Requirement	Solution	Technical support
Create, update, conversion - Prospects	Using standard Lead object	Using standard Lead functionalities including conversion to Account object
Not create travelers directly	Using standard 'Account' object renamed as Traveler - Records are added from the Prospect object by conversion only	Removed 'New' buttons and actions from object views (Page and Search Layouts)
Create and update Trips	Custom Trip object	
Purchased trips	Created **Booking** custom object	Child object of Trips and Travelers
Activities	Activities automatically linked and operational to all standard and custom objects	Activities automatically linked and operational to all standard and custom objects
Number of Available Places	Available Seats is formula field calculated from total of seats booked per trip minus the total of seats allocated for the trip	'Seats Booked' is a Roll-Up Summary field accumulating the number of booked seats from every booking in a given Trip.
Automated Emails	1. Email sent to Prospect when their status changes from Open - Inquiry to Open - Interested 2. Email sent to Traveler at booking confirmation or modification	Flow builder
Bus assignment task	Task assigned to the manager of the salesperson creating the Trip	Process builder
Trip status update	Open Trip status changes to closed 3 hours before departure date.	Workflow rules and daily verification of status using flow builder

Requirement	Solution	Technical support
Reports	Report for sales managers: 1. Number of prospects converted by sales rep 2. Number of purchased trips (booking) by sales rep Report for sales reps: 3. Number of open trips 4. Cumulative sum in Euro of open trips	Sales managers can edit reports using the reports object tab in the home page
Dashboard	● Sales managers dashboard for reports 1, 2, 3, 4; ● Sales reps dashboards for reports 3, 4.	Sales Home Page combining both dashboards with different visibility settings
Profiles	Standard Salesforce user clone profile for all users/ roles	'Salesforce' license required for more users - Platform license can be applied to Managers if they do not require access to the Lead (Prospect) object.
Roles	3 roles = ● Sales rep north, ● sales rep south, ● sales manager	
Mandatory phone number for Prospect + Traveler	Record is not saved if no phone number given (added email too)	Validation Rule for Prospect object
Data consistency	- Destination city and departure city must be different (Trip) - If fare type is return, return date mandatory (Trip) - Email address, phone number mandatory (Prospect) - Can't save booking if Bags more than	Validation rules

	maximum allowance; No more seats; or Trip is closed (Booking) - Insufficient bus capacity for trip (Bus)	