PetExec's Owner Portal/Mobile App – Setup Guide

This document gives step by step instructions on how to setup the owner portal/mobile app. This set up needs to be completed whether you are using the owner portal or the mobile app or both.

If you are currently using the Owner Portal then your business is ready to use the Mobile App.

If you are not using the Owner Portal and want to launch either the portal or the mobile app then we recommend completing these steps for both.

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Identifying the products and services for the owner portal/mobile app

PetExec has the ability to show only selected products and services. So, first we need to figure out which Products and Services should be shown to owners.

1. From your main menu, select Products & Services → Maintain Products or Services

2. Search for the items you wish to mark and simply check the Show to owner box

Maintain Products or Services ⓘ

Add Product / Service

Search for Product / Service

| Search Criteria | Search |

There were 68 services found matching "". Results are shown 50 at a time.

Search Results

« previous **1** 2 next »

		Service Name ▲	Type ⇕	SKU ⇕	Sort Order ⇕	Price ⇕	Qty On-Hand ⇕	Taxed? ⇕	Show to Owner ⇕	Boarding Add-On ⇕
Edit	Delete	1 mile hike - w/ package	Dog Walks		1	10.00	0	No	✔	☐
Edit	Delete	1/2 Day Daycare	Daycare		2	20.00	0	No	✔	☐
Edit	Delete	10 days - Happy Dog Suite Med - 2 dogs	Boarding Package		1	450.00	0	No	☐	☐
Edit	Delete	10 Full Day - Daycare Package	Daycare Packages		0	180.00	0	No	✔	☐
Edit	Delete	10 Half Day - Daycare Package	Daycare Packages		1	150.00	0	No	☐	☐
Edit	Delete	2 week boot camp	Boarding		99	150.00	0	No	☐	☐

Notes:
- If you are adding or modifying individual items, the Show to Owner checkbox corresponds to the "Make Available to Owners?" checkbox. When checked, the item will be visible in the owner portal/mobile app. When unchecked, the item will not be visible in the owner portal/mobile app.
  Make Available to Owners = Show to Owner
- The Boarding Add-on section will show **all** items marked as Show to Owner, except service type = boarding and/or daycare. For example, a grooming item marked as "Make Available to Owners" will be available for grooming appointment requests and for boarding add-on as well.

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Application Preference Settings for Owner Portal/Mobile App

It is important to decide what functionality your owners will be given access to. The relevant application preferences can be found by going to the main menu → Company Preferences → Application Preferences → Owner Portal Category. There are a lot of options, so be sure to review the options and choose the settings that best fit your business. Some of the preferences will add/remove buttons from the owner portal/app. Others will prevent owners from scheduling if certain criteria are not met. Application preference settings here will affect both the owner portal and mobile app.

Maintain Preferences ⓘ

Category

Owner Portal ▼

Filter

Category ⬍	Preference ⬍	Status ⬍	Values
Owner Portal	**Show Menu Options on Owner Dashboard** When selected, will show available menu options as buttons on the owner's Dashboard.	✔	
Owner Portal	**Disable Scheduling if No Temperament Test** Only allows scheduling of pets for Daycare and Boarding that have the "Passed Temp Test?" checkbox selected.	☐	
Owner Portal	**Disable Owner Scheduling if Vaccinations are Expired** When selected, owners will not be allowed to schedule Daycare or Boarding if any of the REQUIRED vaccinations are set to expire on or before the scheduled date(s).	☐	
Owner Portal	**Future Dates Only** When selected, will not allow the owner to schedule boarding, daycare, grooming or scheduled services until the selected duration has passed.	☐	[ ] Hours ▼
Owner Portal	**Enable Boarding Schedule For Owners** Enables / Disables Boarding option that allows owners to schedule or request their own boardings based on the selection to the right. Option A - Displays Boarding Requirements and # Rooms Required. Option B - Displays Boarding Services table (Service, Qty/Day, # Pets, # Rooms)	✔	Schedule Boarding ▼ Option A ▼
Owner Portal	**Require a Boarding Deposit** When selected, an owner scheduled Boarding will have a "Pending Deposit" status until owner applies a Boarding Deposit or the Admin marks it as Active. This preference is only in effect if the "Schedule Boarding" option above is selected. Select the type (dollar or percentage) and enter the required amount.	☐	Percenta ▼ 50
Owner Portal	**Force Owners to Sign Contract #2** When selected, will add a note to the Dashboard if the owner did not sign Contract #2 and redirect owners to sign the contract on registration.	☐	
Owner Portal	**Force Owners to Sign Contract #3** When selected, will add a note to the Dashboard if the owner did not sign Contract #3 and redirect owners to sign the contract on registration.	☐	
Owner Portal	**Show Paw Points** When selected, will show accumulated Paw Points in the Modify Owner screen.	☐	

