



PetExec 3.1 - Boarding Add-Ons

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Overview of Boarding Add-Ons:

Boarding Add-Ons are a great way to add products or services to a boarding. You will see all the boarding add-ons on the Boarding Add-Ons page and can click to add the items to the owner's shopping cart at any time.

You also have the option to add Grooming, Scheduled Services, and Daycare to a boarding appointment. Here are the differences between Boarding Add-Ons, Scheduled Services, and Grooming Appointments:

When adding services as *grooming* or *scheduled services*, you will have the following options:

- Scheduling either grooming or scheduled services for a date and or time.
- Assigning those services to an employee or groomer.
- Signing them in, marking them complete and signing them out on the respective dashboards.
- Automatically calculating grooming commissions by assigned groomer for grooming services.

When adding services as *boarding add-ons* you have the following options:

- Identifying any of your products and services and adding them to a boarding appointment without a scheduled date and or time.
- There is no employee/groomer assignment.
- Adding them to the owner's shopping cart at your discretion.
- Reporting of all boarding appointments with add-ons and their status.

You can determine which products and services work best as a boarding add-on, versus scheduled service, grooming or daycare based on your business model or policies. You can schedule any or all of the following with a boarding: grooming, scheduled services, daycare and boarding add-ons.

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Using Boarding Add-Ons:

Boarding Add-Ons can be added from the Associated Services page of the Edit/Modify Boarding page. You can add boarding add-ons at any time; when scheduling, or after signing a pet into an existing boarding reservation.

1) Click Maintain Boarding Add-Ons to add any of your products and services to the boarding as an Add-On.

Associated Services

☰ Jones, Susie

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Associated Groomings

Add a Grooming

There is no associated Grooming with this boarding.

Associated Scheduled Services

Add a Scheduled Service


There is no associated Scheduled Service with this boarding.

Associated Daycares

Schedule a Daycare

There is no associated Scheduled Daycare with this Boarding.

Associated Add-Ons

 Maintain Boarding Add-Ons

There are no Boarding Add-Ons associated with this Boarding.

The steps to using boarding add-ons are as follows and additional details are provided for each step below:

1. Add any products and services as a boarding add-on
2. Add the boarding add-ons to the shopping cart. Adding items to the shopping cart means they will appear on the customer's order when they check-out of the boarding appointment and the customer will be charged for those add-ons.
3. Modify at any time to do the following:
 - add additional add-ons
 - delete add-on
 - add to the cart
 - delete from the cart

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The Boarding Add-On Screen allows you to add the items to the boarding and manage the items already added.

1. Click the button
2. to return to Modify Boarding page.
3. Existing Add-On Items will be displayed on the top of the screen. This section contains any add-ons that have been added to the boarding appointment.
4. You can change the quantity and/or unit price.
5. Delete items you no longer want added to the boarding. Items that have been added to the cart will be removed from the cart when deleted.
6. Available products and services are shown below. You can select any products/ services to add as a boarding add-on. Update the quantity as needed. When items are added they will appear in the Existing Add-On Items section.

Boarding Add-Ons (i)

1 [Return to Modify Boarding](#)

2 **Existing Add-On Items**

Product/Service	Quantity	Unit Price	Date Added	
1 hour Dog Walk	<input type="text" value="1"/>	30.00	10/13/2016 02:32 PM	<input type="button" value="Delete"/>
Addtl Food	<input type="text" value="3"/>	3.00	10/13/2016 02:32 PM	<input type="button" value="Delete"/>
Bath	<input type="text" value="1"/>	25.00	10/13/2016 02:32 PM	<input type="button" value="Delete"/>

Owner Add-On Notes

Available Products / Services

Filter:

Product Name	SKU	Product Type	On-Hand	Qty	Unit Price	Add
1 hour Dog Walk		Dog Walks		<input type="text" value="1"/>	30.00	<input type="button" value="selected"/>
1 mile hike		Dog Walks		<input type="text" value="1"/>	10.00	<input type="button" value="select"/>
30 Min Dog Walk		Dog Walks		<input type="text" value="1"/>	15.00	<input type="button" value="select"/>
Addtl Food		Food		<input type="text" value="3"/>	3.00	<input type="button" value="selected"/>
Basic Bath		Grooming		<input type="text" value="1"/>	25.00	<input type="button" value="select"/>
Basic Obedience		Group Training		<input type="text" value="1"/>	200.00	<input type="button" value="select"/>
Bath		Grooming		<input type="text" value="1"/>	25.00	<input type="button" value="selected"/>

Update quantity to add more than 1 of those items.

