

# **Project Title : PetCare+ – Specialized Veterinary Treatment Slot Booking System**

**Industry:** Veterinary Healthcare(Multi-specialty Pet Clinics & Hospitals)

**Project Type:** B2C Salesforce CRM Implementation for Veterinary Clinics with Specialist Doctors

## **Target Users:**

- Clinic Administrators – oversee operations, staffing, and revenues.
- Specialist Veterinarians – Orthopedic, Cardio, Neuro, etc.
- Receptionists – manage bookings and customer communication.
- Pet Owners – book treatments and receive reminders.

## **Problem Statement:**

Veterinary hospitals and multi-specialty clinics often face challenges in managing treatment bookings when multiple doctors specialize in different fields such as orthopedics, cardiology, and neurology. Currently, most booking processes rely on phone calls, registers, or spreadsheets, which leads to frequent scheduling conflicts, double-bookings, and difficulties in matching pets with the right specialist doctor. Pet owners often face long waiting times or missed appointments due to the lack of automated reminders and poor communication. Doctors struggle with visibility into their upcoming appointments, while clinic administrators find it difficult to monitor resource utilization and workload distribution across different specializations. These inefficiencies not only reduce operational productivity but also impact the quality of pet care and overall customer satisfaction. To address these issues, a centralized, Salesforce-based slot booking system is required to streamline doctor schedules, automate reminders, prevent booking conflicts, and provide real-time dashboards for clinic performance, thereby ensuring timely treatments, better utilization of specialist doctors, and an improved experience for pet owners.

## **Use Cases**

### **1. Pet & Owner Registration**

- Register pets with species, breed, and medical history.
- Link pets to their owners (support multiple owners per pet).

### **2. Doctor & Specialization Management**

- Maintain Doctor profiles with specialization (Orthopedic, Cardio, Neuro).
- Store availability schedule (working hours, leave days).

### **3. Slot Booking System**

- Receptionists (or owners) book treatment slots for pets.
- Validation prevents double-booking or booking in past slots.
- Doctors see only their scheduled slots in their calendar.

### **4. Appointment Notifications**

- Automated SMS/Email to pet owners upon booking, reschedule, or cancellation.
- Doctors receive internal notifications for new bookings.

5. Treatment & Follow-Up Tracking

- Doctors update treatment details after consultation.
- Owners receive reminders for follow-up appointments.

6. Reporting & Dashboards

- Slots booked per specialization (orthopedic, cardio, neuro).
- Doctor workload utilization reports.
- Monthly appointment volume and revenue tracking.

Phase 1

Requirement Gathering:

Functional Requirements

- Create & manage Pet, Owner, Doctor, and Slot records.
- Allow slot booking based on doctor specialization.
- Prevent double-bookings and past-date bookings.
- Automate notifications for owners and doctors.
- Generate dashboards for workload and specialization trends.

Non-Functional Requirements

- Cloud-based, accessible from multiple branches.
- Easy-to-use UI for receptionists.
- Mobile accessibility for doctors.
- Secure role-based data access.
- Scalable to support growing number of pets and doctors

2. Stakeholder Analysis

Stakeholder	Role in Clinic	Needs from PetCare+
Clinic Admin	Manages operations,staff,revenue.	Dashboards on bookings,doctor utilization.
Specialist Doctor	Provides treatment in specific field.	Calender of allocated slots,patient history.
Receptionist	Handles slot bookings & communication	Easy slot booking system,auto reminders
Pet Owner	Brings pet for treatment	Reminders & confirmation for appointments.

### 3. Business Process Mapping

#### Current Process (Manual)

- Pet owners call or walk in → receptionist writes booking in register/Excel.
- Double-booking happens often.
- Doctors not always informed in real time.
- Pet owners sometimes don't show up or miss appointments.

#### Optimized Process (with PetCare+)

1. Owner/Pet registered in Salesforce.
2. Receptionist selects specialization → system shows available doctors & slots.
3. Slot booked → marked as "Booked" → doctor notified.
4. Reminder sent to pet owner via SMS/Email.
5. Doctor updates treatment notes after consultation.
6. Follow-up reminders triggered automatically.
7. Admin dashboard updated with real-time slot utilization.

