



Occupancy Functionality

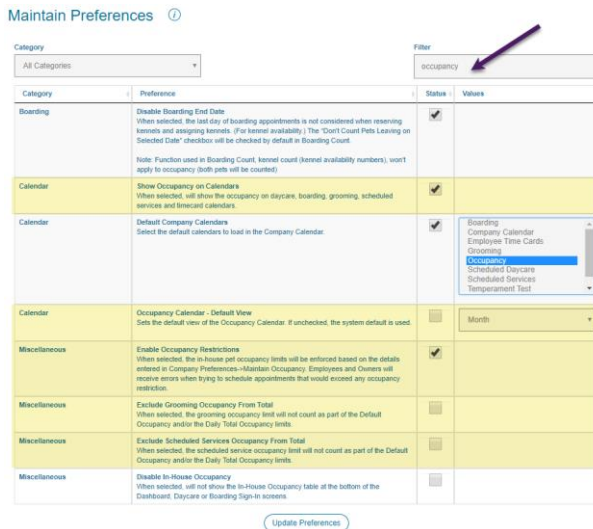
This document provides an overview of the PetExec occupancy functionality. This functionality allows businesses to limit the number of Pets that can be scheduled, or signed in, on a specific date.

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Application Preferences

The application preferences relevant to occupancy can be found by going to Company Preferences → Application Preferences and filtering by the word “occupancy.” The new preferences have been highlighted below.



Now lets cover a few in more detail:

- **Show Occupancy on Calendars**
When selected, will show the occupancy on daycare, boarding, grooming, scheduled services and timecard calendars.
 - Here is an example of the daycare calendar with the occupancy numbers.

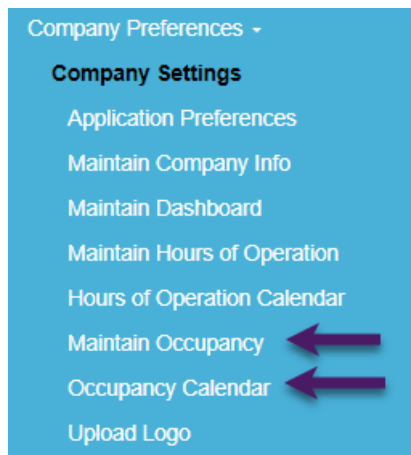
Scheduled Daycare Calendar (i)

May 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)	Scheduled (Allowed) Boarding: 0 (1) Daycare: 0 (1) Grooming: 0 (1) Scheduled Services: 0 (1) Total Pets: 0 (Max: 1.0%)

- **Enable Occupancy Restrictions**
When selected, the in-house pet occupancy limits will be enforced based on the details entered in Company Preferences->Maintain Occupancy. Employees and Owners will receive errors when trying to schedule appointments that would exceed any occupancy restriction.
 - This preference determines if limits are to be enforced. When checked, PetExec will error out when the limits are met and will not allow appointments to be scheduled.
- **Exclude Grooming Occupancy From Total**
When selected, the grooming occupancy limit will not count as part of the Default Occupancy and/or the Daily Total Occupancy limits.
 - This preference allows businesses to still enforce a limit for grooming, but at the same time exclude these pets from the total occupancy values (either default or daily). This is handy when businesses have mobile grooming services and therefore these pets are not in the building.

- Exclude Scheduled Services Occupancy From Total
When selected, the scheduled service occupancy limit will not count as part of the Default Occupancy and/or the Daily Total Occupancy limits.
 - This preference allows businesses to still enforce a limit for scheduled services, but at the same time exclude these pets from the total occupancy values (either default or daily). This can be used when businesses have scheduled services that are performed in a separate location and therefore these pets are not in the building.

