

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.

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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!!

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.

PetExec Training
Today is: 04/11/2016

Hello Bob Smith!
Log Out

PetExec Training Menu Options

- Owner & Pets**
 - Modify Info
 - Manage Credit Cards
 - Modify Pets
 - File Uploads
 - Available Agreements
- Daycare**
 - Schedule a Daycare
 - Daycare Calendar
- Grooming**
 - Request a Grooming
 - Grooming Calendar
- Packages**
 - Daycare Package History
- Purchases**
 - Make a Payment
 - Purchase History
- Boarding**
 - Schedule a Boarding Time
 - Modify Boarding Time
 - Boarding Calendar
 - Boarding
 - PetExec Training Webcam
 - Contact
 - Contact PetExec Training

Welcome valued pack mates!
This message can be customized to fit your business's style.
Here you can give your owners a custom message detailing exactly what you want to communicate and in the design of your liking.

Personal Notes from PetExec Training
04/10/2016 03:09 PM -
Hi Bob,
We want to let you know that Zoe and Ranger are doing great! They are having a blast during the day and are ready to rest when the day comes to an end. We hope you are having a great vacation. Rest assured that we are taking great care of your furry friends.
Your friends at PetExec!

Vaccination Status
This area is being displayed because your pet appears to have expired vaccinations. Please contact PetExec Training or your vet to schedule your vaccination updates.

Pet Name	Vaccination Type	Date
Ranger Smith	Bordetella	03/03/2015
Zoe Smith	Bordetella	03/22/2016
Zoe Smith	Distemper	12/02/2014

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