

PetCare CRM

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

Goal: Monitor business performance, track key metrics, and secure sensitive data for pets, owners, and staff.

1. Reports – Monitoring Pet Services and Revenue

Purpose: Generate detailed insights into service usage and revenue trends.

Implementation:

- Navigate to **Reports** → **New Report**.
- Choose the report type, e.g., `Service_Booking__c` or a custom report type combining `Pet__c` and `Service_Booking__c`.
- Add necessary filters:
 - Booking Date = Today / This Month
 - Status = Completed
- Include relevant columns:
 - Pet Name / Service Type
 - Booking Date
 - Revenue / Service Fee
 - Number of bookings per pet/service
- Save reports as:
 - Pet Services Utilization
 - Revenue by Service

These reports help managers track which services are most popular and evaluate revenue performance.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Reports' section is expanded, showing 'Report Types'. The main content area is titled 'Custom Report Types' and displays the configuration for 'Pets with Service Bookings'. At the top right of this section are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. Below the title, a message states: 'Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type'.

The configuration is divided into three main sections:

- Details:**
 - Display Label:** Pets with Service Bookings
 - API Name:** Pets_with_Service_Bookings
 - Description:** Shows all pets and their related service bookings.
 - Created By:** Mounika Savana, 9/27/25, 4:32 AM
 - Store in Category:** other
 - Deployment Status:** Deployed
 - Modified By:** Mounika Savana, 9/27/25, 4:32 AM
- Fields:**

Source Object	Included Fields
Pets	15
Service Booking	18
- Object Relationships:**

Pets (A) ... with at least one related record from Service Booking (B)

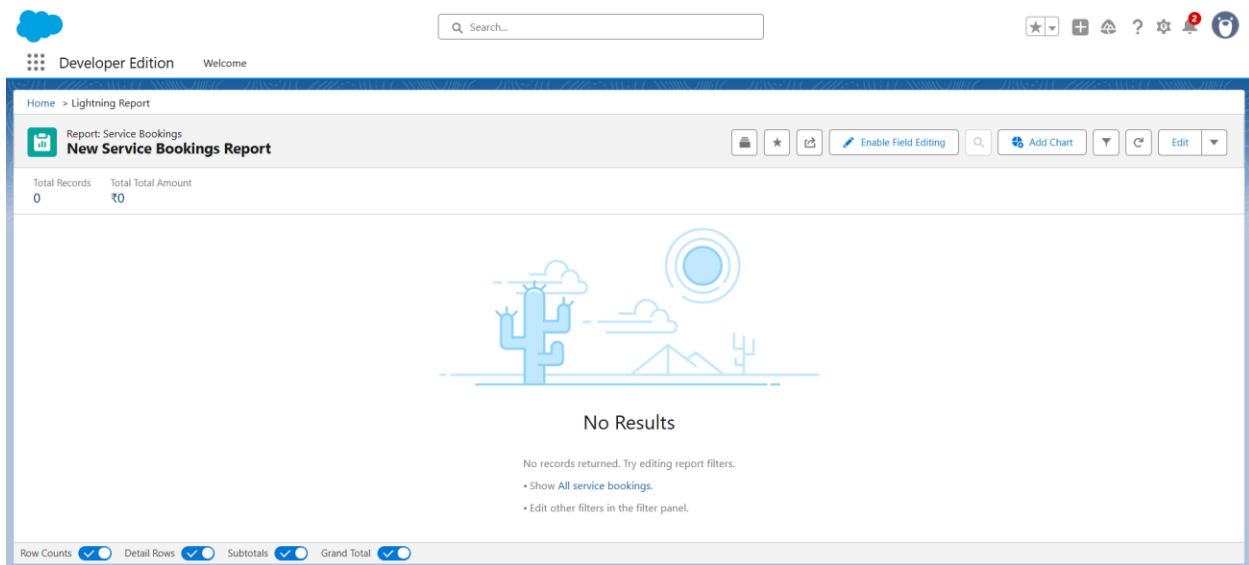
2. Custom Report Types

Purpose: Enable reporting on related objects for more detailed analysis.

Implementation:

- Go to **Setup** → **Report Types** → **New Custom Report Type**.
- Set Primary Object: Pet__c.
- Related Object: Service_Booking__c.
- Activate the report type by setting **Deployment Status** to Deployed.
- Save.

Custom report types allow combined insights, such as all bookings for each pet.



3. Dashboards – Visualize Key Metrics

Purpose: Provide at-a-glance visual representation of service utilization and revenue.

Implementation:

- Navigate to **Dashboards → New Dashboard**.
- Name dashboards appropriately, e.g.,
 - Pet Service Utilization Dashboard
 - Manager Revenue Dashboard
- Drag components (charts, tables) onto the dashboard:
 - Bar chart: Bookings per pet/service
 - Pie chart: Revenue by service type
 - Table: Today's bookings
- Assign reports as data sources.
- Save and run dashboards.

