## **PetCare CRM**

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

**Goal:** Build the data structure for pets, customers, bookings, and service providers.

#### Step 1: Objects

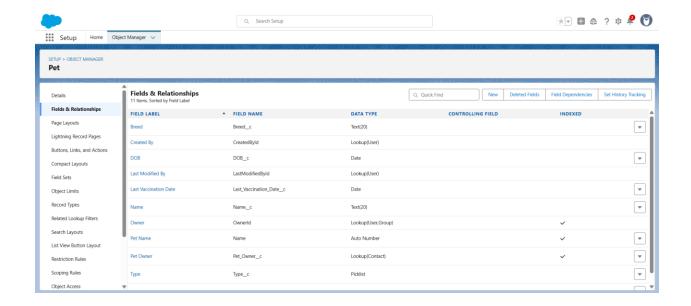
- Standard Object: Contact → for customers/pet owners
- Custom Objects:
  - o Pet → stores pet details
  - Service Booking → stores booking details
  - Service Provider → stores details of groomers, vets, etc.

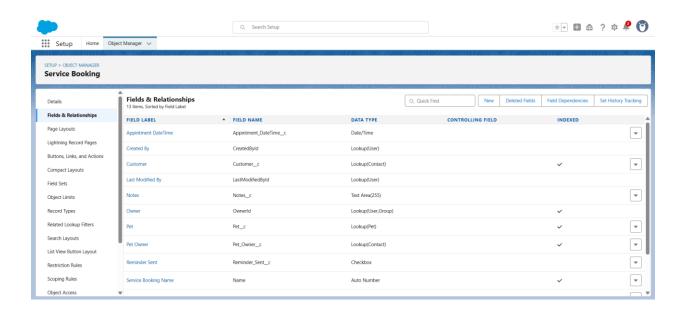
## Step 2: Add Fields

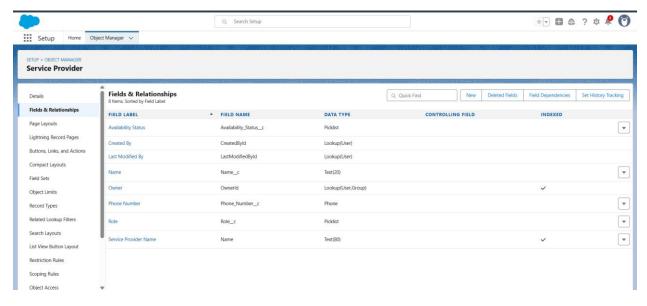
Pet Fields: Type, Breed, Age, Health Status

**Service Booking Fields:** Start Date, End Date, Service Type, Total Amount **Service Provider Fields:** Name, Service Type, Contact Info, Availability

**How:** Object  $\rightarrow$  Fields & Relationships  $\rightarrow$  New  $\rightarrow$  Choose type  $\rightarrow$  Save

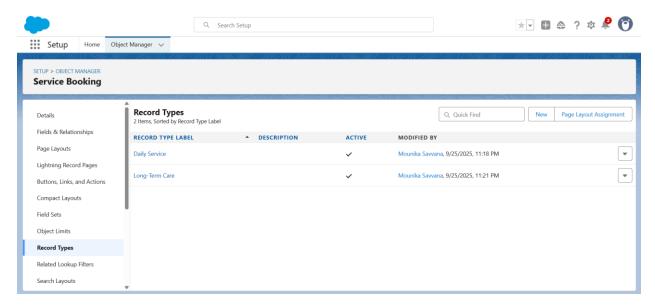






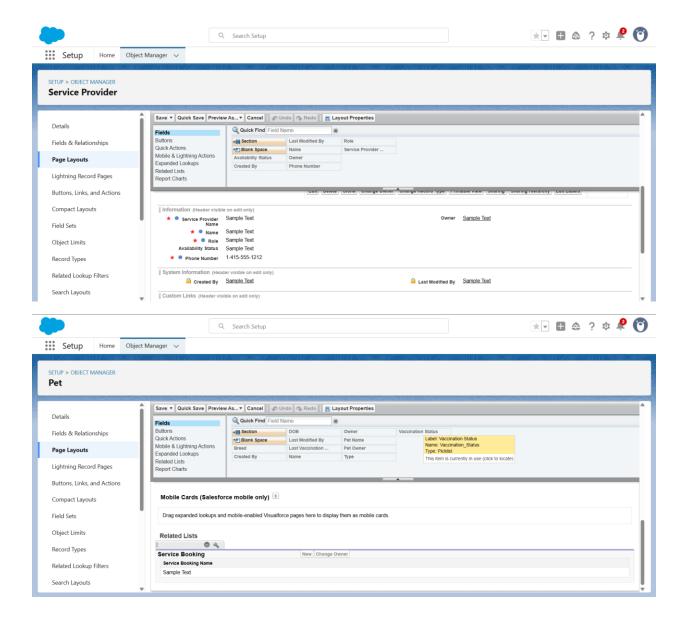
#### **Step 3: Record Types**

Service Booking → "Daily Service" and "Long-Term Care"



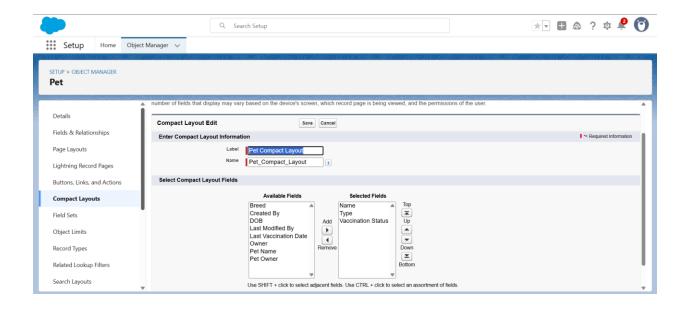
### **Step 4: Page Layouts**

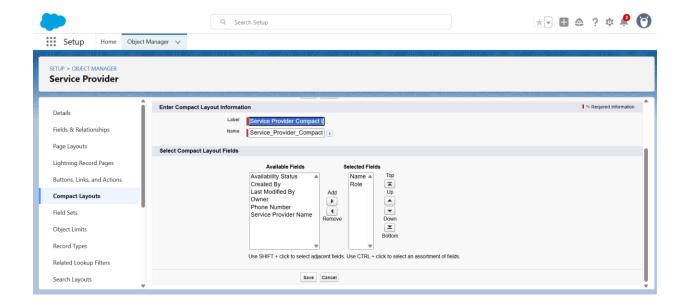
- Pet page: shows pet info + related bookings
- Service Booking page: shows booking info + related pet + customer + service provider
- Service Provider page: shows provider info + related booking



#### **Step 5: Compact Layouts (Mobile)**

- Pet → Name, Type, Health Status
- Booking → Booking ID, Service Type, Start Date
- Service Provider → Name, Service Type





## **Step 6: Relationships**

- Booking → Pet (Lookup)
- Booking → Contact (Lookup)
- Booking → Service Provider (Lookup)

No Master-Detail needed; bookings just reference other objects No junction object needed since one booking = one pet + one provider

## Step 7: Schema Builder

• Use Schema Builder to draw objects and their relationships visually

