PLANE SOFTWARE

UNIQUE SOFTWARE FOR PET CARE PROFESSIONALS

# KennelSuite 7 User's Guide

Updated v7.3.4

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# Quick Start for New Users

All copies of KennelSuite start as an evaluation, which is a fully operational copy of the Professional level with a 30-day trial period. After 30 days from the first use, the evaluation license will expire and the software will stop working.

All data you created during the evaluation are preserved. If you choose to purchase a license, you can keep using your evaluation database or we can send you an empty database and you can start fresh.

## Installation

1 Insert the CD and the installation will begin. Or you can access the CD with My Computer and double-click the executable, which has a picture of a yellow Labrador.

2 Follow the instructions to suit your needs. Normally you should just accept all the defaults, which means clicking the **Next** or **OK** buttons as the installation progresses.

## Start KennelSuite

☐ Basic ☒ Professional ☒ Enterprise

On your Windows desktop:

1 Double-click the application icon to start the program.

2 Complete the login dialog:

- At **User Name**, type the login name that your administrator gave you.
- At **Password**, type your password.

3 Click **OK**.

For KennelSuite Professional and Enterprise, everyone must log in. KennelSuite Basic does not include user security and the program will start without the login screen.

**Note**

If you are at the evaluation level or have not entered any usernames in **Tools** -> **Security** -> **Users**, type "administrator" and click OK to open KennelSuite. There is no default password.

## Initial Configuration

You must be logged in as the administrator or a member of the Administrators or Managers group to configure the program.

Click **Tools** then **Security** from the main window to add new users. Assign each user to a security group. Users can then add or change their own passwords once they are logged in. KennelSuite Basic does not have user security.

Change the program setup by clicking **Tools** then **Options** from the main window. Click each tab and change the settings to suit your facility.

Add new services, change item names, and set your prices by clicking **Lists** then **Prices** from the main window. Set your standard sales tax, located in the dropdown list labeled Type.

Click the **Lists** Menu to change information that applies to all pets, veterinarians, and general lists to suit your needs.

# Get Help

## How to use KennelSuite's Help

As you work in KennelSuite, you can obtain information about windows or dialogs by using the context-sensitive Help available in KennelSuite's Help facility. You can access this Help in the following ways:

- In the Main window, open the **Help** menu and select **Help**. This will display KennelSuite's help facility. You can select the topic by entering in a keyword on the I**ndex** tab or **Search** tab.
- **Help** buttons on dialogs. Click the Help button and a topic opens in a custom window that gives instructions on how to use that topic.
- Use the context-sensitive help by pressing the **F1** key at any time to get more information about that specific topic you are viewing.

## Working with the Help facility

The Help facility is similar to help for other Windows applications. There is an index and search tab to locate the topic of your choice.

### *Open a Help book*

In the Help window:

1. On the **Contents** tab, double-click a **book** to see its topics.
2. Click a **topic** to display the information on the right pane.

### *Use the Help index*

In the Help window:

1. On the **Index** tab, at **Keyword**, type a few letters of your keyword. The index scrolls to entries that begin with those letters.
2. Under the keyword topic, double-click the topic you want or click the **Display** button. The topic displays in the right pane.

### *Search the topics for text*

When you enter a word or phrase in the online Help's Search tab, KennelSuite searches the contents of your topics to find all occurrences of that word or phrase. It's a good way to find a topic title or every instance of a concept or feature.

In the Help window:

1. Click the Search tab.
2. In the text field at the top of the tab, type the word or phrase you want to find and press Enter or click the List Topic button.
3. Under Select topic, double-click the topic you want. The topic displays in the right pane.

# Tips

These are some tips that will make using the program easier.

- To open a reservation for today or a pet's folio, double click their name or information on the Snapshot screen.
- To retrieve or enter information on a pet record or an owner's record, double click their information displayed on the bottom task bar. For example, if a pet's folio is open and you need to retrieve his vaccination records, click the pet's information on the bottom task bar to open the pet record. Clicking the "**!**" by the Pet's name will take you directly to the vaccination tab in the pet's record
- When entering information on a pet or owner, press the Tab key to move forward through each field, press Shift-Tab to move backwards.
- To check out multiple pets, select the owner of the pets, instead of an individual pet, on the main screen. The Folio button becomes a Check Out button.
- To view future occupancy, click the small triangle on the Quick Look button and select Occupancy Forecast. To change the range of dates, select new dates on the calendars and click the Update button.
- Double click a cell with a number displayed in the Occupancy Forecast (by Size or Location) to view the selected pet(s).

# Overview

## Searching

KennelSuite allows you to search for an owner or pet in the following ways:

### Alphabet buttons

Click an alphabet button to load the main list with the owners whose last name begins with that letter. Scroll down the list to find the one you want.

### Search tool

You can locate a specific owner or pet by entering data into the search tool.

1. Click on the picture button until you see the symbol for the kind of search you want.

   Characters at the beginning of a pet name

   Characters at the beginning of an owner name

   Characters within an owner name

   Digits within a telephone number

   Characters within a tattoo

   Digits within a microchip code

2. Type the search text in the box.
3. Click the binoculars or press the Enter key to begin your search. If multiple records contain your search data, e.g., customers with last

names beginning with "Smi", a list is displayed from which you can select the one you want.

## Main window

This window is the core of KennelSuite. It gives you access to the Owner & Pet database and all the records and schedules you need. You can return to this from another window by canceling that window or by selecting Main from the Window menu.

The window has the following features:

**Title bar** Displays the user name and window name at the top of the window.

**Status bar** The display at the bottom of the window, which varies with what is selected on the database display:

- If no name is selected, or you don't have permission to view owner information, it displays the date.
- If an owner is selected, it displays the name and phone number of the owner.
- If a pet is selected, it displays the pet information (name, type, breed, sex, age, and veterinarian) beside the owner information.
- If any owner or pet's name is displayed, you can double click to open their record.

**Note:**
If the pet's vaccination is overdue, there is a red exclamation point to the left of the pet's name on the status bar.

### Menu bar

Displays several menus that you can open to issue commands or display a dialog.

To open a menu and select an option, click the menu and drag your mouse pointer to the desired option and release.

If you are not authorized for a menu option, it will display gray and be disabled.

