An Overview to PetExec's Owner Portal

Owners can be given access to their own PetExec portal. They can perform multiple tasks without the need for extra assistance. This saves you time and money so that you can focus on what matters most to both of you – your guests!

This document gives a high-level overview of the owner portal functionality.

Contents:

What can owners accomplish from their portal? PetExec gives **you** the tools to configure the privileges to fit your business needs. Here is a list of options:

1. Add & modify their own personal information
   - Add & modify pet information
   - Maintain credit card information
   - View, sign, and print contracts (sign with a username & password validation or using a digital signature)
   - Upload files
2. Schedule daycare appointments
3. Schedule boarding appointments
4. Request a grooming appointment
5. View scheduled appointments
6. View purchase history
7. View package status
8. Make payments (must be integrated with First Data)
9. Send email to your company's email address
10. View personal notes from you
11. Have a shortcut to your webcam site

These options are configurable, so you can enable/disable options to customize the owner portal. PetExec offers a lot of flexibility in this area, so be sure to review the options and enable only those that work for your company. For example, if you want owners to register themselves, but not be allowed to schedule any appointments until it's confirmed that their pets pass the temperament test, PetExec can do just that!!

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How does an owner get access?

First they need an account and it can be created in one of two ways: you can create a username and password for them via Modify Owner, or they can create their own when they register themselves using your company's unique link.

What does the owner portal look like? Below is an example. In this particular image, all of the privileges have been enabled for demonstration purposes.