#### Industry-Specific Use Case Analysis

- **Healthcare Scheduling:** Just like human hospitals, veterinary clinics need specialization-based booking.
- **Resource Allocation:** Doctors (specialists) and treatment rooms are resources that must be managed efficiently.
- **Pet Lifecycle Care:** Beyond single appointments, follow-up scheduling is critical for long-term treatment.

#### AppExchange Exploration

- **Salesforce Scheduler** → Native tool for appointment booking.
- **CalendarAnything** → Advanced calendar and slot management.
- **Twilio for Salesforce** → SMS/WhatsApp reminders for owners.
- **FormAssembly / Gravity Forms** → For online appointment requests.
- **DocuSign for Salesforce** → Digital consent forms for surgeries/treatments.

# PHASE 2

## Company Profile Setup

- What it does: Sets company-wide defaults (name, time zone, currency, language).
- What you need:
  - Company Name: PetCare+ Veterinary Hospital
  - Time Zone: Asia/Kolkata (or your clinic location)
  - Currency: INR ₹
  - Language: English
- How it helps: All reminders, appointment times, and reports will match the clinic's working region and avoid time mismatches.

## Business Hours & Holidays

- What it does: Defines working hours and off-days.
- What you need:
  - Business Hours: Mon–Sat, 9 AM – 7 PM
  - Holidays: Sundays + public holidays
- How it helps: Prevents owners from booking appointments outside real clinic timings.

## User Setup & Licenses

- What it does: Creates accounts for staff who will log into Salesforce.
- What you need (Users):
  - 1 Clinic Administrator (System Admin license)
  - 2–3 Specialist Doctors (Salesforce Platform license) – Ortho, Cardio, Neuro
  - 1 Receptionist (Salesforce Platform license)
- How it helps: Each staff member logs in separately with their own role, avoiding mix-ups.

## Profiles

- What it does: Defines what each type of user can do.
- What you need (Profiles):
  - System Admin Profile – full control.
  - Doctor Profile – Can view their patients, update treatment notes, but no slot booking.
  - Receptionist Profile – Can book/cancel slots, view pet/owner details, but no access to medical notes.
- How it helps: Ensures users only see/do tasks relevant to them.

## Roles

- What it does: Sets up hierarchy for data visibility.
- What you need (Roles):
  - Clinic Administrator (Top)
  - Specialist Doctor (Middle)
  - Receptionist (Bottom)
- How it helps: Admin sees everything, Doctors see their own patients/slots, Receptionist sees appointments but not confidential data.

### **Permission Sets**

- What it does: Grants extra permissions on top of profiles.
- What you need (Permission Sets):
  - “Report Access” → If receptionists also need to view dashboards.
  - “Medical Notes Update” → If certain doctors need extra access beyond default.
- How it helps: Avoids creating too many profiles. You give extra access only when needed.

### **OWD (Organization-Wide Defaults)**

- What it does: Controls default sharing for all records.
- What you need:
  - Pet & Owner Records → Private (only assigned staff can see).
  - Appointment Slots → Public Read/Write (so receptionists can manage them).
- How it helps: Protects sensitive medical info but still keeps slots visible to staff.

### **Sharing Rules**

- What it does: Opens up records automatically to the right users.
- What you need:
  - Share booked slots with assigned Doctor.
  - Share Pet medical history with the treating Doctor.
- How it helps: Doctors instantly get access to only their patients without manual sharing.

### **Login Access Policies**

- What it does: Controls login security.
- What you need:
  - Enable MFA (Multi-Factor Authentication).
  - Restrict IP ranges (logins allowed only from clinic network, optional).
- How it helps: Keeps clinic data safe from unauthorized access.

### **Dev Org Setup**

- What it does: Provides a free environment to build & test the project.
- What you need:
  - One Salesforce Developer Org (free signup).
  - Install useful AppExchange apps (e.g., Twilio for SMS, Scheduler for booking).
- How it helps: Lets you design and test PetCare+ without breaking a live system.