



Modify Orders - Change owner payment to a boarding deposit.

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If an owner does an owner prepayment via the PetExec Owner Portal or if an owner prepayment is entered as a payment rather than a boarding deposit by an employee you can take the following steps to correct the transaction. These are the steps, we will go through each step below in detail.

1. Confirm application preferences to exclude boarding deposits as a credit is enabled.
2. Confirm there is a scheduled boarding, or schedule the boarding.
3. Add deposit to the boarding.
4. Find the initial order for the payment.
5. Update the boarding deposit order with the payment details from the initial payment.
6. Delete the initial order.

The following are the details for each of the steps listed above:

1. Before you begin you will want to confirm that you have the following application preference selected. This will ensure that your boarding deposits are used toward the boarding reservation to which they are added, rather than applied as a general credit to the customer's account.

Exclude Boarding Deposits as Credits When selected, will exclude any boarding deposits as a credit to the owner. If this is checked, the deposit amount will be used as part of the boarding charge at checkout.	<input checked="" type="checkbox"/>
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2. To find an existing boarding begin in the Owner menu-->Boarding history. Click on the boarding ID. From the modify boarding screen you have the option to "Add Deposit".

Modify Boarding Schedule for Michelle Thomas (i)

☰ Thomas, Michelle

You can add another boarding for this owner here!

Modify Boarding Schedule

Boarding Pets

Associated Services

Daily Details

Boarding Score Cards

Score Cards only available when signed into system.

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)

06/29/2016

Deposit

\$ 0.00

Add Deposit

If there is not a scheduled boarding reservation, then schedule the boarding for the owner/pet, then click on the Add Deposit button once the boarding reservation is scheduled.

3. Clicking the "Add Deposit" button will bring you to the Owner Payment screen: (See [Additional Boarding Set Up and Daily Operations Guide](#) (page 4) for additional details on adding deposits.

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Select Payment Type. If you have integrated credit card processing and the initial order was processed via Credit Card, enter "tradeout" here so that the credit card is not charged a second time for the same payment. If you don't have integrated card processing, any payment type will work. If the initial payment type was cash or check you can select that option here when adding the deposit.

1. Select the Payment type (See details above related to credit card transactions)
2. Order payment should be entered as a **"Boarding Deposit"**.
3. Enter amount applied.
4. Click to process order.

Owner Payment / Refund for Thomas, Michelle ⓘ

[Click to Toggle Owner Information](#)

Payment Information

1 **Select a Payment Type *** 2 **Order Type**

Cash Boarding Deposit

Fill out the amount applied below and optionally select an "Order Type". Press the "Process Order" button to record the transaction.

Additional Notes

3 **Amount Applied** Skip Receipt Email Receipt Update CC Info

20.00

Process Order 4

[Boarding Calculator](#) [Quick Quote Calculator](#) [Return to Modify Owner](#)

Account Balance

This account is in balance

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You will then see a boarding deposit associated with the boarding. It will appear here on the scheduled boarding dashboard before you sign the pet into the boarding reservation:

Scheduled Boardings ⓘ

Calendar Boarding by Kennel Schedule Boarding

Current Log *There are currently 1 boardings found.*

Date Range: 06/29/2016 - 06/30/2016
Estimated sign-in time: 12:00 PM
Emergency Contact: James
Emergency Number: 345-543-4444

Select a kennel for Wags (Wags)

Redirect to Modify Boarding Schedule

Assigned Pets: Wags

Notes: Pet Notes for Wags:
02/06/2016: Behavioral note added to pet record via modify pet
02/06/2016: boarding note

Vaccinations for Wags:
Rabies - 02/06/2016
Bordetella - 02/06/2016
Distemper - 02/06/2016

There is a \$20.00 deposit associated with this boarding.

Thomas, Michelle

Wags

Sign-In

Edit Boarding

Delete Boarding

Once signed in you will see the boarding deposit on the Modify Boarding Schedule screen:

Modify Boarding Schedule for Michelle Thomas ⓘ

Thomas, Michelle

You can add another boarding for this owner here!

Modify Boarding Schedule Boarding Pets Associated Services Daily Details

Boarding Score Cards

Wags Thomas ⚠️ Web Score Card PDF Score Card Unknown

Status	Resend Email	Date Scheduled (mm/dd/yyyy)	Deposit
Active	Resend Boarding Email Invoice Estimate	06/29/2016	\$20.00 Add Deposit

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. This boarding has a deposit of \$20.00 associated with order ID(s) 10962212. The deposit will now be shown as a credit.

