



Final 3.05 PetExec New Functionality Aide

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Refunding an Order: PetExec has incorporated an automated option to refund an order. In order to activate this new function you will need to update your employee type. From the PetExec menu under Employees-->Maintain Employee Type. Select the appropriate employee type. We recommend adding it to the default administrator employee type, at a minimum. Check the box by "refund order" and click "Modify Employee Type" at the bottom of the screen.

Order Processing	
<input checked="" type="checkbox"/>	Modify Orders
<input checked="" type="checkbox"/>	Deleted Orders
<input checked="" type="checkbox"/>	Cart Checkout
<input checked="" type="checkbox"/>	Maintain Cart
<input checked="" type="checkbox"/>	Purchase History
<input checked="" type="checkbox"/>	Maintain Daycare Packages
<input checked="" type="checkbox"/>	Owner Debits
<input checked="" type="checkbox"/>	Owner Credits
<input checked="" type="checkbox"/>	Maintain Boarding Packages
<input type="checkbox"/>	Refund Order

PetExec can now process a refund directly to a customer's credit card through the integrated First Data GGe4 gateway. Please see the documentation to [Refund an Order](#) for additional details.


Boarding Daily To Do Report Addition:

Boarding Daily To-Do will now include a new option for "No Feeding Time Selected." This will show those pets who are boarding who *do not have* a feeding time indicated in their boarding pets page. This option will allow you to identify these pets so that their feedings are not overlooked. For more information on how the feeding times effect the Boarding Daily To Do report, see online documentation support [Modify Boarding - Boarding Pets](#) (item #6).

Boarding Daily To-Do ⓘ

Search	
<p>Start Date (mm/dd/yyyy)</p> <input type="text" value="05/12/2016"/>	<p>Type</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Both Food and Medication</p> <p style="background-color: #007bff; color: white;">Both Food and Medication</p> <p>Medication Only</p> <p>Food Only</p> <p style="border: 2px solid #007bff;">No Feeding Time Selected</p> </div>
<p>Range</p> <input type="text" value="All Day"/>	<input type="button" value="Search"/>

Boarding Quick Links:

PetExec has added a Quick Link to the pages within the Modify Boarding Schedule from the menu on the boarding and combined in-house dashboard. Clicking on these links will direct you to the specific page of the Modify Boarding Schedule. You will still have access to the other 

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pages within the boarding. This menu will reduce the number of clicks when updating boarding pet details like feeding and medication, adding services to the boarding reservation or making changes to the daily details.

Boarding ⓘ Calendar Modify Boarding Schedule Boarding

Current Log *Currently, we have 1 boarding for a total of 1 pet.*

Owner	Sign-In	Sign-Out	Boarding Type
Edit Boarding James, Teresa Ajax	05/05/2016 07:39 AM Unknown Breed Age Not Specified Male / Neutered Play Areas: Indoor Gym - Small Dogs, Outdoor Playground - Small Dogs Pet Notes for Ajax: 04/20/2016: Special instructions Behavioral Note for Ajax	05/01/2016 12:00 PM	Happy Dog Suite XL - Boarding 1 Dog Kent Sign

- Add a note
- Order Estimate
- Boarding Pet Info
- Boarding Associated Services
- Boarding Daily Details
- Scorecard (Web)
- Scorecard (PDF)
- Create Report Card
- Modify Cart

For example clicking on the *Boarding Pets* Quick link will take you here:

Associated Boarding Pets ⓘ

James, Teresa

Modify Boarding Schedule
Boarding Pets
Associated Services
Daily Details

Unassigned Pets

All pets are assigned

Clicking on Boarding Pets link takes you to the boarding pets page within that scheduled boarding. Other pages are still available directly from this page.

Assigned Pets

Ajax James	Breed / Advisory ⚠ (Unknown)	Weight N/A	Remove Click here to remove from boarding.
Kennel Select a kennel	Special Requirements	Brought Items	
Feeding Times AM <input type="checkbox"/> Noon <input type="checkbox"/> Evening <input type="checkbox"/>	Dietary Owner Provided		
Feeding Instructions AM am feeding instructions	Feeding Instructions Lunch	Feeding Instructions PM	

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Rebuild Boarding Option:

With the launch of PetExec 3.0 the option to select to "rebuild the boarding" was added to the modify boarding schedule screen. Since this option was added the application preference to overwrite all daily values is being removed as it is now obsolete.

