



## Pet Notes and Appointment Notes

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PetExec understands that notes about pets and appointments are important, so there are many ways to add notes to the PetExec system, here is a summary of two different types of notes:

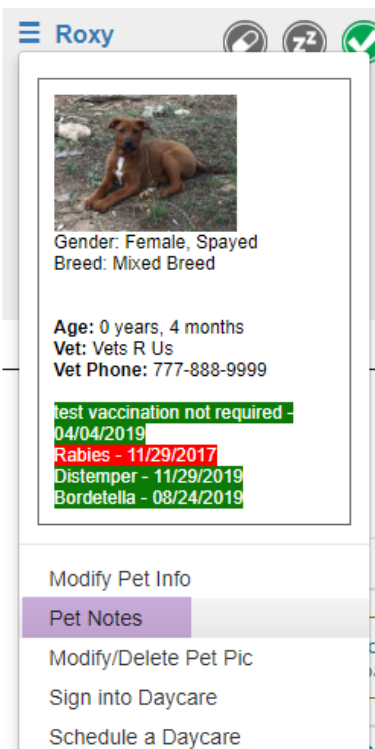
1 - Pet Notes

2 - Appointment Notes

## Pet Notes

Pet Notes are added at the pet record:

When adding a Pet Note from the pet menu note type and note style can be selected:



### 1.) Note Type:

PetExec uses Note Type to indicate where in the system the note will be displayed:

Assoc. with Pet Record is only displayed when viewing the Modify Pet screen/ pet record.

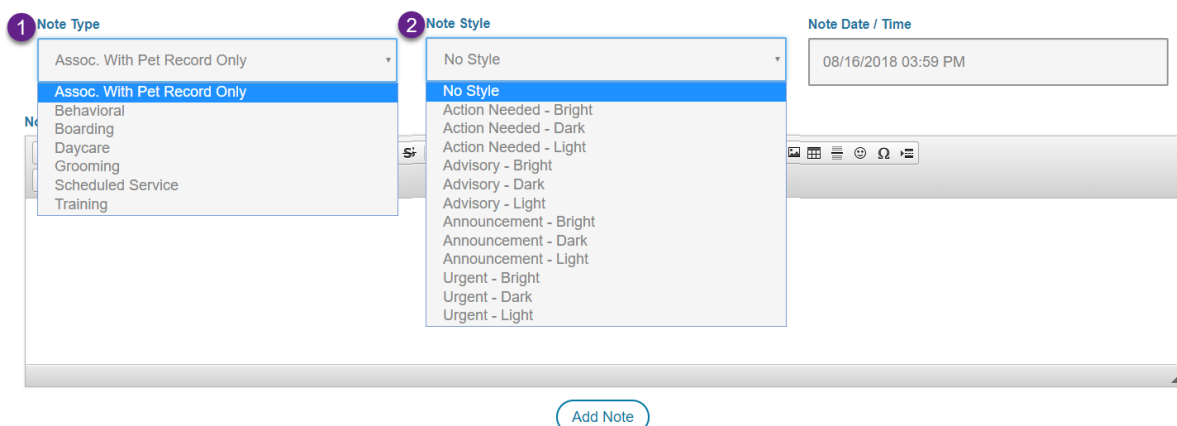
Behavioral notes are displayed anywhere pet notes are displayed regardless of the module (i.e. daycare, boarding, grooming).

The other note types will only be displayed in that module, with one exception, the Scheduled Services module will include both "grooming" and "scheduled service" note types.

### 2.) Note Style:

Note styles apply an associated highlight color. These can be used as desired for your business. There is nothing automated in PetExec related to the descriptions of the note styles, they are simply descriptions.

## Pet Notes for Roxy Jones ⓘ



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Here is an example of a pet record with a note of each note type, each one using a unique note style.

