



Override Functionality

This document provides an overview of the PetExec override functionality. This functionality allows select employees to bypass certain errors. (Sometimes it is necessary to ignore some errors and this provides a simple, but secure, way to do just that.)

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Purpose

This functionality allows selected employees to override certain errors by entering their username and password. This comes in handy when preference settings result in errors that prevent employees from scheduling appointments or signing pets in. It is designed to provide management a more convenient way to work with the desired preference settings, but also make the decision to ignore consequent errors as they see fit. For example, let's say that an employee gets an occupancy limit error when trying to schedule a daycare appointment. However, the manager wants to allow the appointment. The manager can now override the error and make the appointment.

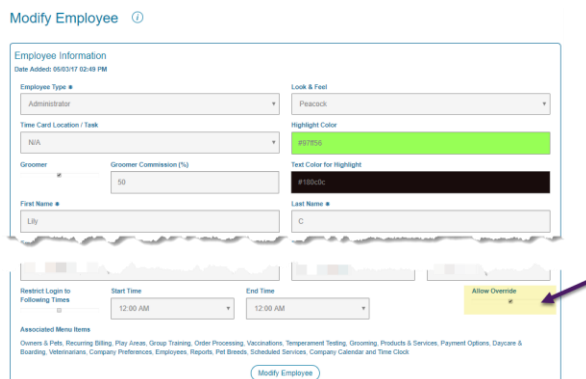
What errors can be overridden?

- In Daycare, Grooming, and Scheduled Services:
 1. Occupancy limit errors
- In Boarding:
 1. Occupancy limit errors
 2. No signed contract/agreement errors
 3. # of pets errors
 4. Require credit card errors
 5. Hours of operation errors
 - Sign-in / sign-out time checks.
 - Boarding closed errors
 6. Kennel availability errors (to allow overbooking – when all kennels are reserved)
 7. Duplicate appointments errors (when siblings require separate appointments)

Setup steps

There are a couple of setup steps to enable this functionality.

1. Decide which employees can perform overrides and update their employee records. To authorize an employee, modify their employee record (Main Menu → Employees → Maintain Existing Employees), check the “Allow Override” box and click the “Modify Employee” button to save the changes.



The screenshot shows the 'Modify Employee' form with the following fields and values:

- Employee Information**
 - Date Added: 05/23/17 02:49 PM
 - Employee Type: Administrator
 - Time Card Location / Task: N/A
 - Groomer: Lily
 - Groomer Commission (%): 50
 - First Name: Lily
 - Last Name: C
- Look & Feel**
 - Look & Feel: Peacock
 - Highlight Color: #00FF00
 - Text Color for Highlight: #000000
- Associated Menu Items**
 - Divorce & Pets, Recurring Billing, Play Areas, Group Training, Order Processing, Vaccinations, Temperament Testing, Grooming, Products & Services, Payment Options, Daycare & Boarding, Veterinarians, Company Preferences, Employees, Reports, Pet Brands, Scheduled Services, Company Calendar and Time Clock
- Restrict Login to Following Times**
 - Start Time: 12:00 AM
 - End Time: 12:00 AM
 - Allow Override: (indicated by a purple arrow)
- Buttons**
 - Modify Employee

