



Updates to PetPoint 9-28-09



INTRODUCTION

The following document summarizes changes that affect all PetPoint users in order to update the program's Intake & Outcome process, Receipt options and Items setup based on user feedback. A new Administrator Setup Option is present: Certificate Setup, plus minor changes have been put in place in current screens that retain the same functionality: Add/Edit Users, Add/Edit Field Values, and Add/Edit Items. The everyday PetPoint user will find some changes in the Receipt screens, and that the Intake and Outcome Details screens contain new fields. Items can be automated to appear on Receipts, and Gift Cards and Vouchers can now be issued from the Receipt screen as well as from the refund screen.

Administrators should review this document carefully as there are numerous new configuration options available and some existing settings may need to be updated (if you currently have Items auto-populating on receipts, for example). Additionally, end users should be made aware of the changes that will impact their daily work.

ADMINISTRATORS WILL NOTICE THE FOLLOWING CHANGES

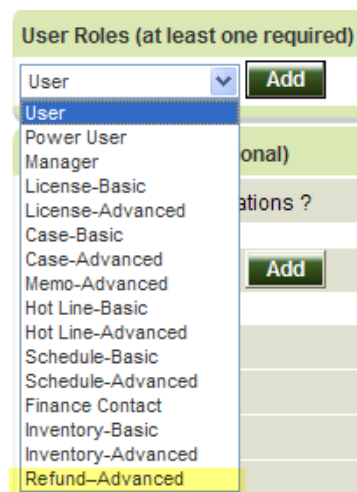
ADMIN OPTIONS > ADD/EDIT USERS

New User Role: Refund - Advanced

Administrators can now assign access to the Admin – Refund screen separately as it is no longer built-in to the Manager Security Role.

Important Note: All existing users with the Manager will be assigned the new Refund – Advanced Security Role with this deployment.

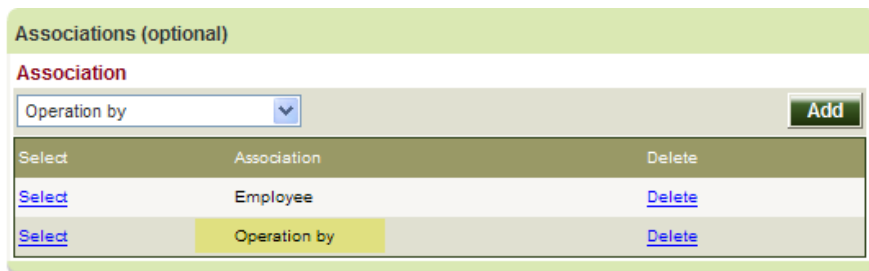
Any new user that needs the ability to do refunds will need to have this additional user role of Refund-Advanced.



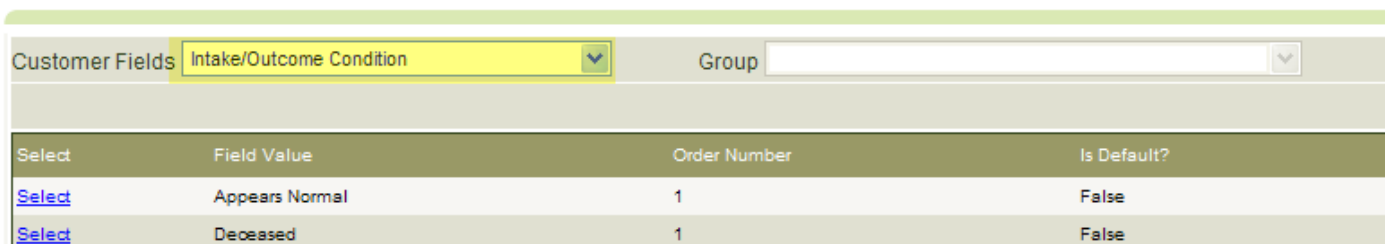
ADMIN OPTIONS > ADD/EDIT FIELD VALUES

Association - new system-defined value of "Operation By" which can be assigned to person records. Those persons with this new Association are listed in the new Intake/Outcome/Release by fields on Intake and Outcome Details.