The **File menu** provides the following options:

**Backup** Backs up your database to your desired location.

**Restore** Restores the backed-up data into KennelSuite.

**Confirmation** Displays a dialog with the details of a confirmation.

**Overdue Check in & Check out** Displays a dialog with a list of pets that are overdue to check in or out.

**Export to QuickBooks** Exports the owner information to the QuickBooks application.

| | |
|---|---|
| **Export Error Log** | Exports the error log to a file so you can send it when instructed. |
| **Logoff** | Logs you out and displays the login dialog |
| **Exit** | Closes KennelSuite. |

The **Lists menu** is available only to members of the Administrators and Managers groups. This menu provides the following options to be changed to fit your facility:

| | |
|---|---|
| **Prices** | Displays a dialog for setting prices, sales tax, and other charges. |
| **Pet Details** | Displays a dialog for managing lists of attributes that pertain to all pets. |
| **General Lists** | Displays a dialog for managing general lists. |
| **Veterinarians** | Displays a dialog for veterinarian records. |

The **Tools** menu provides the following options:

| | |
|---|---|
| **Security** | Displays a dialog for registering users and maintaining your password. Only members of the Administrators and Managers groups have access to the security system. User security is not available in KennelSuite Basic. |
| **Labels and Export** | Displays a dialog for creating mailing lists and labels. |
| **Undelete** | Displays a dialog for restoring records of owners and pets that were deleted. |
| **Occupancy History** | Displays a window for reviewing previous occupancy. |
| **Options** | Displays a dialog for configuring your facilities preferences. |

The **Help menu** provides application information:

| | |
|---|---|
| **Help** | Displays the Help facility. |
| **Web Update** | Displays a Web Update dialog. This connects you to the Plane Software server on the internet and checks to see if there is an update available. If there is something new, it will ask if you want to install it.<br>You should check Web Update periodically to make sure you have the latest version. |
| **Plane on the Web** | Displays Plane Software's Web page |
| **License** | Displays licensing information such as; serial number, level, version, and status. |
| **About KennelSuite** | Displays information about your program. |

## Button bar

The window has the following buttons:

| | |
|---|---|
| **Quick Look** | A dropdown list of windows that display current information about your facility or provide predictions based on current data. You can select the one you want to display. |
| **Reservation** | Displays the reservation list for the selected pet, from which you can open a current reservation or create a new reservation. |
| **Folio** | Displays the record of the pet checked in. |
| **Reports** | Displays a list of reports and worksheets you can view or print. |
| **View Owner** | Displays the record of the selected owner. |
| **View Pet** | Displays the record of the selected pet. |
| **New Owner** | Displays a blank form for creating a record for an owner. |
| **New Pet** | Displays a blank form for creating a record for a pet. |
| **Logout** | Closes the window and logs you out, then displays the Login dialog for the next user. |
| **Exit** | Closes the program. |

**Note**
Some buttons are available all the time, but others may not be, depending on what is selected from the main list. For example, when a pet is selected, the View Pet button is available but the View Owner button is not.

## Account tab

This displays the owner's financial history and balance. Account balances are color coded.

**Blue** for a zero balance.

**Red** for a credit, the kennel owes the customer.

**Black** for balance due, the customer owes the kennel.

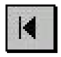
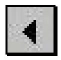
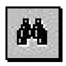
Whether an owner or pet is selected, the tab displays the invoices for the owner.

From the Main window:

1. Select the owner or pet of whose account you wish to view from the Main List.
2. Click the Account tab to open the selected account information.

**Tip:**
To change the appearance of currency or numbers, change your Windows configuration in the regional settings of the control panel.

The account tab also includes buttons and displays to help you view and work with the invoices:

| | |
|---|---|
|  | Click to refresh the display. |
|  | Click to display a list of links of dates. Then click the date desired. |
|  | First page |
|  | Previous page |
|  | Next page |
|  | Last Page |
|  | Click to display the Search dialog, for finding specified text in the account. |
| **Adjustment** | Click to display the Credits & Adjustments dialog to adjust an owner's account. |
| **Payment** | Click to display the Payment dialog to receive a payment that is not associated with a check out. |
| **Print** | Click to print the account. |

The other tools include:

- A dropdown list for selecting the size to view the account.
- A page number box that displays the current page number.

## Events tab

This displays the major events of each pet's visit, such as creating the initial reservation, checking in and out, along with the userid of the person who caused the event. You cannot change anything in the history.

From the Main window:

1 Select the owner or pet whose history you'd like to view.

2 Click the Events tab.

## Logo tab

Selecting this tab displays your company logo, which you add by clicking **Tools** -> **Options** -> **Logo** from the Main window.

Selecting the logo tab can also be used to hide information if you were to step away from the computer. If you are concerned about someone accessing the program while you are away, click the **Logout** button.

## Snapshot tab

This gives a quick view of what is currently happening in the kennel. This view automatically updates itself whenever a reservation or folio is saved, pets check in or out, or if you click on the snapshot tab.

There are two tables that describe the following:

**Current Status** A summary for the current day. It shows the number of pets in these categories:

- Due to check in
- Due to check out
- Scheduled for grooms
- Completed grooms

**Occupancy by Size** Shows how many pets of each size are in the kennel. The numbers are grouped by the pet's size.

**Pets in Kennel** A table showing pets that are in your kennel. If a date in the Check Out column is red, it means the pet was scheduled to depart before today.

**Today's Reservations** A table showing pets that are due to check in today. If the date in the Check In column is red, it means the pet was scheduled to arrive before today.

This indicator appears in the first columns of the Pets in Kennel and Today's Reservations lists. It shows which major services are scheduled.

- Boarding
- Grooming
- Daycare

**Example:**

This reservation or folio has Boarding and Grooming.

**Note:**
Double-clicking any row of either table will open a pet's folio or reservation.

# Quick Look

## Occupancy Forecast

This window provides forecast information of what pets will be staying in your kennel on what dates and which locations they will be occupying for any future date.

### *Button bar*

Provides alternatives for sorting and displaying the data:

**Sizes** Sorts the data into columns by pet size.

**Locations** Sorts the data into columns by location and highlights the cells that refer to occupied cages. The number in each cell represent the number of pets schedule to occupy that kennel

**Colors** Highlights in red the cells that refer to double-booked kennels

**Pivot** Swaps the rows and columns

**Graph** Displays data as a graph

**Export** Enables you to save the data to a file on your computer. This will create a file in CSV format that can be opened by other programs, such as Microsoft Excel. You can use these other programs to analyze the data more closely.

