

Project Management Plan

Pets4Life Project

The Dream Team

Version 3.0.0

12/8/2025

Version History

Version	Approved By	Revision Date	Description of Change	Author
1.0.0	Professor Chrisman	9/8/2025	Draft of document	Dream Team
1.1.0	Professor Chrisman	9/14/2025	Further refined details (mostly cost estimates) from initial draft Completed WBS Dictionary and re-embedded	Dream Team
2.0.0	Dream Team	9/28/2025	Added SAD, ERD, and UFD, along with descriptions	Helen Le
3.0.0	Dream Team	12/8/2025	Updated costs, re-embedded final documents	Dream Team

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Executive Summary

The Pets4Life Project Management Plan establishes the framework for delivering the project efficiently, transparently, and in alignment with organizational goals. It defines clear roles and responsibilities, with Sponsor Karen Mujica providing strategic oversight and authority for scope and funding decisions, while Project Managers, Kyah Owens and Helen Le, lead day-to-day execution. Supporting roles such as Requirements Analyst, Developer, and Systems Analyst are assigned dynamically from internal team resources, ensuring flexibility and adaptability throughout the project lifecycle.

The plan also outlines how resources will be managed, emphasizing the team's independence from Pets4Life for staffing and execution. Communication is structured to maintain accountability and transparency: progress will be monitored continuously within the team, with milestone updates provided to the Sponsor to support informed decision-making.

By combining strategic oversight with operational autonomy, this plan provides the structure necessary for effective governance, clear accountability, and successful delivery of the Pets4Life Project.

All the details needed for website transition are also provided in Appendix A and Appendix B, allowing Pets4Life to recreate the system made with ease.

Introduction

The Pets4Life Project has been established to optimize organizational operations and enhance the value of the Pets4Life organization. This Project Management Plan outlines the overall management approach, including team responsibilities, decision-making authority, and resource allocation.

The project is sponsored by Karen Mujica, who holds final authority for major decisions such as scope or funding approvals. Day-to-day planning and organization are overseen by Project Managers, Kyah Owens and Helen Le, who are responsible for planning and scheduling team meetings. Supporting roles — including requirements analysts, developers, and systems analysts

— will be assigned dynamically throughout the project to provide technical and analytical expertise as needed.

No significant constraints or limitations are anticipated at this time. The decision-making framework ensures that the Sponsor retains oversight of strategic matters while the Project Managers have authority over operational execution. This structure establishes clear accountability, promotes efficiency, and enables the Pets4Life Project to remain flexible in response to evolving needs, ensuring a successful outcome.

Project Management Approach

The Pets4Life Project will be managed through a flexible and structured approach that balances strategic oversight with operational independence. Karen Mujica, as Project Sponsor, retains authority over scope and funding decisions, while day-to-day management and execution are the responsibility of all team members in The Dream Team.

The Project Managers oversee planning and coordination of team meetings, supported by dynamically assigned team members in roles such as Requirements Analyst, Developer, and Systems Analyst. These resources are provided internally by the project team rather than Pets4Life, making careful workload management essential to maintain efficiency and quality.

Given the limited direct contact with the Sponsor, communication will be maintained through periodic updates at key milestones, while continuous collaboration within the project team will ensure alignment and progress. This management approach establishes clear accountability and promotes both transparency and flexibility, positioning the Pets4Life Project for successful delivery.

The Pets4Life Project is designed to optimize organizational operations so the organization can successfully scale and grow as more grants and resources become available. The project will accomplish this by creating a centralized digital platform that connects donors, volunteers, clients, and staff while streamlining administrative tasks and improving the overall user experience.

Project Scope

The scope of the project includes the development of a fully functional WordPress website that serves as the central hub for all stakeholders. This platform will feature an online donation system through Stripe that allows donors to contribute securely, track donations automatically, and reduce manual processing. It will also integrate PlanHero to provide a volunteer management system that enables volunteers to sign up easily, receive automated reminders, and track hours served. In addition, the Amelia plugin will be used to implement an event management system that supports event registration, maintains client information, and automatically sends reminders for upcoming events. The project will also deliver a knowledge-based chatbot with zip-code logic that provides users with tailored responses, offers 24/7 support, and escalates inquiries through the creation of support tickets when necessary. Airtable integration will ensure that databases are updated automatically as users submit forms, while a dedicated content and storytelling section will allow users to share testimonials and pictures to strengthen community engagement.

Certain elements are deliberately excluded from the scope to ensure the project remains focused and achievable. Mobile website development was included as a WordPress feature, but there will not be separate mobile app development. Similarly, advanced analytics and business intelligence dashboards will not be part of the solution, beyond what is provided through standard plugins.

The deliverables of this project include all in-scope items described above, resulting in a fully integrated WordPress-based platform that combines donation management, volunteer coordination, ride request system, event scheduling, chatbot functionality, SMS texting, Airtable synchronization, and community storytelling features. This platform will be thoroughly tested and delivered as a ready-to-use system for Pets4Life.

At this stage, there are no unknown constraints in terms of time, budget, technology, or staffing. The scope has been defined to provide a realistic and achievable foundation for project success while ensuring clarity around what is and is not included.

Project Charter

The project scope will be further managed through the use of a project charter which enables the project managers and team to utilize organizational resources wisely to successfully meet the project's requirements and goals. It formally defines the project's purpose, objectives, various scopes, deliverables, approach, constraints, risks, assumptions, success criteria, fees, and team responsibilities. By clearly outlining these, the charter sets expectations and establishes a shared understanding of both what is included and excluded from the project. This early alignment and agreement helps prevent scope creep, serves as a foundational blueprint for the overall project, and ensures all project activities are to meet agreed-upon goals.



Dream%20Team%20-%20Project%20Charte

Statement of Work

This statement of work defines the specific deliverables and tasks required to successfully complete the project. It serves as a detailed agreement between the project team and relevant stakeholders, outlining the scope of work, responsibilities, timelines, and constraints that may prohibit completion, and quality control. By clearly establishing what is included in the project and the guidelines that will be used for success, the statement of work provides a structured framework for project completion, preventing scope creep and misunderstandings amongst the team. Acting as the team's roadmap, it guides the project team from initiation to completion to both meet stakeholder expectations and achieve project objectives.



Dream%20Team%20-%20Final%20SOW.doc

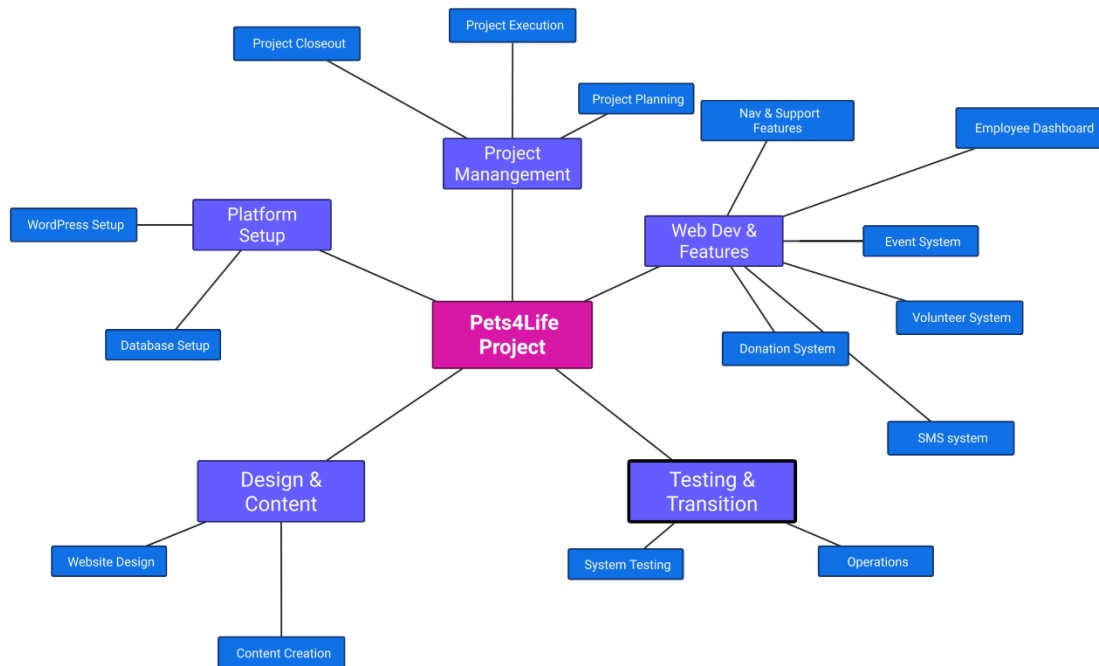
Milestone List

The chart below lists the major milestones for the Pets4Life Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project

schedule and WBS. If there are any scheduling delays which may impact a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

MILESTONE	DUE DATE
RMP and RTM drafted	9/8/2025
SOW, PC, and PMP drafted	9/8/2025
WordPress site up, team is logged on, and everyone understands basics of how to use website	9/10/2025
SAD, ERD, and UFD drafted	9/14/2025
Final SOW for Sponsor Review	9/17/2025
Basic graphical interface that demonstrates navigation	9/17/2025
2 plugins have already begun to integrate Team splits which ones to do	9/24/2025
2 plugins integrated are ready for testing at meeting Feedback and problems are noted for fixing by next meeting	9/29/2025
2 plugins are complete	10/1/2025
Another 2 plugins are beginning to integrate to show by demo date	10/6/2025
Demo #1 – at least 50% of development complete	10/13/2025
2 plugins are ready for testing at meeting Feedback and problems are noted for fixing by next meeting	10/20/2025
2 plugins are complete Begin to implement with database	10/22/2025
Conduct user testing to assess database integrations	10/26/2025
Demo #2 – at least 75% of development complete	11/3/2025
Add final plugin and touch up on graphical interface	11/19/2025
Final Demo	11/23/2025

Work Breakdown Structure



Mind Map (WBS)

For the Pets4Life project, we have mapped out the development into five main phases. First, there is Platform Setup, which involves laying down the technical groundwork like getting WordPress up and running and setting up the database. Next is Design & Content, where we will work on how the website looks and the content within. After that, we move into Web Dev & Features, and that is where we will create all the key functionalities, like systems for donations, volunteer management, and employee dashboards. Then comes Testing & Transition, where we will make sure everything is working smoothly before going live. Along the way, we will be managing the project to keep everything organized and on schedule. This Mind Map is just a breakdown of a huge task into some smaller more manageable pieces to keep everything organized and structured.



Dream Team WBS
DETAILED VERSION.1

Detailed WBS By Phase

This is a detailed work breakdown structure (WBS) that breaks the entire process up into more manageable tasks. The group will use it to assign responsibilities, estimate effort, and chronologically order tasks to align with the project schedule. It is organized into five main phases. First is Project Management, which runs throughout the project to keep our team on track. The Platform Setup phase takes care of the technical aspects like installing WordPress and setting up the database. There is the Design & Content phase, where we focus on creating the site's design and the content for users. The largest section is Website Development & Features, where we get into building all the necessary functionalities. This includes everything from basic navigation and support features to more complex systems like employee dashboards, event management, volunteer coordination, and processing donations. Lastly, we have our Testing & Transition phase, which is about making sure everything operates smoothly before we hand over a fully functional system. This detailed Work Breakdown Structure gives us a clear view of what needs to be done at each stage, making it easier to assign tasks, estimate how long each task will take, and track progress as we work towards the final deliverable.



WBS Dictionary
Dream Team1-2.xlsx

WBS Dictionary

The WBS Dictionary will be used to **describe the WBS components and serve as a reference guide to** avoid confusion and **ensure consistent understanding** of the scope across all stakeholders. By clearly defining what is included in each component, the dictionary is able to **eliminate ambiguity** and **prevent scope creep**. The team will use it to ensure consistent understanding of tasks, align expectations, and track progress. In conjunction with the WBS itself, the dictionary offers the level of detail necessary to manage the project effectively and maintain accountability across all phases. The evaluated components are:

- **WBS Code:** aligns with the associated ID on the detailed WBS
- **Item Name:** the name of WBS component

- **Description:** detail of the WBS component
- **Responsible Manager:** the members responsible for development of components
- **Responsible Team:** adds another layer of responsibility for the whole team to be overseeing components are completed as they should be
- **Acceptance Criteria:** standards to be abided by for completion of project
- **Verification:** how the component will be declared as completed
- **Deliverables:** the exact products made that will meet this component

Project Schedule

The following tables will outline all of the action items assigned to each team member for each week. These were also documented in our meeting minutes.

	ASSIGNED TO	MONDAY: 8/18	WEDNESDAY: 8/24
WEEK 1: 8/18 – 8/24	Ozine	Lecture	CIS 320 Specs: H, I
	Helen	Lecture	CIS 320 Specs: A, G
	Mikey	Lecture	CIS 320 Specs: D, J
	Kyah	Lecture	CIS 320 Specs: E, F
	Spencer	Lecture	CIS 320 Specs: B, C

	ASSIGNED TO	MONDAY: 8/25	WEDNESDAY: 8/27
WEEK 2: 8/25 – 9/02	Ozine	Lecture	Input parts in RMP and RTM
	Helen	Lecture	Input parts in RMP and RTM
	Mikey	Lecture	Input parts in RMP and RTM
	Kyah	Lecture	Input parts in RMP and RTM
	Spencer	Lecture	Input parts in RMP and RTM

	ASSIGNED TO	WEDNESDAY: 9/03	FRIDAY: 9/05
WEEK 3: 9/03 – 9/07	Ozine	Lecture	Complete portions for SOW, PC, and PMP Look into how we can fill what we don't already know
	Helen	Lecture	Complete portions for SOW, PC, and PMP
	Mikey	Lecture	Look into how we can fill what we don't already know

	Kyah	Lecture	Complete portions for SOW, PC, and PMP
	Spencer	Lecture	Look into how we can fill what we don't already know

	ASSIGNED TO	MONDAY: 9/08	WEDNESDAY: 9/10
WEEK 4: 9/08 – 9/14	Ozine	Lecture	Add scope to RMP UFD: Chatbot and Volunteer Final Versions of Documents: SOW, PC, RMP, RTM
	Helen	Lecture	UFD: Event Management and Donate Final Versions of Documents: Add tech/infrastructure and executive summary to SOW, SOW, PC, RMP, RTM Re-embed documents I own Analysis of ERD, SAD, and UFD
	Mikey	Lecture	ERD Final Versions of Documents: SOW, PC, RMP, RTM
	Kyah	Lecture	WBS Dictionary UFD: SMS and Testimonials Final Versions of Documents: SOW, PC, RMP, RTM
	Spencer	Lecture	UFD: Employee Dashboard Final Versions of Documents: SOW, PC, RMP, RTM

	ASSIGNED TO	MONDAY: 9/15	WEDNESDAY: 9/17
WEEK 5: 9/15 – 9/21	Ozine	Lecture	Email Professor Chrisman our SOW and questions Donate Wireframe: Sponsor a Pet, Success Stories (refer to

			Ladybirds and Louisville Codes)
	Helen	Lecture	Petcare Hub Wireframe
	Mikey	Lecture	Volunteer Wireframe Status Report #1
	Kyah	Lecture	Chatbot Wireframes Home Page Wireframes
	Spencer	Lecture	Blog Wireframes Make website layout using wireframes

	ASSIGNED TO	MONDAY: 9/22	WEDNESDAY: 9/24
WEEK 6: 9/22 – 9/28	Ozine	Continue working on form and understand how WP Forms works	Explore Amelia
	Helen	Add pictures to home page Sponsor a Pet layout Play around with chatbot	Blog
	Mikey	Event forms based on P4L's current website Navigation Bar	Storytelling feature (testimonials)
	Kyah	Chatbot Wireframes Home Page Wireframes	Mess around with Tidio (chatbot)
	Spencer	More website layout	Implement chatbot Reformat pages