Intake Condition - is now called Intake/Outcome Condition and is included on all Intake & Outcome Details pages.



Administration - Add/Edit Field Value



Pet ID now allows Administrators to flag which of their custom Pet ID Types are a License for record-keeping purposes.

Administration - Add/Edit Field Value

Customer Fields: PetID Type Group

Select	Field Value	Order Number	Is Default?
Select	Additional Microchip	1	False
Select	Previous Name	1	False
Select	Rabies Tag	1	False

Field Value: Rabies Tag Order Number: 1 Is License? Default: Deleted:

Temperament Condition - if the exam setup tables have been imported into your database you should have several choices, if not please add them here, one at a time if you wish to include this information on your operations.

Administration - Add/Edit Field Value

Customer Fields: Temperament Condition Group

Select	Field Value	Order Number	Is Default?
Select	Aggressive	0	False
Select	Calm	0	False

Voucher Type - is no longer a Field Value, it is now an Item Type. This will allow users to assign prices or a price value to vouchers. *All previously existing voucher types will have been moved to the Add/Edit Item screen and can be updated or modified there.*

Administration - Add/Edit Item

Item Type: Voucher Item Category: -- All --

Active Items Only Inventory Items Only

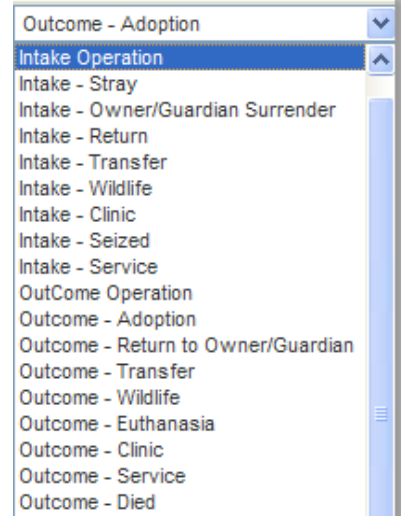
Item#	IRN	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show On Receipt	Tax 1	Tax 2	Multi-Price	Inactive
649307		Free Potty Training Course	Voucher					\$0.00	\$0.00	X	No	No		Delete
649306		Rabies Vaccine	Voucher					\$0.00	\$0.00	X	No	No		Delete

ADMIN OPTIONS > ADD/EDIT ITEM

There have been multiple changes to Item Setup & Receipt for Items

- There now are separate Item Types for each Intake & Outcome present in PetPoint. This is so you may set up separate fees for the different Intake and Outcome operations, allowing Receipts to auto populate with the correct fee based on your Site, the Animal Type, or the animal's Age Group.
- The checkbox formerly known as "Show on Receipt" has been split into separate checkboxes: "Show in Receipt Items" and "Auto-populate on Receipt." This allows a group to use an Item on the Receipt screen but NOT have it auto-populate on the receipt. In other words, you can charge for a Microchip or Rabies vaccine, but if "auto-populate on receipt" is not checked, it won't show up automatically on the animal's receipt just because you performed those functions from the Care: Exam screen.

Item Type



Important Note: All existing Items where "Show on Receipt" is checked will be converted to have the "Show in Receipt Items" checked but the "Auto-Populate on Receipt" will NOT be checked. After the deployment, you should review your Item Setup and adjust the new checkbox settings as-needed.

