



## Report Card Functionality

This document provides an overview of the PetExec report card functionality from setup to daily use.

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# Setting up the template

The first step is designing the report card template. It is important to customize the design to not only meet your business needs, but to create the look and feel to make them unique. PetExec gives a lot of flexibility in this area, so be creative and have fun!

Go to Company Preferences → Maintain Report Cards to get to the template

Maintain Report Card ⓘ

**Report Card Details**

Dynamic Replacement Values you may use in the Template Content  
(There are two (2) underscores in front of and behind of the variable name):

__DATE__	Current Date	__OWNER__	Owner First and Last Name
__PETNAME__	Pet Name	__OWNER_FIRSTRNAME__	Owner First Name
__PETPIC__	Pet Pic, if available	__COMPANY__	Your Company Name
__SECTIONS1__	Section 1	__LOGO__	Your Company Logo
__SECTIONS2__	Section 2	__RESPONSE1__	Section 1 Response
__SECTIONS3__	Section 3	__RESPONSE2__	Section 2 Response
__SECTIONS4__	Section 4	__RESPONSE3__	Section 3 Response
__SECTIONS5__	Section 5	__RESPONSE4__	Section 4 Response
__SECTIONS6__	Section 6	__RESPONSE5__	Section 5 Response
__SECTIONS7__	Section 7	__RESPONSE6__	Section 6 Response
__SECTIONS8__	Section 8	__RESPONSE7__	Section 7 Response
__SECTIONS9__	Section 9	__RESPONSE8__	Section 8 Response
__SECTIONS10__	Section 10	__RESPONSE9__	Section 9 Response
__DEFAULT_DATA__	Location of the default sections / responses when using default option.	__RESPONSE10__	Section 10 Response

**1**

**2**

**3**

Use Default Use Custom

1) The Dynamic Replacement Values (DRVs) are the system variables that can be used in the template in order to customize the information. Create up to 10 sections to add to your report card and name/label them based on the information you want to include. Each Section has a corresponding Response DRV to allow inputs on each individual report card created.

2) The Section 1-10 fields are the questions/topics that can be included in the report card. They can be named/labeled as needed. These are typically followed by a response which is the information that is entered when the report card is created.

For this document, we will use the following values:

Section 1 = "Today I enjoyed the following:"

Section 2 = "Food/water details:"

Section 3 = "I learned or worked on the following:"

Section 4 – 10 will be left blank

Here is an example of where these fields show up:

Where are the \_\_SECTION1\_\_ through \_\_SECTION10\_\_ and the \_\_RESPONSE1\_\_ through \_\_RESPONSE10\_\_ values used?

**When filling out a report card**

\_\_SECTION1\_\_

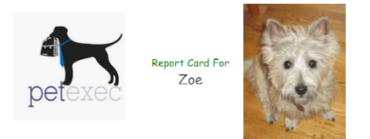
\_\_SECTION2\_\_

\_\_SECTION3\_\_

RESPONSE1

RESPONSE2

RESPONSE3



Today I enjoyed the following: I made a new friend and enjoyed the obstacle course outside.  
Food/water details: I ate all my lunch and drank water often.  
I learned or worked on the following: I was able to stay for a whole minute before getting wiggly.

PetExec Training  
111 Park Ave, City, VA 11111

Sample report card

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3) PetExec provides 2 design options for the report card templates. The “Use Default” option and the “Use Custom” option. This document will go over the specifics of each option in more detail and will provide examples, but in essence, they are 2 types of templates. Only one can be selected at a time.

### Use Default option:

When “Use Default” is selected, the template provides a more responsive email format, meaning that the emails can be more readable on different screen sizes. This template provides the following Email Options:

- 1) Background Color
- 2) Custom Header Image
- 3) Show Company Logo
- 4) Show Owner Portal Login
- 5) Show Media Links
- 6) The “Use Default” template also requires that the \_\_DEFAULT\_DATA\_\_ dynamic replacement value is used in the Default Content section. This section can include other information/images, but the dynamic replacement value must be used where the table with the information entered in the Section 1-10 fields plus their corresponding Responses will be displayed.
- 7) Click the Update button to save changes
- 8) Click the Preview button to view the saved changes

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Here is a sample of the "Use Default" design:

The image shows a sample of a pet report card design. It features a header with a company logo (petexec), a custom header image of a dog, and a login button. The main content includes the report card title, pet name, pet picture, date, and a table with sections and responses. At the bottom, there are social media links.

