

## **Project Overview: Smart Veterinary Appointment & Health Record Management System (Smart Vet CRM)**

### **Problem Statement**

A veterinary clinic currently faces challenges due to manual and fragmented processes in managing pet and owner data, scheduling appointments, and tracking vaccination compliance. Key issues include:

- **Appointment Management:** Appointments are booked through phone calls or spreadsheets, leading to double bookings and missed follow-ups.
- **Vaccination Compliance:** Inconsistent reminders cause overdue or missed doses, resulting in lower preventive care quality.
- **Medical Visit Documentation:** Lack of structured records for treatments, vaccines, and notes limits clinical insight during future visits.
- **Staff and Owner Engagement:** Staff lack visibility into daily workloads, no-shows, and overdue vaccinations. Owners have minimal self-service access and must call for updates.
- **Management Oversight:** Difficulty in monitoring veterinarian utilization, vaccination coverage, and trends in missed appointments.

The proposed solution is a Salesforce-based CRM that centralizes records, enables conflict-aware scheduling, auto-generates vaccination schedules, automates reminders, and provides dashboards for operational metrics.

### **Future Plan**

1. **Requirement & Stakeholder Analysis:** Capture workflows, define KPIs.
2. **Org Setup & Security:** Configure roles and security settings.
3. **Data Modeling:** Create and define relationships for key objects.
4. **Process Automation:** Implement flows for scheduling and reminders.
5. **Apex Development:** Develop triggers and batch processes for automation.
6. **Lightning Components (LWC):** Create user-friendly interfaces for scheduling and tracking.
7. **Integration:** Phase 2+ SMS reminders and potential external integrations.
8. **Data Migration & Deployment:** Load existing data and manage version control.
9. **Reporting & Dashboards:** Create reports for key metrics.
10. **Final Demo & Handover:** Provide a comprehensive walkthrough and documentation.