**Detail** Provides detail of the pets for data in the selected cell. You can also double click on the cell you'd like to view.

**Back** Closes the window

To change the range of the forecast, select the new dates on the calendars and click the Update button.

To use colors or bold font to display the counts that exceed the limits you set in **Tools** -> **Options** -> **Locations**, mark the appropriate checkbox.

**Note**

The check-in and -out column headings display all pets checking in and out for all services. The column headings named by size and total include only boarders (pets staying overnight.) Double click a cell containing a number, or select a cell and click the Detail button to display the description of those pets.

## Grooming Schedule

The Grooming Reservations Screen allows you to see information about grooming reservations. It also allows groomers to stop or start taking grooming reservations and add comments to individual days.

The following fields are available to choose from:

**Range** Allows you to select a range of grooming appointments to view. Choose from: All, 6 weeks, 2 weeks, or today

**Groomer** Allows you to filter the grooming appointments by groomer.

The column headings display the following:

**Day** The day of the week of an appointment.

**Date** The date of an appointment

**Owner** The name of the pet owner.

**Pet** The name of the pet who is scheduled to be groomed.

**Breed** The breed of the pet, which will help schedule perhaps the number of pets being groomed.

**Service** The type of grooming service being provided, bath and brush, bath and trim, or nails.

To save space, this is the abbreviation for the service. These abbreviations are set under **Lists** -> **Prices** -> **View Item**

| | | | |
|---|---|---|---|
| **Location** | The location of the pet if located in the kennel. | | |
| **Comment** | Grooming comments about this pet. | | |
| **Status** | | **No Box** | Pet is not present. |
| | ☐ | **Empty Box** | Pet is checked in but grooming is not complete. |
| | ☑ | **Checked Box** | Pet is checked in and the grooming is complete |

You can annotate a date on the Grooming Schedule Screen to protect a groomer's time. Click the mouse on the date that is of concern and select from the following commands:

**Stop taking <u>all</u> reservations.** This annotates the selected date in red and prevents creating any new appointments on this day for this groomer.

**No more Bath & Trim.** (depending on how you named this service) – This annotates the selected date in red and prevents any new Bath & Trim grooming appointments.

**Comment.** This displays a dialog for typing a comment to annotate the selected date.

**Resume taking reservations** – Click an annotated date and then select this option to remove the annotation and enable the groomer to take new appointments for that date.

**Note:**
Only the selected groomer and members of the Administrators and Managers security groups can perform these functions. Others will receive a message that they are not authorized.

## Grooming Overview

This is a visual overview of each groomer's appointments for the selected date.

This view will have value only if you accurately schedule grooming appointments by the time of day.

The range begins with the time the earliest groomer begins work and ends when the latest groomer ends work.

### *Legend*

- **Blank**. The groomer is not working
- **Available**: The groomer is working but no appointments are scheduled for this time
- **Scheduled**: The groomer has an appointment scheduled for this time
- **Overlap**: The groomer has more than one appointment scheduled at this time.

Change the color scheme by clicking the small buttons. Double-click a cell, or select a cell and click the **Detail** button to see the appointment(s) for that time. Click the **Reset** button to restore the colors to the defaults.

## Pets In Kennel

This displays a list of all the pets that are in the kennel now. You can sort the list by clicking the column headers.

### 2-Week Overview

This window provides a look at the workload of tasks for the next fourteen days. This can help you determine your staffing requirements.

**Rows** The top of the spreadsheet contains a row for each of the following:

Check In
Check Out
Boarding
Daycare
Bath & Trim
Bath & Brush
Medication
Special Diets
Activities

**Columns** One for each of the next 14 days.

**Data** The number of pets associated with each task. Some services may be scheduled for different times of the day (e.g. feeding, exercises, medication). One number is displayed for each time of the day (morning, noon, after-noon, evening, night), separated by a dash (-). For example "2- -3- - " indicates that 2 pets are scheduled for morning, none for noon, 3 for afternoon, and none for evening or night.

# Menus

## File Menu

### Back up

It is *critical* that you back up your data every day or more often if desired in case there is a power outage or a problem with your hardware or operating system. We also recommend that you keep several generations of backups, for example one disc for each day of the week. It is also ideal to have at least one backup disc kept off your premises. Keeping a backup disc in a separate location will also protect your data in the event of fire, flood, theft, etc.

Setup:

1 Click **Tools** -> **Options** -> **File Locations**

2 Click the **Modify** button next to **Backup Location**

3 Select your backup device, normally a CD-RW or Zip drive. This is where KennelSuite will write your backup data

4 Close the Options dialog and return to the main screen

Backing up:

1 Open the File menu and click **Backup**.

2 Click **OK**, when the backup is complete.

## Files

These are the files that contain valuable data:

- PS.MDB is the main database file
- PS.SYS is a supporting file and must be present in the program folder
- PS.LIC is the license file for registered users. The evaluation does not have this file.
- The Images folder is where the pet photos are stored

## Restore

This feature if used to restore your database from backup.

In the Main window:

1 Open the **File** menu and click **Restore**

2 Select the options you wish to restore

3 Click **OK**.

4 Browse to select the source of your data. Normally this will be the same as the you selected under **Tools->Options->File Locations->Backup Location**

5 Click **OK** when the data is restored.

## Confirmation

The confirmation screen allows you to find the status from a confirmation number. When a new reservation is created, KennelSuite assigns a unique identification number that you can give to the customer as confirmation that they have a valid reservation. This confirmation number always exists but will only display if you have it selected in **Tools** -> **Options** -> **General**.

In the Main window:

1 Open the **File** menu and click on **Confirmation**.

2 Type in the Confirmation number.

3 Click the **Search** button.

The screen will then display information about that confirmation number.

Typical results of the search indicate the confirmation number references:

- An existing reservation (pet will be in the kennel)
- A reservation or folio that was canceled or deleted
- An existing folio (pet is in the kennel)
- A history (pet was in the kennel)
- Not Found (the number has not been used)

## Overdue Check in & Check out

If a pet is either late for a scheduled arrival or late for a scheduled departure, you will receive an overdue warning screen when you first log into the software. Change who gets the automatic notification at startup by clicking **Tools** -> **Options** -> **General**. Members of the Administrators group always get the notification.