Existing Notes			
Date	Note Type	Note	
08/16/2018 03:07 PM	Training	Pet Note with note type = "training". Added at Pet Record.	Edit Delete
11/07/2017 12:23 PM	Behavioral	Pet Note with note type = "behavioral". Added at Pet Record.	Edit Delete
08/25/2017 10:29 AM	Grooming	Pet Note with note type = "grooming". Added at Pet Record.	Edit Delete
06/22/2017 09:34 AM	Boarding	Pet Note with note type = "boarding". Added at Pet Record.	Edit Delete
04/07/2017 10:10 AM	Assoc. With Pet Record Only	Pet Note with note type = "Assoc with pet record only". Added at Pet Record.	Edit Delete
03/08/2017 04:52 PM	Daycare	Pet Note with note type = "daycare". Added at Pet Record.	Edit Delete
02/07/2017 09:40 AM	Scheduled Service	Pet Note with note type = "scheduled services". Added at Pet Record.	Edit Delete

### Appointment Notes:

Appointment notes can be added to each of the various types of appointments in PetExec either when scheduling or modifying those appointments, these are separate and unique from the pet notes. The following are examples from the schedule screen for each of the modules:

### Boarding Notes:

#### Boarding Details

<b>Start Date (mm/dd/yyyy)</b> <input type="text" value="08/16/2018"/>	<b>Estimated Sign-In Time</b> <input type="text" value="12:00 PM"/>	<b>Dropoff Location</b> <input type="text" value="East Region"/>
<b>End Date (mm/dd/yyyy)</b> <input type="text" value="08/16/2018"/>	<b>Boarding End Time</b> <input type="text" value="Select a Sign-Out Time"/>	<b>Pick-up Location</b> <input type="text" value="East Region"/>
<b>Boarding Status</b> <input type="text" value="Active"/>	<b>Customer Requested Pick-up</b> <input type="text" value="Select a Customer Pick Up Time"/>	
<b>Emergency Contact *</b> <input type="text" value="Joy"/>	<b>Emergency Number *</b> <input type="text" value="888-999-7777"/>	<b>Scheduler Name / Initials</b> <input type="text" value="Enter Initials"/>

1 **Notes**

Appointment note added when scheduling boarding

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## Daycare Notes:

**Add to Schedule** □ **Roxy Jones**

☰ Roxy    ☰ Jones, Susie    🐾 ⚠ Mixed Breed    4 mons 12 days

**Pet Notes for Roxy:**  
11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record.  
03/08/2017: Pet Note with note type = "daycare". Added at Pet Record.

test vaccination not required - 04/04/2019    Passed Temperament Test  
Rabies - 11/29/2017    Play Areas: Outdoor Playground - Small Dogs  
Distemper - 11/29/2019  
Bordetella - 08/24/2019

**Sign-in Type**    **Nap?**

Full Day Daycare

**Play Area**

\* Outdoor Playground - Small Dogs

**1 Daycare Note for Roxy**

Appointment note added when scheduling daycare

## Grooming Notes:

Step 4 - Appointment Details

**Scheduled Time \***    **Duration \***    **Duration Units**

08:00 AM    2    Hours

**Groomer**

Select a Groomer

**Estimated Drop-off Time**    **Drop-off Location**    **Drop-off Location - Other**

08:00 AM    East Region    Alternate Dropoff Location

**Estimated Pick-Up Time**    **Pick-Up Location**    **Pick-Up Location - Other**

08:00 AM    East Region    Alternate Pickup Location

**1 Notes**

Appointment note added when scheduling grooming

**Redirect to Schedule**

**Make Appointment**    **Override**

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## Scheduled Service Notes:

Step 4 - Appointment Details

<b>Scheduled Time *</b>	<b>Duration *</b>	<b>Duration Units</b>
08:00 AM	2	Hours

**Employee**

Select an Employee

<b>Estimated Drop-off Time</b>	<b>Drop-off Location</b>	<b>Drop-off Location - Other</b>
08:00 AM	East Region	Alternate Dropoff Location
<b>Estimated Pick-Up Time</b>	<b>Pick-Up Location</b>	<b>Pick-Up Location - Other</b>
08:00 AM	East Region	Pick-Up Location

**1** Notes

Appointment note added when scheduling a scheduled service.

Make Appointment      Override

Appointment notes and Pet Notes are also visible in various places throughout each of the modules. Here are some examples:

When scheduling a boarding from the boarding dashboard here:

**Boarding** ⓘ

Calendar      **1** Modify Boarding      Schedule Boarding      Boarding Options ☰

**Current Log**      *Currently, we have 1 boarding for a total of 1 pet.*

The pet notes are displayed. In this example we see the behavioral pet note and the boarding pet note.