Item Details			
Item Number	Reference #	Item Type	Item Category
I00381199		Outcome - Adoption	-- Select --
Show in Receipt Items	Auto-Populate on Receipt	Enable Multi-Price Items	Inactive
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item Name		UPC Code	
Adoption			

- What was originally called Multi-Site pricing has been changed to be Enable Multi-Price Items –here you can establish default prices based on the Site or by 2 new options: Age Group and by Animal Type. (see examples 1, 2 & 3 below)

Item Details			
Item Number	Reference #	Item Type	Item Category
I00381199		Outcome - Adoption	-- Select --
Show in Receipt Items	Auto-Populate on Receipt	Enable Multi-Price Items	Inactive
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item Name		UPC Code	
Adoption			
Multi-Price Item Details			
Price / Site	Price / Animal Type	Price / Age Group	Is Default?
<input type="checkbox"/> -- Select --	<input checked="" type="checkbox"/> Dog	<input type="checkbox"/> -- Select --	<input type="checkbox"/>
Item Cost	Markup %	Item Price	Account Code
\$0.00	.00%	\$0.00	
		Tax Code 1	Tax Code 2
		-- Select --	-- Select --
			PrintLabels
			0

- Not all Items have all of these options – in fact a number of Items have hidden fields now based on what is possible with that particular Item (for example - Manufacturer and Length is not present on S/N Surgery Items).
- You may also now update the names of the Items and the Item Types, but retain the same Item number. This may affect your current reports so please be careful when altering these.

ITEM EXAMPLE 1 - ONE ADOPTION PRICE

Administration - Add/Edit Item

Item Type: Item Category: Site:

Active Items Only Inventory Items Only

Item#	IRI	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show On Receipt	Tax 1	Tax 2	Multi-Price	Inactive
381199		Adoption	Outcome - Adoption					\$0.00	\$50.00	X	No	No		<input type="button" value="Delete"/>

Item: I00381199

Item Details

Item Number: I00381199 Reference #: Item Type: Item Category:

Show in Receipt Items: Auto-Populate on Receipt: Enable Multi-Price Items: Inactive:

Item Name: UPC Code:

Item Cost: Markup %: Item Price: Account Code: Tax Code 1: Tax Code 2: PrintLabels:

Item Notes: Since this item is checked for Auto-Populate on Receipt, the Item & Item Price will appear as a balance for any receipt that is attached to an animal that was processed through Outcome Adoption. Enable Multi-Price Items is not checked, so all adoptions regardless of site, animal type or age group will appear as the same price.

ITEM EXAMPLE 2 - ADOPTIONS BROKEN DOWN BY CAT / DOG

Item Details

Item Number: I00381199 Reference #: Item Type: Item Category:

Show in Receipt Items: Auto-Populate on Receipt: Enable Multi-Price Items: Inactive:

Item Name: UPC Code:

Multi-Price Item Details

Price / Site: Price / Animal Type: Dog Cat Price / Age Group: Is Default?:

Item Cost: Markup %: Item Price: Account Code: Tax Code 1: Tax Code 2: PrintLabels:

Item Notes: In this example, we have different adoption fees based on whether a dog or a cat adoption is taking place. By checking Enable Multi-Price Items we can add individual prices for animals based on criteria we select - either Site, Animal Type, or Animal Age Group, and the predefined Item and Item Price will Auto-Populate on the animal's receipt (if enabled) and streamline the entire outcome process.

Multi-Price Items

Item#	IRI	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show in Receipt Items	Auto-Populate	Tax 1	Tax 2	Animal Type	Age Group	Site	Inactive	Is Default
381199		Adoption	Outcome - Adoption					\$0.00	\$40.00	X	X	No	No	Cat		X		<input type="button" value="Delete"/>
381199		Adoption	Outcome - Adoption					\$0.00	\$50.00	X	X	No	No	Dog		X		<input type="button" value="Delete"/>

Item: I00000553

Important Note: You could additionally enable pricing to vary by Age Group, if you have different pricing for kittens vs. cats or puppies vs. adult dogs.