	ASSIGNED TO	MONDAY: 9/29	WEDNESDAY: 10/01
WEEK 7: 9/29 – 10/05	Ozine	Research Stripe	Individual portion of RTM aligning with tasks you've completed (Design Date & Status) Look more into PlanHero
	Helen	Sponsor a Pet	Individual portion of RTM aligning with tasks you've completed (Design Date & Status) Look into Amelia Look into how to reduce whitespace Fill out home page
	Mikey	Storytelling feature	Individual portion of RTM aligning with tasks you've completed (Design Date & Status) Look into Amelia
	Kyah	Chatbot/Ticketing System	Individual portion of RTM aligning with

			tasks you've completed (Design Date & Status) Look into PlanHero Add chatbot to all pages
	Spencer	Research Stripe	Individual portion of RTM aligning with tasks you've completed (Design Date & Status) Homepage slideshow Make blog posts lighter orange

	ASSIGNED TO	MONDAY: 10/06	WEDNESDAY: 10/12
WEEK 8: 10/06 – 10/12	Ozine	Continue looking into Amelia	Lecture
	Helen	Redesign Volunteer Mission Partners border Blog header	Lecture
	Mikey	WPSMS to Home Page after Demo 1 Make Testimonials page as subpage to Blog	Lecture
	Kyah	Mission Partners form	Lecture
	Spencer	Carousel Redo Sponsor a Pet to post format Finalize navigation bar	Lecture

	ASSIGNED TO	MONDAY: 10/13	WEDNESDAY: 10/15
WEEK 9: 10/13 – 10/19	Ozine	DEMO 1: Amelia, Chatbot, GiveWP, Strong Testimonials	Zapier
	Helen	DEMO 1: Amelia, Chatbot, GiveWP, Strong Testimonials	Airtable forms and spreadsheet
	Mikey	DEMO 1: Amelia, Chatbot, GiveWP, Strong Testimonials	Airtable forms and spreadsheet
	Kyah	DEMO 1: Amelia, Chatbot, GiveWP, Strong Testimonials	Event forms à assess her flowchart Continue working with Tidio chatbot
	Spencer	DEMO 1: Amelia, Chatbot, GiveWP, Strong Testimonials	Integrate WPSMS and MailPoet Enhance Blog more

	ASSIGNED TO	MONDAY: 10/20	WEDNESDAY: 10/22
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WEEK 10: 10/20 – 10/26	Ozine	Continue working with Amelia and the various versions Figure out what custom fields we need and how to display them	Work through repopulating events and add custom fields for event scheduling FIRST Then see if can add ride request form without the scheduling format becoming too long in the interface Play with Zapier and Amelia
	Helen	Flesh out Ride Request form logic	See how to add depth to the website Help make custom fields for event scheduling
	Mikey	PlanHero and Ride Request form logic	Continue working with PlanHero and see how integration and automation works with Airtable (pretty sure it's just CSV files)
	Kyah	Continue working through Tidio flowchart	Continue working through Tidio to make the user form option more simple
	Spencer	Configure MailPoet and WPSMS	Continue working through SMS and mailing list systems

	ASSIGNED TO	MONDAY: 10/27	WEDNESDAY: 10/29
WEEK 11: 10/27 – 11/02	Ozine	Get Amelia and add custom fields with pet information	Rehearse for demo Fill out Amelia Customer fields
	Helen	Redo Testimonials à do we need new Airtable form for Testimonials? Redo Blog to match theme Add motion to pages	Rehearse for demo Help with Amelia design Duplicate Testimonials to show next page Pet Profile system
	Mikey	Continue working with PlanHero	Rehearse for demo Flesh out Ride Request to make more automated
	Kyah	Continue working on chatbot	Rehearse for demo
	Spencer	Add sticky navigation bar	Rehearse for demo

		Fix CSS to do motion when scroll (currently only does on load)	
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	ASSIGNED TO	MONDAY: 11/03	WEDNESDAY: 11/05
WEEK 12: 11/03 – 11/09	Ozine	DEMO 2: Amelia + Pet Profile, Ride Request, Stripe, Sender.net, Zapier	Amelia RTM
	Helen	DEMO 2: Amelia + Pet Profile, Ride Request, Stripe, Sender.net, Zapier	Airtable, Donation, and Success Stories RTM Project Status Report #2
	Mikey	DEMO 2: Amelia + Pet Profile, Ride Request, Stripe, Sender.net, Zapier	Ride Request and PlanHero RTM
	Kyah	DEMO 2: Amelia + Pet Profile, Ride Request, Stripe, Sender.net, Zapier	Chatbot RTM
	Spencer	DEMO 2: Amelia + Pet Profile, Ride Request, Stripe, Sender.net, Zapier	Remove inactive plugins Performance and Security RTM

	ASSIGNED TO	MONDAY: 11/10	WEDNESDAY: 11/12
WEEK 13: 11/10 – 11/16	Ozine	Flesh out Amelia (refund and canceling events)	Testing Amelia payment GiveWP vs DonorBox à look at percentage of fees and make final decision
	Helen	Pet Profile editing capabilities Copy Pet Profile linked record to Volunteer for Volunteer Interests	Finish paw print design on background Start presentation slides
	Mikey	Continue working with PlanHero automation	Complete PlanHero automation
	Kyah	Explore tab options for Pet Resources Continue chatbot	Complete chatbot
	Spencer	Add sender.net payment information to sheet	Automate it so updating a record will replace the old record

	ASSIGNED TO	MONDAY: 11/17	WEDNESDAY: 11/19
	Ozine	PowerPoint portion	Rehearse for sales pitch

WEEK 14: 11/17 – 11/23	Helen	PowerPoint portion	Rehearse for sales pitch Add rest of blog posts
	Mikey	PowerPoint portion	Rehearse for sales pitch
	Kyah	PowerPoint portion	Rehearse for sales pitch
	Spencer	PowerPoint portion	Rehearse for sales pitch

	ASSIGNED TO	MONDAY: 11/24	WEDNESDAY: 12/01
WEEK 15: 11/24 – 12/08	Ozine	FINAL DEMO: Pet Profile automation + Amelia, PlanHero automation into Airtable, polished previous plugins	
	Helen	FINAL DEMO: Pet Profile automation + Amelia, PlanHero automation into Airtable, polished previous plugins	
	Mikey	FINAL DEMO: Pet Profile automation + Amelia, PlanHero automation into Airtable, polished previous plugins	
	Kyah	FINAL DEMO: Pet Profile automation + Amelia, PlanHero automation into Airtable, polished previous plugins	
	Spencer	FINAL DEMO: Pet Profile automation + Amelia, PlanHero automation into Airtable, polished previous plugins	

Requirements Management Plan

This requirements management plan outlines the processes and procedures used for identifying, documenting, analyzing, and controlling project requirements throughout the project’s development. It serves as a guide to ensure stakeholder needs are accurately recorded, validated, and align with business objectives. By defining how requirements are prioritized, tracked, and verified, the plan helps to establish a clear, structured approach to minimize uncertainty and provide a clear framework for managing changes, which are also mentioned in the following

header. It ensures the final deliverables made will meet both stakeholders' expectations and project success criteria.



Dream%20Team%20-%20Final%20RMP.doc

Requirements Traceability Matrix

A requirements traceability matrix (RTM) is then used to map and track the project requirements. This established the relationships between requirements and their unique ID, business objectives, deliverable that accomplishes the requirement, and verification/validation. The matrix ensures that the project meets the requirements that were established based on our client's needs and thus is key to follow and update throughout the project. These are the features used for categorization:

- **Design:** referring to the branding of the company through consistent themes, simplicity of look, and promoting the Pets4Life mission
- **Nav / Access:** refers to ensuring users are able to easily find what they need in as little time as possible
- **Database:** refers to data properly being stored and automatically uploaded into the Airtable database
- **Group SMS Text Messaging:** product feature of users being able to sign up for group messaging from Pets4Life
- **Client Event Sign-Ups:** product feature of clients being able to sign up for events in a streamlined process
- **Volunteer Management:** product feature regarding all processes relating to volunteers, including signing up for events and logging hours
- **Donation Page:** contains features to Sponsor a Pet, make a general monetary donation, or learn of other ways to donate
- **Success Stories:** product feature allowing users to submit their own stories relating to Pets4Life or display success stories from past donations
- **Blog:** product feature where Pets4Life can share news and updates with their community



Dream%20Team%20-%20RTM.xlsx

Systems Architecture Design

The systems architecture design provides a high-level blueprint of the project's technical framework, ensuring all components work cohesively to meet business objects. It outlines the payment management system, content management system, hosting service, and flow of how the user interacts with the website. By clearly outlining the data flows, the architecture ensures that development efforts remain outlined with stakeholder expectations and organizational goals. This structured approach reduces scope creep and provides a strong foundation for system deployment.



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Entity Relationship Diagram

The entity relationship diagram (ERD) serves as a visual representation of the data and relationships that exist within the system. It identifies entities, their attributes, and the relationships that connect them, ensuring the structure follows both business requirements and objectives. By outlining the primary and foreign keys, cardinalities, and dependencies, the ERD serves as a foundation for database design to minimize redundancy and support data integrity rules. This diagram creates an understanding of how information will be stored, managed, and can be accessed throughout the system. It helps to streamline development and ensure consistency in data storage and processing.



Dream%20Team%20-%20ERD.docx

User Flow Diagram

The user flow diagram illustrates the pathways users take when interacting with the system, clearly outlining steps, decision points, and outcomes. It maps the sequence of actions from entry to completion, showing how users interact with various aspects of the system. This diagram ensures workflows are intuitive to create a simply interface for users, prioritizing user experience. This diagram will help the team make decisions that enhance efficiency, usability, and overall user satisfaction. It serves as a valuable reference for the team and stakeholders, ensuring consistency between user expectations and system functionality throughout the project's development.



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Change Management Plan

For the Pet4Life Louisville project, any project team member, key stakeholder, or the Executive Director, may submit change requests when new needs or issues arise. All changes are reviewed and approved by the project managers. Change requests are submitted in writing, either through email, shared documents, or logged in the project's Requirements Traceability Matrix (RTM) and Gantt chart. Approved or rejected changes are documented in the RTM for traceability, and the project manager updates timelines or deliverables accordingly. Communication of decisions is handled through email updates or team discussions, ensuring the entire team remains aligned. This streamlined approach eliminates the need for a formal change control board, making it appropriate for a small nonprofit while still maintaining accountability and transparency.

Communications Management Plan

The Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of Dream Team members as they pertain to communications. The Project Managers will take the lead role in ensuring effective communications on this project.

CONTACT INFORMATION

NAME	TITLE	EMAIL	OFFICE PHONE
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Helen Le	Project Manager / Requirement Analyst	hnle0002@louisville.edu	N/A
Ozine Byamungu	Requirement Analyst / Developer	ojbyam01@louisville.edu	N/A
Kyah Owens	System Analyst / Developer / Project Manage	nikyah.owens@louisville.edu	N/A

COMMUNICATION PROCESSES

COMMUNICATION TYPE	DESCRIPTION	FREQUENCY	MESSAGE DISTRIBUTION	DELIVERABLE	DELIVERABLE OWNER
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Project Status Updates	Overall progress reports, risks, milestones, decision points, and individual member stand-ups	Weekly	Email to Prof. Chrisman (when needed) + team	Meeting Minutes	Helen Le / Kyah Owens
Client Updates	Summary of progress and key deliverables for Pets4Life	During demo	Live Presentation	Demo	Dream Team
Change Requests	Documentation and review of requested changes	As needed	Email or RTM log	Change log entry	Karen Mujica / Prof. Chrisman
Technical Updates	System design, coding progress, integration updates (Stripe, Airtable, etc.)	Bi-weekly	Shared Google Drive / Email	Updated prototypes & codebase	Spencer Taylor / Mikey Martinez
Testing Reports	Results of unit, integration, and user acceptance testing	At each testing cycle	Email + shared RTM	Test Report	Kyah Owens / Ozone Byamungu
Final Deliverables	Final website and documentation from project's life cycle	End of Deployment phase	Email + Shared Drive	Deployed system & user docs	Full Team (approved by Prof. Chrisman & Karen Mujica)

Communications Conduct

Meetings:

The Project Managers will distribute a meeting agenda at least 2 days prior to any scheduled meeting and all participants are expected to review the agenda prior to the meeting. During all project meetings, they will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive to each meeting on time and all cell phones should be turned off or set to vibrate mode to minimize distractions. If applicable, members who are meeting virtually must be in the Teams meeting found in the Dream Team team. Meeting minutes will be distributed no later than 24 hours after each meeting is completed.

Email:

All email pertaining to the project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. All attachments should be in one of the organization's standard software suite programs and adhere to established company formats. If the email is to bring an issue forward then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue. The Project Manager should be included on any email pertaining to the Pets4Life project.

Informal Communications:

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager so the appropriate action may be taken. If needed, further escalation will take place through meeting with the Faculty Advisor.

Cost Management Plan

For development purposes, as we begin developing and go through early demonstrations, we aim to utilize free plans for our plugins. As we get closer to the final date, we will utilize paid plans to show full capabilities of plugins. Tidio with Lyro AI, Stripe/GiveWP (evaluating options –

will be finalized at a later date), and Amelia Lite plugin will be available at no cost for development and testing purposes. The primary plugin expense will be PlanHero at \$18 per month, totaling to \$72 over four months. WordPress web hosting will then amount to approximately \$160. Altogether, the approximate total projected cost for this project is \$232.

FEE BREAKDOWN					
PLUGIN	PLAN	NONPROFIT DISCOUNT	FUNCTION	MONTHLY	YEARLY
Amelia	Lifetime Pro	50%	Event Scheduling with Waitlist	\$	\$159.50
PlanHero	Pro	No	Volunteer Management	\$15.00	\$180.00
Tidio	Flows	No	Chatbot and Support Ticket	\$24.17	\$290.04
Zapier	Pro	15%	Automation Tool	\$16.99	\$203.90
Airtable	Team	50%	Database	\$12.00	\$144.00
Sender.net	Pro	No	SMS and Newsletter	\$	\$240.00
WordPress	Premium	No	Actual Website	\$8.00	\$96.00
First Year Total					\$ 1,313.44
After First Year Total					\$ 1,153.94

Project Scope Management Plan

The Pets4Life Project will follow a collaborative and structured approach to ensure scope is clearly defined, managed, and delivered as agreed. Authority for scope management rests jointly with the project team with the Project Managers guiding oversight. The Sponsor, Karen Mujica, holds authority to introduce new deliverables at any time, and these will be automatically included in the project scope, should they arise. When scope changes are suggested by project

team members, they will be discussed collectively during team meetings or through informal communication to determine feasibility, alignment, and next steps.

The project scope is defined through the Scope Statement, a detailed Work Breakdown Structure, and supporting documentation such as the WBS and Statement of Work. These tools ensure all required deliverables and tasks are fully captured, broken down into manageable components, and communicated clearly among stakeholders. Scope completion will be measured and verified through quality checklists, user testing, and deliverable reviews to confirm that outcomes meet agreed-upon requirements. Work performance will also be monitored against the scope baseline to detect deviations early.

Changes to scope may be proposed by any team member at any time. The Dream Team will collectively review and evaluate proposed changes, considering impacts on schedule, resources, and deliverables before deciding how to proceed.

Final acceptance of deliverables and project scope will rest with the Sponsor, Karen Mujica, who will confirm that all requirements have been satisfied, and outcomes align with the mission of the Pets4Life Project. This approach ensures clarity, collaboration, and accountability throughout the lifecycle of the project, reducing the risk of scope creep and ensuring the successful delivery of all agreed outcomes.