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From the Associated Services page of the boarding reservation, go to the bottom to find the "Associated Add-Ons" section. This is how you can manage the add-ons for a particular boarding. Here are the options:

1. View any items that were added as a Boarding Add-On
2. Click to add an existing add-on to the cart. When added to the cart, it will appear at checkout so that the customer is billed for that item.
3. Click to delete an item that was already added to the cart. The date and time the item was added to the cart is displayed.
4. Click "Maintain Boarding Add-Ons" to add additional items to the boarding.

Associated Services (i)

☰ Jones, Susie

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Associated Groomings

Add a Grooming

There is no associated Grooming with this boarding.

Associated Scheduled Services

Add a Scheduled Service

There is no associated Scheduled Service with this boarding.

Associated Daycares

Schedule a Daycare

There is no associated Scheduled Daycare with this Boarding.

Associated Add-Ons

1

2

3

4

Add to Cart	Not In Cart		1 hour Dog Walk	1	30.00
Add to Cart	Not In Cart		Addtl Food	3	3.00
Delete From Cart	Added to Cart	10/13/2016 02:40 PM	Bath	1	25.00

Owner Add-On Notes

Maintain Boarding Add-Ons

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Note: The Boarding History at the bottom of the Modify Boarding Schedule screen displays important details of related to the add-ons.

Boarding History (Last 10 Changes Shown, Most Recent On Top)
Date: 10/13/2016 02:40:20 PM, changed by PetExec Administration - Dori Added the Boarding Add-On "Bath" with a quantity of 1 to the cart.
Date: 10/13/2016 02:32:51 PM, changed by PetExec Administration - Dori Added "Bath" to the Boarding Add-On list.
Date: 10/13/2016 02:32:49 PM, changed by PetExec Administration - Dori Deleted "" to the Boarding Add-On list and cart if signed in.
Date: 10/13/2016 02:32:46 PM, changed by PetExec Administration - Dori Added "Addtl Food" to the Boarding Add-On list.
Date: 10/13/2016 02:32:42 PM, changed by PetExec Administration - Dori Deleted "Bath" from the Boarding Add-On list.
Date: 10/13/2016 02:32:31 PM, changed by PetExec Administration - Dori Added "Bath" to the Boarding Add-On list.
Date: 10/13/2016 02:32:27 PM, changed by PetExec Administration - Dori Added "1 hour Dog Walk" to the Boarding Add-On list.
Date: 10/13/2016 02:32:11 PM, added by PetExec Administration - Dori Added a boarding to system starting 10/13/2016 and ending 10/14/2016 for Roxy using the f

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If Boarding Add-Ons are added when a boarding is scheduled, you will see the add-ons on the scheduled boarding dashboard the day the boarding starts. You have the option to Automatically Sign In All Boarding Add-Ons when signing in the boarding.

1. Check the box
2. Click Sign-In to sign the pet into the boarding.

Scheduled Boardings ⓘ

Calendar Boarding by Kennel Schedule Boarding

Current Log *There are currently 1 boardings found.*

Date Range: 10/13/2016 - 10/14/2016
Estimated sign-in time: 12:00 PM
Emergency Contact: Joy
Emergency Number: 888-999-7777

Select a kennel for Roxy (Roxy)
 Jones, Susie
 Joy
 Roxy

Redirect to Modify Boarding Schedule
Assigned Pets: Roxy

Sign-In 2

Edit Boarding
 Delete Boarding

Notes: Pet Notes for Roxy:
 02/10/2016: Boarding Note in Pet Record
 02/10/2016: Behavioral note in pet record

Vaccinations for Roxy:
 Test: Onilia - 09/02/2016
 test vaccination - 09/02/2016
 Rabies - 12/16/2016
 Bordetella - 12/16/2016
 Distemper - 12/16/2016

There are no Related Scheduled Services.

Boarding Add-Ons - Automatically Sign In All Boarding Add-Ons 1

Product/Service	Quantity	Unit Price	Status
1 hour Dog Walk	1	30.00	Not In Cart
Addtl Food	3	3.00	Not In Cart
Bath	1	25.00	Already in Cart

Add-On Notes:

There is a setting in Company Preferences-->Application Preferences-->Boarding to set the checkbox by default.

Automatic Sign-In for Boarding Add-Ons
 When selected, will set the Related Boarding Add-Ons check box to be checked by default.
 This will automatically add all Boarding Add-On items to the cart when signing in a boarding.

When adding a add-on to a boarding after signing in, they will need to be manually added to the cart even if the preference is set.

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Boarding Add-On Report:

From the PetExec menu--> Daycare & Boarding-->Boarding Add-Ons will display boarding add-on details for all your boarding appointments by date or date range.