Overwrite All Daily Values

When selected, sets the "Overwrite All Daily Values" checkbox on in Modify Boarding.



By checking "rebuild boarding" PetExec will "rebuild" the boarding details for that pet's boarding based on changes made elsewhere in the system.

Modify Boarding Schedule for Teresa James (i)

James, Teresa

You can add another boarding for this owner here!

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Boarding Score Cards

Ajax James (!)

Web Score Card

PDF Score Card

Unknown

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)

04/20/2016

Deposit

\$ 0.00

Add Deposit

Boarding Details

Start Date (mm/dd/yyyy)

05/05/2016

End Date (mm/dd/yyyy)

05/21/2016

Estimated Sign-In Time

12:00 PM

Dropoff Location

In-House

Estimated Pick-up Time

12:00 PM

Pickup Location

In-House

Customer Requested Pickup

Emergency Contact *

Jim

Emergency Number *

667-777-8785

Scheduler Name / Initials

Enter Initials

Notes

Notes

Note Style

No Style

This is a sample note.

Click the box to rebuild boarding, and then click Update Boarding Information

Rebuild Boarding

Update Boarding Information

Return to Dashboard

Schedule Another Boarding

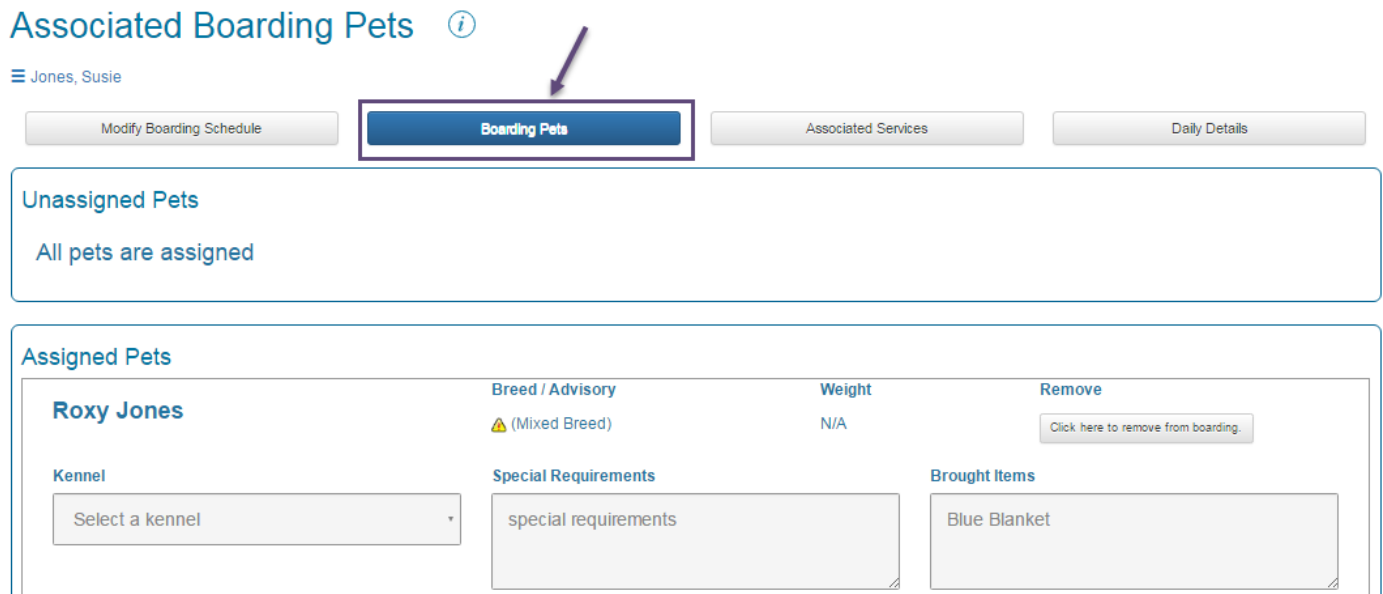
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Changing any details in the Modify boarding schedule, boarding pets, associated services or daily details just requires that you click the *Update Boarding Information* button at the bottom of each of those screens, and DO NOT require the rebuild boarding box to be checked.