Stakeholder Management Plan

The Pets4Life Project involves a focused group of stakeholders, with primary responsibility and authority resting with the Project Sponsor, Karen Mujica, Director of Pets4Life. As the sponsor, Karen provides strategic direction, has the authority to introduce new deliverables, and is the sole approver of final project outcomes. While Pets4Life receives grant funding from PetSmart, their role in this project is indirect; they are not actively engaged in decision-making or oversight but are recognized as supporting stakeholders due to their contribution to organizational resources.

To maintain strong engagement, the Dream Team will provide Karen with periodic demonstrations of project progress, gathering her feedback to guide refinements and ensure alignment with organizational needs. Communication with Karen will primarily take place

through Professor Chrisman, who serves as the liaison, or directly during scheduled presentations. This structured process ensures the sponsor remains closely informed and her input is consistently integrated into project execution.

Final approval of deliverables rests solely with the Project Sponsor, who will confirm that the agreed scope has been satisfied and that the solution supports Pets4Life's long-term goals. Other stakeholders, such as donors, volunteers, and clients, will benefit from the project's outcomes but will not actively influence scope or deliverable decisions during execution. This approach ensures clear accountability, efficient communication, and alignment with the sponsor's vision for the Pets4Life Project.

Status Report #1

This status report reflects development up to 9/21/2025. It begins with an executive summary to describe the purpose of the project and a general description of what the report entails.

Milestones are listed with baseline date, expected date, and a status key; recent accomplishments are listed; risks, issues, and dependencies are noted, and next steps until the next report are planned out. Each status also contains a general RAG (red, amber, green) status, and for the initial development, we felt we were at Amber due to having just started official development.



Dream%20Team%20-%20Project%20Status'

Status Report #2

This status report contains the same information as the previous one, but milestones are more centered around development than documentation. This status report reflected progress up to 11/9/2025, which was right after Demo 2. Our team felt more confident at the pace we were going at and moved our RAG status to green.



Dream%20Team%20-%20Project%20Status'

Final Status Report #3

The final status report represents progress up to 12/8/2025, which is also the final date for this project. All milestones have been completed, and RAG status is set to complete. Risks, issues, and dependencies are centered around transition and post-deployment functionality. Rather than a ‘Next Steps’ section, a breakdown of ownership and total cost of ownership are provided.



Dream%20Team%20-%20Final%20Project%

Schedule Management Plan

TASK #	DESCRIPTION
2.1	Project Planning
2.1.1	Gather requirements from stakeholder needs
2.1.2	Review current operational system and tools to assess where changes are needed
2.1.3	Develop RMP (requirements management plan) and RTM (requirements traceability matrix)
2.1.4	Develop SOW (statement of work), PC (project charter), and PMP (project management plan)
2.1.5	Develop SAD (systems architecture design), ERD (entity relationship diagram), UFD (user flow diagram)
2.2	Website Design and Development
2.2.1	Create design mockup to base development off of
2.2.2	Develop WordPress visual interface
2.2.3	Implement donation page with integrated payment options
2.2.4	Integrate 24/7 knowledge-based chatbot with zip code logic
2.2.5	Integrate volunteer signup and management system
2.2.6	Integrate event management system with calendar and registration
2.2.7	Add user-submitted testimonials
2.2.8	Integrate Ride Request system

2.2.9	Add SMS and newsletter plugin
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The tasks described above create the schedule below, where these tasks are then given deadlines to ensure the project continually progresses to meet completion by the final date. These tasks are currently not chronological but will be updated in later iterations to represent the true order of development.

TASK #	DUE DATE	DELIVERABLE DESCRIPTION
2.1.1 2.1.2	Week 1	Requirements gathered and needs evaluated
2.1.3	Week 2	RMP and RTM drafted
2.1.4	Week 3	RMP and RTM finalized SOW, PC, and PMP drafted
2.1.5	Week 4	SOW, PC, and PMP finalized SAD, ERD, and UFD drafted Consider website design mockup
2.2.1 2.2.2	Week 5	Status Report #1 Website design mockup finalized WordPress visual interface made
2.2.3 2.2.4 2.2.6 2.2.7	Week 6-8	Integrate various plugins, as numbered in table above, and conduct testing throughout
-	Week 9	DEMO 1 – 50% of project complete
2.2.4 2.2.6 2.2.8 2.2.9	Week 9-11	Integrate various plugins, as numbered in table above, and conduct testing throughout
-	Week 12	DEMO 2 – 75% of project complete Finish plugin integration and aim to just be testing

2.2.5	Week 13-14	Final polishing
-	Week 15	FINAL DEMO – 100% of project complete

Quality Management Plan

Our quality management plan ensures all deliverables meet the client’s expectations and functions as intended. Defining such quality standards ensures that the team is in agreement with what is expected from our work for our client. Quality checks will be integrated into every phase of the project life cycle from initiation to closing. This plan is created during the planning phase and is intended for the project manager, project team, and project sponsor. The table below outlines the project team, the project sponsor, and the project advisor, and their responsibilities in ensuring this project follows quality standards.

NAME	ROLE	QUALITY RESPONSIBILITY
Helen Le	Project Manager / Requirement Analyst	Ensure team members remain on par with established quality standards, ensure requirements are well-defined and align with needs, and ensure objectives are being met
Kyah Owens	Project Manager / System Analyst / Developer	Ensure tasks align with the quality management plan and oversee that best practices are being used
Ozine Byamungu	Requirement Analyst / Developer	Ensure requirements are being met, document testing as it occurs, and ensure deliverables meet quality criteria
Mikey Martinez	System Analyst / Requirement Analyst / Developer	Ensure requirements are being met, the system is secure, and deliverables are made according to established quality standards

Spencer Taylor	Developer / System Analyst	Ensure secure implementation and testing standards are being used
J. David Chrisman	Project Manager / Faculty Advisor	Ensure deliverables meet needed requirements and standards
Karen Mujica	Executive Director, Pets4Life Louisville (Client Sponsor)	Communicate whether demo is meeting client expectations and provide feedback for improvement

Quality Baseline

The quality baseline below addresses the specific criteria to be used during development to ensure team expectations align with stakeholder ones. Having a set, agreed-upon guideline will prevent misunderstandings throughout the project and ensure the client receives a functional, quality, and successful product.

Client and Project Goals	Provide a streamlined and fully integrated website that reduces manual workload, integrates a formally fragmented system into an all-inclusive one, and improves overall user experience
Quality Standards	<ul style="list-style-type: none"> - Functionality – features work as intended with no major bugs or errors - Usability – system is user-friendly and accessible - Reliability – system maintains uptime and needs little downtime for maintenance (if so, then at low traffic time) - Maintainability – Pets4Life team is able to easily maintain project after team’s completion - Accuracy – all information is inputted into database with no errors - Satisfaction – stakeholder expectations are met and measured through demos - Accessibility – usable by all audiences - Security – data is safely maintained and protected
Critical Success Factors	<ul style="list-style-type: none"> - Fully functional chatbot with zip code-based logic using a knowledge base

	<ul style="list-style-type: none"> - Integrated payment system for donations and sponsorships of pets - Volunteer management system for volunteer information tracking and sign-ups - Event scheduling system for clients to sign up for events - User-submitted testimonials will display appropriately - Smooth and simple user navigation
Acceptance Criteria	<ul style="list-style-type: none"> - Features consistently pass verification and validation testing - Volunteering and scheduling information automatically input into database - Payment system is secure and accurate

Risk Management Plan

The Pets4Life Project will use a proactive and structured approach to managing risks to ensure that challenges are identified early, monitored consistently, and addressed effectively. Risks have already been documented across core features—including the chatbot, volunteer management system, event management system, donation page, and general integrations—and each risk has an associated mitigation or contingency strategy. For example, chatbot risks include limitations with zip code logic, inaccurate responses, or potential overload from high query volumes. These risks will be addressed through early testing, active monitoring, and backup solutions. Similarly, for volunteer and event management systems, risks around registration, data tracking, and client functionality will be mitigated by user testing, alternative manual forms, or system configuration updates.

Payment and donation risks, such as gateway failures or limitations on custom features, will be managed by plugin testing, exploring alternative solutions, and leveraging WordPress customization when possible. General risks—such as unexpected cost increases, database upload issues, or plugin compatibility challenges—will be handled through contingency budgets, backup processes, and pre-implementation compatibility testing. The Project Managers will maintain a central risk log, review risks during regular project meetings, and escalate critical risks to the

Sponsor if required. This process ensures that risks are systematically tracked, prioritized, and mitigated, minimizing disruptions and safeguarding the successful delivery of the project.

Risk Register

The table below outlines risks already identified and ways to mitigate them as they occur. This prevents the risk of scope creep occurring and ensures that the presence of risks do not hinder the team’s performance.

PROJECT RISKS		
FEATURE	RISK	MITIGATION / CONTINGENCY
Chatbot	Knowledge-based chatbot is not able to provide zip code-based logic	Test zip code logic early in development. If not supported by Tidio + Lyro AI, assess alternative chatbot solutions that do have this logic.
Chatbot	Chatbot provides inaccurate or incomplete answers	Ensure knowledge base is regularly maintained and monitor responses.
Chatbot	High volume of user queries at once overloads chatbot	Conduct testing to overload system and implement a failure message to display with alternative contact methods.
Volunteer Management System	Volunteers are unable to register correctly	Conduct testing early on to ensure data is being properly loaded. Find alternatives with PlanHero on what to do if system is down – consider making a manual form that only appears when the volunteer management system is down.
Volunteer Management System	Volunteer management system cannot meet tracking requirements	Configure an alternative method to track hours, such as a QR code that tracks check in and out time to automatically record hours that way.
Event Management System	Event registration fails	Conduct regular user testing, ensuring that notifications work. Consider making a manual form that only appears when event management system is down.

Event Management System	Client cannot register for multiple pets	Update system to allow multiple entries per client with clear instructions on what to do if multiple registrations are needed.
Donation Page	Payment gateway fails	Conduct user testing to ensure plugin works. Find alternatives if it does not.
Donation Page	Payment plugin interface does not allow for forms that would allow the Sponsor-a-Pet feature	Find alternative plugins that allow this or assess WordPress's drag-and-drop features to see if this is possible.
General	Information not uploading to database automatically	Provide manual upload option as backup and regularly test integration.
General	Unexpected cost increases	Aim to keep a budget with some room for flexibility. However, utilize priority levels in RTM if trade-offs are necessary.
General	Integration challenges with plugins	Plugins have been researched for compatibility before. However, conduct compatibility testing during implementation, have backups for each plugin beforehand, and allow for lag time between iterations.

Sponsor Acceptance





Approved by the Project Sponsor:

Karen Mujica

Executive Director

Date: _____

References to Other Documents

Attachment Name	Location/Link
Project Charter (PC)	 Dream%20Team%20-%20Project%20Charte
Statement of Work (SOW)	 Dream%20Team%20-%20Final%20SOW.doc
Requirements Management Plan (RMP)	 Dream%20Team%20-%20RMP.docx
Requirements Traceability Matrix (RTM)	 Dream%20Team%20-%20RTM.xlsx
Requirements Management Plan (RMP) Template	https://share.google/b8CN6CMG8itk3vOS0
Requirements Traceability Matrix (RTM) Template	https://www.stakeholdermap.com/project-templates/requirements-traceability-matrix.html
Project Charter (PC) Template	https://www.projectmanager.com/templates/project-charter-template
Statement of Work (SOW) Template	https://www.smartsheet.com/free-statement-work-templates
Project Management Plan (PMP) Template	https://www.projectmanagementdocs.com/template/project-planning/project-management-plan/

Appendix A: Solution Transfer

Handover Details

To transfer the WordPress website to our client, we will provide a full exported backup that includes both the website files and the database bundled into a ZIP file created through WordPress managers backup tool. This ensures the client receives an exact copy of the live site that can be restored to any WordPress-compatible server via the client or hosting support.

Exporting the Full Website Backup

1. Login to hosting providers Cpanel
2. Navigate to Tools → Export/Backup
3. Select **Full Backup**, making sure both components are included: Website Files and Database Export
4. Click **Generate Backup** to allow WordPress to bundle the entire site into a ZIP file
5. Download the ZIP file once the export is complete and store it in a secure local folder

Transferring the Backup to Pets4Life

Once the ZIP file is generated, it will be delivered to the client through one of the following secure methods:

1. A shared drive (Google Drive, OneDrive, Dropbox)
2. Direct email download link
3. A physical storage device, if preferred

The client should store this file safely, as it contains all operational components of the live website.

Restoring the Website on Client Hosting

Pets4Life can restore the website on any WordPress-compatible hosting service. The restoration process follows standard WordPress migration procedures.

Restoration Steps

1. Open WordPress Manager or WordPress Toolkit, depending on the hosting environment
2. Click Install to create a new, temporary WordPress instance.

3. Once installation completes, go to the Backup/Restore section for that WordPress instance
4. In a separate tab, open cPanel File Manager and navigate to the backup directory specified by WordPress Manager
5. Upload the provided backup ZIP file into this directory
6. Return to the Backup/Restore tab in WordPress Manager and click Refresh
7. Select the available backup and click restore
8. Allow cPanel to complete the automated restoration process
9. Once the restoration finishes, visit the website URL to confirm the site has been successfully restored

If you decide to host directly with WordPress disregard the above steps, contact their support directly and ask them to restore this backup for you.

Post-Restoration Verification

After the site is restored, Pets4Life should check:

- All pages load and navigation works
- Donations through GiveWP display properly
- Stripe reconnection (Stripe may require re-authentication)
- Amelia schedules and event flows display correctly
- Tidio chatbot loads and responds
- PlanHero workflows function normally
- Airtable forms submit and populate records
- All images and media appear as expected
- Admin login works using the provided credentials

Any plugins requiring new API keys or organization-specific credentials can be updated in WordPress under Settings or the appropriate plugin dashboard.