ITEM EXAMPLE 3 - DIFFERENT INTAKE PRICE PER SITE

Multi-Price Item Details

Price / Site		Price / Animal Type		Price / Age Group		Is Default?
<input checked="" type="checkbox"/> SNAP	<input type="checkbox"/> -- Select --	<input type="checkbox"/> -- Select --	<input type="checkbox"/> -- Select --	<input type="checkbox"/> -- Select --	<input type="checkbox"/> -- Select --	<input type="checkbox"/>
Item Cost	Markup %	Item Price	Account Code	Tax Code 1	Tax Code 2	PrintLabels
\$0.00	.00%	\$20.00		-- Select --	-- Select --	0

Item Notes

A veterinary hospital brings in two kinds of animals, those who are adoptables and sent directly to the adoption center and those who are part of the trap-neuter-release program we will call in this example SNAP (set up as a separate site in PetPoint). SNAP intakes have a \$20 fee, which is automatically added to the animal's receipt. The fee is automatically assessed based on the intake type and site chosen when location is assigned. Intakes of adoptable animals from the vet hospital are free.

Multi-Price Items

Item#	IRN	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show in Receipt Items	Auto-Populate	Tax 1	Tax 2	Animal Type	Age Group	Site	Inactive	Is Default
381134		Intake from Veterinarian	Intake - Transfer					\$0.00	\$20.00	X	X	No	No			SNAP	X	Delete
381134		Intake from Veterinarian	Intake - Transfer					\$0.00	\$0.00	X	X	No	No			Pethealth Animal Shelter - Adoption Center		Delete

Item: I00000550

NEW ITEM TYPES – VOUCHER & GIFT CARD

In addition to these changes, two new Item Types are being created (Voucher and Gift Card) so they actually can be sold as an Item on a Receipt – and be tracked as Inventory Items. If you previously had any Voucher types listed under Admin Options > Add/Edit Field Value, it will now be found on the Add/Edit Items screen. You may set up default expiration dates on the Voucher and Gift Card Items by filling in the Length fields in Add/Edit Item.

Administration - Add/Edit Item

Item Type: Item Category:

Active Items Only Inventory Items Only

Item#	IRN	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show On Receipt	Tax 1	Tax 2	Multi-Price	Inactive
649307		Free Potty Training Course	Voucher					\$0.00	\$0.00	X	No	No		Delete
649308		Rabies Vaccine	Voucher					\$0.00	\$0.00	X	No	No		Delete

Administration - Add/Edit Item

Item Type: Item Category: Site:

Active Items Only Inventory Items Only

Item#	IRN	Name	Type	Category	Inventory Item	Vendor	Manufacturer	Cost	Price	Show On Receipt	Tax 1	Tax 2	Multi-Price	Inactive
649204		Gift Card	Gift Card	Special Event Items				\$0.00	\$20.00	X	No	No		Delete
643428		Gift Card - Clinic Services	Gift Card		X			\$0.00	\$50.00	X	No	No		Delete
643427		Gift Card - Retail Shop	Gift Card		X			\$50.00	\$50.00	X	No	No		Delete

NEW SCREEN IN ADMIN OPTIONS > SETUP CERTIFICATE

Shelters can enable Gift Card and/or Voucher Validation, which allows groups to sell Gift Cards and/or Vouchers in specific amounts and later redeem them based on the price sold and a unique Voucher or Gift Card #.

Administration - Certificate Setup

Gift Card Setup			
Expiry Date	Validation	Validation Override	Auto Populate
<input type="checkbox"/> Required	<input type="checkbox"/> Enabled	<input type="checkbox"/> Power Users <input type="checkbox"/> Managers	<input checked="" type="checkbox"/>

Voucher Setup			
Expiry Date	Validation	Validation Override	Auto Populate
<input type="checkbox"/> Required	<input type="checkbox"/> Enabled	<input type="checkbox"/> Power Users <input type="checkbox"/> Managers	<input checked="" type="checkbox"/>

Note also that new configuration options allow Administrators to set the Expiry Date for both as optional or required, and can have PetPoint auto-generate unique Voucher or Gift Card #'s for end-users (this setting will be enabled by default).

