PetExec 3.4 Features List

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Owner Portal

1. New look and feel of buttons on dashboard: More consistent with the Owner Portal App.
2. Requested appointments as well as confirmed appointments will show on the owner calendar.
3. Click on events in the PetExec calendar events to add to your personal calendar from your iphone or MAC.
4. Renamed "scheduled services" to "other services" on the main dashboard.
5. Added the ability for owners to select any/all of their pets when requesting scheduled services.
6. Added the ability for owners to request reoccurring scheduled service appointments.
7. Changes made to how other services can be added to a boarding. Owners will now schedule/request a boarding and then have the option to add boarding add ons, scheduled services and grooming. When scheduled services and grooming are added to a boarding, they will be included in the associated services page of the boarding.
8. Owners can either "schedule" daycare services or "request" daycare services.
9. Option to disable daycare locations within the Owner portal.
10. Option to allow owners to select breakfast, lunch and dinner with their daycare appointment.
11. Option to disable the calendar from the owner portal. If owners have access to the calendar they will see both requested and confirmed appointments on the calendar.

Notifications:

1. Real time notification via the bell icon on the dashboard when services are requested via the owner portal. Ability to see all requested services regardless of module, as opposed to going into each menu and requested appointments.

Application Preference Changes

1. Search application preferences by category, and then filter to quickly find application preferences within each category.
   - Renamed "Customer Settings" to "Owner Portal"
   - Renamed "Email Reminders" to "Email Customers" now contain all preferences related to emails being generated from PetExec.
   - "Email Customers" now contains all preferences related to emails being generated from PetExec.

- Added "Calendar" category. All preferences related to calendars are all in one place. Also added new calendar preferences see below for details.
2. Calendar application preferences added to customize calendars for each module (daycare, boarding, grooming, scheduled services etc).
   - Set start and end times for each module for calendars and scheduling drop downs. Calendars no longer show the "non working" hours. (These are separate from Hours of Operation.)
   - Choose unique time increments for the drop downs when scheduling appointments. For example, daycare can have 30 minute increments, grooming can have 10 minute increments, boarding can have 5 minute increments. Each can have different appointment start times and end times as well.
   - Choose the start date for timecard schedules and calendars.
3. Dashboard Application Preferences:
   Notifications were added in the Bell Icon on the dashboard. This preference allows you to choose how you want the details of the notifications displayed. Also have the ability to disable the Daily Notes.
   - Enable Requested Appointment Notifications
     When selected, will display the details of the owner portal requests in the Bell icon on the dashboard.
   - Enable Daily Notes
     When selected, will display the Daily Notes in the Bell icon on the dashboard.
4. Daycare Application Preferences:
   The option to include Breakfast, Lunch and Dinner feeding options, and notes and medications and notes to daycare were added. These preferences give you the option to disable those times.
   - Disable Daycare Food Fields
     When selected, the feeding time drop downs and feeding notes will be hidden when scheduling or signing in pets for daycare.
   - Disable Daycare Medical Fields
     When selected, the medical time check boxes and medication details will be hidden when scheduling or signing in pets for daycare.
5. Email- Customers: Added new email reminders: Application preference descriptions were updated. Added (owner portal) for those preferences that are related to Owner Portal. Added * for those email preferences that are triggered by a daily job, meaning PetExec automatically generates these emails if they are enabled. Emails are sent out each night during PetExec's nightly system processing. As opposed to emails that are sent out based on an action or activity that happens, like a confirmation email that goes out immediately following an appointment being scheduled.
   - Enable Boarding Package Reminder

When selected, automatically sends out an email to the owner stating the expiration date and number of package instances left the specified number of days (entered in the field) before it expires. If left blank, the system defaults to two weeks. *

- Enable Other Package Reminder
  When selected, automatically sends out an email to the owner stating the expiration date and number of package instances left the specified number of days (entered in the field) before it expires. If left blank, the system defaults to two weeks. *
- Enable Other Package Reminder - # Days Left
  When selected, automatically sends out an email to the owner stating the expiration date and number of package instances left when the specified package hits on or below the selected number. If checked and left blank, a default of 2 days left will be used. Emails are only sent out once per package. *
- Email Daycare Request Confirmation
  When selected automatically sends out the "Daycare Confirmation" email when the request is confirmed and the appointment is created. (Owner Portal)

6. Email-Others: Added new email notification to business
   - Email Company Copy of Daycare Request
     When selected, a copy of the "Daycare Request" email sent to owners will also be sent to the email address associated with this preference. (Owner Portal)

7. Grooming Application Preferences:
   - Grooming Default Duration
     When selected, sets the default duration and duration units when scheduling grooming appointments. When unselected, the default is 2 hours.