Admin Credentials

Zapier Account:

- Email: DREAMTEAM502@outlook.com
- Password: Pets4LifeLouisville

Airtable Account:

- Email: DREAMTEAM502@outlook.com
- Password: Pets4LifeLouisville

Tidio Account:

- User: Ndownen02@louisville.edu
- Password: Pets4LifeLouisville

Procedures

Event Scheduling/Amelia

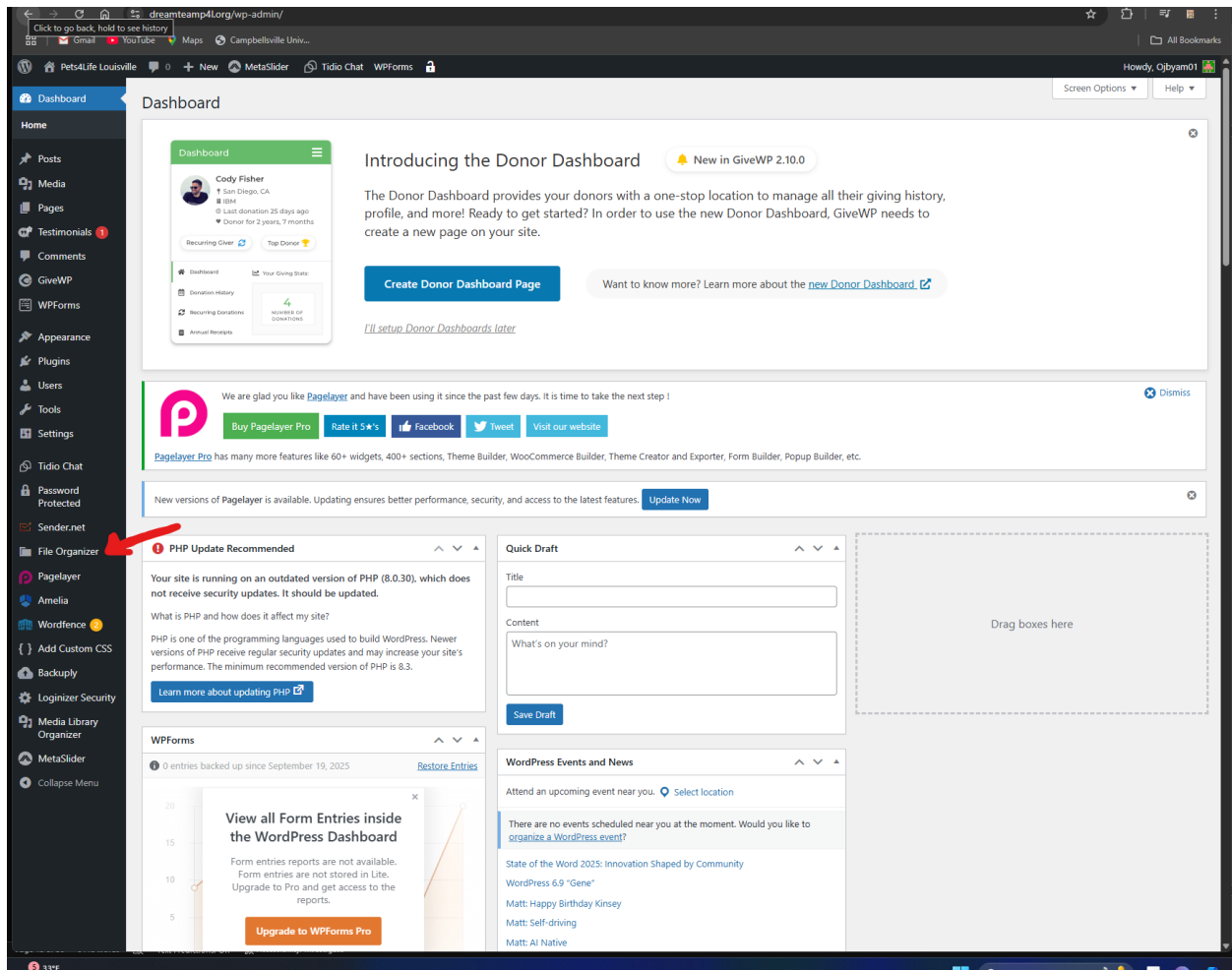
The screenshot shows a web browser window with the URL app.gleap.io/share/NDnYUDh4l18PS4h2bnYKMhgmEfpRUhfNye0eRdA8mAXVPtVhY6QMwIbl4RYqFAflaQ5dG?u=e1c7f640-01ad-4724-8d07-690f9df5b2a4&h=a482455e. The browser tabs include YouTube, Maps, and Campbellsville Univ... The chat interface has a title "Missing extract option for Emilia starter plan".

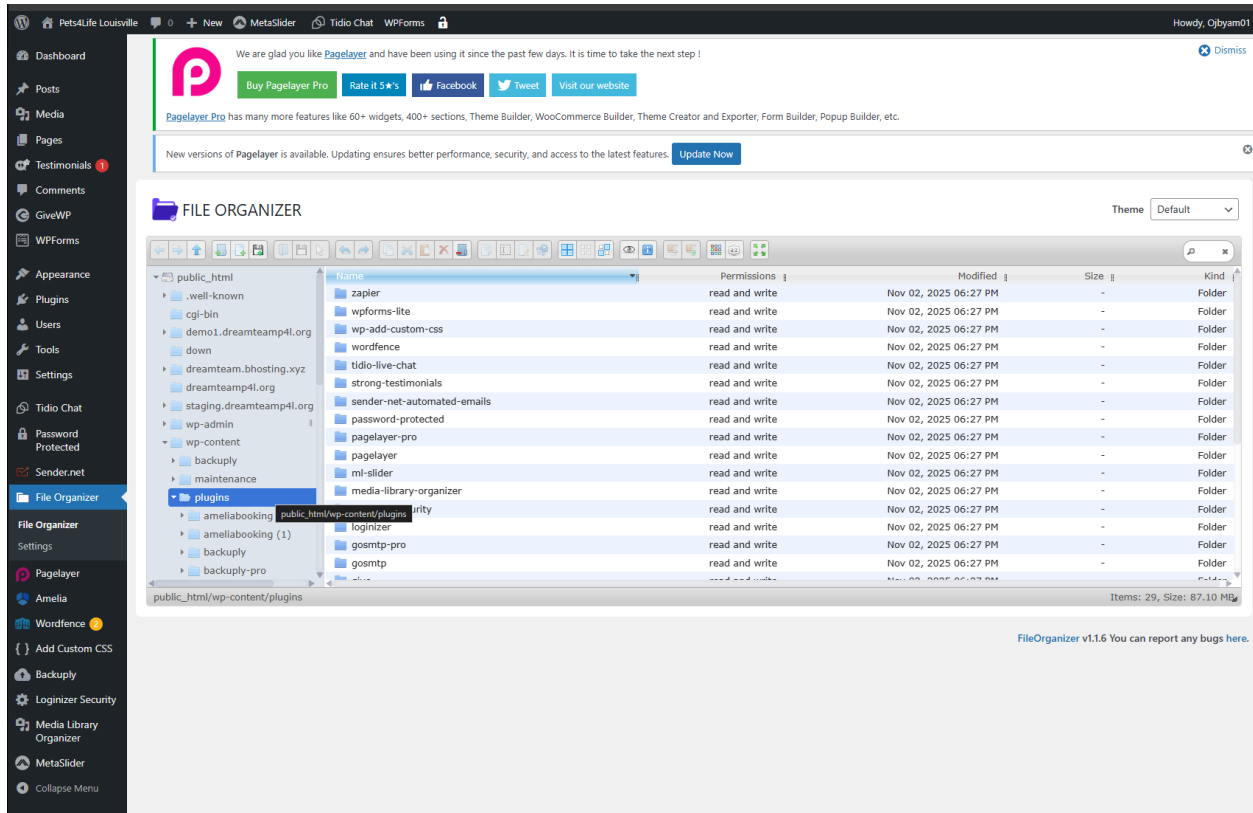
The chat history includes:

- A blue message bubble from the Amelia Support Team (Oct 22, 7:15 AM) containing the text: *issue was escalated), you can safely ignore this message for now. However, if the ticket gets closed before we respond, just reply to this message — it will automatically reopen and we'll continue from where we left off.* Thanks again!
- A white message bubble from the user (Oct 22, 8:01 AM) asking: "So two things, did you figure out if the organization I mentioned is approved for a discount like we talked about? If yes how might we enroll in a plan of our choosing with the supposed discount? Please and thank you".
- A blue message bubble from a team member (Oct 23, 6:39 AM) replying: "Hey Ozine, You have a discount with the coupon code 441925BE. At checkout, please remove any pre-filled promo code, then enter 441925BE and apply—it will update the total before payment. If you have any other questions, just let us know."

Here is the 50% discount code that you guys will need to remove the current Amelia, and then add the new one for it to be in effect.

The website is a little different, so in order to add it back, you have to go file organizer. This is assuming that you are in the admin view:





From here, remove the current file related to ameliabooking, delete, and then make sure that on the admin home page on the plugins, Amelia is deactivated. How do you know that it is deactivated? If you look at it, the only option should be **activate**. Keep track of the version number, as the new one should have a higher number, so that you know which one you are activating.

Introducing Campaigns in Give 4.0 !
Say hello to a whole new way to supercharge your fundraising!

- Easily create, manage, and level up your campaigns.
- Add as many donation forms as you want.
- Enjoy tailored reports—all in one awesome place!
- Update your campaigns on the fly.

[Explore campaigns](#)

We are glad you like **Pagelayer** and have been using it since the past few days. It is time to take the next step !

[Buy Pagelayer Pro](#) [Rate it 5★](#) [Facebook](#) [Tweet](#) [Visit our website](#)

Pagelayer Pro has many more features like 60+ widgets, 400+ sections, Theme Builder, WooCommerce Builder, Theme Creator and Exporter, Form Builder, Popup Builder, etc.

New versions of Pagelayer is available. Updating ensures better performance, security, and access to the latest features. [Update Now](#)

All (23) | Active (16) | Inactive (7) | Recently Active (2) | Drop-ins (2)

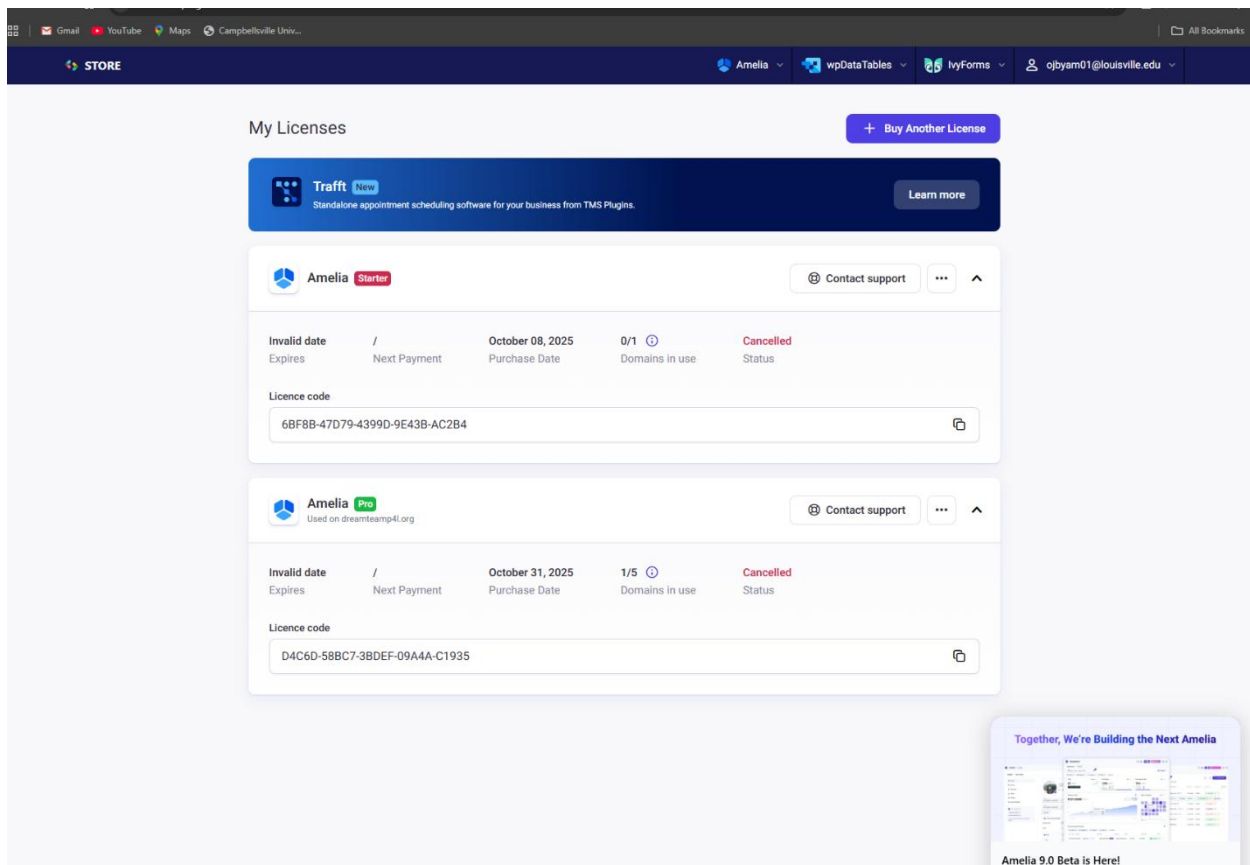
Search installed plugins

Plugin	Description
<input type="checkbox"/> Amelia Deactivate	Amelia is a simple yet powerful automated booking specialist, working 24/7 to make sure your customers can make appointments and events even while you sleep! Version 8.6 By TMS Visit plugin site
<input type="checkbox"/> Backupy Deactivate	Backupy is a Wordpress Backup plugin. Backups are the best form of security and safety a website can have. Version 1.4.9 By Softaculous Visit plugin site Required by: Backupy Pro Note: This plugin cannot be deactivated or deleted until the plugins that require it are deactivated or deleted.
<input type="checkbox"/> Backupy Pro Activate	Backupy is a Wordpress Backup plugin. Backups are the best form of security and safety a website can have. Version 1.4.9 By Softaculous Visit plugin site Requires: Backupy – Backup, Restore, Migrate and Clone
<input type="checkbox"/> FileOrganizer Deactivate	FileOrganizer is a plugin that helps you to manage all files in your WordPress Site. Version 1.1.6 By Softaculous Team Visit plugin site

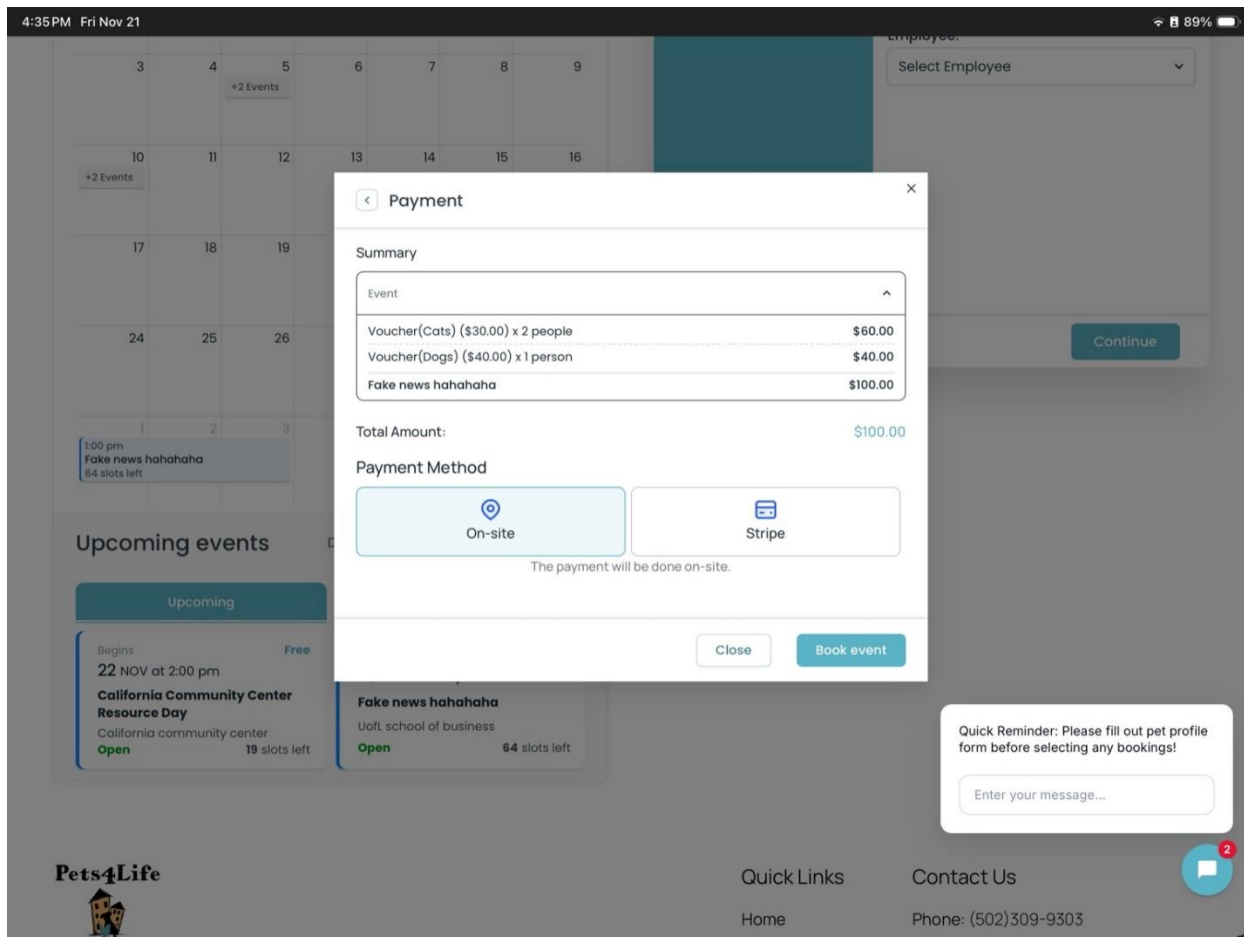
cal (1).ics	11/2/2025 10:52 AM	Outlook.File.ics.15	1 KB
cal.ics	11/2/2025 10:52 AM	Outlook.File.ics.15	1 KB
ozine-planner	11/21/2025 1:39 AM	File folder	
portfolio #2	11/19/2025 12:12 AM	File folder	
portfolio	11/16/2025 10:32 AM	File folder	
Earlier this year			
ameliabooking-pro (1).zip	10/31/2025 5:36 AM	Compressed (zipp...	32,066 KB
ameliabooking-pro.zip	10/31/2025 5:36 AM	Compressed (zipp...	32,066 KB
pcapanalysis (1).pdf	10/28/2025 10:48 PM	PDF File	41 KB
labtainer-student.pdf	10/28/2025 10:36 PM	PDF File	159 KB

Once you add it, it still won't show until you go on the plugins again, and you should see Amelia with a higher version number (eg: 8.9 or something). Click activate, reload, and then you should see Amelia available.