Receipt Items

Site: -- All -- Animal Type: -- Select -- Age Group: -- Select --

Item Type: Gift Card Category: -- All -- UPC Code: >> IRN#: >>

Item Name	Unit Price	# of Units	Animal ID
Gift Card - Shelter Services	25.00	1	- or <input checked="" type="checkbox"/> not for an animal

Voucher # Issue Date Expiry Date Issued By

GC-00025564 09/25/2009 Today 12/31/2009 Grucelski, Brad

Discount % Discount Amount Discount Reason

0 \$0.00 -- Select --

Tax 1 Code	Tax 1 Amount	Tax 2 Code	Tax 2 Amount	Sub Total
-- Select --	\$0.00	-- Select --	\$0.00	\$25.00

PLEASE CONTACT THE SUPPORT TEAM IF YOU HAVE ANY FURTHER QUESTIONS

- ❖ Click: Admin – Feedback from inside PetPoint Application
- ❖ Email: helpdesk@petpoint.com
- ❖ Call: 866-630-7387 ext. 400

HOURS: 8AM-8PM EASTERN, MON - FRI | EMERGENCY SUPPORT: 24/7

USERS WILL NOTICE THE FOLLOWING CHANGES

VOUCHERS & GIFT CARDS

Vouchers can now be issued from either Care – Voucher or Receipt; Gift Cards can be sold from a Receipt. The voucher issue row only appears for Voucher and Gift Card Item Types - it is otherwise hidden.

Receipt Items

Site: -- All -- Animal Type: -- Select -- Age Group: -- Select --

Item Type: Voucher Category: -- All -- UPC Code: >> IRN#: >>

Item Name	Unit Price	# of Units	Animal ID
Training Class	30	1	- or <input checked="" type="checkbox"/> not for an animal
Voucher #	Issue Date	Expiry Date	Issued By
VC-00030122	09/25/2009 Today	10/25/2009	Zeidman, Steve

RECEIPT CHANGES

Receipts have many Item Types, besides Gift Card and Voucher, added to the list which allow for easier searching for items and automated pricing structures based on what the administrator has set up. Note there is now an Item Type for each Intake and Outcome Type that exists.

Item Type

- Outcome - Adoption
- Intake Operation**
- Intake - Stray
- Intake - Owner/Guardian Surrender
- Intake - Return
- Intake - Transfer
- Intake - Wildlife
- Intake - Clinic
- Intake - Seized
- Intake - Service
- OutCome Operation
- Outcome - Adoption
- Outcome - Return to Owner/Guardian

Receipt Payment Details has been updated to allow both Vouchers and Gift Cards as payment methods.

Payment Details

Site: PAWS - Prairieland Animal Welfare Society Cash Drawer: Intake Desk

Total Current Receipt: \$30.00 Receipt Date: 09/25/2009 11:50:59 AM Receipt By: Brad Reference:

Cash Paid: \$0.00 Check Paid: \$0.00 Debit Paid: \$0.00 Credit Card Paid: \$0.00 Type: -- Select --

Gift Card #	Gift Card Type	Gift Card Paid	Voucher #	Voucher Type	Voucher Paid
	-- Select --	\$0.00		-- Select --	\$0.00
Change Given		Balance			
\$0.00	-- Select --	\$30.00			

Gift Card - Clinic Services
Gift Card - Retail Shop
Gift Card - Shelter Services

Submit Receipt Void

Gift Cards and Vouchers can be issued from Admin - Refund as a Reimbursement Method

Refund Date:	8/18/2009 2:30 PM	Total:	\$60.00
Refund By:	brad	Cash Reimbursed:	0
Cash Drawer:	Intake Desk	Check Reimbursed:	0
Type Refund:	<input checked="" type="radio"/> Refund <input type="radio"/> Error	Debit Reimbursed:	0
Reason:	Returned Adoption	Credit Card Reimbursed:	0
Notes:		Credit Card Type:	-- Select --
		Gift Card Reimbursed:	
		Gift Card Type:	-- Select --
		Voucher Reimbursed:	\$60.00
		Voucher Type:	Adoption Credit Certificate

These 2 sections below appear once an Amount has been entered into either Gift Card Reimbursed or Voucher Reimbursed Amount fields.

