



Additional Boarding Setup and Daily Operations Guide

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How to set-up Holiday Boarding Dates

You can set holiday dates and prices for boarding. To set which days you want to charge holiday rates, go to Company Preferences -> Maintain Holiday Boarding Dates. *Note: This item needs to be added to any associated Employee Types for it to show up.*

Menu

Products & Services -

Company Preferences -

Maintain Company Info

Maintain Agreements

Maintain Report Card

Maintain Hours of Operation

Hours of Operation Calendar

Maintain Locations

Upload Logo

Maintain Holiday Boarding Dates

Maintain Taxes




Once you are in the Maintain Holiday Boarding Dates screen, you can enter a single date, a custom repeating date (i.e. every other Sunday), or a date range. Once you have selected your dates or date range, click the Add Holidays button. If you already have boardings scheduled for a newly selected holiday date, the Rebuild Future Boardings checkbox will allow PetExec to automatically update those future boardings with the new holiday prices. If you do not wish to automatically update these future boardings that fall on the new holiday date, leave the Rebuild Future Boardings checkbox blank. These boardings can also be updated manually on a case-by-case basis under each boarding by clicking the new Overwrite All Daily Values checkbox and then clicking Update Boarding Information on the Modify Boarding screen.

The active holidays are shown below the Add Holidays button. To remove a holiday, select the box under the Delete column to the right of the date that you'd like to remove, and click the Delete Selected Dates button.

Holiday Boarding Dates

Add Holiday Dates

Selected Date Custom Repeating Selected Days During Date Range

 Date (mm/dd/yyyy)

12/25/2016

Rebuild Future Boardings

There are 4 dates defined as "Holiday" dates

Day of Week	Date	Delete
Monday	07/04/2016	<input type="checkbox"/>
Sunday	11/27/2016	<input type="checkbox"/>
Monday	11/28/2016	<input type="checkbox"/>
Sunday	12/25/2016	<input type="checkbox"/>
		<input type="checkbox"/>

Toggle All Dates


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Setting up Boarding Holiday Prices

The Holiday Boarding feature in PetExec allows you to set holiday prices for each of your boarding products. Go to Products & Services -> Add Product or Service, and fill out the fields for your new boarding service. Be sure to select Boarding as your Service Type. The Boarding Holiday Price field is located just below the regular Price field. It's an optional field, so you don't have to set a holiday price for every boarding service. You can also add Boarding Holiday Prices to your existing boarding products by going to Products & Services -> Maintain Products or Services.

Product / Service Details

Product / Service Name *	Service Type *
Boarding 1 Dog - Medium	Boarding
Description	Highlight Color
Product Description	#5ea2ff
Price *	SKU
30.00	SKU
	Boarding Holiday Price
	40.00



Using Boarding Holiday Prices

After you have added Boarding Holiday dates and prices, you can schedule a boarding that falls on the holiday dates and PetExec will automatically apply the holiday price for the defined dates. Using the Modify Boarding → Daily Details screen, you can view and update the boarding prices on a day-by-day basis. The highlighted line items on the Per Day Pricing Information table indicate a holiday, and the Boarding Holiday Price is applied accordingly. All prices can be adjusted from this screen, and you'll need to click the Update Prices button to save any changes.

The Assign Kennels section of this screen is also a useful PetExec feature. You can assign kennels to your boarding pets on a day-by-day basis. You have the ability to select ANY kennel, without affecting the price of the boarding. This provides you with complete control and flexibility over your kennel assignments. Click the Update Locations button to save your changes.

*Note: To change the names in the Assigned Kennel drop down list, please reference the [Boarding Type Details document](#).

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Assigned Pet Kennels i

Smith, Bob

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Per Day Pricing Information

Directions: This section allows users to customize prices for the duration of the appointment. This is not a required step and is only used when rates differ from the base rate from day to day. The listed service(s) can be changed in the Modify Boarding Schedule page.

Day of Week	Boarding Date	Service Type	Base Price	Holiday Price	Daily Price
Sunday	07/03/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		30
Monday	07/04/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00	40.00	40
Tuesday	07/05/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		30
Wednesday	07/06/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		Pickup Date
					\$100.00

Update Prices

Assigned Kennels

Directions: Regular kennel assignments normally take place in the Boarding Pets page. This section provides a way to manually assign kennels on a daily basis. When occupancy limits are being reached and a guest must reside in different accommodations from day to day, this provides the flexibility to do so. However, when kennels are assigned here, PetExec provides no error checking and will allow ANY kennel selections, so be sure to double check availability before manually assigning kennels. The Boarding Pets page contains the kennel allocated for the entire appointment regardless of the allocations made here. Also, when assignments are made in the Boarding by kennel page, those assignments are reflected here and vice versa. You can also view and modify the overall assignments in the Boarding by Kennel screen.