Once you buy the Amelia Pro lifetime plan that is discounted, you will get access to the tms.store which is good to have because the Amelia file you need to upload to the file organizer is there. Also, you can contact support if you have any questions and they will help you. If you keep up with their channel (www.youtube.com/@ameliawordpressbookingplugin), they always have updates that may introduce features that you might need, like custom fields with logic. This is a feature that we think *would have* been very useful for you guys to have, but we had to adjust because that feature could not accommodate the Pet Profiles in a neat way. Our new solution does work better than the Amelia fields with conditional logic that we were intending to have. However, if Amelia does introduce custom fields conditional logic, this is an avenue that would be worthwhile to consider.



Everything should be easy and there are enough resources and customer support. I also use ChatGPT if I am stuck on something. For example...



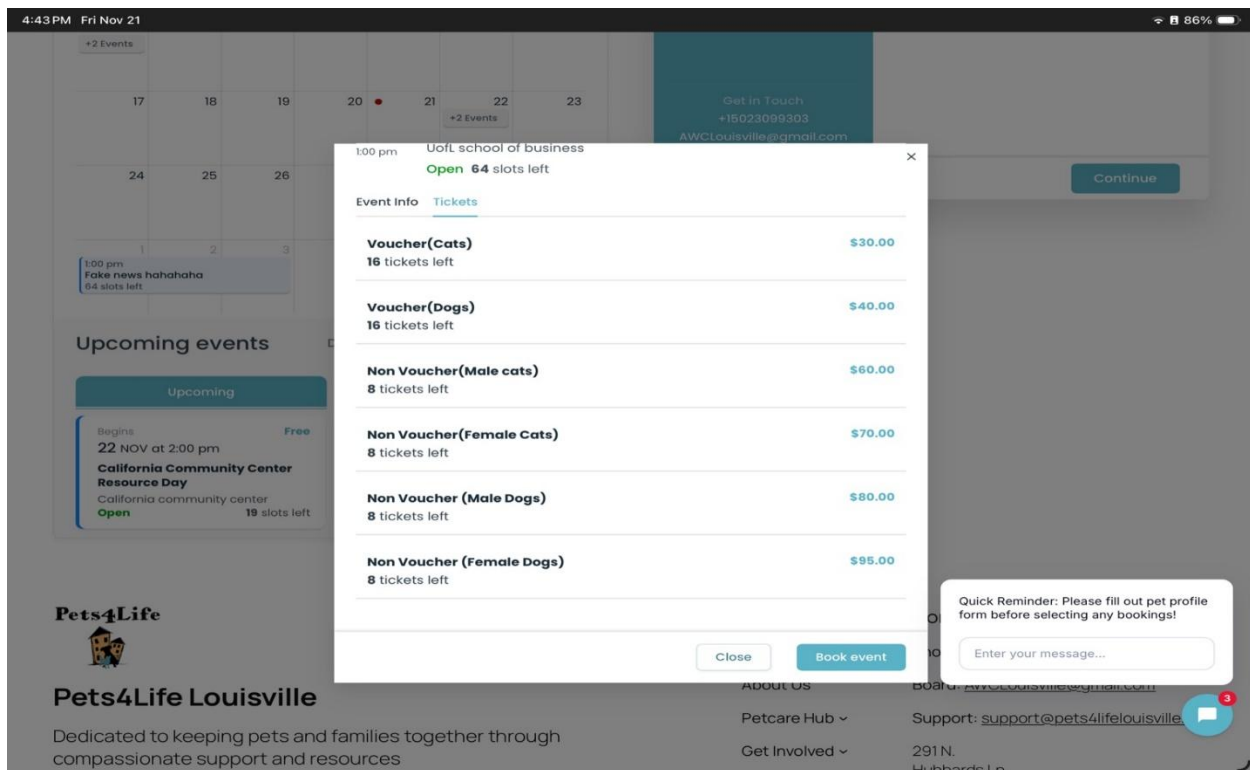
I asked ChatGPT: “Is there a way I can switch this part ‘on the image’ on Amelia? On WordPress, the payment part says person, but they are for pets, as in a person can bring pets to an event, but I would like the pet to be what shows there, since the pet is what needs the service. Walk me through how to do this on using Amelia pro.”:

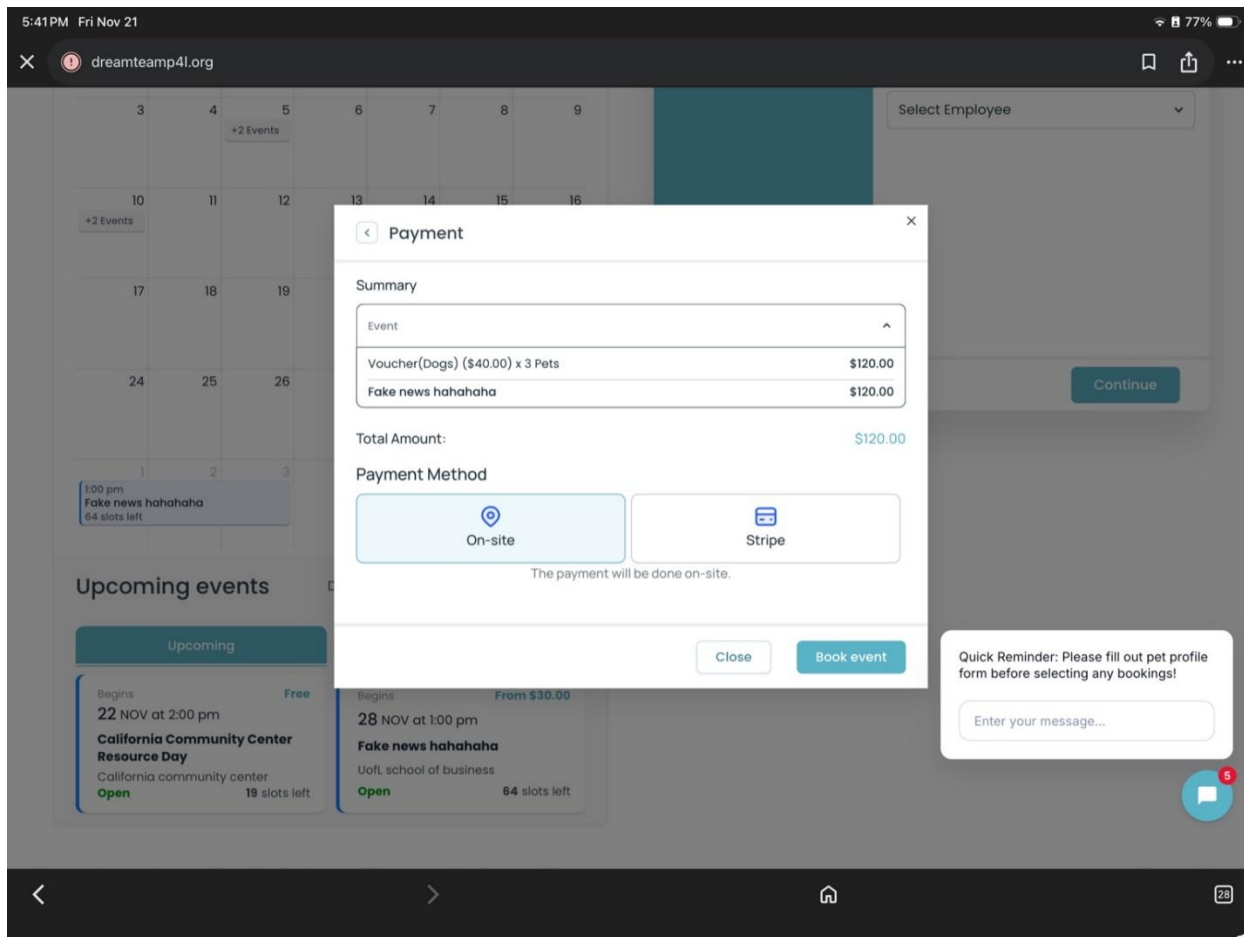
Here is the response:

- Log in to your WordPress dashboard** using an administrator account.
 - In the lefthand menu, go to **Amelia** → **Settings** → **Labels**. Make sure “**Enable Labels Settings**” is switched on – this option allows you to change the frontend labels
- And then -> **Open your WordPress dashboard** and go to **Amelia** → **Customize**. This opens the visual editor for the 2.0 booking forms.
- In the righthand panel, select the form you’re using (e.g. **StepbyStep Booking View** or **Events List Booking View**) and then navigate to the “**Info**” or “**Payment**” step. This is where labels like “**Person**” appear.

- Scroll through the text fields on that step. You should see fields labelled “**Person**”, “**Persons**”, or “**People**”. Replace those with “**Pet**” and “**Pets**”. You can edit other labels in the same way—this is what Amelia’s documentation refers to when it says you can “change the names of the main labels on the frontend to align with your business” wpamelia.com.
- Click **Save** in the lower right corner of the editor. Clear any site caching if you use a caching plugin, then reload your booking page to confirm that the payment summary now shows “pet(s)” instead of “person(s).”

The reason I mentioned this is because you need to do this when you want the bookings to not be confusing for users at the end, when they select a service and how many pets they are bringing,





Now, it shows that a person selected three pets and not ‘person,’ and how much they need to pay. Ideally, they want to pay when they get to the event, so you can verify their ID to determine if your service is applicable for their zip code.

I am glad that I got to do anything to help the organization in any way because I believe that you guys are doing something important. If you guys ever run into any problems related to Amelia and want a quick fix, I am still determined to continue to help in any way I can. My email is ozinebyamu@gmail.com, but my cell is 502-291-6238.

PET PROFILE SYSTEM

For ease, the steps to automate Amelia with our Pet Profile system are in the embedded document below.



Amelia%20and%20Pet%20Profile%20System

For information on how to make the form for Pet Profiles with conditions, please refer to the Airtable section below.

PlanHero

For the main PlanHero page, the one that is currently being used will work as it would be unnecessary to create a new one.

PlanHero to Airtable Automation

After Zapier is transferred, the Zapier account email should be the email chosen by P4L. **It is important that the email connected to the PlanHero account is the same one used for the Zapier account.** Go to Outlook and add noreply@planhero.com to your contact list. For that email, some rules need to be created by going to File → Manage Rules & Alerts. A prompt should pop up where “New Rule” should be selected. It is recommended that it should be named “Planhero Automation”. Set the rules to be as follows, “Apply this rule after the message arrives from noreply@planhero.com forward it to jkdjfdjkdj@robot.zapier.com except if the subject contains ‘deletion’ or ‘change’ or ‘confirmation’ or ‘your’.

After that, all emails from PlanHero notifying P4L that a new sign up has occurred will be sent to the zapier parser (jkdjfdjkdj@robot.zapier.com) and Zapier will take the parsed output will populate the respective records in Airtable. The final rule should look something like this.

Rule description (click an underlined value to edit):

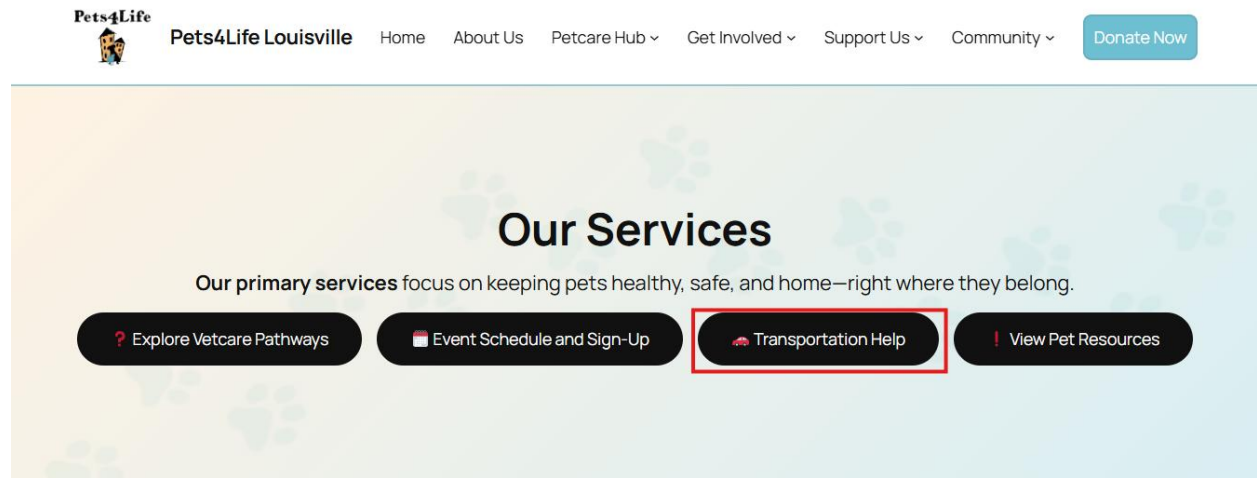
Apply this rule after the message arrives
from noreply@planhero.com
forward it to jkdjfdjkdj@robot.zapier.com
except if the subject contains: ['deletion' or 'change' or 'confirmation' or 'your'](#)

Also, don't forget to turn on the rule.

If the populated records appear to be incorrect, go to <https://parser.zapier.com/mailboxes/> and sign in with your Zapier account. There you will be able to click on the gear icon and adjust the template. You are also able to click on “View Emails” and see where the parsed outputs come from, mark emails as accurate or inaccurate, and delete emails.

Ride Request System

On the website, when a user wants to request a ride, they go here.



The user will then be met with the “Ride Request Form”. After filling it out, the respective fields in Airtable will be populated. In Airtable, an automation should be created where the trigger should be “When a Form is Submitted” and the action should be “Send an Email”. On the trigger, the table should be “Ride Requests” and the form should be “Ride Request Form”. The email should be an email made specifically for the ride system. The subject should be “Ride Request” to indicate the email's purpose. The message should read as follows.

