2024, 11:09 pm	<span>▾</span>
Created by Me	New Food Options Report		Private Reports	Adarsh AB	17/11/2024, 11:08 pm	<span>▾</span>
Private Reports	New Customers Report		Private Reports	Adarsh AB	17/11/2024, 11:09 pm	<span>▾</span>
Public Reports	New Hotels Report		Private Reports	Adarsh AB	17/11/2024, 11:07 pm	<span>▾</span>
All Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	16/11/2024, 7:14 pm	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						



## 5. Testing and Validation

### 1. Unit Testing:

Unit testing is essential for Salesforce development. It involves writing test classes to verify the correctness of individual Apex classes and triggers. By isolating these components, we can ensure their functionality and identify potential issues early in the development process. Key approaches include test-driven development, high code coverage, mock data, and adherence to Salesforce best practices.

### 2. User Interface (UI) Testing

Ensures the application's visual elements and user interactions function as intended. Combines manual (visual inspection, interaction testing, usability evaluation) and automated (Selenium WebDriver, visual regression testing, performance testing) techniques to validate functionality, usability, and performance.

## 6. Key Scenarios Addressed by Salesforce in the Implementation Project

In implementing a **Trip Advisor E- Management** using Salesforce, there are several key scenarios and challenges that Salesforce addresses to ensure the system meets business needs and provides a robust, user-friendly solution.

### Sales and Marketing:

- **Lead Management:** Capturing, qualifying, and nurturing leads.
- **Opportunity Management:** Tracking sales opportunities from initial contact to closure.

- **Customer Relationship Management (CRM):** Managing customer interactions and building relationships.
- **Marketing Automation:** Automating marketing campaigns and tracking their effectiveness.

### **Service and Support:**

- **Case Management:** Tracking and resolving customer issues.
- **Knowledge Base:** Providing self-service support options.
- **Field Service:** Scheduling and managing field service appointments.

### **Salesforce Platform:**

- **Customizations:** Developing custom applications and workflows.
- **Integrations:** Connecting Salesforce with other systems (e.g., ERP, marketing automation).
- **Data Migration:** Migrating data from legacy systems to Salesforce.
- **User Adoption:** Training and enabling users to effectively use Salesforce.

## **7. Conclusion**

### **Summary of Achievements:**

The successful implementation of the **Travel Management Solution** has significantly optimized key operational areas within the travel industry, leading to improvements in **efficiency**, **customer satisfaction**, and **business scalability**. By integrating **TripAdvisor's vast travel database** with **Salesforce's CRM and automation tools**, the solution enables a seamless and personalized experience for travelers, while empowering travel businesses with powerful customer management, analytics, and automation capabilities.