You can also manually view or print these warnings at any time.

In the Main window:

1 Open the **File** menu and click Overdue **Check in & Check out**.

2 Click the **Print** button to print the report or the **Cancel** button to return to the Main window.

**Note**

It's a good idea to resolve any overdue reservations or folios. If the pet did not arrive on the scheduled date, you should either delete the reservation or change the arrival date.

For pets that did not depart on the scheduled date you should change the check out date on the folio.

## Export to QuickBooks

This allows you to export owner information, such as name and address, to an external file in a format that can be imported into QuickBooks.

In the Main window:

1 Open the **File** menu and click on **Export to QuickBooks**.

2 KennelSuite will write to the file you have selected in Tools.Options.File Location.

3 Click **OK**.

**Note**

This does not export transaction information. Because of the way Intuit handles interaction with other programs, we feel it is safer for you to print a Sales Summary report and manually transfer the summary numbers to QB.

## Export Error Log

A Plane support engineer may ask you to email your error log so a problem can be diagnosed.

In the Main window:

1 Open the **File** menu and click on **Export error log**.

2 Note the location the errors.log file was written to. For example, C:\Program Files\Plane Software\KennelSuite\errors.log

3 Click **OK**.

4 Send an email to support@planesoftware.com with the error log file attached.

## Logout

Users should logout each time they leave the computer unattended. When you logout of KennelSuite, the login screen will display.

In the Main window, do one of the following:

- Open the **File** menu and click **Logout**.
- Click the **Logout** button.

### Exit KennelSuite

This will exit you from KennelSuite and will not display the login screen.

In the Main window:

- Open the **File** menu and click **Exit**.
- Click the **Exit** button

## Lists Menu

The lists menu is available only to members of the Administrators and Managers security groups. This menu provides the capability to set your prices and general details for Kennel-Suite.

### Prices

In the Main window:

1 Open the Lists menu and click Prices.

2 Select the service you wish to view and edit from the dropdown list.

- Services
- Other Charges
- Sales Tax

3 Assign prices.

See **Work with Prices** in the **How Do I…?** chapter for more information.

### Pet Details

When you enter information on the Pet Record, you are asked to select the pet's various attributes by choosing from pre-defined lists. If your desired item is not listed, you can add it to the Pet Details Lists.

Each tab offers the capability to create a new item, change a displayed item, or delete an item.

From the Main window:

1 Open the Lists menu and click Pet Details.

2 Select the desired tab to create a new item, change an item, or delete an item.

**New** Click the **New** button to add a new item. Type the new item, click **OK** and **Save** before existing the General Lists dialog

**Change** Select the item you wish to modify and click the **Change** button. Make your desired changes, click **OK** and **Save**.

**Remove** Select the item you wish to delete and click the **Remove** button. Click **Save**.

#### *Breeds*

The program has approximately 220 built-in breeds and their typical sizes. You can add to or change this list. Each pet must be assigned a breed.

The size you specified for each breed is used when you create a new pet. The pet's size is automatically assign based on this list. If you change an individual pet's size on the pet's record, that size remains with the pet regardless of changes you make to the breed's default size.

#### *Colors*

The program has several common pet colors. You can add to or change this list. Each pet must be assigned a color.

#### *Markings*

Use this list for distinguishing features of a pet. This assignment is optional.

#### *Sexes*

Add additional sexes or change the terms for the built-in "male", "female", "neutered" and "spayed". Each pet must be assigned a sex.

#### *Sizes*

The concept of "size" was designed to refer to the physical size of the animal, which is also related to the breed. You can add additional sizes and change their reference, e.g., you might prefer the size to refer to the kennel instead of the animal. Each pet must be assigned a size.

In general, keep the length of the name short to conserve space on the screen and on reports.

Use the **Order** buttons to organize the sizes with smallest at the top and largest at the bottom.

#### *Species*

Add additional species or change the terms from the built-in "canine" & "feline".

#### *Vaccinations*

Select a species from the list and add or change vaccinations that apply. By selecting the **Required** box, you tell the program to check each pet's records for valid expiration dates when a reservation is created. This check is performed each time the reservation or folio is saved.

If a date for a required vaccination is missing or expired (or will be expired before the departure date on a reservation) you will be warned. This is only a warning and it won't prevent you from proceding.

Each pet can be exempted from this requirement. See **Pet** for more information.

#### *Varieties*

Use this list to add or change additional attributes for pets. This assignment is optional.

### General Lists

The General Lists offers you the ability to store your Medication, Special Diets, etc., in a list so you don't need to manually type them in.

These items are available from a variety of dropdown lists when working with a pet's schedule or using a credit card as a payment.

In the Main window:

1 Open the Lists menu and select General Lists.

2 Select the desired tab to add a new item, change an item, or delete an item.

| | |
|---|---|
| **New** | Click the **New** button to add a new item. Type the new item, click **OK** and **Save** before existing the General Lists dialog. |
| **Change** | Select the item you wish to modify and click the **Change** button. Make your desired changes, click **OK** and **Save**. |
| **Remove** | Select the item you wish to delete and click the **Remove** button. Click **Save**. |

### *Medications & Special Diets*

Items in these lists are used by the medication & diet schedulers on reservations and folios. You can add common items here and select them from the list when you create the schedule.

### *Feeding Quantities*

Enter common quantities for feeding. This is used in the Diet scheduler on reservations and folios.

This list is not sorted and you cannot rearrange it. If you want to customize the items or their order, it is probably best to delete all the items and create a new list.

### *Credit Cards*

This list is used on the check out and payment windows. Change or add to this list so it contains the credit cards your facility accepts.

### *Skills*

Add the skills a groomer might posses which you feel are important to perform certain grooming tasks.

The items in this list are used when working with a groomer's record.

- **Tools** -> **Security** -> **Users**
- **Lists** -> **Prices** -> **View Item**

### *Referrals*

Add items to this list that indicate how your customers learned about your facility. This list is used in the Owner's record and in the Referrals report.

## Veterinarians

When you enter information on the Pet Record, you are asked to select a pet's veterinarian. If your desired item is not listed in the dropdown list, you can add it by clicking on the **Details** button on the Pet record or changing it on the Lists menu.