Contact:

Phone:

Address:

Event:

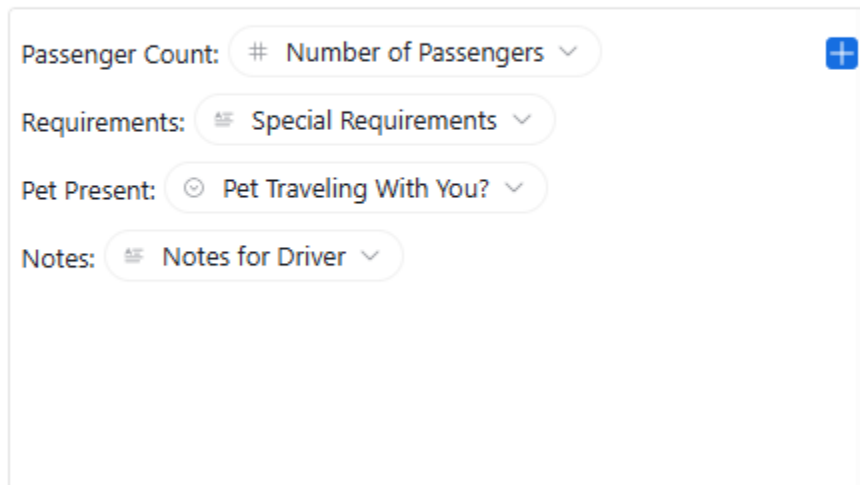
When:

Passenger Count:

Return Address & Time:

* Message

Use markdown or HTML for rich text formatting: ****bold****, *_italics_*, # Headings, * Bullets,
 for line breaks, and more



A screenshot of a message form. At the top, there is a header with instructions on using markdown or HTML for rich text formatting. Below the header, there are four dropdown menus: 'Passenger Count: # Number of Passengers', 'Requirements: Special Requirements', 'Pet Present: Pet Traveling With You?', and 'Notes: Notes for Driver'. A blue plus icon is visible in the top right corner of the form area.

Airtable

To transfer Airtable, during the handover meeting, we will share our 'P4L Base Transfer' base with the client and give them owner access.

These are all of the forms we have on Airtable:

- Pets4Life Mission Partner Sign-Up
- Volunteer Interest Form
- Ride Request Form
- Volunteer Ride Form
- Pet Profile Information

We found Airtable to be best for forms as it eliminates an extra step for uploading into the database. Many of these forms are straightforward, most being single line text, single select, or multiple select. However, below we discuss how to do conditionals so that users with multiple pets are able to enter their information, but users will not see all the options at once.

PET PROFILE FORM WITH CONDITIONALS

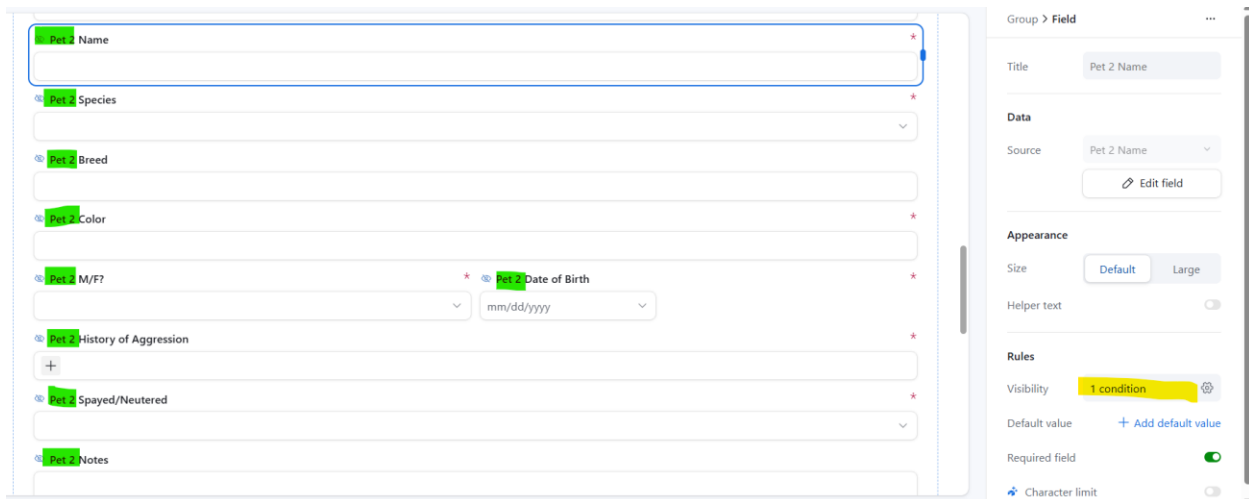
Owner Information

Owner First Name *	Owner Last Name *
<input type="text"/>	<input type="text"/>
Phone Number *	
<small>XXX-XXX-XXXX</small>	
<input type="text"/>	
Email Address *	
<input type="text"/>	
Pet Name *	
<input type="text"/>	
Species *	
<input type="text"/>	
Breed	
<input type="text"/>	

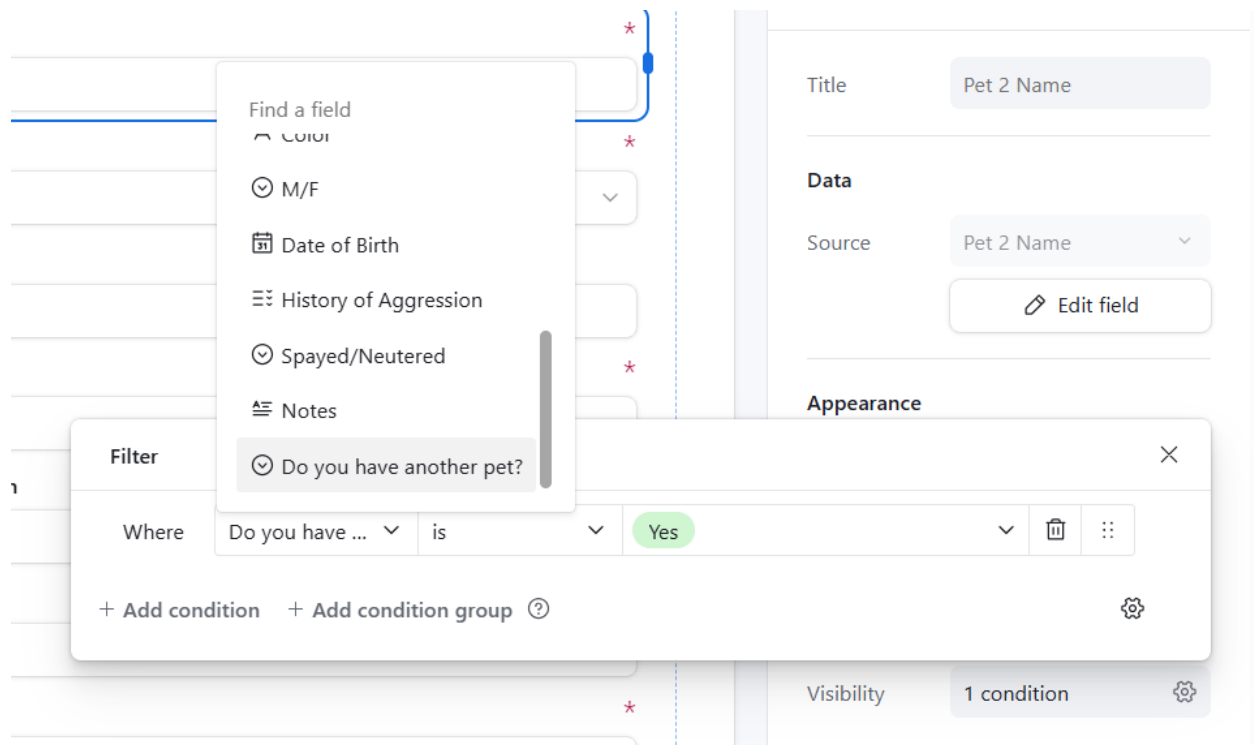
The starter owner information and initial pet information are standard. If a question has multiple answers, use the multiple select option. If only one answer is possible, use the single select option. If a question requires users to enter unique information, use single line text. These questions were obtained from your current Fillout system, but adding additional information is as simple as adding a new question. It will then auto populate into the table in the database. For required versus unrequired questions, we also followed the same format as Fillout. However, the new field of ‘Do you have another pet?’ must be required for these flows to work.

Color *	
<input type="text"/>	
M/F	* Date of Birth *
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>
History of Aggression *	
<input type="text"/>	
Spayed/Neutered *	
<input type="text"/>	
Notes	
<input type="text"/>	
Do you have another pet? *	
<input type="text"/>	

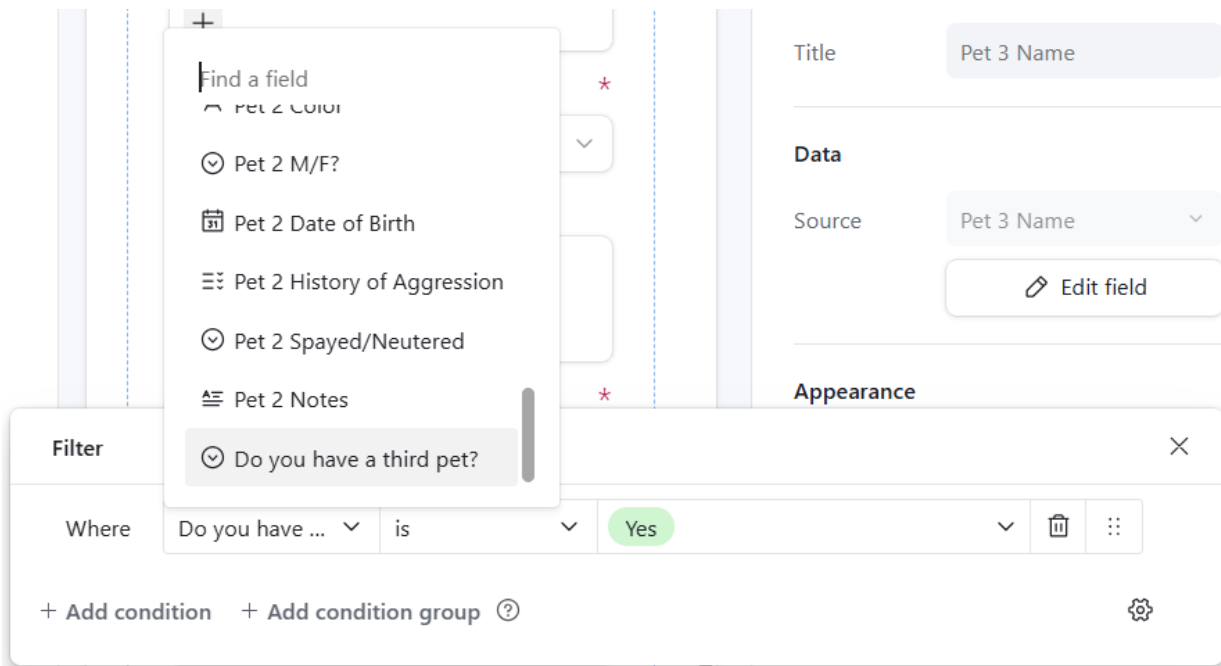
‘Do you have another pet?’ will be important for the conditional statements. If a user says yes, those same questions will be repeated for Pet 2. If a user says no, the form remains the same and they can submit.



As you can see, the questions are the same for Pet 2, but each begin with Pet 2. This is important for uniqueness. Highlighted in yellow, you will need to add a visibility condition to ensure these options are only visible if the user says they do have another pet.



The added condition would be “Where ‘Do you have another pet?’ is Yes. The Yes originates as one of the options from that question. This condition would need to be added to all of Pet 2’s information, including ‘Do you have a third pet?’ As the numbers increase, we recommend doing fourth, fifth, sixth, and so on, for the question just to help keep track.

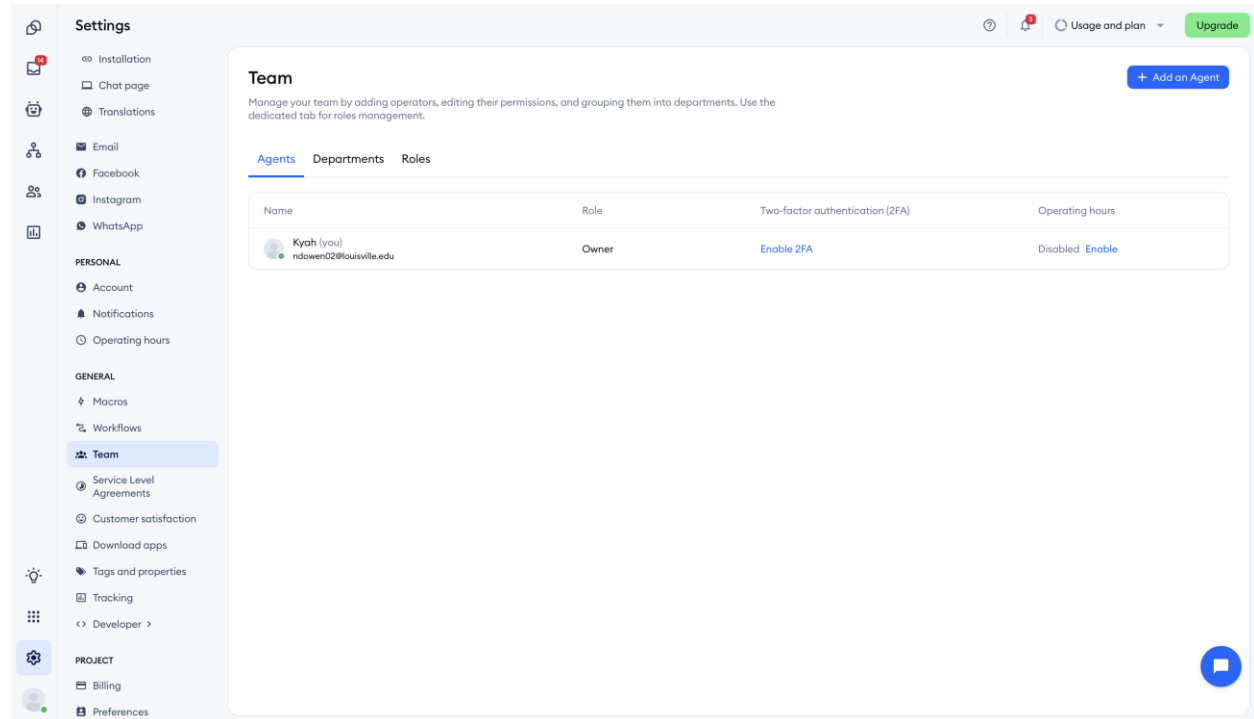


This visibility condition is on Pet 3 Name and would need to be applied to all of Pet 3's information fields.

Zapier

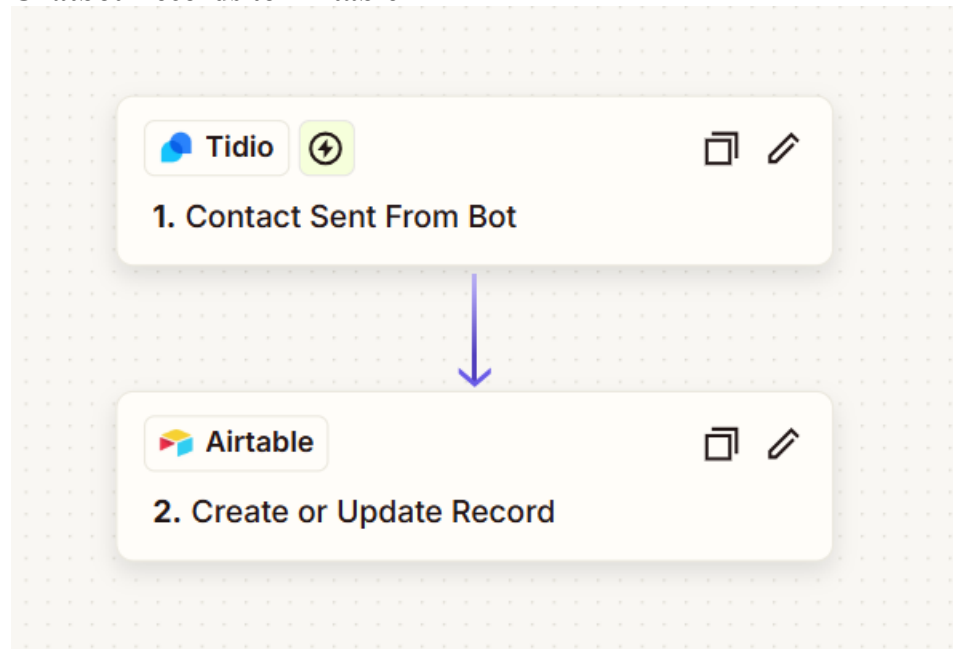
For Zapier, we cannot directly transfer our zaps, but access to our Zapier account will be shared, and zaps made are outlined in their respective sections.