8. Miscellaneous Application Preferences:
   - Enable Occupancy Restrictions
     When selected, the in-house pet occupancy limits will be enforced based on the details entered in Company Preferences->Maintain Occupancy. Employees and Owners will receive errors when trying to schedule appointments that would exceed any occupancy restriction.
   - Exclude Grooming Occupancy From Total
     When selected, the grooming occupancy limit will not count as part of the Default Occupancy and/or the Daily Total Occupancy limits.
   - Show Override Buttons
     When selected, the override buttons will be visible wherever override is allowed. Override buttons will allow employees that have the "Allow

Override" option checked in Modify Employee to override some system preferences/settings.

- Exclude Scheduled Services Occupancy From Total
When selected, the scheduled service occupancy limit will not count as part of the Default Occupancy and/or the Daily Total Occupancy limits.

9. Owner Portal Application Preferences: This section was changed from "Customer Settings" to "Owner Portal".

- Enable Daycare Schedule For Owners
Enables / Disables Daycare option that allows owners to schedule their own daycares. Includes the option for owners to "request" daycare or to "schedule" daycares. Requested daycares must be approved by an administrator/employee. Scheduled daycares will be added directly to the daycare calendar/schedule with no approval needed. If occupancy limits are added, the scheduled daycare from the owner portal will be checked against the occupancy limits before being added.

- Disable Daycare Locations
When selected, will not show the drop-off and pick-up location when scheduling daycare. (Owner Portal)

- Disable Daycare Breakfast
When selected, will not show the breakfast option when scheduling daycare. (Owner Portal)

- Disable Daycare Lunch
When selected, will not show the lunch option when scheduling daycare. (Owner Portal)

- Disable Daycare Dinner
When selected, will not show the dinner option when scheduling daycare. (Owner Portal)

- Enable Grooming Request for Boarding
When selected, Enables / Disables Grooming option that allows owners to request a Grooming associated with a Boarding. This option requires the "Enable Grooming Request" option to also be enabled. Note: If you currently use boarding add ons, review which products/services you have selected as boarding add ons to reduce redundancy.

- Enable Scheduled Service Request for Boarding
When selected, Enables / Disables Scheduled Service option that allows owners to request a Grooming associated with a Boarding. This option requires the "Enable Scheduled Service Request" option to also be enabled. Note: If you currently use boarding add ons, review which products/services you have selected as boarding add ons to reduce redundancy.

10. Scheduled Services Application Preferences:

- Scheduled Service Default Duration
When selected, sets the default duration and duration units when scheduling scheduled service appointments. When unselected, the default is 2 hours.

Occupancy Management by Module:

1. Ability to set PET occupancy limits for the business as a whole, as well as by module (daycare, boarding, grooming, and scheduled services) and by day. Need to [add the menu option for employee type](). Then in menu under Company Preferences→Company Settings→Maintain Occupancy & Occupancy Calendar.

Override:

1. Ability to override variety of error messages throughout the system based on employee. For example: override and accept a boarding when boarding is full, override and add a daycare when daycare occupancy is full etc.

General Changes:

1. Ability to select Pet Types when adding pets. If a business only works with dogs, can select that as default pet type so don't have to change in the drop down each time they add a pet. Can remove other pet types from the drop down list.
2. Boarding product/service colors will be displayed on the boarding calendar unless there are multiple products/services selected with a boarding. If more than one product/services is selected, then the boarding color will default to blue.
3. Added the option to sign all boarding dogs who are also signed into daycare back into boarding.

Daycare: Click for details on [PetExec 3.4 Daycare Changes]()

1. You can now modify a daycare appointment to change the sign in type (ie half day to full day etc), the feeding and medication options, add notes etc.
2. Added logging to daycare so you can see which employee (based on their login) took actions within a daycare appointment.
3. Daycare pets that are SIGNED IN to daycare, versus SCHEDULED and then signed in, will be displayed on the scheduled daycare calendar.
4. Daycare pets that are SIGNED IN to daycare, versus SCHEDULED and then signed in, can be included on the Scheduled Daycare Report. There is an option to include signed in pets on the report.
5. Ability to track breakfast, lunch, dinner for daycare pets. You can disable the daycare food fields via Application Preferences→Daycare.

6. Ability to track am, lunch and PM medications for daycare pets. You can disable the daycare food fields via Application Preferences→Daycare.
7. Added all feeding and medication times to the daycare daily to do report.
8. Ability to sign multiple boarding dogs that are signed into daycare back into boarding via toggle all option.

New Emails:

1. New Emails added to enhance existing features and support some of the new features. The templates can be found under Company Preferences→Communication Settings→Modify Email Content.