Callouts and their corresponding elements:

- Company Logo
- Owner Portal Login
- Custom Header Image "Catch Me!" image displayed
- Background Color
- Report Card Title
- Pet name
- Pet picture (if one exists)
- Date
- \_\_DEFAULT\_DATA\_\_ (table with the relevant Section and Response fields)
- Show Media Links

Note: The layout allows for customization, but the formatting for the following items can't be modified: The Report Card Title, Pet name & Pet image, Date, and the table with the relevant sections and the corresponding responses.

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## Use Custom option:

When "Use Custom" is selected, the template provides a Header, Content, and Footer section which can be customized to include whatever content and formatting is needed. This gives more freedom with the design but does not include some of the responsive email features available in the "Use Default" template. In the image below, we find the following:

- 1) Header – In this example, the header is using Dynamic Replacement Values (DRVs) like \_\_LOGO\_\_, \_\_PETNAME\_\_, and \_\_PETPIC\_\_.
- 2) Content – In this example, the Content section of the email contains 3 sections and the corresponding response DRVs.
- 3) Footer – In this example, the Footer contains the company name and address, but no DRVs.
- 4) Click the Update button to save any changes.
- 5) Click the Preview Changes button to preview the saved changes.

Directions: Choose the style you like. The "Default" will do most of the formatting and provide the best choice for responsive emails. The "Custom" choice gives you more choice in the design at the expense of added complexity.

Use Default Use Custom

1 Header

Report Card For  
\_\_PETNAME\_\_

2 Content

SECTION1 \_\_RESPONSE1\_\_  
SECTION2 \_\_RESPONSE2\_\_  
SECTION3 \_\_RESPONSE3\_\_

3 Footer

PetExec Training  
111 Park Ave, City, VA 11111

4 Update Preview Changes 5

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Here is a preview of the report card created for Zoe using the template shown above:



The image shows a preview of a report card for a dog named Zoe. The report card is divided into three sections: a header, content, and footer. The header section includes the PetExec logo (a black dog silhouette with a blue leash and the text 'petexec'), the title 'Report Card For Zoe', and a photograph of a small white dog. The content section contains three entries: 'Today I enjoyed the following: I made a new friend and enjoyed the obstacle course outside.', 'Food/water details: I ate all my lunch and drank water often.', and 'I learned or worked on the following: I was able to stay for a whole minute before getting wiggly.'. The footer section contains the text 'PetExec Training' and '111 Park Ave, City, VA 11111'. Three purple callout boxes with white text point to the 'Header', 'Content', and 'Footer' sections respectively.

petexec

Report Card For  
Zoe

Header

Content

Footer

Today I enjoyed the following: I made a new friend and enjoyed the obstacle course outside.

Food/water details: I ate all my lunch and drank water often.

I learned or worked on the following: I was able to stay for a whole minute before getting wiggly.

PetExec Training  
111 Park Ave, City, VA 11111

Once your template design is complete, be sure to save your changes!

