



Scheduled Services Overview

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Scheduled Services Overview

Scheduled services are a way to schedule appointments for services outside of grooming, group training, daycare, and boarding. Two common examples of these types of services are: dog walks and one-on-one training. But you can set up this module for any type of services that you offer.

The following are advantages of using the scheduled services module of PetExec for these types of appointments:

- Schedule the service for a specific date/time and duration.
- Assign the service to an employee, or leave unassigned.
- Sign the pet into the service, and mark when the service has been completed.
- Generate a scheduled service report of all services scheduled for a specific date/time and employee.

This document provides an overview of the Scheduled Services Functionality. For more detail on each of the Scheduled Services menu items please visit the [PetExec Documentation](#) (Online Documentation Support Section under Scheduled Services).

Adding Service Types

In order to schedule appointments, we need to create a service type. Once we have a service type, we will be able to create items in Products & Services and that will enable us to schedule those services.

Adding a new service type does the following:

Creates a new service type for your products and services:

[Add Product or Service](#) ⓘ

Product / Service Details

Product / Service Name *

Product / Service Name

Description

Product Description

Price *

Product Price

Paw Points

Paw Points

Service Type *

- Additional Charges
- Boarding
- Boarding Package
- Clothing
- Daycare
- Daycare Packages
- Dog Walks
- Food
- Grooming
- Group Training
- Private Training
- Product
- Scheduled services
- Service
- Toys
- Treatment

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Creates a new service type for your reporting:

Service Statistics By Service Type ⓘ

Search

Start Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

Total Amount Charged from 03/01/2016 - 03/08/2016 (by Service Type)

Service Type	Quantity	Total	Details
Additional Charges	15	40.00	View Details
Boarding	4	100.00	View Details
Boarding Package	0	0.00	View Details
Clothing	0	0.00	View Details
Daycare	0	0.00	View Details
Daycare Packages	0	0.00	View Details
Dog Walks	11	215.00	View Details
Food	0	0.00	View Details
Grooming	3	75.00	View Details
Group Training	0	0.00	View Details
Private Training	4	400.00	View Details
Product	2	10.00	View Details
Scheduled services	1	25.00	View Details
Service	0	0.00	View Details
Toys	0	0.00	View Details
Treatment	0	0.00	View Details
Total		865.00	

[Click here to download the service type breakdown to Excel](#)

Creates a new service type for your scheduled services appointments:

Step 2 - Select the Services

Available Services

Select a Service Type

Product Filter:

Clear

Name	SKU	Product Type
1 hour dog Walk		Dog Walks
1 mile hike		Dog Walks
30 Min Dog Walk		Dog Walks

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Here is an example:

- Add service type of "Dog Walks".
- Create your unique "Dog Walk" products; 30 minute dog walk, 45 minute dog walk etc and price accordingly.
- You can then schedule these dog walks for a date and time and assign to an employee.
- You can use the Scheduled Services dashboard and reports to sign the pets in, mark as processed, and check them out.

There are also benefits of adding Service Types outside of the scheduled services module. Here is an example for using Service Type for Retail food items:

- Add a service type of "retail food".
- DO NOT select the "include in scheduled services menu", as these would not be a service type that you would want to see when scheduling your services.
- Add your retail food products under products/services-->add product. Select this new "retail food" service type.
- You will have visibility to these items as "retail food " in reports by Service Type.
- These retail food items will appear in your product list when you are checking out. But they will not be available as a scheduled service, nor will they appear in your food drop down lists in daycare and boarding.

Scheduled Services Dashboard Overview

Once your scheduled services set up is complete, you can use the scheduled services dashboard to manage your services.

The service type that is scheduled is visible on the dashboard, and you have the following options:

1. Sign the pet into the service. This will add the service to that pet's shopping cart.
2. Mark the service as completed.
3. When services are marked as completed, they will show in green on your dashboard. You can then click to log them out. If the scheduled service is not associated with a boarding, you will proceed to the checkout process. If the scheduled service is associated with a boarding, those services will be included in the pet's shopping cart when that pet is checkout of their boarding reservation. If the pet is signed into Daycare, the services will be included when you check them out of daycare.

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**It is important to note that scheduled services have to be SIGNED IN in order to be added to the pet's shopping cart. If the services are not signed in, they will NOT be in the customer's cart at check out.

Scheduled Services ⓘ

Calendar Add Service

Current Log *There are currently 3 pets with Scheduled Services today.*

Owner	Pet	Date	Service(s)	Employee	Notes	Modify	Status	Delete
Thomas, Michelle	Wags Thomas	03/08/2016 10:00 AM	30 Min Dog Walk	Grace Clark	Pet Notes for Wags: 02/06/2016: Behavioral note added to pet record via modify pet 02/06/2016: Grooming note added to pet record via modify pet	1	Sign-In	Delete
James, Teresa	Ajax James	03/08/2016 12:00 PM	Private training 1 hour	No Employee Assigned	Kennel:	2	Incomplete	Delete
Peterson, Don	Sparky Peterson	03/08/2016 01:00 PM	Dog Massage		Pet Notes for Sparky: 03/08/2016: Scheduled services note added at pet record 02/03/2016: Test behavioral note added at pet record 02/03/2016: test grooming note added at pet record	3	Completed	Delete

It is also important to look at the application preferences for scheduled services. They can be found in the PetExec menu, Company Preferences-->Application Preferences-->Scheduled Services. With the available options you can customize this functionality to fit your needs.

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