Chatbot

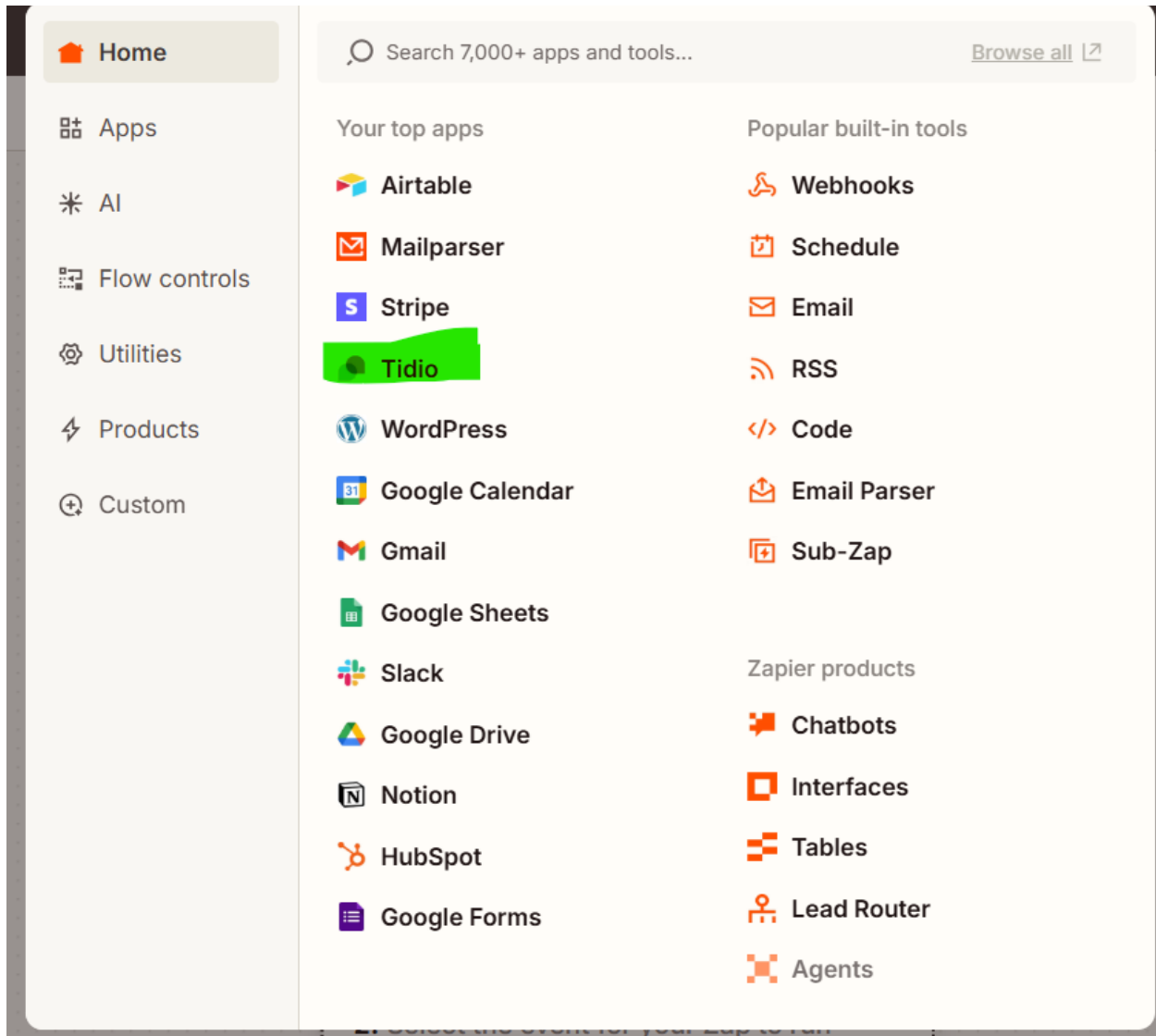


All you need to do is go into your Tidio settings, find the section called “Team,” and add an agent using email. Once you add them, choose the role “Admin” so you can fully control Lyro and everything else. After that, I will remove myself by giving you complete access to Tidio/Lyro dashboard.

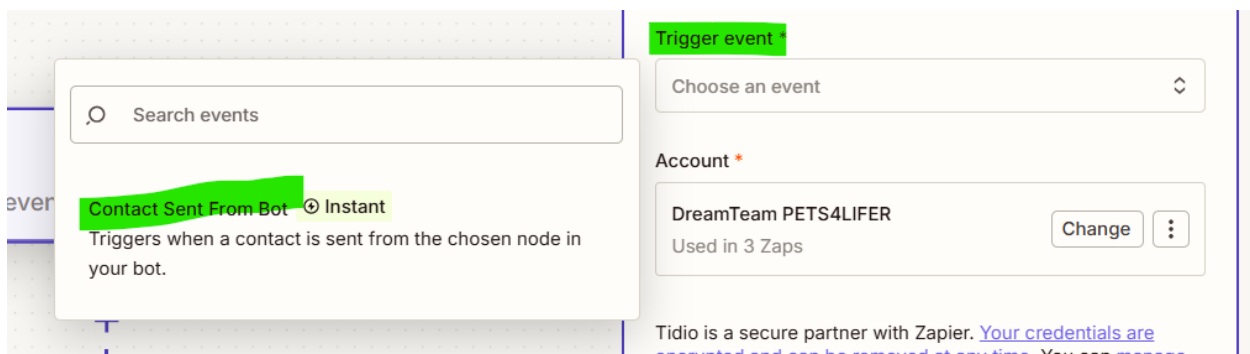
Chatbot Records to Airtable



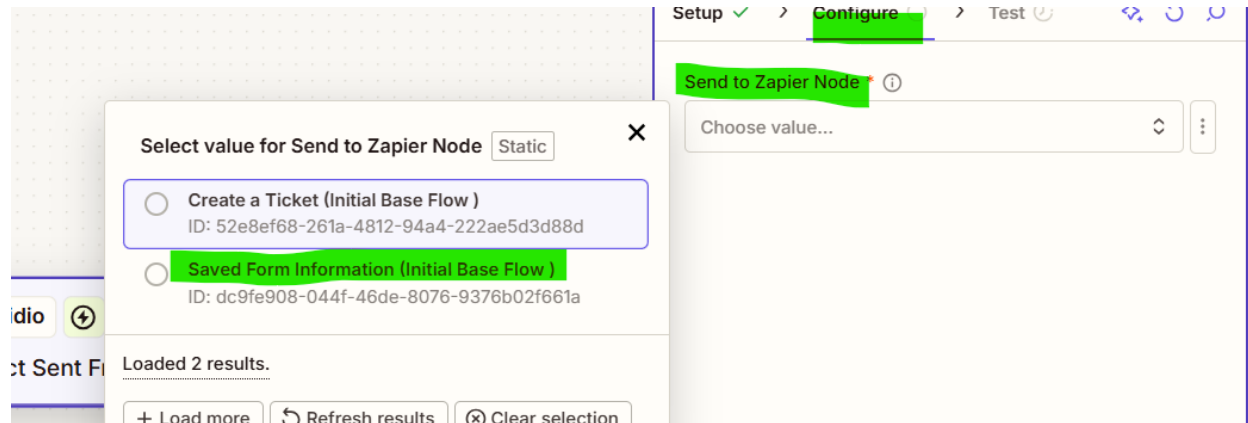
Using a Zapier titled ‘Customer Records,’ Zapier will take records of clients using the chatbot and populate them into Airtable if a ticket is needed. It will take the user’s name, phone number, email address, street address, and zip code.



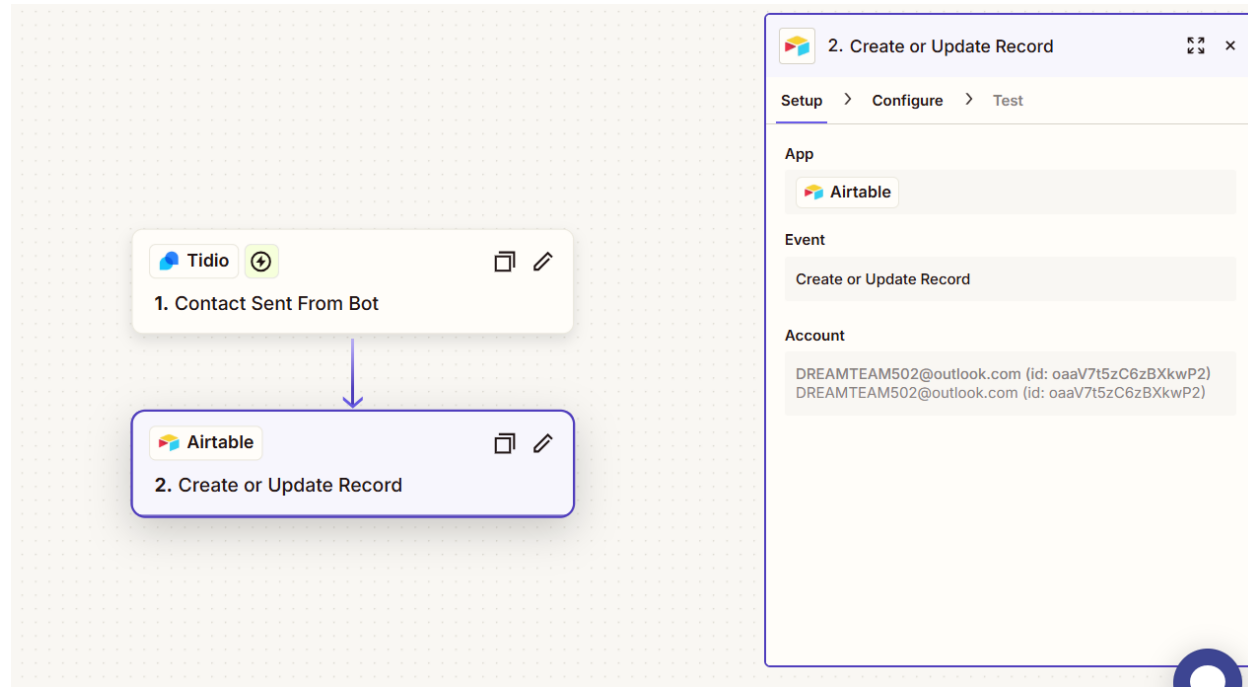
When you go to create a new zap, ensure you click the Tidio app.



There will then only be one trigger event to choose from.



Then, when going to configure, you will choose 'Saved Form Information (Initial Base Flow)'.



For the action step, you will then choose the Airtable app and the event will be 'Create or Update Record.'



2. Create or Update Record



Setup > **Configure** > Test

Show all fields

Base

Pets4Life Databases

Table

Chatbot Records

Primary lookup field

Name

User ID

1. ID: *No data*

Name

1. Name: Luigi Hamill PhD

Phone Number

Phone Number

1. Phone: 680.228.2907

Email

1. Email: pstrosin@hotmail.com

Street Address

1. Street Address: Voluptatem exer...tas libero est.

Zip Code

1. Zip Code: 8805

Following that, you will use your chosen base, the chosen table (in our case, we used Chatbot Records), the primary lookup field will be Name, and then connect all of the dynamic records with the associated table. The **table in Airtable** would need to be **created first** before creating this zap.

GiveWP and Stripe

These steps will explain how to manage, update, and troubleshoot GiveWP and Stripe, including how to create new forms, connect stripe, view transactions, and view and adjust settings.

- Accessing GiveWP
 1. Log into the WordPress admin dashboard.
 2. On the left sidebar select GiveWP

This has now opened GiveWP and allows you to view all related information.

- Creating or editing Donation Forms
 1. Create Campaign or click edit on an existing one.
 2. Select Forms
 3. Edit or create new form
 4. Under Payment Options, confirm Stripe is selected.

5. Click publish or update
- Connecting Stripe to GiveWP
 1. Navigate to GiveWP → Settings.
 2. Select the Payment Gateways tab.
 3. Click Stripe.
 4. Click Connect with Stripe.
 5. You will be redirected to the Stripe login page.
 6. Log in using the organization's Stripe account.
 7. Authorize the connection to GiveWP.

GiveWP will automatically pull in your Stripe API keys and configure the connection.

- Verifying the Connection
 1. Return to Donations → Settings → Payment Gateways → Stripe.
 2. Ensure:
 - Live Mode is ON when accepting real donations
 - Test Mode is OFF unless testing
 3. Confirm the correct Stripe account appears under the connection details.
- Viewing Donations & Donor Information
 1. Go to GiveWP → Donations.
 2. Here you will see:
 - a. Donor name
 - b. Donation amount
 - c. Payment method
 - d. Donation status (Complete, Pending, Failed)

To View Donor Profiles

1. Go to GiveWP → Donors.
2. Each donor record includes:
 - a. Contact information
 - b. Donation history

- c. Lifetime giving total

Managing Stripe Payouts & Financial Settings

These actions happen inside Stripe, not GiveWP.

Visit <https://dashboard.stripe.com>

From the menu:

1. Payments → View all transactions
2. Balances → Payouts → View money transferred to bank
 - a. Customers → View donor records created through GiveWP
3. Disputes → Manage chargebacks
4. Account Settings → Update bank account or tax info

Embedding Donation Forms on Website Pages

If you want to place a donation form anywhere on the site:

Option 1: Using the Block Editor

- a. Edit any WordPress page.
- b. Click **Add Block**.
- c. Search for **GiveWP Form**.
- d. Select the form you want to embed.

Option 2: Shortcode

Every form has a shortcode like:

```
[give_form id="1234"]
```

Place the shortcode anywhere on a page or post in the shortcode block.

Sender.net

To set up Sender.net,

Design

Most of our designs use basic WordPress features, so they are ones you are already familiar with.

However, for our counter on the Home page and the tabs on the Pet Resource page, we used

Pagelayer.

Palette:

Oranges

- FFB152 = Bright Orange; used for headings and some borders



- FFC8D8FA8 = Slightly Translucent Orange



- FFC8D8F = Lighter but Opaque Orange



Teals

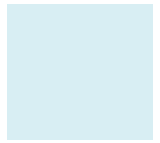
- 6EBFD1 = Bright Teal; used for headings and some borders and the gradient on home page



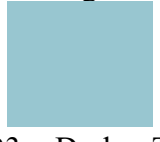
- 6FBFD112 = Extremely Translucent Pale Teal



- 6FBFD145 = Translucent Pale Teal



- 98C6D0 = Lighter, but Opaque Teal



- 5FA4B3 = Darker Teal



Blog, Testimonials, and Success Stories

Add title

Type / to choose a block



Post Block X

Set featured image

[Add an excerpt...](#)

Last edited 2 minutes ago.

Status 🔄 Draft

Publish Immediately

Slug 2824

Author (No author)

Template Single Posts

Discussion Closed

Format Standard

Categories ^

- Blog Posts
- Success Stories
- Testimonial
- Uncategorized

The layout to display all of these are already set up using Query Loops. To create new posts in each one, you simply go to Add post in the dashboard and then add the title, text, and any images. From there, using the Settings, within Post, you can add a desired featured image which will display automatically in the block for the post, set an excerpt (optional, an automated one will be made if not), and then highlighted in yellow, you will need to choose where you want it displayed.

