# **Phase 1: Problem Understanding & Industry Analysis**

### ****Requirement Gathering****

* **Customers** want seamless end-to-end booking, personalization, and safety.
* **Travel Agents** want digital tools to reduce manual effort, errors, and delays.
* **Local Vendors** want visibility, trust, and fair integration into digital ecosystems.

### ****Stakeholder Analysis****

* **Customers**: Young professionals, families, solo travelers → seeking convenience, trust, and personalization.
* **Travel Agents**: Small & mid-size agencies → struggling with outdated manual systems.
* **Local Vendors**: Guides, transport providers, small hotels → excluded from mainstream platforms.
* **Platforms**: Current large players (MMT, Yatra) → provide scale but lack personalization, local vendor integration, and safety-first features.

### ****Business Process Mapping (Current vs. Future)****

* **Current**:
  + Customer books hotels on one app → transport on another → calls agents for guides.
  + Agent manually calls vendors → updates customer via calls/WhatsApp → prone to errors.
  + Local vendor remains offline/unverified.
* **Future (Unified Platform Vision)**:
  + Customer books everything in **one place** (AI-driven planner).
  + Agents use an integrated **dashboard** for coordination.
  + Local vendors onboarded with **verification & trust layers**.
  + Safety and transparency features embedded into the flow.

### ****Industry-specific Use Case Analysis****

* **End-to-End Travel Management** → Hotel, transport, guide, and activity booking under one platform.
* **AI-driven Recommendations** → Budget planning, interest-based itineraries, safety-first routing.
* **Local Vendor Integration** → Verified, rated, and promoted within platform.
* **Emergency/Safety Support** → SOS features, verified vendors, transparent pricing.

# **AppExchange Exploration**

Potential Salesforce AppExchange features to leverage:

* **Booking & Scheduling Apps** → integration into CRM.
* **Vendor Management Apps** → onboarding and verification.
* **AI Recommendation Engines** → personalized itineraries.
* **Customer Service Automation** → chatbots, case management for travel emergencies.

## **Problem Statement**

India’s travel industry is fragmented, trust-deficient, and inefficient for both customers and agents. Customers face complexity and lack personalization, while agents rely on outdated manual workflows. Local vendors are excluded, resulting in missed opportunities for inclusivity and trust-building. A unified, intelligent, and secure travel platform is needed to bring all stakeholders together.

## **Problem Tree – Travel & Tour Booking Industry**

# **Root Causes (Why the problem exists?)**

* Fragmented ecosystem → Hotels, transport, guides, activities managed separately.
* Lack of vendor verification → Local vendors not trusted or digitized.
* Manual processes → Agents depend on calls, emails, spreadsheets.
* Limited personalization → No AI-driven recommendations.
* Weak safety & transparency features → Hidden costs, no emergency support.

# **Core Problems (What is happening?)**

* Complex, time-consuming booking journeys.
* Agent inefficiency → delays & errors.
* Local vendors excluded from digital reach.
* No flexible, personalized trip planning.
* Low trust & confidence in existing platforms.

# **Consequences (Impact of the problems?)**

* Customers waste time, effort, and lose trust → high drop-off rates.
* Customer dissatisfaction reduces platform retention & loyalty.
* Lost revenue for agents & local vendors.
* Growth concentrated among big players → small/local vendors excluded.
* Safety concerns discourage adoption of new services.
* Missed opportunity to build inclusive, personalized travel ecosystems.

# **Phase 2: Org Setup & Configuration**

# Salesforce Editions

• We are using Salesforce Developer Edition (Free), which provides all core features required for our setup.

• Edition chosen because it allows creation of custom objects, roles, profiles, and permission sets.

# Company Profile Setup

• Setup → Company Information.

• Entered company name: SmartTravel Pvt. Ltd.

• Default Currency: INR.

• Default Locale: English (India).

• Time Zone: (GMT+5:30) Asia/Kolkata.

# Business Hours & Holidays

• Setup → Company Settings → Business Hours.

• Created Business Hours: 9:00 AM – 6:00 PM IST (Mon–Sat).

• Added Holidays: National Holidays, Diwali, Christmas, New Year.

# Fiscal Year Settings

• Setup → Company Settings → Fiscal Year.

• Using Standard Fiscal Year (April–March) as per Indian financial standards.

# User Setup & Licenses

• Created Users with licenses: Salesforce Platform.

• CEO/Admin → Krishna (System Administrator).

• Operations Manager, Travel Agent, Vendor Manager, Customer Service Agent, Local Vendors etc.

# Profiles

• Created Custom Profiles for each role: Travel Agent, Vendor Manager, Customer Service Agent, Local Vendor.

• System Administrator Profile (Krishna) has full access.

• Profiles define object-level access (CRUD).

# Roles

• Setup → Roles → Set Up Roles.

• Hierarchy built: SmartTravel Pvt. Ltd. → CEO/Admin → Managers → Agents.

• CEO/Admin (Krishna) → Operations Manager → Travel Agent.

• CEO/Admin → Vendor Manager.

• CEO/Admin → Customer Service Manager → Customer Service Agent.

# Permission Sets

• Created extra permission sets without editing profiles.

• AI Travel Planner Access → Travel Agents.

• Vendor Verification Access → Vendor Manager.

• SOS & Emergency Handling → Customer Service Agent.

• Analytics Dashboard Access → Managers.

# OWD (Organization-Wide Defaults)

• Setup → Sharing Settings → Organization-Wide Defaults.

• Booking\_\_c: Private.

• Itinerary\_Item\_\_c: Public Read/Write.

• Vendor\_\_c: Private.

• Emergency\_Case\_\_c: Private.

• Grant Access Using Hierarchies: Enabled.

# Sharing Rules

• Setup → Sharing Settings → New Sharing Rule.

• Example: Booking\_\_c owned by Travel Agent shared with Vendor Manager (Read Only).

• Example: Emergency\_Case\_\_c owned by Customer Service Agent shared with Operations Manager (Read/Write).

# Login Access Policies

• Setup → Login Access Policies.

• Enabled: Administrators Can Log in as Any User.

• Allowed Salesforce.com Support Login Access.

# Developer Org Setup, Sandbox Usage & Deployment Basics

## Developer Org Setup

• Create Salesforce Developer Edition account.  
• Configure Company Profile, Users, Roles, Profiles, Business Hours, and Security settings.  
• Enable required features: custom objects, automation, reports.  
• Integrate with GitHub/Salesforce CLI for version control.

## Sandbox Usage

• Use Developer Sandbox for building and testing changes safely.  
• Optionally, use Full Sandbox for testing production-level scenarios.  
• Always test major changes in a sandbox before deploying to production.

## Deployment Basics

• Change Sets: Simple point-and-click deployment between orgs.  
• Salesforce CLI (SFDX): Advanced deployment with version control and automation.  
• GitHub Integration: Track changes, collaborate, and maintain version control.  
• Always document deployment steps and maintain backups.