(Update Preferences)

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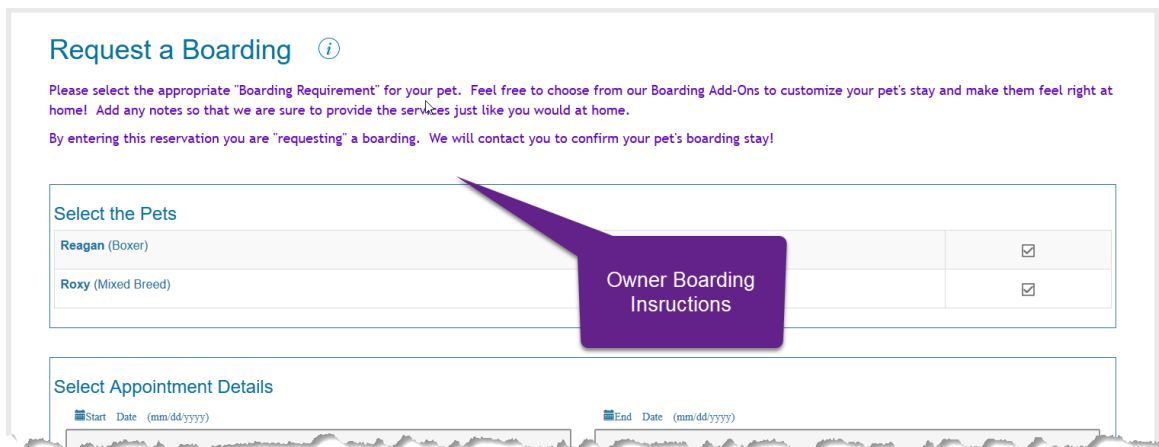Page 3 of 10
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Customized Messaging for the Owner Portal

PetExec allows you to customize your **owner portal** with messages, instructions, and/or owner notes. (These message options are currently not available in the mobile app).

a. Owner message – design your own by going to your main menu → Company Preferences → Maintain Company Info→ Owner Message
The owner message is a general message for **all** owners to see when they log into the **owner portal**.
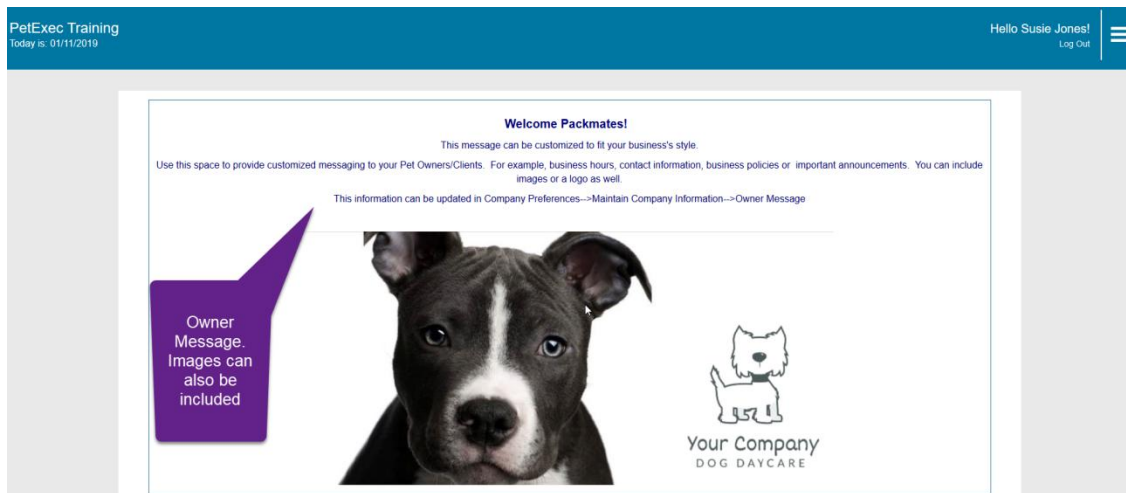
b. Owner Instructions for each module: You can add detailed instructions so that owners know your policies/expectations when they schedule/request an appointment. Add instructions, details regarding add-ons, cancellations/deposits/sign-in/pick-up/scheduling policies, and/or any messages/instructions– design your own for each module by going to your main menu → Company Preferences → Maintain Company Info→Owner instructions for each module are at the bottom of the page. Here is an example of the Owner Boarding Instructions.

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Request a Boarding ⓘ

Please select the appropriate "Boarding Requirement" for your pet. Feel free to choose from our Boarding Add-Ons to customize your pet's stay and make them feel right at home! Add any notes so that we are sure to provide the services just like you would at home.

By entering this reservation you are "requesting" a boarding. We will contact you to confirm your pet's boarding stay!