The Rebuild Boarding option is useful if you make a change your boarding pricing. If you change your prices for the boarding products/services and you want the boarding to reflect the updated prices, you can select to the rebuild boarding. Another example of using the rebuild boarding option is if you were to add custom pricing to an owner record. If that owner had a scheduled boarding, you could rebuild that boarding reservation to reflect that newly added custom pricing.

Scheduled Boarding Navigation Change:

When scheduling pet(s) for boarding, when you complete the boarding details and click the "Schedule Pets" button PetExec will redirect you to the boarding pets page with the boarding reservation. You will still be able to toggle to modify boarding schedule and associated services buttons from this page.



Associated Boarding Pets ⓘ

☰ Jones, Susie

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

Unassigned Pets
All pets are assigned

Assigned Pets

Roxy Jones	Breed / Advisory ⚠ (Mixed Breed)	Weight N/A	Remove Click here to remove from boarding.
Kennel Select a kennel	Special Requirements special requirements	Brought Items Blue Blanket	

Boarding Services & Assignments Look and Feel Changes:

The "Daily Details" page within modify boarding was renamed from "Services/ Assignments." No functionality has changed, it was renamed to a more meaningful name for our packmates.



Assigned Pet Kennels ⓘ

☰ Jones, Susie

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

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The "directions" under the Per Day Pricing section of this page have been revised. How the per day pricing functions HAS NOT changed, we have just updated the language to explain it more clearly.

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.

The "directions" under the assigned kennels section of this page have been revised. Again, how the daily kennel assignments function HAS NOT changed we have just updated the language to explain it more clearly. See the PetExec documentation for [Modify Boarding- Daily Details](#) for instructions on when to use the daily details page to modify a boarding.

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.

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In addition, we have added some other "help" verbiage on the boarding pets screen under the kennel assignment when modifications are made in the daily details page.

Here is an example to show you the changes: This pet is booked with a Happy Dog Medium Suite boarding product, you can see that in the screen shot below under service type. He was assigned the "Happy Dog Small Suite 1" for the first day of the boarding in the assigned kennels section.

Assigned Pet Kennels i

☰ Jones, Susie

↓

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
Friday	05/13/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		<input type="text" value="30"/>
Saturday	05/14/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		<input type="text" value="30"/>
Sunday	05/15/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		<input type="text" value="30"/>
Monday	05/16/2016	Happy Dog Med Suite - Boarding 1 Dog	30.00		Pickup Date
					\$90.00

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
Friday	05/13/2016	Roxy	Happy Dog Small Suite # 1
Saturday	05/14/2016	Roxy	Happy Dog Small Suite # 1
Sunday	05/15/2016	Roxy	Happy Dog X-Large Suite # 1
Monday	05/16/2016	Roxy	Luxury Suite # 1

Update Locations

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The boarding pets page shows the *Happy Dog Suite #1* in the kennel assignment, below that you see the new message. PetExec has added this message so that you can easily identify that a daily assignment was made for this pet. Based on the daily detail kennel assignments above, on Day 2 of this boarding, this message will display Happy Dog X-Large Suite #1 for the assignment.

Associated Boarding Pets i

☰ Jones, Susie

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Unassigned Pets

All pets are assigned

Assigned Pets

Roxy Jones

Breed / Advisory

⚠ (Mixed Breed)

Weight

N/A

Remove

[Click here to remove from boarding.](#)

Kennel

Happy Dog Suite # 1

Kennel assignments may vary by day as specified in the Daily Details page. For today, it is **Happy Dog Small Suite # 1**. Changing the Kennel here will overwrite the assignments in the Daily Details page.

Special Requirements

special requirements

Brought Items

Blue Blanket

In addition, PetExec will now display the kennel assignment from the daily details page on the dashboard for the CURRENT day. If there is a different kennel assigned each day the kennel will be updated on the dashboard based on the daily kennel assignment. In this example for this pet the following day, the dashboard will display Happy Dog X-Large Suite #1 based on the assignments in the daily details page.

Edit Boarding Jones, Susie 05/12/2016 10:17 AM 05/16/2016 12:00 PM Happy Dog Med Suite - Boarding 1 Dog

☰ Roxy ⚠ Mixed Breed Age Not Specified | Female / Spayed **Kennel: Happy Dog Small Suite # 1** [Sign Into Daycare](#)

Play Areas: Outdoor Playground - Small Dogs

Pet Notes for Roxy:

- 02/10/2016: Boarding Note in Pet Record
- 02/10/2016: Behavioral note in pet record

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