Gift Card Reimbursed			
Gift Card #	Issue Date	Expiry Date	Issued By
	Today		-- Select --

Voucher Reimbursed			
Voucher #	Issue Date	Expiry Date	Issued By
AC-09-25581	8/18/2009 Today	11/18/2009	Grucelski, Brad

INTAKE & OUTCOME DETAILS

In addition to the usual choices on the Intake and Outcome details screens, you will now be asked a few additional questions, which are outlined below.

The changes are on all Intake and Outcome Operations and may require some initial setup by the administrator.

Intake - Stray

Intake Details Step 3 of 4

Intake Type	Intake SubType	DOA	Intake Condition	Temperament Condition	Asilomar Status
Stray	Abandoned	<input type="checkbox"/>	Appears Normal	Calm	Healthy

Jurisdiction	Zip Code	State	City	City Alias
Brown	60008	Illinois	ROLLING MEADOWS / ROLLING MEADOWS	ROLLING MEADOWS

Location Found
on front porch

Intake Date/Time	Intake By	Recorded By	Emancipation Date	Stage	Review Date/Time
09/23/2009 09:31 PM	Wainscott, Melissa	admin		New Arrival	

Site	Location	Cage #1	Case ID
-- All --	Cat Condos		C0000000

Temperament Condition - what was the temperament of the animal upon Intake/Outcome?

Zip/State/City – these new fields allow organizations to track exactly where animals are coming from or going to based on the USPS’s list of zip codes/cities already used on Person Addresses. The fields will be pre-populated with the Person OR Agency Member address linked to Intake/Outcome. For Persons/Agency Members without an address (or anonymous Persons), these will default to your group’s Primary Company Address (or Site Primary address for multi-site groups).

Outcome Condition - same choices as Intake Condition

Intake By/Outcome By/Release By - this is new drop down allows groups to record who was responsible for the Intake/Outcome/Release independently of which user is logged into PetPoint. This list is populated with all person records with the new “Operation By” Person Association assigned on the Edit Person screen. All Intake and Outcome Reports are being updated to reflect these new fields.

Important Note: All active users’ person records will be assigned this Association and the list will automatically default to the logged in user if they have that Association.

Outcome - Return to Owner/Guardian

Outcome Details Step 3 of 4

Outcome Type	Outcome SubType	Outcome Condition	Temperament Condition	Asilomar Status		
Return to Owner/Guardian	Stray Reclaim	Appears Normal	Timid	Healthy		
Jurisdiction	Zip Code	State	City	City Alias		
Brown	60501	Illinois	BATAVIA			
Outcome Date/Time	Outcome By	Recorded By	Release	Release Date/Time	Release By	Recorded By
9/23/2009 9:39:53 PM	Zito, Shari	admin	<input checked="" type="radio"/> Immediate <input type="radio"/> Deferred	9/23/2009 9:40:04 PM	Hazen, Courtney	admin
Site	Location	Stage	Review Date/Time			
-- All --	Cat Condos	Cage #4	-- Select --			

Pet ID

Pet ID Types in setup now have a flag called “Is License” to indicate the particular Pet ID is a license.

Pet ID (optional)

Pet ID Number	Pet ID Type	Pet ID Issuer	Issuer Phone	Issued	Expires	Is License?
	-- Select --					<input type="checkbox"/> Add

Important Note: This is a flag, only administrators may update whether a Pet ID type is also a license.

PLEASE CONTACT THE SUPPORT TEAM IF YOU HAVE ANY FURTHER QUESTIONS

- ❖ Click: Admin – Feedback from inside PetPoint Application
- ❖ Email: helpdesk@petpoint.com
- ❖ Call: 866-630-7387 ext. 400

HOURS: 8AM-8PM EASTERN, MON - FRI | EMERGENCY SUPPORT: 24/7