Dashboards enable managers to quickly review key performance indicators.

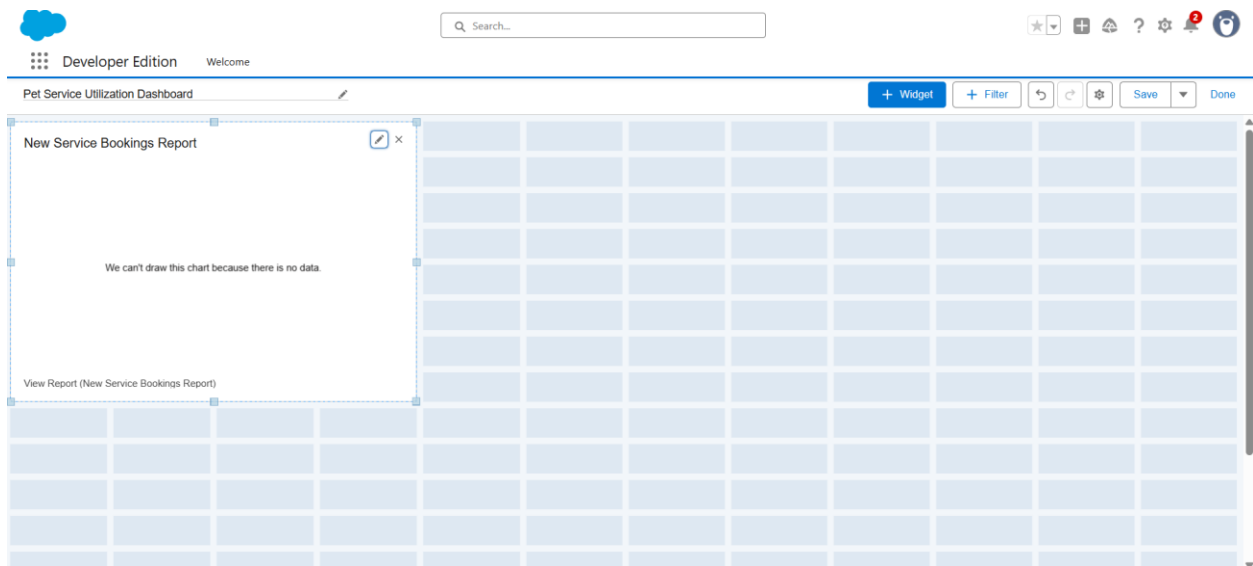
4. Dynamic Dashboards – Role-Based Views

Purpose: Ensure each user sees only the data relevant to their role.

Implementation:

- Set **View Dashboard As** → **Logged-In User** in dashboard settings.
- Assign roles or profiles to ensure correct visibility.

Dynamic dashboards allow each agent to view only their own bookings and performance metrics.



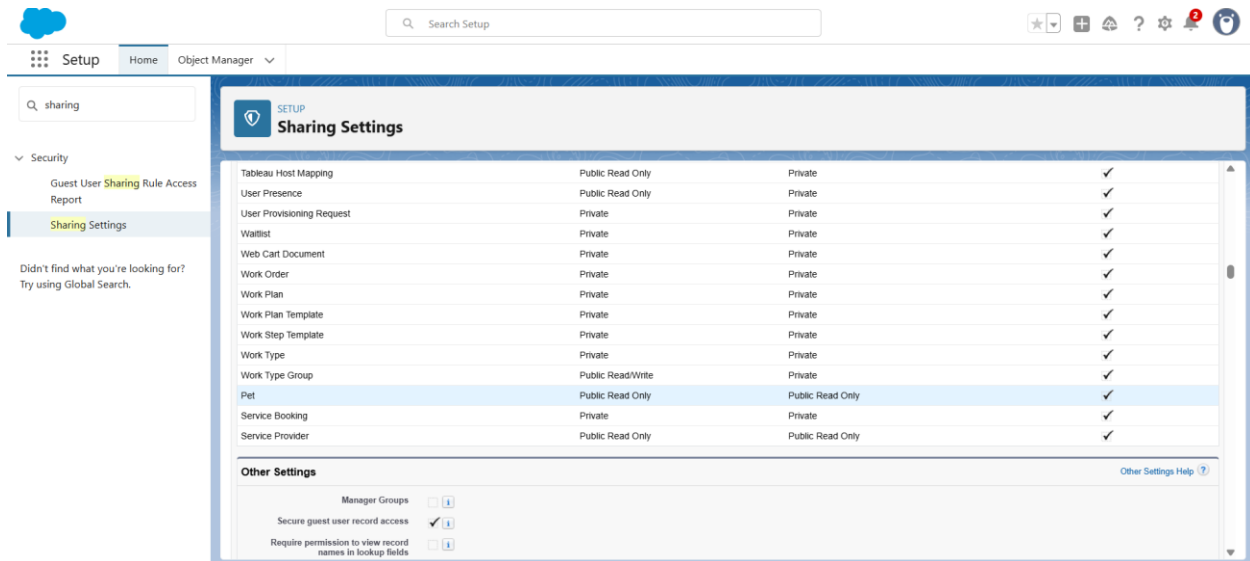
5. Sharing Settings – Control Record Access

Purpose: Protect sensitive records from unauthorized access.

