



Adding existing daycare packages from another software/system/process to an owner account in PetExec

If you are new to PetExec and have pet owners with existing daycare packages they will need to be added to PetExec using the following steps. Daycare Packages are not included in the Data Upload option and they will not be uploaded into PetExec with other owner and pet information.

Here are the steps to add existing daycare packages to a customer's account. Details, including screen shots, are shown below.

Step 1. Create a daycare package product & service called "Carry Over Package"

Step 2. Complete an Owner Purchase to add the package to an owner's account

Step 3. Modify the package on the owner account so that it reflects the appropriate number of days and expiration date if appropriate.

Details and Screen Shots:

Step 1: Create a daycare package product.

1. Product/Service name, we suggest calling it "carry over package".
2. Service type = Daycare Package
3. Price = \$0
4. Quantity = 1
5. Select Number of days, number of days active = 999
6. Add product/service

[Return to Table of Contents](#)

Add Product or Service (i)

Product / Service Details

1 Product / Service Name *
Carry Over Package

2 Service Type *
Daycare Packages

Description
Product Description

Highlight Color
Highlight Color

SKU
SKU

3 Price *
0.00

4 Quantity *
1

Paw Points
Paw Points

5 Number of Days
Number of Days Active *
999

Time Period
Date Range *
Select a Range

Sort Order
1

Taxable

Hourly Service?

Include on EVERY Checkout?

Minimum One Hour Charge?

Make Available to Owners?

No Commission?

6 Add Product / Service

We will use this same package for all carryover packages, and just modify the package once it has been added to the owner's account.

Note: you can use an existing package and change the dollar amount to \$0, however, PetExec best practice recommends creating a carry-over package for ease in reporting. This will eliminate \$0 orders for your regular package products.

Step 2: Add the package to the owner's account by doing an owner purchase. From the Owner menu, select owner purchase, select the carry over package product and select one of the following:

Purchase and Place in Cart or **Purchase and Checkout.**

[Return to Table of Contents](#)

Owner Purchase (i)

Step #1 - Search for Owner

Step #2 - Select an Owner

< previous 1 next >

Use	Owner Name	Last Order	Pets
<input type="button" value="selected"/>	Jones, Susie	08/11/2017	Boxy

< previous 1 next >

Step 3 - Select the Products/Services

Product Name	SKU	Product Type	Qty	Price	Add
Carry Over Package		Daycare Packages	<input type="text" value="1"/>	0.00	<input type="button" value="select"/> 1

There are no items selected.

2 3

Purchase and place in cart: If the owner has a pet(s) signed into a service and you don't want to sign them out, click purchase and place in cart. You will get a confirmation message, you are done! You can process the \$0 transaction when you sign the pet out of the service. By placing the package in the cart, you have made the package available for use. When you are ready to sign the pet out of the service, you can process the order and use the package for that days service. Here is an example of an owner's cart when the package has been added.

[Return to Table of Contents](#)

Modify Cart for Bailey Walker i

Walker, Amy

If you are trying to modify a boarding service that has an associated boarding package, you need to remove the boarding package by modifying the boarding first.

Adding daycare or boarding items to the cart in this manner **DOES NOT** make them appear on the Dashboard and may have unintended consequences, especially relating to grooming. Please use Daycare Sign-In or Sign-In Boarding to correctly enter the pets into the system. **DO NOT ADD A DAYCARE MANUALLY AND USE A PACKAGE WITHOUT SIGNING A PET INTO THE SYSTEM!** Daycare packages REQUIRE a pet be assigned.

Please do not adjust the quantity for boarding services that have a boarding ID attached to the line item. The final quantity is calculated at checkout and this quantity is for the number of Kennels/Rooms/Spaces associated with the boarding, not the number of nights. Click on the Boarding ID and modify it there.

Modifying the price of a boarding DOES NOT change the price for EACH NIGHT of the boarding and may have unintended results. Please change the price by clicking on the Boarding ID, then clicking on the "Services / Assignments" button to modify the prices, as that will also show boarding packages and any associated holiday prices or other customized prices that may be in effect. At checkout, the system goes by those numbers to determine pricing.

Blue colored items are items that have owner-level

Carry over package visible in cart.