   - Boarding Package Reminder
   - Daycare Confirmation
     Daycare Request
   - Grooming Confirmation
   - Group Training Confirmation
   - Other Package Reminder
   - Scheduled Service Confirmation

Email Templates ⓘ

Existing Email Templates

Email Name	Is Blastable	Edit
4th of July	Yes	Edit
Birthday	No	Edit
Boarding - Deposit Required	No	Edit
Boarding Invoice Estimate	No	Edit
Boarding Package Reminder	No	Edit
Boarding Reminder (Day Before)	No	Edit
Boarding Request	No	Edit
Boarding Template	No	Edit
Boarding Wait List	No	Edit
Combined Invoice	No	Edit
Daycare Confirmation	No	Edit
Daycare Package Reminder	No	Edit
Daycare Request	No	Edit
Grooming Confirmation	No	Edit
Grooming Reminder	No	Edit
Grooming Request	No	Edit
Group Training Confirmation	No	Edit
Group Training Request	No	Edit
Halloween	Yes	Edit
Happy Holidays	Yes	Edit
New Owner	No	Edit
Order Receipt	No	Edit
Other Package Reminder	No	Edit
Scheduled Service Confirmation	No	Edit
Scheduled Service Request	No	Edit
Scheduled Services Reminder	No	Edit
Temperament Test Reminder	No	Edit
Thanksgiving	Yes	Edit
Thank You / Follow Up	No	Edit
Training Class Reminder	No	Edit
Upcoming Vaccinations	No	Edit
Valentine's Day	Yes	Edit

2. To enable the emails go to Company Preferences→Application Preferences→Email- Customers.

Enable Boarding Package Reminder
When selected, automatically sends out an email to the owner stating the expiration

date and number of package instances left the specified number of days (entered in the field) before it expires. If left blank, the system defaults to two weeks. *

Email Daycare Request Confirmation
When selected, automatically sends out the "Daycare Confirmation" email when the request is confirmed and the appointment is created. (Owner Portal).

Email Grooming Request Confirmation
When selected, automatically sends out the "Grooming Confirmation" email when the request is confirmed and the appointment is created. (Owner Portal)

Enable Other Package Reminder
When selected, automatically sends out an email to the owner stating the expiration date and number of package instances left the specified number of days (entered in the field) before it expires. If left blank, the system defaults to two weeks. *

Enable Other Package Reminder - # Days Left
When selected, automatically sends out an email to the owner stating the expiration date and number of package instances left when the specified package hits on or below the selected number. If checked and left blank, a default of 2 days left will be used. Emails are only sent out once per package. *

Email Scheduled Service Request Confirmation
When selected, automatically sends out the "Scheduled Services Confirmation" email when the request is confirmed and the appointment is created. (Owner Portal)

Reports: Two new reports were added in PetExec 3.4. These reports need to be added to your employee type to be visible in your PetExec menu. See this link to <u>add new features to your employee type.</u>

Override Report. All overrides done for a date range/employee/type of override.

Menu→ Reports→Employee Reports→Override Report

Override Report ⓘ

Search Criteria

Start Date (mm/dd/yy)

| 05/01/18 |

End Date (mm/dd/yy)

| 05/30/18 |

Employee

| All Employees ▾ |

Type

| All Types ▾ |

[Search]   [Download Spreadsheet]

Date	Employee	Service Type	Log
05/30/18 07:22 AM	PetExec Administration - Otilia	Grooming	Overrode grooming appointment by id James A. The following errors were overidden: There is only space for -1 pets without going over occupancy limits for Grooming on Wednesday, 05/30/18. There are already the maximum pets that can be scheduled for Grooming on Wednesday, 05/30/18.
05/30/18 07:19 AM	PetExec Administration - Otilia	Boarding	x - Boarding 1 dog: multiplier = 1, numpets = 1, quantity = 1 Overrode boarding ID 3636813 by James A during inital scheduling of the boarding. The following errors were overidden: ""
05/30/18 07:13 AM	PetExec Administration - Otilia	Grooming	Overrode grooming appointment by id James A. The following errors were overidden: Occupancy limit reached on Wednesday, 05/30/18. There is no space left without going over occupancy limits for Grooming on Wednesday, 05/30/18.
05/29/18 03:47 PM	PetExec Administration - Otilia	Daycare	Overrode daycare sign-in by id James A. The following errors were overidden: Occupancy limit reached on Tuesday, 05/29/18. There is only space for -1 pets without going over occupancy limits for Daycare on Tuesday, 05/29/18. There are already the maximum pets that can be scheduled for Daycare on Tuesday, 05/29/18.

Owner Custom Pricing Report. All owners with custom pricing, the product/service with the custom price, regular price, owner price.

Menu→ Reports→Owner & Pet Reports→Override Report

Owner Custom Pricing Report   ⓘ

A total of 5 services were found. [Download Spreadsheet]

Search: [   ]

Edit	Advisory	Owner	Service	Regular Price	Owner Price	Difference
Edit		≡ Dawn, Andrew	x - Boarding 1 dog	20.00	20.88	-0.88
Edit		≡ Liam, Madie	Small suite - 1 pet boarding (charging by room)	20.00	19.99	0.01
Edit		≡ owner, test	Hourly daycare	6.00	3.00	3.00
Edit		≡ White, Daniel	Blue collar	10.00	9.99	0.01
Edit		≡ White, Daniel	large suite (charging by size and suite)	20.00	19.99	0.01