Select the Pets

| Reagan (Boxer) | ☑ |
| Roxy (Mixed Breed) | ☑ |

Owner Boarding Instructions

Select Appointment Details

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

c. There are instruction fields for each of the modules: boarding, daycare, grooming, group training and scheduled services. These instruction fields are displayed in the owner portal at the top of the request/schedule screen for each service type. These messages (with the exception of group training) are only displayed in the owner portal, not the app.

d. Owner specific notes – Add custom messages for owners to see when they login to the owner portal. Unlike the owner message above, which is a general message to all your owners, these owner notes, are added to the owner's record in PetExec and are owner specific.

- The note can be added by going to the owner menu→Owner notes
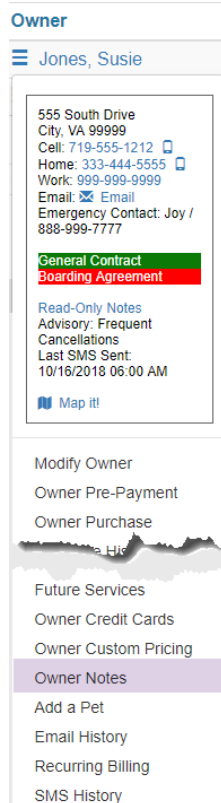
- Add the note and click on the Show Note to Owner box. Images can be added as well by clicking on the insert/edit image button.

Owner Notes for Susie Jones ⓘ

- This is what this note will look like when the owner logs in to the portal.

Login Credentials for Owner Portal/App

Owners must have an owner record in your PetExec system with a username and password to be able to login to either the Owner Portal or App.

Option1: Owner is in your system, but needs login credentials.

If the owner has a record in your PetExec system you simply assign a username and password on the modify owner page:

We recommend using their email address as their username. Once credentials have been created, an owner can use the reset password function to create their own password and login to the owner portal. Click for details on the password reset function.

Option 2: Create login credentials for all your owners, and communicate in mass with all your customers.

If you want to create login credentials for ALL the owners in your system, Tech support can do that for you.   Contact us at techsupport@petexec.net, it takes just a few minutes. Our team will generate usernames for all owners in your system with a unique, valid email address; this email address will be set as their username. They will be assigned a system generated password. Passwords are never displayed in the owner record for security reasons.

You can then generate an email blast to all your owners/clients announcing the launch of the Owner Portal/App. Provide them the link to the login page (https://secure.petexec.net/login.php) and advise then that their username is the email address. Instruct your owners to complete the "Forgot Password?" steps to reset their password, and they will be able to login.

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Option 3: Login credentials for new Clients who are not currently set up in your PetExec system:

If the owner record has not been created in your system, you can add owners yourself or Owners can create their own by using your company's unique link located in Company Preferences → Application Preferences → Miscellaneous category.

The Web Developer's Guide will give you or your web developer the steps on how to add this URL to your website.

An email is automatically sent to the Company Email address located in Main Manu→ Company Preferences → Maintain Company Info to notify that a new owner has registered.

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Notes:

- Usernames must be unique and are case sensitive. We recommend using an email address.
- The username and password will allow your owners to login to the owner portal as well as the mobile App.
- Resetting passwords is easy! Click on the Reset Password button right on the login window (https://secure.petexec.net/login.php). Click for details on the Forgot Password function.

Confirm your settings

Now you're ready to take a test drive in the owner portal and/or mobile app! It is important to confirm your setup, so take it for a test drive before you let your owners in. You also want to train your employees and owners, so this step is critical.

1. Create a test owner. (This can be done either with the unique link or by creating it with your employee account. Choose whatever method you plan to use or better yet, test both by creating 2 test owners, one via each method.)
2. Login as the test owner. (Remember everyone uses the same link to login: https://secure.petexec.net/login.php)
3. Test all the functionality you enabled, try requesting/scheduling an appointment for each of the service types you have created. (Yes, all of it! You want to be confident in how it works.)
4. Be sure to follow up by confirming from an employee login. Can you see the appointments? Where do you approve requests? Etc

Here's a tip: Login as a PetExec employee/administrator from one browser (i.e. Chrome). Login as a pet owner/client form a different browser (i.e. Firefox). Using two different browsers, you can be logged in as both at the same time. Make changes on the admin side, and refresh the owner side to see those changes.

Consider Business Processes

We know everyone's business is unique and now that you have configured and tested, you are ready to create business processes to help you incorporate this piece into your everyday work flow.

For example if you have your application preferences set to "request" services, how will you manage those requests?

Want help? Our Golden Paw Coaching program can help guide you, so if you have questions or need additional assistance; give us a bark, we'd be happy to help! For more information, visit Golden Paw Coaching or call us at 888.738.3935 ext. 3.

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