1. Enter the date or date range. The default is today's date.
2. Select boarding status. The default is Active boardings.
3. "Add-Ons Only" checkbox if checked will display boarding appointments that contain Add-Ons, if you want to see all boarding appointments, with and without add-ons uncheck this box.
4. Click the "Search" button to pull up the results.
5. Click on the "Boarding ID" to go to the Associated Services page of the boarding to add or delete items from the cart or to maintain boarding add-ons.
6. Boarding Status is displayed depending on the status criteria selected above. In addition, the sign in status for the boarding is displayed.
7. The Add-On Services section shows the add-on items for the boarding as well as the details and cart status for each.
8. Click to download to a spreadsheet or create and/or print a PDF.

Boarding Add-Ons [i](#)

Search Criteria

1

2 Boarding Status: Add-Ons Only: 4

Search:

Boarding ID	Start Date	End Date	Owner	Pets / Boarding Services	Add-On Services																				
2103149 Active - Not Signed In	10/13/2016	10/14/2016	Jones, Susie	Roxy Happy Dog Med Suite - Boarding 1 Dog (1)	<table border="1"> <thead> <tr> <th>Product/Service</th> <th>Quantity</th> <th>Unit Price</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1 hour Dog Walk</td> <td>1</td> <td>30.00</td> <td>Not In Cart</td> </tr> <tr> <td>Addl Food</td> <td>3</td> <td>3.00</td> <td>Not In Cart</td> </tr> <tr> <td>Bath</td> <td>1</td> <td>25.00</td> <td>In Cart</td> </tr> <tr> <td colspan="4">Add-On Notes:</td> </tr> </tbody> </table>	Product/Service	Quantity	Unit Price	Status	1 hour Dog Walk	1	30.00	Not In Cart	Addl Food	3	3.00	Not In Cart	Bath	1	25.00	In Cart	Add-On Notes:			
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2103150 Active - Signed In	10/13/2016	10/17/2016	Smith, Bob	Zoe Happy Dog Small Suite - Boarding 1 Dog(1)	<table border="1"> <thead> <tr> <th>Product/Service</th> <th>Quantity</th> <th>Unit Price</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Stuffed Kong Treat</td> <td>2</td> <td>5.00</td> <td>In Cart</td> </tr> <tr> <td>Swimming time</td> <td>1</td> <td>10.00</td> <td>In Cart</td> </tr> <tr> <td colspan="4">Add-On Notes:</td> </tr> </tbody> </table>	Product/Service	Quantity	Unit Price	Status	Stuffed Kong Treat	2	5.00	In Cart	Swimming time	1	10.00	In Cart	Add-On Notes:							
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2103151 Active - Signed In	10/13/2016	10/15/2016	James, Teresa	Ajax Happy Dog Suite XL - Boarding 1 Dog(1)	<table border="1"> <thead> <tr> <th>Product/Service</th> <th>Quantity</th> <th>Unit Price</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1 hour Dog Walk</td> <td>1</td> <td>30.00</td> <td>Not In Cart</td> </tr> <tr> <td>Pet-a-cure</td> <td>1</td> <td>20.00</td> <td>Not In Cart</td> </tr> <tr> <td colspan="4">Add-On Notes:</td> </tr> </tbody> </table>	Product/Service	Quantity	Unit Price	Status	1 hour Dog Walk	1	30.00	Not In Cart	Pet-a-cure	1	20.00	Not In Cart	Add-On Notes:							
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Add-On Notes:																									

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Sample of the PDF report. The report shows the start date and end date dates search criteria when the report was generated.

Boarding Add-Ons - 10/13/2016 to 10/13/2016						
Boarding ID	Status	Start Date	End Date	Owner	Pets / Services	Add-On Services
2163149	Active - Not Signed In	10/13/2016	10/14/2016	Jones, Susie	Roxy Happy Dog Med Suite - Boarding 1 Dog (1)	Service: 1 hour Dog Walk Quantity / Price: 1 ea / 30.00 Status: Not In Cart Service: Addtl Food Quantity / Price: 3 ea / 3.00 Status: Not In Cart Service: Bath Quantity / Price: 1 ea / 25.00 Status: In Cart
2163150	Active - Signed In	10/13/2016	10/17/2016	Smith, Bob	Zoe Happy Dog Small Suite - Boarding 1 Dog(1)	Service: Stuffed Kong Treat Quantity / Price: 2 ea / 5.00 Status: In Cart Service: Swimming time Quantity / Price: 1 ea / 10.00 Status: In Cart
2163151	Active - Signed In	10/13/2016	10/15/2016	James, Teresa	Ajax Happy Dog Suite XL - Boarding 1 Dog(1)	Service: 1 hour Dog Walk Quantity / Price: 1 ea / 30.00 Status: Not In Cart Service: Pet-a-cure Quantity / Price: 1 ea / 20.00 Status: Not In Cart

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