Implementation:

- Go to **Setup** → **Sharing Settings**.
- Set object-level permissions:
 - Service_Booking__c = Private
 - Pet__c = Public Read Only
- Create sharing rules if needed, e.g., share high-priority bookings with managers only.

This ensures agents cannot access unrelated bookings while allowing visibility into pets.



6. Field-Level Security – Protect Sensitive Data

Purpose: Restrict access to sensitive fields such as owner documents.

Implementation:

- Navigate to **Setup → Object Manager → Pet__c → Fields & Relationships → [Field] → Set Field-Level Security**.
- Uncheck visibility for profiles that should not see sensitive data, e.g., Customer ID Proof for agents.
- Save changes.

Field-level security enforces data privacy within the application.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'sharing' and a 'Security' section expanded, showing 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The main content area is titled 'Set Field-Level Security Pet Owner' and includes a 'Save' button. Below this is a table with 'Field Label' (Pet Owner) and 'Data Type' (Lookup(Contact)). The main table lists profiles and their security settings:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for 'Record Type'. The left sidebar is identical to the previous screenshot. The main content area is titled 'Set Field-Level Security Record Type' and includes a 'Save' button. Below this is a table with 'Field Label' (Record Type) and 'Data Type' (Record Type). The main table lists profiles and their security settings:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

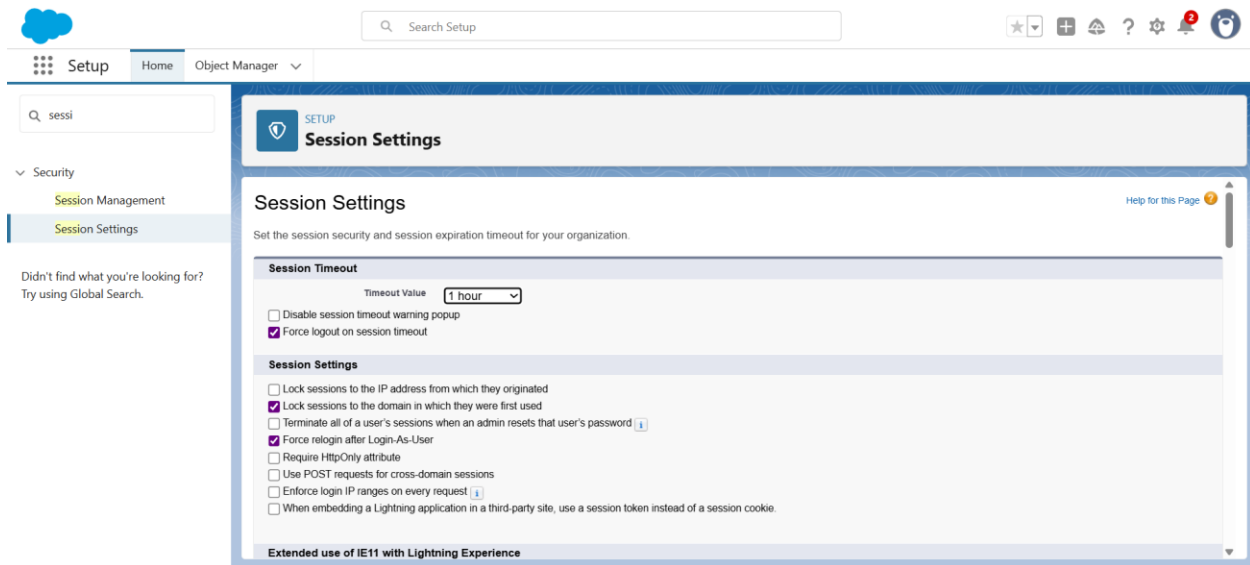
7. Session Settings – Timeout for Security

Purpose: Automatically log out inactive users to reduce risk.

Implementation:

- Navigate to **Setup** → **Session Settings**.
- Set **Session Timeout** to 30 minutes.
- Save.

This minimizes the risk of unauthorized access if a user leaves a session unattended.