# Creating a report card

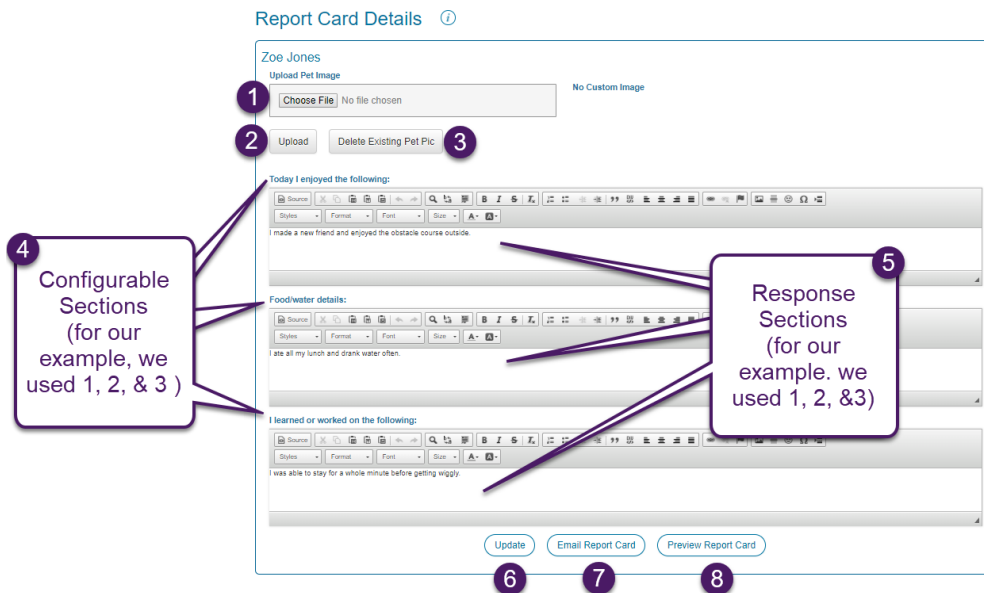
Now you are ready to create report cards for your guests!

Note: A pet can have one report card created per day.

1. To create a report card, go to the pet menu and click on the Create Report Card option.



2. Once you click on the Create Report Card link, you are ready to fill out the information for that particular pet. Let's review the options:
  - 1) Choose File allows you to select a different image to be used with the \_\_PETPIC\_\_ Dynamic Replacement Value. One image per report card can be uploaded. However, more images can be added in the response sections if needed.  
(Note: The image in the pet record, if one exists, will be used if a new one is not uploaded. )
  - 2) Click the Upload button to upload the image selected above. The uploaded image will display when the upload is completed.
  - 3) Click the Delete Existing Pet Pic to remove the uploaded image.
  - 4) Notice that the names entered in the template in the Section 1, Section 2, and Section 3 fields are displayed here.
  - 5) The corresponding Response 1, Response 2, and Response 3 DRVs are the areas where the report card information can be entered.
  - 6) Click the Update button to save any changes.
  - 7) Click the Email Report Card button to email the report card to the owner.
  - 8) Use the Preview Report Card button to preview the latest saved changes.



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# Report Card Maintenance

Maintaining report cards is easy! The Report Card Maintenance functionality provides a convenient place to see the created report cards and their status.

From the main menu, go to Owners & Pets → Report Card Maintenance. From there, you can pull up report cards by date range and review their status. From here, employees can update report cards, email them, and even pull up past report cards by pet.

- 1) Select the date range you want to review. You can leave the search field blank and click the Search button to return all records for the date range or search for a specific pet name.
- 2) The status will show if a report card was started (filled in) or emailed (sent). Click the button in the Status column to pull up the report card details.  
*Note: Filled in simply means that some text was entered/saved and may not mean the report card is complete and ready to be sent.*
- 3) You can select multiple report cards at a time to either delete or send all at once. Or use the Toggle All to check the boxes for all.
- 4) Once you check the desired report cards, click the Send Selected Reports to email the selected report cards to the owners, or select the Delete Selected Reports to delete the selected report cards. (PetExec saves 1 report card per day.)

## Report Card Maintenance ?

**1**

Start Date (mm/dd/yy) 04/01/18 End Date (mm/dd/yy) 04/09/18

Search Criteria

**2**

**Search Results**

Date	Owner	Email	Pet Name	Status	
04/09/18	Fist, Sam	samEmail@yahoo.com	Joey	Unsent, filled in	<input type="checkbox"/>
04/09/18	Jones, Derek	Derekemail@gmail.com	Zoe	Unsent, filled in	<input type="checkbox"/>
04/09/18	Richards, Andy	email@aol.com	Shadow	Sent, not filled in	<input type="checkbox"/>

**3**

**4**

Have fun with the report card functionality!

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