- Next, find the initial order for the payment. Begin in the PetExec menu under Order Processing -->Modify Order. Search for the order by Owner first name, last name, email address or order ID. Click on the order id for the payment or pre-payment. You can also access orders from the owner menu under "purchase history". Either way will take you the modify order screen.
 - Click on the order ID to see the details of that order. Note, payment orders are highlighted in pink; pre-payment orders are highlighted in orange.
- Copy the details of the credit card payment from the Additional Info field and paste them into the boarding deposit order Additional Info field, AND change the Type from "trade out" to "credit card" in the boarding deposit order. This will keep your payment balancing in order, but not charge the owner's credit card a second time. You will notice the initial boarding deposit order has "boarding deposit" in the Additional Info field to indicate it was a boarding deposit.

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Billing Information for Order Id: 11037017 i

Order Date

07/06/2016 01:25 PM

Permanently Delete This Order

Receipt

Email Receipt

Purchase History

Modify Owner

Apply Refund

Click to Toggle Owner Information for Michelle Thomas

Transaction Detail

Product/Service	Price	Quantity	Subtotal	Delete
Owner Payment	0.00	1	\$ 0.00	<input type="button" value="Delete"/>
Discount				
Total Discount to Date : 0.00				
Subtotal			\$ 0.00	
Tax			\$ 0.00	
Total			\$ 0.00	

Account Balance

As of 07/06/2016 01:59:59 PM, this account has a CREDIT of \$20.00

Payment Information

Select a Payment Type *

Select a Payment Type

Additional Notes

Skip Receipt

Email Receipt

Amount Applied

Amount Applied

Payment History

Change the dates, additional info or amount applied and recalculate the totals.

Note: Once deleted, the record can not be recovered.

There has to be at least ONE history record. If there are no records, you must create one.

Changing the type to "Credit" DOES NOT charge external processors and fees.

This is the Owner Payment Order. This will be the order that gets deleted once we copy the details.

We are going to copy the details for the credit card transaction in Additional Info from this order and put them into the boarding deposit in order to retain those details.

The "Delete" checkbox will delete the record from the system and

format like mm/dd/yyyy hh:mm AM.

Order Date

07/06/2016 01:25 PM

Employee

PetExec Administration - Dori

Additional Info

Payment -
Card Type:
Card Number: XXXX-XXXX-XXXX-

Type

Credit

Amount Applied

20.00

Delete

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Billing Information for Order Id: 11037884 i

Order Date

07/06/2016 01:53 PM

Permanently Delete This Order

Email Receipt

Modify Owner

Receipt

Purchase History

Apply Refund

Click to Toggle Owner Information for Michelle Thomas

Transaction Detail

Product/Service	Price	Quantity	Subtotal	Delete
Owner Payment	0.00	1	\$ 0.00	

Discount	
Total Discount to Date : 0.00	
Subtotal	\$ 0.00
Tax	\$ 0.00
Total	\$ 0.00

Add a Product

Account Balance

As of 07/06/2016 02:00:06 PM, this account has a CREDIT of \$20.00

Payment Information

Select a Payment Type *

Select a Payment Type

Additional Notes

Skip Receipt

Email Receipt

Amount Applied

Amount Applied

Process Order

This is the Boarding Deposit Order.
 You can see the "Boarding Deposit in the Additional Info Field"
 You can see the payment type of "Tradeout"

Paste the details from the Owner Purchase order here
 and update the payment type from "Trade Out" to "Credit Card"

Click "Update History"

Payment History

Change the dates, additional info or amount applied as recalculate the totals.

Note: Once deleted, the record can not be recovered. You will delete the record from the system and

dd/yyyy hh:mm AM .

There has to be at least ONE history record. If there are Changing the type to "Credit" DOES NOT charge external processors like First Data!

Order Date	Employee	Additional Info	Type	Amount Applied	Delete
07/06/2016 01:53 PM	PetExec Administration - Dori	Boarding Deposit -	Tradeout	20.00	<input type="checkbox"/>

Update History

Return to Daily Stats

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**Helpful Tip - You can open the initial owner payment order in one browser window, and have the boarding deposit order open a second browser window. That will make it easy to move back and forth between orders.

6. You can then delete the initial order from the modify order screen. This will keep your orders balanced.

Modify Order

Search

Search Results

◀ previous 1 2 3 4 next ▶

Order Id	Owner Name	Transaction Date	Charge	Tax	Discount	Amount Applied	Receipt	Delete
10962332	Thomas, Michelle	06/29/2016 11:37 AM	0.00	0.00	0.00	20.00	Receipt PDF Email	<input type="button" value="Delete"/>
10962212	Thomas, Michelle	06/29/2016 11:27 AM	0.00	0.00	0.00	20.00	Receipt PDF Email	<input type="button" value="Delete"/>

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