

# Salesforce Mini Knowledge Hub

## Problem Statement

Animal shelters face challenges in managing adoption processes. Manual methods cause inefficiency, errors, and delays. A Salesforce solution ensures streamlined, transparent, and automated adoption management.

## Phase 1: Problem Understanding & Industry Analysis

Identify adoption challenges and inefficiencies. Analyze existing adoption systems. Highlight the need for a Salesforce-based solution.

## Phase 2: Org Setup & Configuration

Set up Developer Org and Pet Adoption App. Create roles: Admin, Volunteer, Adopter. Configure profiles and permission sets.

## Phase 3: Data Modeling & Relationships

Design Pet, Adopter, and Adoption Request objects. Add fields like status, contact, and notes. Build relationships between pets and adopters.

## Phase 4: Process Automation (Admin)

Use Flows to approve adoption requests. Automatically update Pet status to Adopted. Send confirmation emails to adopters.

## Phase 5: Apex Programming (Optional)

Add matching logic between adopters and pets. Validate duplicate or incomplete requests. Enhance process with advanced rules.

## Phase 6: User Interface Development

Create Lightning App Pages for pet management. Add components to search and view pets. Optionally build LWCs for requests.

## Phase 7: Integration & External Access

Enable Experience Cloud for adopters. Expose pets and adoption flows online. Integrate email/SMS for notifications.

## Phase 8: Data Management & Deployment

Import sample pets and adopters. Deploy configurations with DX or Change Sets. Test adoption workflows with sample data.

## Phase 9: Reporting, Dashboards & Security Review

Create reports on adoption trends. Build dashboards for shelter admins. Review security and access controls.

## **Phase 10: Final Presentation & Demo Day**

Demo pet search and request process. Show status updates and dashboards. Highlight full Salesforce lifecycle.