Text Spanning Whole Page

We understood that it may not be entirely obvious how you can make text span the entire page. Thus, we wanted to ensure it was covered here!

to our virtual PetCare Hub Navigator. we

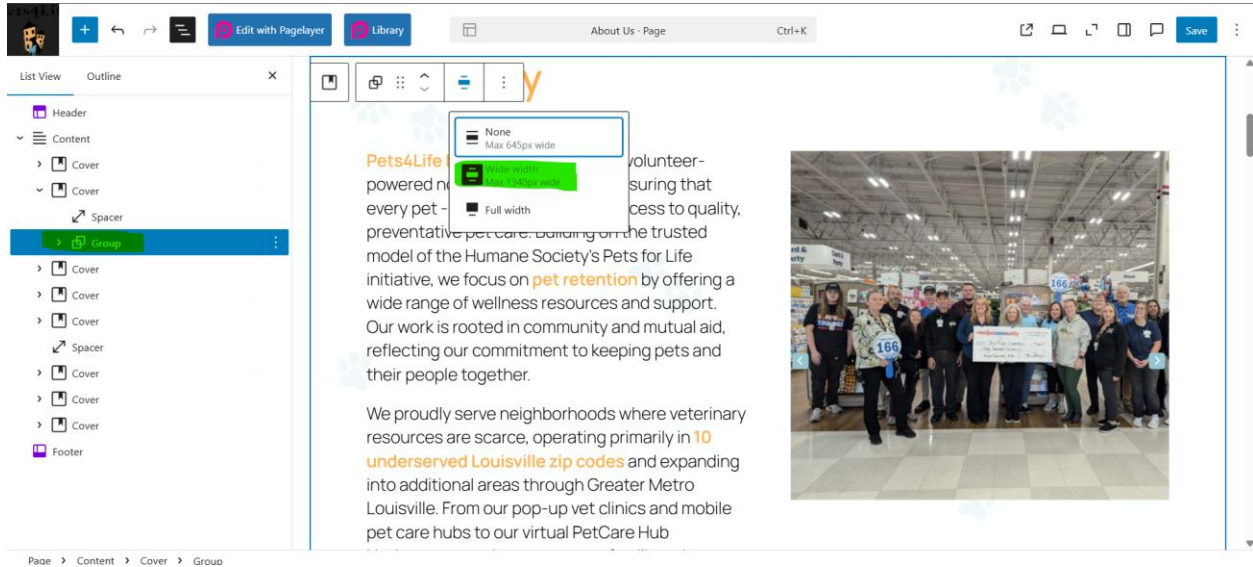
nilies who

hello

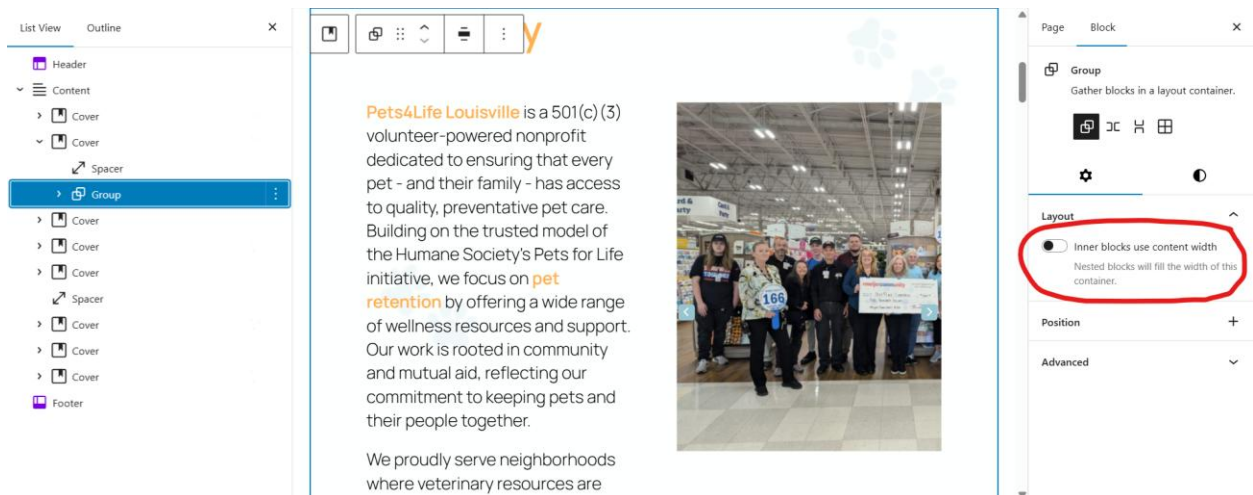
test

123

You will need to add any text that you have into a group using the highlighted squares. Simply highlight over everything that you want in this group. We chose to group together meaningful parts, such as Our Story together, Our Mission together, etc.

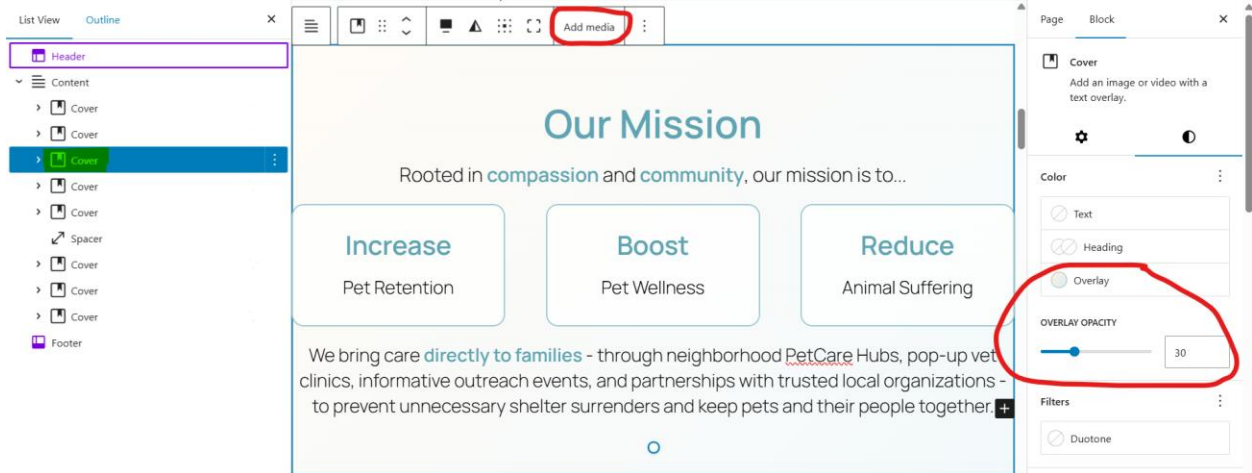


From there, you can see on the left that the information is in a group. You will want to click the button to the right of the arrows and within that, choose wide width.

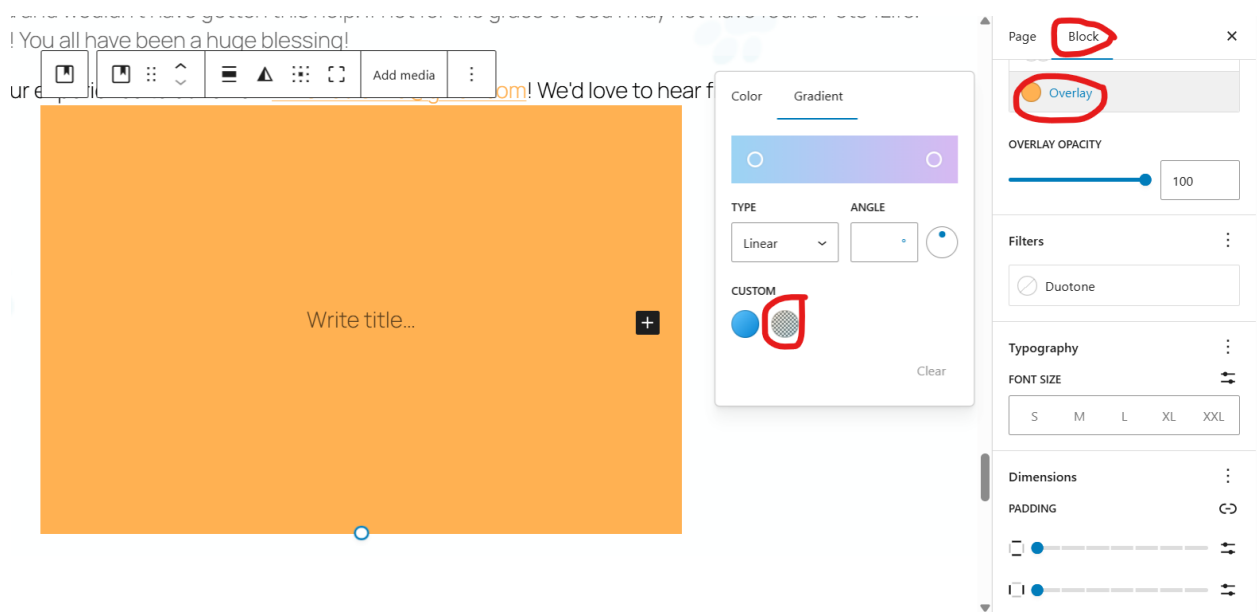


From there, when you click on your group in the Document Overview, on the right within Block, you should see the option for 'Inner blocks use content width.' Make sure this is **inactive**.

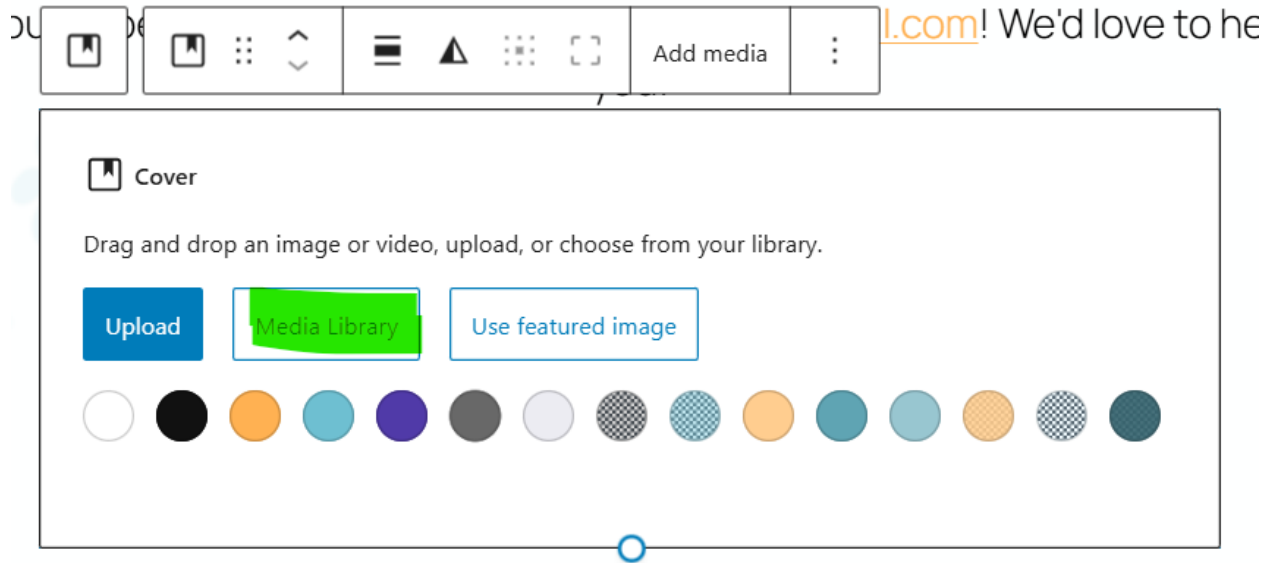
Backgrounds



For anything with a background, which we have on essentially all portions for the gradient background or paw print background, you simply need to create a cover. For the gradient background, the gradient is saved within WordPress, but you will need to set it to 30% opacity.



As seen below, the gradient will not automatically be an option, so you will need to click the Overlay button again and then go to Gradient from there to find the designed one.



The paw print background is already created to be translucent with many different designs to choose from, already loaded into WordPress, to add unique designs throughout. You can choose Media Library to add the image.

Appendix B: Solution Technical Support

We have linked below where you can find support for all of the plugins used in case there are issues with plans or implementations.

Amelia

<https://wpamelia.com/contact/>

With the Lifetime plan recommended, Amelia offers a lifetime of support. Using the link above, you can find a contact form, a chatbot, a community board, documentation, a Facebook group, and their blog. We have contacted their team before to learn more about their features and refund policy and received excellent service each time. There is also a [YouTube channel](#) where you can find videos explaining each of the unique features they have like notifications, integration with Google Calendar, and payment integration.

Tidio/Lyro AI Support

<https://help.tidio.com/hc/en-us/articles/5423451000604-Contact-Tidio-Support>

The link above tells of the various support options that Tidio includes, which include their AI agent, email support (support@tidio.net), a help center with a knowledge base, [YouTube channel](#) where they show how to use and troubleshoot Tidio, and a live chat but it is not available for the plan we recommend.

PlanHero Support

<https://planhero.com/contact/>

What's unique about PlanHero is you can [schedule a free, 15-minute demo](#), where PlanHero staff trains you with how to use the platform. Although you are already familiar with the platform, it would be great to learn how to track volunteer hours, as that was an objective you requested and PlanHero already has built-in features to accomplish that. Outside of that, there is a FAQs page, a phone number, and email address (support@planhero.freshdesk.com) that you can contact for further help. If those aren't preferred, you can create a support ticket in the link above where you provide your name, your email, your inquiry, and any further comments that you need to make. This will then be sent to the PlanHero support staff who will do their best to respond in an efficient manner. They also have a [YouTube channel](#) where they walk you through various features, like multiple date sign-ups, downloading reports, and auto-populating contact information.

Airtable

<https://support.airtable.com/>

Airtable has a general help center with documentation on the basics of Airtable, billing information, how to build your base, automation, managing your account, and troubleshooting. On top of this, there is an AI help bot. If the bot cannot answer your question, you will be sent to the support team and help continues over email. While Airtable itself has a YouTube channel, we would recommend browsing through other creators' videos, such as [this one](#) by Julian Post for a full course for beginners that also teaches automations.

Zapier

<https://help.zapier.com/hc/en-us>

Similar to Airtable, Zapier has a help center with articles on the basics of Zapier, account management, zaps (automated workflows), tools, AI, custom logic and integrations, and many more. Zapier itself has a YouTube channel, but we would recommend other creators' videos, such as [this one](#) by Kevin Stratvery that sends an email once a Google Form is submitted. While our design does not use Google Forms, it teaches the basics of Zapier very well, even using Copilot alongside development.

GiveWP

<https://givewp.com/support/>

Using the link above, scrolling down to “How can we help?” will take users to online documentation that aims to answer common questions, such as GiveWP 101, adding custom functions to your website, creating custom form fields, and more. We did recommend the free plan, but a paid plan would offer priority help. However, as GiveWP is mainly a visual interface, it is extremely simple to use. To connect GiveWP with Stripe, [this document](#) provides clear step-by-step instructions along with pictures to guide users.

Stripe

<https://support.stripe.com/>

Stripe also has popular articles that answer commonly asked questions, such as sign in issues, payout information, adding bank accounts, and many more. If those cannot address your issue, with a Stripe account, you can get live chat support or email support at [this link](#). Furthermore, while Stripe has a YouTube channel, we would recommend other videos, such as [this one](#) from Kevin Stratvert.

Sender.net

<https://help.sender.net/>

Sender.net similarly has a help center with a well-documented knowledge base, FAQ, and if those don't address what you need, there is a [Contact Form](#) you can reach out to for help. We did choose Sender.net over other plugins because of the simple dashboard, so the process of setting up should look extremely simple.