In the Main window open the Lists menu and select Veterinarians.

| | |
|---|---|
| **New** | To add a veterinarian, click the New button and fill in the desired information. Click the Save button when satisfied. |

| | |
|---|---|
| **Change** | To edit an existing veterinarian, select it from the dropdown list and click the Change Button. Click the Save button when satisfied. |
| **Delete** | To delete an existing veterinarian, select it from the dropdown list and click the Delete button. |

This list is used in the pet's record. There is a special vet, "None" which can be assigned to a pet when you don't know the vet. The "None" vet cannot be changed or deleted.

# Tools Menu

## Security

KennelSuite Basic does not have user security and it does not require you to login. Everyone using KennelSuite Basic is logged in to the administrative account and has access to all information.

**Note:**
See the **Work with User Security** topic in the **How Do I...?** chapter for more information

## Labels and Export

This feature lets you print mailing labels for pets and owners who meet various requirements. You can also export the name and address information to a file that can be used by another program.

In the Main window:

1. Open the Tools menu and click Labels and Export
2. Choose the following options:

### *Type*

Select the type of output for your query.

### *Labels*

When this is selected KennelSuite will format the owner's name and address information so it will print on most standard labels.

### *Export*

KennelSuite will create a file in comma-separated values (CSV) format, which can be used by many other programs. You can use this, for example, to create a list of address for use with a mail merge program. If the Include field names box is checked, KennelSuite will add the field names (First Name, Last Name, etc.) as the first record in the exported file.

These are the data included in the export file:

Title, First Name, Initial, Last Name, Suffix, Address, Address1, City, State, and Postal Code

### *Return Address*

This selection causes KennelSuite to print the name and mailing address you entered under **Tools** -> **Options** -> **Facility**. The number you enter for Qty is the number of individual labels that will be printed.

### *Search*

This is the criteria KennelSuite uses to select the name and address information. The output is selected in the Type box and is sorted.

- **All Owners** This will list all the owners in the KennelSuite database
- **Owners by City** This will list the owners living in the cities checked in the Range list. Output is sorted by city then last name.
- **Owners by postal code** This will list the owners living in the postal codes checked in the Range list. Output is sorted by city then last name.
- **Birthday cards** This will list the owners who have pets with birthdays between the two dates selected in the range box.
- **Boarding reminders** This will list the owners who have pets with boarding reservations between the two dates selected in the range box.
- **Grooming reminders** This will list the owners who have pets with grooming appointments between the two dates selected in the range box.
- **Grooming ticklers** This will list the owners whose pets had had grooming appointments in the past but it's been some time since the last appointment. Enter the number of weeks.
- **Vaccination reminders** This will list the owners who have pets with reservations between the two dates selected in the range box and who's pets have one or more missing vaccinations or vaccinations that will expire within the date range.

**Note:**

If the Include All box is checked, all pets are included whether they have a reservation or not.

**Revenue exceeding**

This will list the owners who have spent more than the amount you enter in the edit box between the between the two dates selected in the range box.

### *Size*

Choose the size of the Avery label to print on.

### *Auto Update*

If this box is checked, KennelSuite will update the information in the Status box each time you make a change to any of the criteria. You can improve performance by un-checking the box. If this box is not checked, you can see the current status of your criteria by clicking the Update button.

**Note**

If Auto-Update is off, you must click the **Update** button before printing the report. If you don't update the selection, your report may be blank or incorrect.

## Undelete

| | |
|---|---|
| **Owners** | Displays the names of deleted owners. Click the box beside each name you want to undelete, to put a checkmark there. |

| | |
|---|---|
| **Pets** | Displays the names of deleted pets. Click the box beside each name you want to undelete, to put a checkmark there. |
| **Undelete** | Click when ready to restore these owners or pets. |

This dialog enables you to view names of deleted owners or pets and allows you to select the desired one(s) you wish to restore back to the database. Select either owners or pets:

**Note:**
Un-deleting an owner also un-deletes that owner's pet(s)

## Occupancy History

This screen allows you to get an overview of previous occupancy. It will display the number of pets that stayed in your facility over the selected days.

In the Main window:

1. Open the **Tools** menu and click **Occupancy History**.
2. To change the range, select the days you wish to view on the Begin and End Calendars and click the **Update** button

## Options

This is where you set the main configuration options for KennelSuite. Only members of the Administrators and Managers security groups have access to this feature.

### *Facility*

In the Main window:

1. Open the **Tools** menu and click **Options**. You will now see the facility tab.
2. Enter the address and business hours for your kennel.
3. Enter the Tax/VAT if desired. This will display on invoices and receipts.

Information in the facility name, mailing address and phone fields are printed on invoices, quotations and receipts

### *Days & Times*

Use this to set your facility's hours of operation.

Each of the 7 days of the week as well as holidays is independently configurable.

- Opening and closing hours denote when the facility is open for business. These times are compared to the actual time of each check-in and check-out. If the actual time is outside this range, KennelSuite will prompt you to add a surcharge for the after-hours activity.
- Check-in and check-out times denote the deadlines for the actual times for checking in and out. If the actual time of check-in precedes the check-in deadline, or the actual check-out time is after the check-out deadline, KennelSuite will prompt you to add a surcharge for the missed deadline
- Each day can be *split* into 2 segments. If the split option is selected, then the day can have 2 of each deadline.

- You must indicate which days of the week the facility is open for business but the times of day are optional.

If you enable the deadlines by entering times in the Options dialog, KennelSuite will prompt you to add the applicable surcharges at the moment of check-in and check-out. Of course, you should check the accuracy of each computer's clock.

The arrival and departure times you enter on reservations and folios are used only for scheduling. The check-in and –out reports are sorted by the scheduled times but KennelSuite doesn't use these times for any other purpose.