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## Schedule Boarding (i)

Search

There were 1 pets found matching 'roxy'.

### Search Results

◀ previous 1 next ▶

	Pet Name	Type	Gender	Spay/Neuter	Breed	Weight	Owner		Photo	Pet Notes
Select	Roxy	Dog	Female	Spayed	Mixed Breed test vaccination not required - 04/04/2019 Rabies - 11/29/2017 Distemper - 11/29/2019 Bordetella - 08/24/2019		Jones, Susie Contract: Yes Boarding Contract: Yes	\$	 1	<b>Pet Notes for Roxy:</b> 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record. 06/22/2017: Pet Note with note type = "boarding". Added at Pet Record.

◀ previous 1 next ▶

When scheduling a daycare, from the daycare dashboard the pet notes are displayed here for each pet:

Add to Schedule Roxy Jones

---

☰ Roxy    ☰ Jones, Susie    🐾 ⚠ Mixed Breed    1 Pet Notes for Roxy:

4 mons 13 days

---

test vaccination not required - 04/04/2019    Passed Temperament Test  
Rabies - 11/29/2017    Play Areas: Outdoor Playground - Small Dogs  
Distemper - 11/29/2019  
Bordetella - 08/24/2019

---

11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record.  
03/08/2017: Pet Note with note type = "daycare". Added at Pet Record.

When you schedule a grooming from the grooming dashboard and search for a pet the pet notes are displayed. In this example you see the Pet Notes and the appointment notes from the prior appointments:

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## Add Grooming (i)

Search for Pet

 Search

There were 1 pets found.

Search Results

	Pet Name	Pet Type	Breed / Notes	Weight	Owner Name	
Select	Roxy Jones	Dog	Mixed Breed Pet Notes for Roxy: <span style="background-color: #007bff; color: white; padding: 2px;">11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record.</span> <span style="background-color: #ffc107; padding: 2px;">08/25/2017: Pet Note with note type = "grooming". Added at Pet Record.</span> 08/16/2018 Appointment note added when scheduling a grooming. 03/21/2018 note added to grooming appt in notes field 3/21/18 11/09/2017 note added at schedule 10/27/2017 test note added to grooming 10/27 dms 02/24/2017 note added at scheduled grooming on owner portal		Jones, Susie	\$ ⓘ

When you schedule a scheduled service appointment from the scheduled service dashboard the pet notes are displayed. In the scheduled service module you will see "behavioral" notes, "grooming" notes and "scheduled service" notes.

## Add Scheduled Service (i)

Search for Pet

 Search

There were 1 pets found.

Search Results

	Pet Name	Pet Type	Breed / Notes	Weight	Owner Name	
Select	Roxy Jones	Dog	Mixed Breed Pet Notes for Roxy: <span style="background-color: #007bff; color: white; padding: 2px;">11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record.</span> <span style="background-color: #ffc107; padding: 2px;">08/25/2017: Pet Note with note type = "grooming". Added at Pet Record.</span> <span style="background-color: #dc3545; color: white; padding: 2px;">02/07/2017: Pet Note with note type = "scheduled services". Added at Pet Record.</span> 08/16/2018 Appointment note added when scheduling a scheduled service.		Jones, Susie	\$ ⓘ

Pet Notes and Appointment Notes are then displayed on the various dashboards throughout PetExec: 1) Pet Notes 2) Appointment Notes.

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Boarding Dashboard showing pet notes and appointment notes:

**Boarding** ⓘ

Calendar    Modify Boarding    Schedule Boarding    Boarding Options ☰

**Current Log** *Currently, we have 1 boarding for a total of 1 pet.*

Search | 🔍

Owner	Sign-In	Sign-Out	Boarding Type
Edit Boarding Jones, Susie Roxy Mixed Breed 0 years, 4 months   Female / Spayed Play Areas: Outdoor Playground - Small Dogs Pet Notes for Roxy: 1 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record. 06/22/2017: Pet Note with note type = "boarding". Added at Pet Record.	08/16/2018 03:12 PM	08/16/2018 12:00 PM	Happy Dog Small Suite - Boarding 1 Dog 2 note added to the boarding appointment. Kennel: Unknown Already Signed Into Daycare