Menu Items

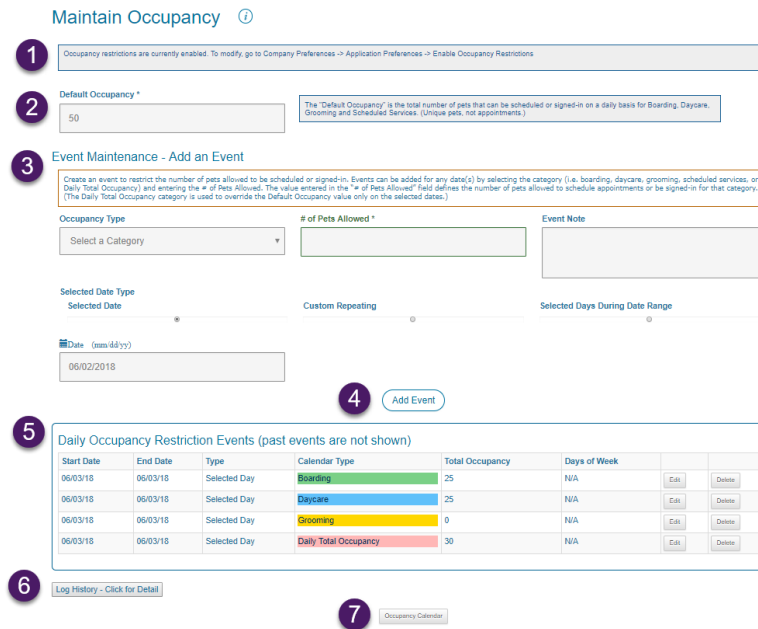


New Menu items: Maintain Occupancy and Occupancy Calendar

To enable these menu items, each relevant employee type will need to be updated. Detailed steps can be found here: [How do I enable new features released as part of a PetExec software update for my PetExec system?](#)

Adding Occupancy Limits

Now let's cover the steps to add occupancy limits by module. The limits can be added by navigating from the PetExec Main Menu to Company Preferences → Company Settings → Maintain Occupancy.

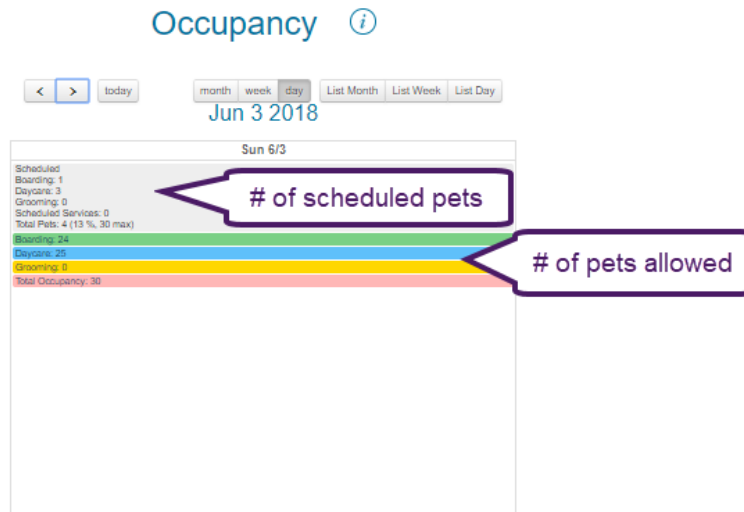


1. This section will reflect if the occupancy limits are enabled or disabled. When enabled, the limits will be enforced and users will get errors when scheduling appointments, or signing in daycare pets, if the limits have been met. When disabled, errors will be disabled and the occupancy limits entered are informational only.
2. Default Occupancy - The "Default Occupancy" is the total number of pets that can be scheduled or signed-in on a daily basis for Boarding, Daycare, Grooming and Scheduled Services. (Unique pets, not appointments.)
3. Event Maintenance – Add an Event
 - Create an event to restrict the number of pets allowed to be scheduled or signed-in.
 - Category
 - Select a specific module (Boarding, Daycare, Grooming, Scheduled Services) to set a limit by module
 - The Daily Total Occupancy category is used to override the Default Occupancy value only on the selected dates.)
 - Selected Date Type
 - Events can be added for a specific date (Selected Date), or date range (Custom Repeating or Selected Days During Date Range)
 - # of Pets Allowed
 - The value entered in the "# of Pets Allowed" field defines the number of pets allowed to schedule appointments or be signed-in for that category. Zero is allowed and means that no pets can schedule, or be signed in, for the specified category.
4. Click the "Add Event" button to save.
5. Daily Occupancy Restrictions Events

- This table shows all future events. (Past events are not displayed, but can be viewed on the calendar.)
6. Log History
 - Click to open/close the log of the last 20 changes made
 7. Occupancy calendar
 - The occupancy calendar is only a click away.

Occupancy Calendar

The calendar provides a one stop view into not only the occupancy limits, but also to the number of pets scheduled by module. As with other calendars, you have the option to view it by month, week, day, List Month, List Week, and List Day.



Error Message Example

When occupancy is enabled and the limit has been met, errors will prevent scheduling, or signing in. Here is an example of an error message.