Cart Items

Product / Service	Start Time	Price	Qty	Subtotal	
Carry Over Package (Owner Level Purchase)	08/16/2017 01:14 PM	0.00	1	\$ 0.00	Delete
Full Day Daycare	08/16/2017 01:18 PM	25.00	1	\$25.00	Delete
(Bailey Walker)					
No Package					
No Package					
Carry Over Package (1 left)					
Order Subtotal				\$25.00	

Package available for use here.

Pre-Checkout Confirmation Modify Cart Order Estimate

Purchase and Checkout: Purchase and checkout if there is no pet signed in currently. You can then modify the package, and it will be ready for use at the next appointment.

When checking out the package, since it is a \$0 product, you can enter "no payment" for the payment type and process the order. We do recommend adding a note to the order for your records to indicate you are adding a carryover package to the customer's account as well as any additional details relevant for your business.

If you had additional products/services included in the order you can enter the payment type for those products and services and process the order.

[Return to Table of Contents](#)

 Walker, Amy


[Click to Toggle Owner Information for Amy Walker](#)


Authorized to Pick Up

Additional Owner: Tom Walker
Emergency Contact: Tom
By Pet:
Tom (Bailey)

Carry over package on order at checkout.

Transaction Detail

Product/Service	Price	Quantity	Discount %	Subtotal	Delete
Carry Over Package	0.00	1	0	\$ 0.00	

Product/Service	Price	Quantity	Subtotal	Delete
Tip / Gratuity	0.00	1	\$ 0.00	

Discount	
Discount (Against order total <u>after</u> taxes)	0.00
Subtotal	\$ 0.00
Tax	\$ 0.00
Total	\$ 0.00

\$0 total order

[Add a Product](#)

Account Balance

This account is in

Enter No Payment as payment type

Payment Information

Select a Payment Type *

No Payment

Press the "Process Order" button to record the transaction.

Additional Notes

- Update Credit Card Info
- Skip Receipt
- Email Receipt
- Send Thank You
- Include Additional Notes with Thank You Email

Click process order

Amount Applied

0.00

[Process Order](#)

[Unlock Process Order Button](#)

[Print Invoice](#)

[Mobile Signature](#)

[Return to Table of Contents](#)

Step 3: Modify the package on the owner record. Begin in the owner menu-->Maintain Packages. The carry over package you just added via Owner Purchase will be displayed. Click on the button to modify the details of the package.

1. End date is the date the package is set to expire. If the carry over package had an expiration date you can enter it here. The expiration date calculated from the product settings will be displayed.
2. Package note will be displayed on the daycare dashboard and at checkout when using the package for a service; it is not a required field.
3. Number left is the number of days left in the package for this owner.
4. When modifying a package a note is required.
5. Click Modify Daycare Package.

Daycare Packages for Amy Walker (i)

Walker, Amy

Daycare Package Detail

Package Type Carry Over Package	Tracking ID 6357850	
Start Date 08/16/2017	1 End Date (mm/dd/yyyy) 12/31/2018	2 Package Note Package from former system
Initial Number 1	3 Number Left 3	Status Active
4 Notes * Added carryover package with 3 days left, expiration date 12/31/2018		
5 Modify Daycare Package		

Done! When you sign that pet into daycare, you will see the carryover package selected for use based on your application preference settings.

Daycare (i)

Quick Check-in

Daycare Sign-In

Schedule Daycare

Daycare Options ☰

Current Log There are currently 3 pets logged into Daycare.

Search



Pet	Owner	Time-In	Type
<p>Bailey Walker Unknown Breed 4 years, 6 months Female / Spayed</p> <p>! 🔄 ✖</p>	<p>Walker, Amy</p> <p>⚠</p>	<p>08/16/2017 01:39 PM</p> <p>Full Day Daycare Pickup: N/A</p>	<p>Unassigned</p> <p>Pet Notes for Bailey: 02/05/2016 daycare note Package #6357850, Carry Over Package, 2 left Package from former system</p>

[Return to Table of Contents](#)

You will have to complete steps 2 & 3 for each owner with a carryover package. An owner purchase is the only way to put a package on an owner's account to use it for future services.

These steps describe adding a Daycare Package. If you have "Other Packages" like dog walks, grooming services those can be added in the same way. The Carry Over Package product should be set up as an "other package" service type.

[Return to Table of Contents](#)