### *Grooming*

In the Main window:

1 Open the **Tools** menu and click **Options**.

2 Click on the **Grooming** tab.

| | |
|---|---|
| **Groomer** | Select the groomer in which to set their schedule. |
| **Grooming Days** | Days of the week and hours that the selected groomer is working.<br>Note: You cannot schedule grooming on days that the selected groomer is not working. |
| **Appointments** | Select this option of how you want to schedule your grooming appointments.<br>**Length**<br>You can change the length of each appointment when you schedule grooming appointments by time.<br>**Day**<br>Check Out Day/Day Before Check Out.<br>This determines the default day for grooming. If a pet is scheduled to be in the kennel for boarding and you select a grooming service, KennelSuite will automatically select the date for the grooming.<br>Note: You can always pick any date for a grooming appointment.<br>**Prevent checkout if grooming is incomplete**<br>This is normally used with the Enterprise level when there is a computer in the grooming area. As the groomers finish their appointments, they can indicate that the grooming is complete. This information is then instantly available on the receptionist's computer. |

| | |
|---|---|
| **Grooming Holidays** | Holiday dates or vacation time the groomer is not working.<br>To select a date:<br>1 Type a single date or click the calendar button to select a range of dates.<br>2 Click the **Add** button<br>3 To remove a holiday date, select the date(s) and click the **Remove** button.<br>Grooming appointments cannot be made on days the groomer is not working. |

### *File Locations*

In the Main window:

1. Open the **Tools** menu and click **Options**.
2. Click on the **File Locations** Tab.
3. Click **OK** to save any changes.

The following options are available, click the **modify** button to browse to a different folder.

| | |
|---|---|
| **QuickBooks Export Location** | This is the folder where KennelSuite will create the export file for QuickBooks. KennelSuite only exports the client information (name and address). |
| **Backup Location** | This is the folder where KennelSuite will write the data and security information when you do a backup from the File menu. |
| **Images Location** | This is the folder where KennelSuite will write the images files. This is usually the "images" folder under the KennelSuite folder on the server. |
| **Verify Backup Media Label** | If this box is checked, KennelSuite checks the volume label of your backup disc to make sure the label matches the current day of the week.<br>We recommend backing up your database at the end of *each business day*, and using a different backup disc for each day. This will reduce your risk if one of the backup discs fails.<br>If you use this option, you must give each disc a volume label that matches a day of the week, e.g., TUESDAY. Volume labels are created by Windows. Use My Computer to select the disc and right-click to change the label. |

### *General*

In the Main window:

1. Open the **Tools** menu and click **Options**.
2. Click the **General** tab.

3 Set any of the following options:

**Inactivity** To force log off after a period of time. You can select the length of inactivity as well. This is a useful security feature that helps prevent unauthorized access to the KennelSuite database.

**Confirmation Number** To display the confirmation number when a new reservation is saved. This confirmation number is also used in the history log for each entry involving that reservation or folio.

**Owner Names** To add blanks to the owner record for recording a middle initial and for a name suffix, such as "Jr." You can select either or both.

**Overdue Check in & Check out** To display a list of pets that should already have checked in or out by the current date. This screen displays at the start up after logging in as a reminder. Members of the administrators group will always see this warning at start up.

**Main List Pictures:**

KennelSuite can display flags next to pet or owner names on the main list. There are three different options you can choose from, depending upon your preference.

You can choose the setting in either of the following ways:

- Right click on the main list and select from the popup menu.
- From the Main window, open the **Tools** menu, click **Options** and select the **General** tab to see the Main List Pictures.

**Reservations and Folios**

If the Main List Pictures is set to flag **Reservations & Folios**, they will call your attention to the following:

- Pets with reservations will show a yellow box ☐ next to the pet's name.
- Pets that have checked in and have folios will display a cyan box ☐.
- Pets that have checked in and also have a future reservation the box will display both colors.

**Comments and Rating**

If the Main List Pictures is set to flag **Comments and Rating**, they will call your attention to the following:

Pets or owners you might want to give special attention to or refuse to accommodate are indicated by a colored box.

☐ Preferred

☐ Neutral

☐ Caution

☐ Unwanted

☑ Pets or owners whose records contain any comments will display a checkmark in the box.

**No Pictures**

If the main list is set to flag **No Pictures**, just the names will appear. This will allow the list to load faster, but provides the least amount of information. If you have a slow computer, a large database, or you simply want the fastest response, you should select this option.

**Free Boarding Days** To select a form of discount for long term boarding. Select a day from the list (2-31) and boarding will be free on every occurrence of that day.

### *Logo*

KennelSuite allows you to add a logo for your screen as well as a logo to display on your receipts and invoices.

In the Main window:

1 Open the **Tools** menu and click **Options**.

2 Click the **Logo** tab. Choose the image to display on the Screen Logo and/or the Invoice Logo.

3 Choose the **Select** button to browse the folder of your image.

4 Choose the **Clear** button to clear your current image displayed.

5 Click **OK**.

**Note**
The image must be in either BMP, GIF, JPG, or WMF format. The approximate size for an image should be 450X350 pixels.

### *Printing and Cash Drawer*

KennelSuite supports up to 3 separate printers for different tasks. The printer(s) may be connected to the local computer or they may be a shared resource on another computer on your network.

You can increase your efficiency and possibly reduce expenses by using multiple printers. Load one printer with full-size paper for reports, worksheets, invoices and quotes. Load another with card stock (4x6 in. or 3x5 in.) for the run cards and use a third printer with inexpensive 3 in. roll paper for receipts.

In the Main window:

1 Open the **Tools** menu and click **Options**.

2 Click the **Printing and Cash Drawer** tab.

3 Set the following information:

**Receipt Printer**

Select the printer for your receipts. You must also select a paper size that matches the printer. If you select a paper size that doesn't match the printer, you may receive an error when printing, or the printed output may not be what you expect.

**Run Card Printer**

Select the style of run card and the printer you wish to print from. If you select either of the index card styles, make sure your printer supports that paper size. You may also choose to include the following on certain styles of run cards.

- **Contract:** Contracts are available on full size (A4/Letter) run card, this contract will print below the run card information.
- **Signature Line:** The Signature line is available on full size (A4/Letter) run card. This line will display below the contract for a customer signature.
- **Diet Details:** Diet details are available on all size run cards. When this item is selected the feeding schedule of the pet will display on the run card**.**

- **Owner's address:** The owner's address is only visible if selected for the full size (A4/Letter) run card.
- **Use Color:** The run cards can print certain important information in color. Select this option if you want the Med, Diet, Activity and Alerts to print in color. Otherwise, they will print in black and white. This is normally done to save colored ink but you should also clear this option if you don't use a color printer for run cards.

**Note**

If you are printing on index cards (3x5 in. or 4x6 in.), you may need to set the printer as the default Windows printer (Control Panel->Printers). This restriction varies with the printer driver and version of Windows. You may need to experiment to find the correct setting because KennelSuite cannot determine this for you.

