



PetExec 3.2 Features List

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Application Preferences - Click for Additional Details on [Application Preferences](#).

- Added error checking related to application preferences. Will now see an error message if a preference does not have an associated email address or selection made in additional fields.
- Added logging to application preferences, will be able to see employee, date, time an application preference was modified.
- Show Dashboard buttons. Show the rounded buttons at the top of each dashboard module.
- Menu Option by module. Added option to show menu options by module on each of the dashboards. This will be a PetExec menu with the most applicable options for that particular module (based on employee type).
- Removing "Attach Daily Note to Daycare Pet(s)", no longer applicable.
- Ability to select a daycare type when setting the preference to automatically schedule Daycare with boarding.
- Ability to exclude signed out pets from the Boarding Daily-to-do report.
- Future Dates Only, – Requires your owner to schedule daycare, grooming, boarding and scheduled services xx days/hours in advance, based on the associated fields. (hours, day and entry for a number value).
- Enable owners to purchase "other" packages via the PetExec Owner Portal.
- Require owners make a selection in the "How Did You Find Us" drop down when registering themselves in PetExec.
- Allow owners to "request" a group training class via the PetExec Owner Portal.
- Hide uploaded files from owners in the Owner Portal.
- Preference to require Contract #1, Contract #2, and/or Contract #3 be signed before owners/clients can perform any function in the PetExec Owner Portal. (also added a third contract option)
- Ability to show paw points to customers via the PetExec Owner portal.
- Ability to only limit Paw Point accumulation to identified customers.
- Ability to disable the "How Heard" defaults, and only use custom how heard list.
- Application Preference page added for the enhanced Group Training Module. Includes calendar preferences, ability to require a trainer be assigned to group class, and enable owner requesting group training classes via the owner portal.

Boarding

- Added the customer estimated departure time to the Boarding Coming and going report
- Option via Application Preference to not show pets that have an order associated with the boarding (meaning they have been signed out) on the Boarding Daily To Do Report.
- Option to select a "daycare" product when automatically scheduling daycare with boarding.
- Additional logging added to Boarding History. For example, boarding status changes, changes made from the dashboard that result in a boarding being rebuilt.
- Boarding template change to remove the text "**The following Boarding Add-Ons have been requested with this Boarding:**" Allowing you to customize how you refer to items added through the boarding add on feature. **If you use boarding add ons, we recommend you preview your Boarding Template email to see if changes need to be made.**

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Group Training

- Class dates are automatically scheduled based on the start and end date and days of the week assigned when a group training class is initially built.
- Option to assign an employee to a group training class, can also make this a required field based on application preferences.
- Click to schedule multiple pets from the same owner to the same class.
- Payment tracking via orders as pets are assigned to a class.
- Pet notes visible on the Class Information page. (Must be behavioral or Group Training note style).
- Ability to send an email to all owners with pets assigned to a class.
- Ability for owners to request a group training class via the owner portal.
- Associated "Group Training Request" email that can be sent to owners when they request a group training class via the owner portal.
- Training History added to Pet Menu
- Group Training Request added to group training menu to manage requests made via the Owner Portal.
- Application Preferences added for more control over group training module and group training calendar.

Logging

- The following actions are logged and displayed under **Grooming/Scheduled Services appointment history**.
 - Changes to appointments such as date/times, notes, services selected, sign in, sign out etc.
 - Logging can be accessed from the bottom of the modify appointment page, click on "Log History – Click for Detail" button.
- The following actions are logged under **daycare, boarding and other packages**:
 - Before and after values for Changes to package end/expiration dates.
 - Changes name to package quantities.
 - When packages are used for services/pets.
 - Deleted packages.
 - Order ID associated with package purchase (for packages purchased post 3.2 release).
 - When it was added to the cart and the employee who added it.
 - Changes made via modify order or receipt page.
- The following actions are logged and displayed under the **Email Blast menu**:
 - Date/Time and employee who sent the email blast. Number of emails that received the email blast. Click on number of emails to see the list of email addresses who received the email blast.
- The following actions are logged and displayed in the **Modify Owner** screen:
 - New quick link to "Email History". Will display any emails the owner received from the automated PetExec email reminders. Click to view the email that was sent. Click resend email to owner.

