**🐾 PawTrack Project Documentation**

**Pet Adoption Management System on Salesforce**

**Phase 1: Problem Understanding & Industry Analysis**

**Project Title:**  
PawTrack – Pet Adoption Management System

**Industry:**  
Animal Welfare / Non-Profit / Pet Adoption Services

**Project Type:**  
B2C Salesforce CRM Implementation

**Target Users:**

* Pet Adoption Agencies
* Volunteers & Staff
* Pet Adopters (Customers)
* Veterinary & Support Teams

**1. Problem Statement**

* Pet adoption centers currently manage adoptions manually (Excel sheets, paper forms).
* Tracking of pets (availability, health, vaccination) is inefficient.
* Communication with adopters (approval, reminders, follow-ups) is inconsistent.
* No proper system for analyzing adoption trends, pet health, or agency performance.

**Proposed Solution:**  
A centralized Salesforce CRM solution for **pet adoption lifecycle management** that:

* Allows staff to register pets and track adoption status.
* Provides adopters with an easy adoption request form (via Experience Cloud).
* Automates approval workflows, vaccination reminders, and post-adoption follow-ups.
* Offers dashboards for adoptions, pet health, and agency insights.

**2. Requirement Gathering**

* **Adoption Agencies / Staff:** Need streamlined pet records, adoption approvals, and reporting.
* **Adopters:** Need a simple way to register adoption requests, get timely updates & reminders.
* **Volunteers:** Need quick access to pet info, tasks, and follow-ups.
* **Admins:** Need centralized, secure system control with role-based access.

**3. Stakeholder Analysis**

* **Primary Stakeholders:** Pet Adopters, Adoption Agency Staff.
* **Secondary Stakeholders:** Volunteers, Veterinary Partners.
* **Tertiary Stakeholders:** Admins, Developers, System Integrators.

**4. Business Process Mapping**

**Current Scenario (Without Salesforce):**

* Manual pet data management (spreadsheets, paper).
* Adoption requests via phone/email.
* Delayed approvals and lack of reminders.
* No real-time reporting.

**Proposed Future (With Salesforce):**

* Pet records (breed, age, vaccination, adoption status) inside Salesforce.
* Experience Cloud portal for adopters to request adoptions.
* Automated approval workflow (Adoption Request → Staff Review → Approval → Notification).
* Automated vaccination & follow-up reminders.
* Dashboards showing pets by status, adoption trends, and volunteer activities.

**5. Industry-specific Use Case Analysis**

* **Pet Registration:** Staff creates records for each pet (details, health, availability).
* **Adoption Request:** Adopter submits request via portal/form.
* **Approval Workflow:** Automatic check + manual approval by agency staff.
* **Vaccination & Health Tracking:** Staff update vaccination/medical records.
* **Communication:** Automated emails/SMS for approval, reminders, and post-adoption follow-up.
* **Reporting:** Dashboards for adoptions by month, pet types, volunteer performance.

**6. AppExchange Exploration**

Potential Salesforce AppExchange solutions to leverage:

* **Survey Apps:** To collect adopter feedback after adoption.
* **Email/SMS Apps:** For reminders and notifications.
* **Animal Shelter/Non-Profit Apps:** Pre-built packages for animal care & adoptions.
* **Analytics Apps:** For advanced adoption trend analysis.

✅ **Phase 1 Deliverable:**  
By the end of Phase 1, we have:

* Defined problem statement & proposed solution.
* Identified key requirements & stakeholders.
* Mapped current vs future business process.
* Outlined industry-specific use cases.
* Explored potential AppExchange solutions.

This forms the foundation for **Phase 2: Org Setup & Configuration**.