Day of Week	Date	Pet Name	Assigned Kennel
Sunday	07/03/2016	Zoe	None Selected
Monday	07/04/2016	Zoe	None Selected
Tuesday	07/05/2016	Zoe	None Selected
Wednesday	07/06/2016	Zoe	None Selected

Update Locations

Accepting Boarding Deposits

PetExec has a great feature to add boarding deposits that will be applied to the boarding only, and will not be shown as a credit on the owner's account. To enable this setting, go to Company Preferences -> Application Preferences -> Boarding -> Exclude Boarding Deposits as Credits.

To add a deposit to a boarding, click on the "Add Deposit" link on the Modify Boarding Schedule screen when creating or modifying a boarding. This will take you to the Owner Payment screen, and PetExec will tie the deposit payment to the Boarding ID under the Order Type "Boarding Deposit". The deposit will not show up as a credit on the owner's account, but will instead be added to the pet's cart and be applied automatically when the boarding is checked-out.

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Modify Boarding Schedule for Bob Smith (i)

Smith, Bob You can add another boarding for this owner here!

Modify Boarding Schedule | Boarding Pets | Associated Services | Daily Details

Boarding Score Cards
Zoe Smith (Warning) | Web Score Card | PDF Score Card | Cairn Terrier / Weight: 14


Boarding Packages

Boarding Package	Start Date	End Date	Related Service	Days Left
<input type="checkbox"/> Use Package 22500	03/04/2016	11/28/2018	Boarding Package - 10 days Cat / Happy Cat Suite - Boarding 1 Cat	10

Status: Active
This boarding is within 72 hours of the scheduled time and the owner will be charged \$20.00 per pet cancellation fee if this Boarding is deleted.

Resend Email: Resend Boarding Email | Invoice Estimate

Date Scheduled (mm/dd/yyyy): 07/05/2016

Deposit: \$ 0.00 Add Deposit 

You can easily see if a boarding has a deposit on the Modify Boarding Schedule screen, on the Scheduled Boarding dashboard, and when you are signing-in the boarding.

Scheduled Boardings (i)

Calendar

Schedule Boarding

Current Log *There are currently 1 boardings found.*

Date Range: 01/30/2016 - 01/31/2016
Estimated sign-in time: 08:30 AM
Emergency Contact: John Smith
Emergency Number: 444-555-6666

Select a kennel for Zoe (Zoe) (i)
Smith, Bob

Redirect to Modify Boarding Schedule
Assigned Pets: Zoe (i)

Notes:
There is a \$50.00 deposit associated with this boarding.

Sign-In
Edit Boarding
Delete Boarding

Score Cards:
Zoe (i) (Web)
Zoe (i) (PDF)

If the boarding is deleted, an error message appears explaining that the existing deposit will now be shown as a credit to the owner's account.

Are you sure you want to delete this boarding? This boarding has a deposit of \$50.00 associated with order ID(s) 8934785. The deposit will now be shown as a credit to the owner.

Cancel **OK**

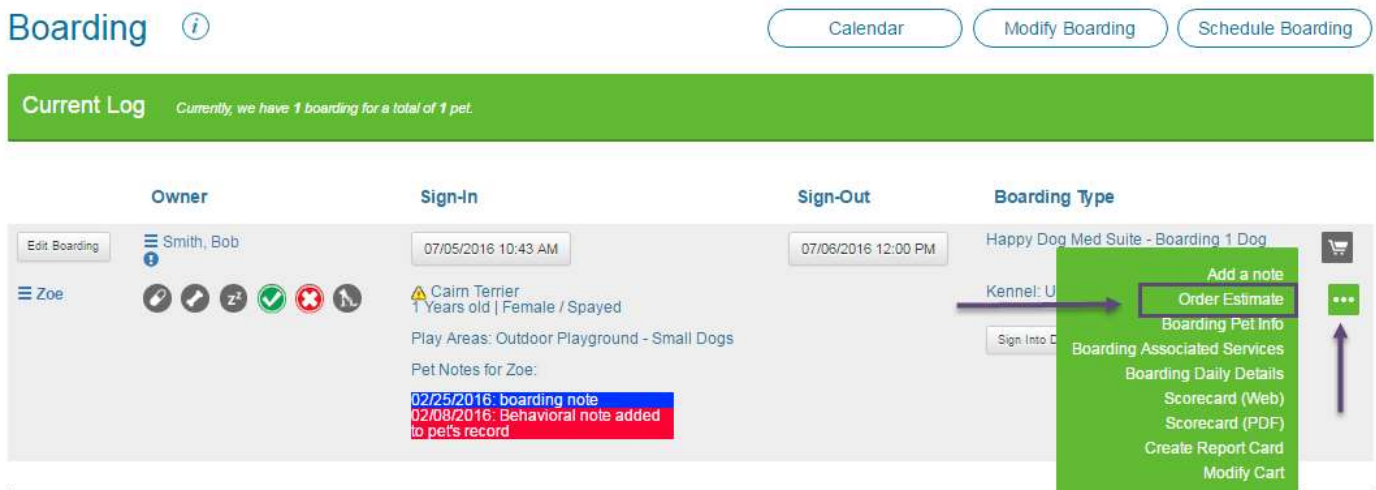
If you wish for boarding deposits to be non-refundable, you'll need to go to the Order ID provided in the error message and add a product (i.e. Non-Refundable Boarding Deposit) equivalent to the boarding deposit to balance out the owner's account. Alternatively, you [Return to Table of Contents](#)

