



Setting up the Owner Portal/Mobile App to allow pet owners to request or schedule grooming appointments

Summary Version

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Overview: What is the difference between schedule and request?

Within the PetExec Owner Portal and the Mobile app you can either allow your pet owners to *schedule* grooming appointments or *request* grooming appointments.

When pet owners are allowed to "Schedule Grooming" the system will show available appointment times based on groomers' hours in the time clock, the hours of operation for the business, and other appointments already scheduled. When pet owners schedule through the owner portal or mobile app, appointments will be added directly to the grooming calendar.

When pet owners are allowed to "Request Grooming" they are simply requesting an appointment time based on the hours of operation for the business. All times based on hours of operation are shown, regardless of any availability, as a result these appointments must be confirmed by an employee/administrator in order to be added to the calendar.

Steps to set up for SCHEDULING:

1. Set up your application preferences:

Menu→Company Preferences→Application Preferences→ (Use the filter to find these preferences by name)

Enable Grooming, select schedule grooming in the drop down.

When "schedule grooming" is selected these appointments will be added directly to the grooming calendar.

Grooming Default Duration. The duration set here will help to generate the number of appointment slots per day based on the hours of operation. For example, if duration is set to 2 hours, and the business is open from 8 am – 5 pm there will be 4 available appointment slots each day, for each employee marked as a groomer. Appointment times will also vary based on the groomers work schedules entered in the time clock module. See set up examples for additional details.

2. Add your business hours of operation for grooming. If there are no hours of operation the system will use the opening and closing times in Maintain Company Info.

Menu→Company Preferences→Maintain Hours of Operation

3. Employee set up and scheduling:

Menu→Employees→Modify Employee

- A. Set a highlight color. This color is visible on the grooming calendar.
- B. Checking the "Groomer" checkbox will allow you to assign grooming appointments to this employee. Enter the percentage for commissions; this percentage will be used on the groomer commission report.

Menu→Time Clock→Add Employee Schedule

- C. Add employee schedule via Time Clock.

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Future availability option when set to “schedule grooming”

Based on this setup pet owners can select available appointment times. When a groomer is selected, options for future availability will also be shown. The dates displayed are the next 10 calendar dates from the date selected when that groomer has available appointment times. If a future date is either already booked, or the groomer does not have an employee schedule entered, the dates will not be shown. If a pet owner clicks on a future date, the appointment date will update to that date, and available times will be shown in the appointment time field

Steps to set up for REQUESTING:

1. Set up your application preferences:

Menu→Company Preferences→Application Preferences→ (Use the filter to find these preferences by name)

Enable Grooming, select request grooming in the drop down.

When this preference is set to “Request Grooming” the system will allow pet owners to request appointments based the hours of operation for the business. When “Request Grooming” is selected these appointments will appear in the bell icon with other notifications.

Show All Grooming Types on Calendar. This will allow you to see requests on the grooming calendar.

2. Add your business hours of operation for grooming. . If there are no hours of operation the system will use the opening and closing times in Maintain Company Info.

Menu→Company Preferences→Maintain Hours of Operation

Hours in the appointment time drop down can be customized in application preferences in order to limit the options.

Menu→Company Preferences→Application Preferences→Category = Grooming

Grooming Default Start Time

Grooming Default End Time

3. Employee Set Up - All employees who are marked “grooming” will show in the groomer drop down for pet owners to select. If no employees are selected, “No Preference” will be the only option.

When appointments are requested by pet owners via the owner portal/mobile app, you will see those requests in the Bell Icon on your dashboard.

Manage request will bring you to the Add Grooming page: You can modify any appointment details here and click “make appointment”. The appointment is now on the grooming calendar and schedule.

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Manage request will bring you to the Add Grooming page: You can modify any appointment details here and click "make appointment". The appointment is now on the grooming calendar and schedule.

Additional Set-Up regardless of schedule/request option:

Products/Services; show to owner:

Menu→Products/Services→Maintain Products or Services→Service type = Grooming.

You will need to identify which products/services you want to make available to your pet owners for scheduling. Check "show to owner" to make the services visible in the owner portal/mobile app. Product/service descriptions will be displayed in the owner portal/mobile app.

Customized Messaging for owner portal/mobile app.

Menu→Company Preferences→Maintain Company Info

Owner Portal Message, Owner Grooming Instructions, Mobile App Message.