**Report & Invoice Printer**

Select the printer for your reports, invoices, and quotations. This should be full-size paper (either Letter or A4).

**Cash Drawer**

KennelSuite supports 3 types of interfaces:

1. Serial
2. Printer
3. USB

KennelSuite will open the drawer when a transaction is complete. If you select a serial port, you must select the port and settings. Consult the manufacturer's specifications to get these settings. Most cash drawers use "9600,n,8,1".

When installing a USB drawer, you *must* install the software before connecting the drawer to the computer. This software is available on the KennelSuite CD in the Printers folder.

If your drawer connects to a receipt printer, you may need to configure the printer driver in Windows to enable it to open the drawer. To configure the printer driver, open the Windows Control Panel and select Printers. Then right-click on the receipt printer and set the cash drawer options.

### Locations

The Location box is where you identify the physical spaces in your kennel. When naming locations, we suggest that you use the same number of characters for each location, for example A01, A21, etc. This will make sure they sort in the correct order on worksheets and in the location box on reservations and folios.

Use the tab to specify the layout of your kennels and set up warnings to tell you when you are approaching capacity.

**Locations** Select a size from the list and add, update, or delete.

- **New** Click to display a Location dialog, for describing a kennel of the type you selected.
- **Delete** Click to delete the selected kennel.
- **Change** Click to display a dialog for changing a kennel description.

**Limits** Boxes for specifying, for each kennel type, how many kennels you are willing to fill and when to flag a warning that they are filling up.

- **Warning** Type the number of kennels in use that should flag a warning that you are reaching capacity. This warning will display the number of occupancy in blue.
- **Capacity** Type the number considered to be your capacity. The warning will display the number in red.
- **Physical** Number of kennels on the premises. This value is taken from the number of kennels you create on the Locations list; you cannot change this number.

**Note**
KennelSuite will not prevent you from exceeding your capacity; it will only alert you by showing a colored number on the Occupancy Forecast.

### *Contract*

If you have selected a full size run card on the Printers & Cash Drawer tab, you can include a contract if desired.

In the Main window:

1. Open the Tools menu and click Options.
2. Click the Contract tab.

You may edit manually or paste another contract from another program. If your contract exceeds the space allowed, the run card will print on more than one page. To prevent this find the appropriate length of contract to fit.

### *FlexRates*

FlexRates™ allows you to have different prices for the same item on different days of the week or different dates.

You may want to charge a higher price during your busiest times, perhaps Saturdays or every day between December 20 and January 2. Or perhaps a lower price to encourage business during slow periods.

Dates take precedence over days of the week. For example, if you select Wednesdays as Economy, and you select the last week of December as Premium, the Wednesday that falls in the last week of December will be priced at the Premium level.

See **Prices** for more information.

**Note**
After you select the days and dates that use FlexRates, you must also enable FlexRates for the boarding service and set the prices for each FlexRate level

FlexRates are available only for Boarding.

### *Localize*

**Language**

Select the language you prefer for the screens. This will change only the static text, such as labels and menu items. It will not alter the data.

**Address Format**

Select the style you prefer for addresses. This works in conjunction with your country settings and applies to the Owner and Veterinarian addresses.

**Telephone Format**

Select how you want telephone numbers to be displayed.

The number symbols (#) are placeholders that will be replaced with the digits in the actual phone number. You may use any other characters for your format. The most common are "()+-x" and <space>.

When you are editing your format, the number of placeholders must equal the number of digits in the number you are formatting. Otherwise you cannot save your format.

Numbers less than 5 digits or more than 16 digits will be displayed with no formatting.

**Country**

Select this if you have customers from different countries. It allows you to save their addresses in the correct format. Select the most common country as the default.

**Alphabet**

The main window has a row of buttons across the top. Each button is labeled with a letter of the alphabet. Clicking one of these buttons causes the list to load with owners whose last name begins with the letter.

By default, the first 26 buttons are assigned the letters of the English alphabet (A-Z). Since some other languages have a different number of letters in their alphabets, there are 30 buttons and they are all programmable.

To program the buttons, enter the desired letter in the field that corresponds to the letter's position in the alphabet.

To restore the assignments to the English default, click the **Reset** button.

# How Do I…?

## Work with Owner Records

Before you can provide services or create a record for a pet, the pet's owner must have a record in KennelSuite.

### Display an owner record

Display an owner in either of the following ways. From the main window:

- Find the owner's name on the alphabetical list and then click the View Owner button, or just double click the owner's name
- Find the owner using the search facility and then click the View Owner button, or just double click the owner's name.
- On the bottom task bar, click the owner's name if the owner is presently selected.

### Create a new owner record

In the main window:

1. Click the **New Owner** button, to display a blank owner record.
2. Complete each field and click the **Save** button when finished.

**Note**
The minimal information required in the owner record is the first and last name.

### Update an owner record

In the Main window:

1. Display the owner record.
2. Click each tab where you want to add or update information.
3. Click **Save**

### Delete an owner record

Deleting an owner record also deletes the pet records associated with it.

Deleting an owner does not actually remove the owner and their pets from the database. They remain in the database to preserve their history but they are hidden from view. You can make an owner or pet "inactive" which keeps the visible and accessible but you can't create any new reservations. Disabled owners and pets are displayed in the main list in a dim color.

In the Main window:

1. Display the owner record.
2. Click the **Delete** button.
3. To continue, click **Yes**.

### Undelete an owner record

In the Main window:

1. Open the **Tools** menu and click **Undelete**.
2. In the Undelete screen, click the **Owner's** button
3. Scroll the list and click the checkbox next to the name of each owner you want to undelete.
4. Click the **Undelete** button.

## Auto-Caps

When Auto-Caps is on, certain words are automatically adjusted for proper casing. The first letter of each word is uppercase and the others are lowercase

When Auto-Caps is off, the case of the letters is not changed and remains as you typed them.

The formatting is applied when you leave the field, not when you click the option on or off.

## Tabs

### *General & Grooming Comments*

This displays grooming and general comments from staff regarding this owner. Beside each comment is the date and the name of the userid who entered the comment. Use the following buttons to work on the tab.

| | |
|---|---|
| **New** | Click the New button to create a comment. |
| **Change** | Click the Change button to display the selected comment in a dialog for editing. |
| **Delete** | Click the Delete button to delete the selected comment. |

**Note**
If there are comments for an owner, a checkmark will display next to the owners name in the Main window if you have Comments and Ratings selected.