Daycare dashboard showing pet notes and appointment notes:

**Daycare** ⓘ

Quick Check-in    Daycare Sign-In    Schedule Daycare    Daycare Options ☰

**Current Log** *There are currently 1 pets logged into Daycare.*

Search | 🔍

Pet	Owner	Time-In	Type
Roxy Jones Mixed Breed 0 years, 4 months Female / Spayed	Jones, Susie	08/17/2018 06:20 AM	* Outdoor Playground - Small Dogs Full Day Daycare Pickup: 06:00 PM Check Back into Boarding ☐ 1 Pet Notes for Roxy: 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record. 03/08/2017: Pet Note with note type = "daycare". Added at Pet Record. 2 Appointment note added when scheduling daycare Package #6593014, 10 Half Day - Daycare Package, 20 left

Grooming dashboard showing pet notes and appointment notes:

**Grooming Schedule** ⓘ

Calendar    Schedule Grooming    Grooming Options ☰

**Current Log** *There are currently 1 pets on the schedule for grooming today.*

Search | 🔍

Owner	Pet	Date	Service(s)	Groomer	Notes	Modify	Status	Delete
Jones, Susie	Roxy Jones Mixed Breed	08/17/2018 08:00 AM	Pet-a-cure(20.00) , Basic Bath(15.00) Already signed into Daycare or Boarding test vaccination not required - 04/04/2019 Rabies - 11/29/2017 Distemper - 11/29/2019 Bordetella - 08/24/2019	Clark, Grace Pickup: AM	Appointment note added when scheduling a grooming Pet Notes for Roxy: 1 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record. 08/25/2017: Pet Note with note type = "grooming". Added at Pet Record. Score Card (PDF)	Modify	Sign-In	Delete

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Scheduled service dashboard showing pet notes and appointment notes:

**Scheduled Services** ⓘ Calendar Add Service Scheduled Services Options

**Current Log** *There are currently 1 pets with Scheduled Services today.*

Owner	Pet	Date	Service(s)	Employee	Notes	Modify	Status	Delete
Jones, Susie	Roxy Jones	08/16/2018 08:00 AM	Trail Hike test vaccination not required - 04/04/2019 Rabies - 11/29/2017 Distemper - 11/29/2019 Bordetella - 08/24/2019	Grace Cla	Appointment note added when scheduling a scheduled service. Pet Notes for Roxy: 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record. 08/25/2017: Pet Note with note type = "grooming". Added at Pet Record. 02/07/2017: Pet Note with note type = "scheduled services". Added at Pet Record.	Modify	Sign-In	Delete

Kennel:

Only appointment notes are displayed on the Combined In House dashboard:

**Combined In-House** ⓘ Schedule Daycare Daycare Sign-In Quick Check-in Combined Options

**Current Log** *There are 1 daycares, 1 boardings containing 1 boarding pets and 1 groomings.*

Type	Owner	Pet Name / Description	Sign-In	Sign-Out
Daycare	Jones, Susie	Roxy Mixed Breed Female / Spayed	08/17/2018 06:20 AM Appointment note added when scheduling daycare.	06:00 PM
Boarding	Jones, Susie	Roxy Mixed Breed Female / Spayed	08/16/2018 03:12 PM Appointment note added when scheduling boarding	08/16/2018 12:00 PM
Grooming	Susie Jones	Roxy Jones Mixed Breed Female / Spayed	Appointment note added when scheduling a grooming Pet-a-cure, Basic Bath	08/17/2018 8:00 AM Pickup: 08:00 AM Logged In

When pets are added to a group training class, you will see the pet notes under the currently assigned pets when you click on the training class. Since there no "appointments" associated with group training, there are no appointment notes available. Notes about a pet should be added to the pet record as note type = "training".

**Currently Assigned Pets**

Pet / Owner	Date Enrolled	Status	Training Notes
Roxy Jones Jones, Susie	08/16/2018	Order ID: 22747770 on 08/16/2018	Pet Notes for Roxy: 08/16/2018: Pet Note with note type = "training". Added at Pet Record. 11/07/2017: Pet Note with note type = "behavioral". Added at Pet Record.

Resend Email Edit Note Delete

There are no outstanding requests for this class.

Email Class

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