

Travel software requirements

Buyer checklist | UK and US project planning

Mark each item: ready / needs discussion / not applicable. Use fictional examples.

01 Business goal and first release

- ☐ Describe one booking-to-operation bottleneck and the desired change.
- ☐ List customer, agent and staff users; specify separate access and ownership.
- ☐ Choose first-release workflows: enquiry, quotation, booking, fulfilment or reporting.
- ☐ List must-have features separately from later-phase requests.
- ☐ Define a fictional example that demonstrates successful acceptance.

Notes / owner / open dependency:

02 Bookings, suppliers and integrations

- ☐ Name required products: flights, hotels, transfers, packages or other services.
- ☐ Document each supplier/API, commercial approval, sandbox access and dependency.
- ☐ Define availability, quote expiry, price changes and confirmation rules.
- ☐ Specify cancellation, amendment and refund ownership and exception review.
- ☐ List existing CRM, accounting, email and messaging tools to connect.

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03 Payments, currencies and reconciliation

- ☐ Choose customer payment methods and the provider; confirm access separately.
- ☐ Keep customer collections and supplier obligations as separate records.
- ☐ Record deposits, balances, provider references, fees and settlement status.
- ☐ Specify original and settlement currencies; agree finance-team treatment of differences.
- ☐ Define duplicate/failed payment handling, refunds and approval responsibilities.

Notes / owner / open dependency:

04 People, data and reporting

- ☐ Assign roles for sales, operations, finance and administration; define permissions.
- ☐ List reports, their owners, filters and source records before quoting.
- ☐ Inventory data to migrate; use anonymised samples during discovery.
- ☐ Agree retention, access logging, backups and recovery responsibilities.
- ☐ Keep enquiry submissions, qualified opportunities and won projects distinct.

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05 UK/US rollout and delivery planning

- ☐ Confirm business markets and buyer preferences: GBP/USD displays and quote currency.
- ☐ Specify date formats and GMT/BST or relevant US team time zones.
- ☐ List procurement, hosting, data-processing and accessibility requirements for review.
- ☐ Record budget direction, target launch window and dependencies; these are planning inputs.
- ☐ Agree remote review availability, decision makers and milestone approvals.

Notes / owner / open dependency:

06 Acceptance, ownership and handover

- ☐ Write test examples for happy paths, price changes, failed requests and exceptions.
- ☐ Agree migration checks, training and launch readiness before acceptance.
- ☐ Specify source-code/data ownership and access handover in the written proposal.
- ☐ Separate development cost from hosting, licences and ongoing support charges.
- ☐ Confirm support scope, response arrangements and change-request handling.

Notes / owner / open dependency:

Next step: share the first-release workflow and open dependencies.

Remote delivery from India. Scope, integrations, price and timing are agreed in writing.

Planning aid; it does not certify compliance or guarantee integration availability.