



PetExec 3.4 Owner Portal Boarding Changes

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Overview of Changes:

In PetExec 3.4 owners can add grooming services, scheduled services AND boarding add ons to a boarding. Services added this way will show as groomings, scheduled services, an add ons in the modify boarding page under associated services page.

Modify Boarding Information (i)

Please select the appropriate "Boarding Requirement" for your pet. Feel free to choose from our Boarding Add-Ons to customize your pet's stay and make them feel right at home! Add any notes so that we are sure to provide the services just like you would at home.

By entering this reservation you are "requesting" a boarding. We will contact you to confirm your pet's boarding stay!

Your boarding is successfully requested and the details of the boarding are shown below. For each selected pet, add dietary and medical information and save the boarding.

Boarding Deposit

Current Boarding Deposit

0

Add Deposit

Appointment Details

Status

Requested

Start Date (mm/dd/yyyy)

06/01/2018

End Date (mm/dd/yyyy)

06/05/2018

Estimated Sign-In Time

08:00 AM

Estimated Pick-up Time

12:00 PM

Emergency Contact

Joy

Emergency Number

888-999-7777

Boarding Requirements

Happy Dog Suite XL - Boarding 2 Dogs

Rooms Required

1

Kennel / Room Description

Large 10 x 10 Kennels

1

Add a Grooming

Add Other Services

2

3

Boarding Add-Ons

Qty	Add-On	Details
<input type="checkbox"/> 1	Boarding Early Drop Off	
<input type="checkbox"/> 1	Medication Administration	
<input type="checkbox"/> 1	Stuffed Kong Treat	

Add-on Notes

Services added here in the owner portal by clicking Add a Grooming; Add Other services, or Boarding Add-Ons...

Associated Services (i)

☰ Jones, Susie

1 **Associated Groomings**

There is no associated Grooming with this boarding.

Type	Request Date	Details
Grooming Request	05/31/2018 03:06 PM	Appt. Date / Time: 06/05/2018 / 08:00 AM Owner: Susie Jones Pet List: Roxy and Reagan Services: Basic Bath Associated with boarding 3636817 via Web Portal

2 **Associated Scheduled Services**

There is no associated Scheduled Service with this boarding.

Type	Request Date	Details
Scheduled Service Request	05/31/2018 03:06 PM	Appt. Date / Time: 06/01/2018 - 06/05/2018 / 09:00 AM Days of Week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday Owner: Susie Jones Pet List: Roxy and Reagan Services: Hugs and Cuddles Associated with boarding 3636817 via Web Portal

Associated Daycares

There is no associated Scheduled Daycare with this Boarding.

3 **Associated Add-Ons**

<input type="button" value="Add to Cart"/>	Not In Cart	Boarding Early Drop Off	1	25.00
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[Owner Add-On Notes](#)

...Will be displayed here in the Modify/Edit Boarding page of the boarding.

They are associated services with the boarding.

Application Preferences:

The following are the steps to set up your system so your owners can schedule this way: Starting in the PetExec menu-->Company Preferences-->Application Preferences-->Customer Settings.

The following application preferences need to be enabled:

Owner Portal	Enable Grooming Request Enables / Disables Grooming option that allows owners to request a Grooming.	<input checked="" type="checkbox"/>
Owner Portal	Enable Scheduled Service Request Enables / Disables Scheduled Service option that allows owners to request a Scheduled Service.	<input checked="" type="checkbox"/>

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.	<input checked="" type="checkbox"/>
Owner Portal	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.	<input checked="" type="checkbox"/>

Products & Services:

There are three key fields to display your products/services to your owners: Show to Owner, Boarding add on, and the service type of the product/service.

To make products/services available under "Add Grooming":

Service type must be "grooming".

Show to Owner option must be selected within maintain products/services.

Here is an example:

Basic Bath is service type = Grooming.

Show to Owner is checked.

		Service Name	Type	SKU	Sort Order	Price	Qty On-Hand	Taxed?	Show to Owner	Boarding Add-On
Edit	Delete	Basic Bath	Grooming		1	7.00	0	No	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The owner basic bath is an available option when "Adding Grooming" on the owner portal.

Available Services

Service	Description	Price	
Basic Bath	Prices will vary depending on breed and condition of coat.	7.00	<input type="checkbox"/>

To make products/services available under "Add Other Services":

Service type must be one of the unique service types you have added for the scheduled service module. PetExec default service types like Additional charges, Clothing, Product, Service, Toys and Treatment will not be available in the scheduled service module for your owners. For more information click on [Scheduled Service Overview](#).

Show to Owner option must be selected within maintain products services.

Here is an example:

Hugs and Cuddles is Service Type = Additional Services which is a unique service type. Show to Owner is checked.

		Service Name	Type	SKU	Sort Order	Price	Qty On-Hand	Taxed?	Show to Owner	Boarding Add-On
Edit	Delete	Hugs and Cuddles	Additional Services		3	10.00	0	No	<input checked="" type="checkbox"/>	<input type="checkbox"/>


The owner has Hugs and Cuddles as an available option when “Adding Other Services” on the owner portal.

Select a Service Type

Additional Services

Available Services

Add	Quantity	Unit Price	Product Name	Product Type
<input type="checkbox"/>	1	5.00	Stuffed Kong Treat	Additional Services
<input type="checkbox"/>	1	5.00	Teeth Brushing	Additional Services
<input type="checkbox"/>	1	7.00	Story Time	Additional Services
<input type="checkbox"/>	1	10.00	Hugs and Cuddles	Additional Services

To make products/services available under “Boarding Add Ons”:
Show to Owner option must be selected within maintain products services.
Boarding Add On option must be selected within maintain products services.
 Both system default service types and unique service types are included in the add on section. Service types that are not available in the add ons section will show a  in the boarding add on field.

Here is an example:
 Boarding Early Drop Off is Service Type = Additional Charges.
 Show to Owner and Boarding Add -On are checked.

		Service Name	Type	SKU	Sort Order	Price	Qty On-Hand	Taxed?	Show to Owner	Boarding Add-On
Edit	Delete	Boarding Early Drop Off	Additional Charges		0	25.00	0	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The owner has Boarding Early Drop Off as an available option under boarding add ons:

Boarding Add-Ons

Qty	Add-On	Details	Price
<input checked="" type="checkbox"/> 1	Boarding Early Drop Off		25.00
<input type="checkbox"/> 1	Medication Administration		5.00
<input type="checkbox"/> 1	Stuffed Kong Treat		5.00

Add-on Notes

Changing services from Add Ons to Add Grooming/Add Other Service:

If you are a Packmates who are currently using the Boarding Add Ons option in the Owner Portal to allow your customers to add groomings and other services and you want to take advantage of this new feature the following adjustments should be made:

Step 1:

Enable these application preferences for either grooming or schedules services or both:

- Enable Grooming Request

- Enable Scheduled Services Request

- Enable Grooming Request for Boarding

- Enable Scheduled Services Request for Boarding

Step 2:

Uncheck the Boarding Add-On selections in the products/service. Leave the show to owner option checked.

Products/Services that are grooming or a unique service type, have show to owner and boarding add on checked will show in both the boarding add on section and the Add Other Services section of the owner portal.

To remove products/services from this Boarding Add On section, simply uncheck Boarding Add-On. If they are grooming or scheduled services, they will still show in the add grooming, add scheduled services pages provided the application preferences mentioned above are selected.

To remove products/services from either the Add Grooming or Add Other services, simply uncheck Show to Owner. They will still show in the Boarding Add on Section.