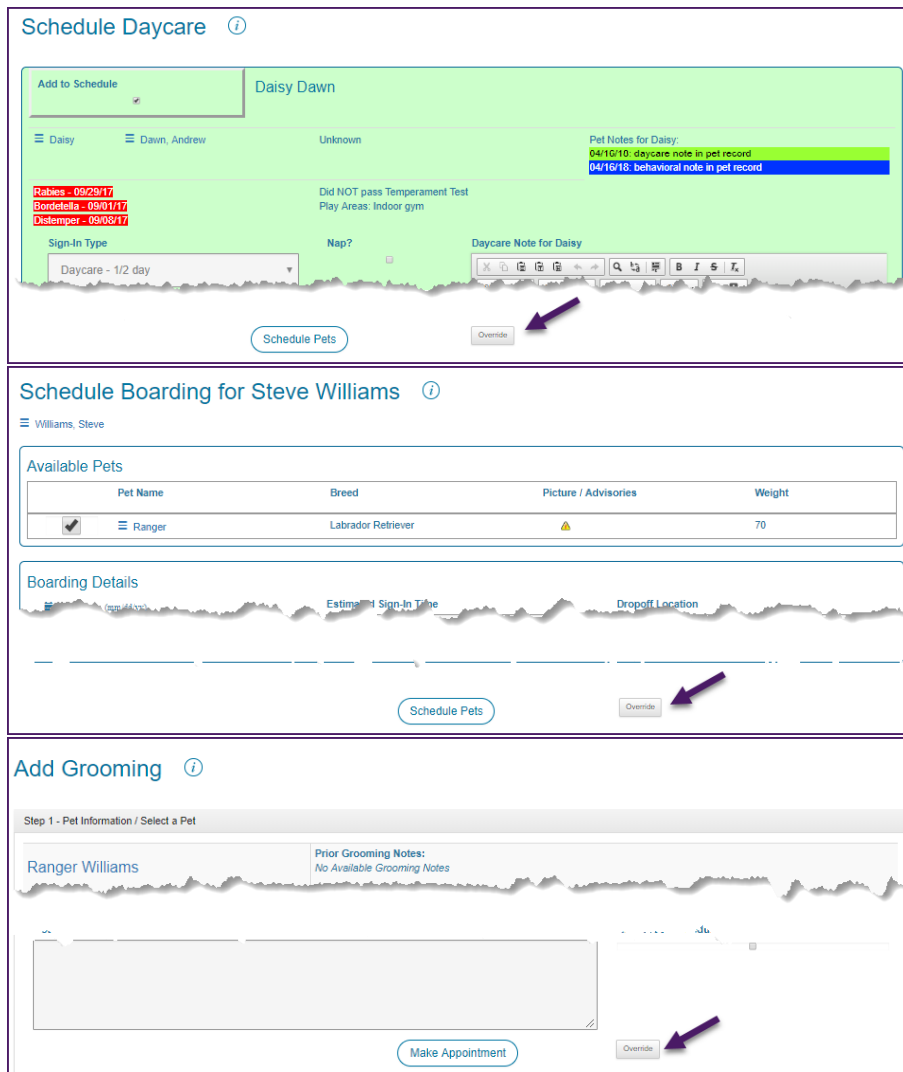
2. Check the “Show Override Buttons” preference to make sure it is enabled.

Application preference

The application preference relevant to override can be found by going to Company Preferences → Application Preferences and filtering by the word “override.”

Category	Preference	Status
Miscellaneous	Show Override Buttons When selected, the override buttons will be visible wherever override is allowed. Override buttons will allow employees that have the “Allow Override” option checked in Modify Employee to override some system preferences/settings.	<input checked="" type="checkbox"/>

- The “Show Override Buttons” preference does just that, it makes the override buttons visible wherever relevant. Below are some examples:



Steps to perform an override

1. Employee gets errors when scheduling an appointment or signing in a daycare.
2. Employee reaches out to manager (any employee with override privileges) and shows them the error.
3. Manager reads the error message and decides it is ok to override. They close the error message and click on the override button. Manager enters their username and password, and clicks the "Validate" button to complete the override.
4. If the credentials are successfully validated, the override button will turn green indicating that the override was successful
5. Proceed with scheduling, or signing in.

Boarding example

Let's go through an example for boarding:

1. Employee tries to schedule a boarding appointment:

Pet Name	Breed	Picture / Advisories	Weight
<input checked="" type="checkbox"/> Ranger	Labrador Retriever		70

Boarding Details

Estimate Sign-In Time Dropoff Location

Schedule Pets Override

They get the following error:

Doggone it!