Owner Communications:

There are different email options available based on the preference to allow pet owners to schedule vs. request. The following options are available in:

Menu→Company Preferences→Application Preferences→Email/App Message customer

Menu→Company Preferences→Communication Templates

<p>App/Owner Portal</p>	<p>Enable Grooming Enables/Disables Grooming option that allows owners to schedule or request their own grooming appointments. If "schedule grooming" is selected available appointment times will be created based on the "Grooming Default Duration", the hours of operation and the groomer's schedules in the time clock module. If "request grooming" is selected pet owners can request any appointment times, they are simply requests and not added to the calendar.</p>	<input checked="" type="checkbox"/>	<p>Schedule Grooming</p>	<p>If option is set to allow pet owners to "Schedule Grooming"</p>
<p>Email/App Message - Customers</p>	<p>Enable Grooming Confirmation Email When selected, automatically sends out the "Grooming Confirmation" email/app message when a grooming is scheduled. Emails/app messages are always automatically sent when a pet owner schedules a grooming from the App/Owner Portal (when selected or unselected), and can be sent manually from the grooming page.</p>	<input checked="" type="checkbox"/>	<p>Email</p>	
<p>Email/App Message - Customers</p>	<p>Enable Grooming Reminder When selected, automatically sends out the "Grooming Reminder" email prior to a scheduled grooming. The email will be sent prior to the appointment date based on the number of days entered. If selected and the value is left blank, the email will be sent the day before the appointment date. *</p>	<input checked="" type="checkbox"/>	<p>Email</p>	<p>When Enable Grooming Reminder is selected pet owners will receive a reminder prior to the appointment.</p>

Grooming			
Grooming Confirmation	Edit		N/A
Grooming Request	Edit		N/A
Grooming Request Confirmation	Edit		N/A
Grooming Reminder	Edit		Edit

These are the applicable email templates for the above emails.

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App/Owner Portal	Enable Grooming Enables/Disables Grooming option that allows owners to schedule or request their own grooming appointments. If "schedule grooming" is selected available appointment times will be created based on the "Grooming Default Duration", the hours of operation and the groomer's schedules in the time clock module. If "request grooming" is selected pet owners can request any appointment times, they are simply requests and not added to the calendar.	<input checked="" type="checkbox"/>	Request Grooming
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If option is set to allow pet owners to "Request Grooming"

Email/App Message - Customers	Email Grooming Request Confirmation When selected, automatically sends out the "Grooming Request Confirmation" email when the request is confirmed and the appointment is created. (Owner Portal)	<input checked="" type="checkbox"/>	
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Pet owners will automatically receive the "Grooming Request" email when they submit a request. There is no way to enable/disable this email.

Email/App Message - Customers	Enable Grooming Reminder When selected, automatically sends out the "Grooming Reminder" email prior to a scheduled grooming. The email will be sent prior to the appointment date based on the number of days entered. If selected and the value is left blank, the email will be sent the day before the appointment date. *	<input checked="" type="checkbox"/>	<input type="text"/> Email
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When Email Grooming Request Confirmation is checked pet owners will receive a confirmation email when their request is scheduled.

When Enable Grooming Reminder is selected pet owners will receive a reminder prior to the appointment.

Grooming		
Grooming Confirmation	<input type="button" value="Edit"/>	N/A
Grooming Request	<input type="button" value="Edit"/>	N/A
Grooming Request Confirmation	<input type="button" value="Edit"/>	N/A
Grooming Reminder	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

These are the applicable emails for the above emails.

If the scheduled appointment is modified on the employee side of the system, employees can click to resend a confirmation email. Emails are only sent automatically by PetExec when they are first scheduled. If an appointment is updated, you will need to click to resend the confirmation email. The Resend Confirmation email button is only displayed when the "Enable Grooming Confirmation Email preference is enabled.

Additional Notes:

Regardless of whether you allow scheduling or requesting these application preferences will allow you to further customize the owner portal/app for your pet parents.

App/Owner Portal	Disable Grooming Drop-off / Pick-up Times When selected, will not show the drop-off and pick-up times when scheduling grooming. (Owner Portal).	<input type="checkbox"/>	
App/Owner Portal	Disable Grooming Prices When selected will not show the grooming service prices on owner portal / Mobile App.	<input type="checkbox"/>	

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App/Owner Portal	Future Dates Only When selected, will not allow the owner to schedule boarding, daycare, grooming or scheduled services until the selected duration has passed.	<input type="checkbox"/>	<input type="text" value="1"/> <input type="text" value="Day"/>
Calendar	Grooming Default Start Time When selected, the value sets the start time for the Grooming Calendar and the drop-down in grooming appointments. If unchecked, the Opening Time set in Company Preferences -> Maintain Company Info is used.	<input type="checkbox"/>	<input type="text" value="09:30 AM"/>
Calendar	Grooming Default End Time When selected, the value sets the end time for the Grooming Calendar and the drop-down in grooming appointments. If unchecked, the Close Time set in Company Preferences -> Maintain Company Info is used.	<input type="checkbox"/>	<input type="text" value="04:30 PM"/>
Calendar	Grooming Time Increment When selected, sets the time increment for the drop-downs in grooming appointments. When unselected, defaults to 15 minutes.	<input checked="" type="checkbox"/>	<input type="text" value="30 Minutes"/>

Regardless of request or schedule, pet owners cannot modify or delete grooming appointments or requests from the owner portal/mobile app.

The application preference Enable Grooming, schedule or request, will also be followed when allowing pet owners to add a grooming to a boarding appointment (Enable Grooming Request for Boarding).

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