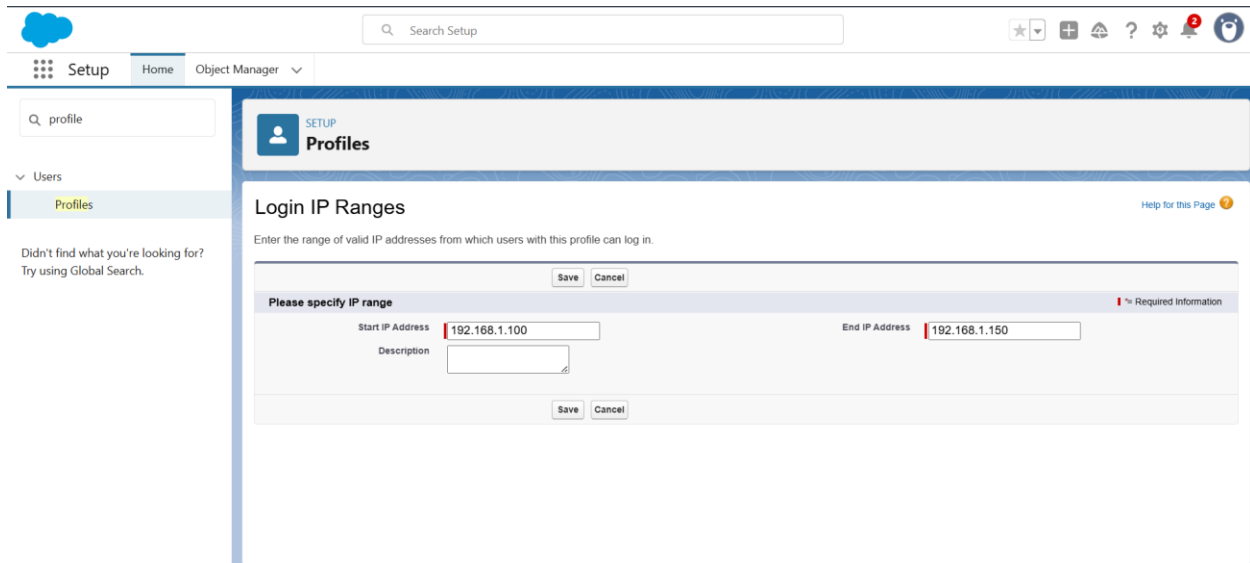
8. Login IP Ranges – Restrict Access by Location

Purpose: Limit login access to trusted networks.

Implementation:

- Go to **Setup** → **Profiles** → [Agent Profile] → **Login IP Ranges**.
- Add IP ranges for trusted office networks.
- Save.

Users outside the allowed IP ranges cannot log in, enhancing security.



9. Audit Trail – Track Changes

The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'View Setup Audit Trail' selected. The main content area is titled 'View Setup Audit Trail' and displays a table of configuration changes.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 3:50:40 PM PDT	monikasavvana438@agentforce.com		Requested an export	Data Export	
9/26/2025, 3:49:14 PM PDT	monikasavvana438@agentforce.com		For duplicate rule Prevent Duplicate Pets, changed evaluation criteria.	Duplicate Rule	
9/26/2025, 3:49:13 PM PDT	monikasavvana438@agentforce.com		Created new 01gK000002SL1F duplicate rule "Prevent Duplicate Pets". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/26/2025, 2:52:00 PM PDT	monikasavvana438@agentforce.com		Created custom object: Pet Emergency Event	Custom Objects	
9/26/2025, 2:48:54 PM PDT	monikasavvana438@agentforce.com		Created Service Booking Trigger code: BookingTrigger	Apex Trigger	
9/26/2025, 2:48:41 PM PDT	monikasavvana438@agentforce.com		Changed PetInsuranceTriggerHandler Apex Class code	Apex Class	
9/26/2025, 2:47:29 PM PDT	monikasavvana438@agentforce.com		Created PetInsuranceTriggerHandler Apex Class code	Apex Class	
9/26/2025, 2:44:41 PM PDT	monikasavvana438@agentforce.com		Changed PetInsuranceService Apex Class code	Apex Class	
9/26/2025, 2:42:11 PM PDT	monikasavvana438@agentforce.com		Created PetInsuranceService Apex Class code	Apex Class	
9/26/2025, 2:21:14 PM PDT	monikasavvana438@agentforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Pet_Insurance_External_Credential) for Pet_Insurance_API	Named Credentials	
9/26/2025,	monikasavvana438@agentforce.com		Created a new parameter: Uri (Parameter Type: Uri, Parameter Value:	Named	

Purpose: Maintain accountability by logging changes to configuration and data.

Implementation:

- Navigate to **Setup → Security → View Setup Audit Trail**.
- Monitor changes to:
 - Pet records
 - Service bookings
 - Configuration (fields, workflows, rules)
- Export audit logs regularly for compliance.

The audit trail allows administrators to review who made changes and when, improving traceability.