can use the PetExec boarding cancellation fee setting by going to Company Preferences -> Application Preferences -> Boarding -> Boarding Cancellation Fee. To set the Boarding Cancellation Fee price, go to Products & Services -> Maintain Products or Services, and search for the pre-loaded Additional Charges product called Boarding Cancellation Fee. If this fee is missing from your product list, please contact PetExec support for assistance.

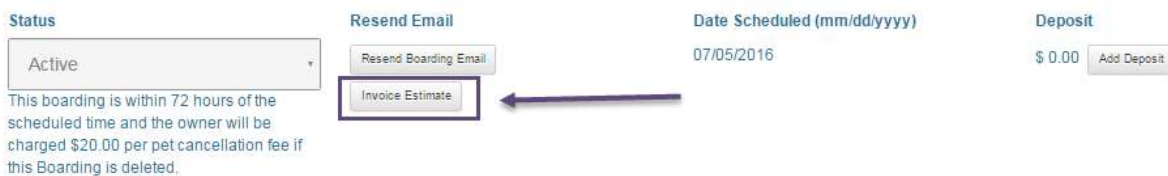
Order Estimate/Invoice Estimate Feature

There are two ways to create an order estimate.

The "Order Estimate" link right from the "..." menu provides estimates for Boarding and Daycare pets. This is a quick way to print an invoice or tell an owner how much their stay will be. The Boarding Order Estimate calculates the costs for the stay based on the scheduled start and end dates. It does not calculate food charges, grooming or other scheduled services until they have been checked-in. If the pet stays past the scheduled boarding end date, you need to manually modify the end date either by clicking on the Sign-Out date/time on the boarding tab or on the Modify Boarding screen for the estimate to calculate the actual boarding charges prior to checkout.



The "Invoice Estimate" button from the Modify Boarding Screen provides estimates for boarding pets which includes food charges, as well as any grooming, daycare, or scheduled services included in the boarding reservation. Click on the "Invoice Estimate" button from the Modify Boarding screen:



Using Boarding by Kennel

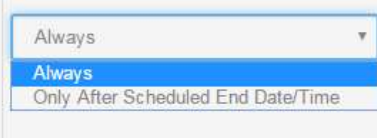
The Boarding by Kennel feature is now drag and drop! You can view all your kennels for the week at once, and move pets around all from one screen. You can also adjust a pet's kennel assignments on a day-by-day basis, assign them to ANY kennel without affecting the boarding prices, and even assign more than one pet to a kennel. This provides you with

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complete control and flexibility over your kennel assignments. The Boarding by Kennel feature is located in the Daycare & Boarding menu.

Using the Include Last Day Preferences

PetExec also provides the option to automatically charge for the last day of boarding. This setting is located under Company Preferences -> Application Preferences -> Boarding -> Include Last Day as Day of Boarding. Enabling this preference gives you the option, via the adjacent drop-down menu, to Always include the last day as a boarding day or to only include the last day if the scheduled End Date / Time has passed. For example, if you charge for an extra boarding day for all pick-ups after noon, you can set all End Times to be at 12:00pm and PetExec will automatically charge this extra day when the pet is checked-out after noon.

Include Last Day as Day of Boarding When selected, will include the last date as a boarding day, depending on the status of the associated drop-down. "Always" will include the last day of boarding for all instances. "Only After Scheduled End Date/Time" will include the last day of boarding only if the scheduled boarding pick-up date and time is passed.	
Include Departure Day Meals When selected, the system will add another day of meals if the "Include Last Day as Day of Boarding" preference is selected.	

There is also a setting to Include Departure Day Meals. This will add any meal charges for the last day of the pet's stay associated with the boarding. Use this setting if most of your boarding pets are picked up later in the day.

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