- 1 A signed Boarding Contract is required prior to scheduling a Boarding. Please modify the owner and check the "Signed Boarding Agreement" checkbox before attempting to board the pets.
- 2 There is no credit card on file, which is a prerequisite to scheduling or modifying a Boarding.
- 3 No boardings are allowed on Sunday, 06/03/18.
- 4 The # of pets entered does not match the number of pets selected to board.
- 5 The following dates are fully booked:
Date: 06/03/18 ... Maximum number of already scheduled kennels associated with x - Small Suite:
- 6 Occupancy limit reached on Sunday, 06/03/18.
There is no space left without going over occupancy limits for Boarding on Sunday, 06/03/18.

Close

Notice that the error includes a total of 6 separate errors.

2. They call the manager to override so that they can schedule. Manager reads the error messages (6 in this case) and decides it's ok to override. They then click the override

button.

Schedule Boarding for Steve Williams ⓘ

Williams, Steve

Available Pets

Pet Name	Breed	Picture / Advisories	Weight
<input checked="" type="checkbox"/> Ranger	Labrador Retriever	⚠	70

Boarding Details

Estimate Sign-In Time Dropoff Location

Schedule Pets Override

3. The validation message asking for username and password pops up. They enter their username and password, and click the validate button.

Enter Credentials to Validate Override

Username Password

Validate

4. Once they successfully validate, the override button turns green

Schedule Boarding for Steve Williams ⓘ

Williams, Steve

Available Pets

Pet Name	Breed	Picture / Advisories	Weight
<input checked="" type="checkbox"/> Ranger	Labrador Retriever	⚠	70

Boarding Details

Estimate Sign-In Time Dropoff Location

Schedule Pets Override

5. Employee can now click "Schedule Pets" and proceed with scheduling the appointment.
- ❖ The appointment will have a log entry specifying the override details including the errors that were overridden.

Modify Boarding Schedule for Steve Williams ⓘ

Williams, Steve You can add another boarding for this owner here!

[Modify Boarding Schedule](#)
[Boarding Pets](#)
[Associated Services](#)
[Daily Details](#)

Boarding Score Cards

Ranger Williams ⚠ [Web Score Card](#) [PDF Score Card](#) Labrador Retriever / Weight: 70

Resend Email [Resend Boarding Email](#)
Invoice Estimate [Invoice Estimate](#)
Date Scheduled (mm/dd/yy) 06/03/18
 Deposit \$ 0.00 [Add Deposit](#)

Boarding Details

[Start](#) Date (mm/dd/yy) [End](#) Date (mm/dd/yy)

Log History

There are no history records available.

Boarding History (Last 25 Changes Shown, Most Recent On Top)

Date: 06/03/18 01:14:33 AM, added by Lily C
 Added a boarding to system starting 06/03/18 and ending 06/03/18 for Ranger using the following services: x - Small Suite: multiplier = 1, numpets = 1, quantity = 10 x - Boarding 1 dog: multiplier = 1, numpets = 1, quantity = 1, with the following status: Active
 Overrode boarding ID 3636819 by Lily C during initial scheduling of the boarding. **The following errors were overridden:** "A signed Boarding Contract is required prior to scheduling a Boarding. Please modify the owner and check the "Signed Boarding Agreement" checkbox before attempting to board the pets.
 There is no credit card on file, which is a prerequisite to scheduling or modifying a Boarding.
 The # of pets entered does not match the number of pets selected to board.
 The following dates are fully booked:
 Date: 06/03/18 ... Maximum number of already scheduled kennels associated with x - Small Suite:
 Occupancy limit reached on Sunday, 06/03/18.
 There is no space left without going over occupancy limits for Boarding on Sunday, 06/03/18.
 "

Note: For boarding, multiple errors can be overridden at once. It is critical to fully understand the errors before performing overrides.