PetCare CRM

A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

Goal: Showcase the project professionally, highlighting functionality, design, and business value.

1. Pitch Presentation – Problem, Solution, Benefits

Problem:
Pet care centers face challenges in managing multiple pets, bookings, and services manually. Tracking vaccination status, service history, and revenue is cumbersome. Lack of visibility leads to missed appointments and reduced customer satisfaction.

Solution:
Pet Care CRM is a Salesforce-based platform that digitizes all pet management activities:

- Centralized pet and owner records

- Service booking system with automated approvals and notifications

- Reports and dashboards for operational insights

Benefits:

- Efficiency: Reduce manual work for staff

- Transparency: Owners can track pet services and vaccination history

- Revenue Insights: Managers can monitor service utilization and revenue

- Scalability: Platform can be extended for additional services and integrations

2. Demo Walkthrough – Key Features

- Create a Pet record with details such as Name, Type, Owner, and Vaccination Status

- Create a Service Booking by selecting available service dates and service type

- Demonstrate automated approval process and notification sent to pet owner

- Display reports such as Pet Services Utilization and dashboards like Manager Revenue Dashboard

- Show security features including restricted access for staff and dynamic dashboards

3. Handoff Documentation – System Design & User Guide

System Design Document:

- Data model overview including objects like Pet__c, Service_Booking__c, and Users

- Apex triggers, classes, and approval process logic

- Lightning Web Components (LWC) and page layouts

User Guide:

- Instructions for creating pets and service bookings

- Steps to view reports and dashboards

- Security and access instructions

Deployment Instructions:

- Steps to set up the system in a sandbox or developer org

4. LinkedIn / Portfolio Project Showcase

- Project Name: Pet Care CRM

- Tech Stack: Salesforce, Apex, LWC, Lightning App Builder

- Features: Booking system, approval process, notifications, reports

- Include screenshots or demo video

- Description of role and learning outcomes:

    o Designed data model

    o Developed Apex triggers and LWC components

    o Implemented security and reporting