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- Click to see a history of changes made to the owner record (ie: address, phone number, signed contract updates etc).
- The following actions are logged and displayed in the **Modify Pet** screen:
 - Click to see a history of changes made to the pet record (ie: Pet Information, boarding preferences, medical preferences, vaccinations.
 - Vaccinations will be logged with every entry, regardless of whether they are modified.
- The following actions will be logged and displayed in the **Modify Employee** screen:
 - Click to see a history of changes made to the employee record (ie: username/password, address, phone number, login time restrictions etc).
- The following actions are logged and displayed in the **Modify Order** screen:
 - Check #
 - Paw points
 - Additional daycare/boarding charges made due to preferences and checked out time
 - Payment history changes
 - Package # being purchased

Owner and Pet

- Pet allergies now displayed in pet menu
- Added Group Training history to pet menu.
- Ability to modify existing pet notes.
- Map It! Feature added to owner menu
- Color coding added to owner and pet record. Can change highlight color and text color.

Owner Portal – These are all Application Preference changes related to the Owner Portal

- Future Dates Only, – Requires your owner to schedule daycare, grooming, boarding and scheduled services xx days/hours in advance, based on the associated fields. (hours, day and entry for a number value).
- Enable owners to purchase “other” packages via the PetExec Owner Portal.
- Require owners make a selection in the “How Did You Find Us” drop down when registering themselves in PetExec.
- Allow owners to “request” a group training class via the PetExec Owner Portal.
- Hide uploaded files from owners in the Owner Portal.
- Preference to require Contract #1, Contract #2, and/or Contract #3 be signed before owners/clients can perform any function in the PetExec Owner Portal. (also added a third contract option)
- Ability to show paw points to customers via the PetExec Owner portal.

PetExec Emails

- Create a custom subject line for automated email reminders in “Modify Email Content”. Also added functionality to include Dynamic Replacement Values in subject lines
- Boarding template change to remove the text “**The following Boarding Add-Ons have been requested with this Boarding:**” Allowing you to customize how you refer to items added through

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the boarding add on feature. **If you use boarding add ons, we recommend you preview you Boarding Template email to see if changes need to be made.**

- Email blast all owners "with an item in the cart".
- Added "Vaccination List" dynamic replacement value to Grooming Reminder Email and Grooming Request Email so you can include vaccination information in those automated emails.
- Created unique dynamic replacement values for Owner Name (includes both first and last), Owner First Name, and Owner Last Name to allow for unique communication with your owners.

Play Area Enhancements

- Play areas now available on the daycare dashboard. Can select and assign play areas from drop down.
- Play areas now available when scheduling and signing a pet into daycare.
- From the play areas dashboard, drag and drop pets into play areas to assign or reassign.
- Flags will indicate if a pet is in a play area that is not indicated on their pet record.
- Report of which pets are assigned to which play areas. From the PetExec menu Play Areas→Maintain Play Areas. Click on pet count to see list pets assigned to each play area.

Packages

- Ability to add "Other Packages" for any product services (excluding daycare and boarding). Click here for details on [Adding "Other" Package Products & Services.](#)
- Ability to select "number of days" or "time period" to define package expiration for daycare, boarding and "other" packages.
- All packages marked as "deleted" status, but not deleted from PetExec. Will have the option to view all deleted packages. Will allow for additional tracking when packages are deleted.
- Start date of package is read only, cannot edit start date.
- Ability to add a "package note" when a unique package is created for an owner.
- Additional Logging for packages.

Reports

- Scheduled Revenue Report – Search by date range to see forecasted revenue by daycare, boarding, grooming and scheduled service. Data is based on scheduled appointments for those modules. Reports→Accounting reports→Scheduled Revenue
- Scheduled Pet/Appointment Report – Search by date range to see the number of pets scheduled for daycare, boarding, grooming and scheduled services. Data is based on the scheduled appointments for those modules. Reports→Misc. Reports→Number of Pets Forecast.
- Timecard payroll report added comments to the spreadsheet only. Will display the "in comment" and "out comment" along with sign in/out data.

Scheduled Services

- Ability to select and sign in multiple services using toggle buttons or toggle all and sign in selected pets from the scheduled services dashboard.

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Usability Changes

- When adding a new owner, the city will default to blank, rather than the city on file in Maintain Company Info.
- Can now set preference to not display the default "how heard" list, and just display the customer added "how heard" options on the add/modify owner screen.
- Discount by line item functionality during checkout and modify orders.

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