### *Performance*

Use this information as an aid in judging a customer's value to your facility. It includes the amount spent and the frequency of use at your facility, including no-shows and cancellations with less than 2 days notice.

### *Security*

Use this tab to record credit card and identification information

Credit card and license information is encrypted before being written to the database and user security is enforced to restrict access via the program

Groomers and Staff have no access. Receptionists can enter the info but can't view it afterwards. Owners and Managers have full access.

This info is not used anywhere else in the program and is not printed on any reports.

### *Status*

Use these optional fields to specify the owner's status and rating as a customer. This gives the receptionist information which she may find helpful when making some decisions, such as whether to take a reservation over a holiday or extend credit.

#### *Active*

For new and repeating customers.

#### *Inactive*

For customers who no longer come in

### *Rating*

Select a status by clicking its option button. The tab label displays the color code of the rating. If desired, the rating can be displayed beside the owner name in the database.

If you assign a status other than Neutral, it's a good idea to enter a brief explanation so others will understand.

| | | |
|---|---|---|
| ■ | **Preferred** | A customer to give special attention to (green) |
| □ | **Neutral** | No rating (white) |
| ■ | **Caution** | Indicates a few problems in the past (yellow) |
| ■ | **Unwanted** | Not desirable as a customer (red) |
| | **Reason** | In the text box, type a comment to explain the reason of the rating |

# Work with Pet Records

Before you can provide any services, the pet must have a record in KennelSuite.

## Display a pet record

Display a pet in either of the following ways. In the main window:

1 Find the owner's name on the alphabetical list and then click on their pet and click on the View Pet button, or just double click the pet's name

2 Find the pet by using the search facility by last name, phone number, by name of pet, tattoo or microchip.

3 Click the **View Pet** button, or double click the pet's name.

4 On the bottom task bar, double click the pet's name if the pet is presently selected.

## Create a pet record

An owner must exist before creating a pet record.

In Main Window:

1 Click the owner's name.

2 Click the **New Pet** button, to display a blank Pet record.

3 Complete the fields to describe the pet:

4 Click **Save**

**Name** Type in the name of the pet.

**Details** Select from each list to fully describe the pet.

**Age** Either type the pet's age at Years and Months or else type its' birthday at Birth date. You must enter your own delimiters.

**Veterinarian** Select a veterinarian from the list. If you don't know the name of the vet, select "None". Each pet must have a vet, even if it's the "None" vet.

If the vet is not in the list, click **New** and add the vet, then select the vet from the list on the pet window.

To see information about the pet's vet, click the **Detail** button.

## Delete a pet

1. Display the pet record.
2. Click the **Delete** button.
3. Click **Yes**.

## Update a pet record

1. Display the pet record.
2. Click each tab to add or update your information.
3. Click **Save**.

## Undelete a pet record

1. Open the **Tools** menu and click **Undelete**
2. In the Undelete screen, click the button at Pets. The dialog displays a list of pets that have been deleted.
3. Scroll the list and click the checkbox next to the name of each pet you want to undelete.
4. Click the **Undelete** button.

## Tabs

### *Pet*

**Note**
When you create a new pet record, the form includes only the **Pet** tab. The other tabs are added after the record is saved, and they are visible the next time you display the record.

This tab contains data describing the pet. You must complete each field to save the pet record.

**Name** Type the pet's name in the text box.

An owner cannot have more than 1 pet with the same name. This includes inactive and deleted pets.

**Details** Open each of the dropdown lists to select a value to describe the pet:

To scroll a list quickly, type the first letter of the value you want to find.

- If a list does not contain the value you need to describe the pet, click the **Lists** button. This displays the Lists Screen, where you can add and save the description you need, and then return to the Pet record to select it.
- Some Items, such as Variety, Markings and Vet, include a choice of "none". This will satisfy KennelSuite.

**Age** Supply the age in either of these ways:

- Type in the birth date box, using your local format, e.g., *mm-dd-yy,* and KennelSuite will calculate the age in years and months
- Fill in the age in years and months, and KennelSuite will calculate the birth date.

**Veterinarian** Select a veterinarian from the list or, if the pet's veterinarian is not listed, click the **Detail** button to add that veterinarian. Then return to the pet record and select the name from the list.

### *Change Owner*

On this tab you can select a new owner and the pet and all its history will transfer to the new owner.

In the Main Window:

1. Display the Pet record of the pet that you wish to change owners.
2. Click the **Change Owner** tab.
3. Select the owner's name from the dropdown list.
4. Click the **Change** button.
5. Click **Yes** to confirm your request.

**Note**
Before you can transfer a pet and their record, the new owner must exist in the KennelSuite database.

### *General Comments*

This tab displays comments of staff regarding this pet. Beside each comment is the date and the name of the userid who entered the comment. Use the following buttons to work on the tab:

**New** Opens a dialog where you can create a comment. Type the comment in and click ok.

**Change** Displays the selected comment in a dialog for editing. Type the necessary changes and click ok.

**Delete** Deletes the selected comment. Select the item to delete and click on the delete button.

### *Grooming Comments*

Displays comments of groomers regarding this pet. Beside each comment is the date and the name of the user who entered the comment. Use the following buttons to work on the tab.

**New** Opens a dialog where you can create a comment. Type the comment in and click ok.

**Change** Displays the selected comment in a dialog for editing. Type the necessary changes and click ok.

**Delete** Deletes the selected comment. Select the item to delete and click on the delete button.

**Note**
If there are comments, the tab label displays a checkmark.

### *Photo*

Below the pet name and owner name is a space for the current picture of the pet, if any. Use the following buttons to work on the tab:

| | |
|---|---|
| **Clear** | Removes the current picture from display |
| **Select** | Displays a window for selecting the file that contains the pet's picture. The file you select is copied to another file that is named for the pet. |
| **View** | Shows you how the picture will look when printed |
| **Printer icon** | Prints the picture |

In the normal view, KennelSuite adjusts the image to fit the viewer on the screen, which may cause distortion depending on the dimensions of the original image. If you click the **View** button, KennelSuite toggles the image to its original size. If the original image is larger than the viewer, you can move the image within the viewer by putting the mouse over the image, holding down the left mouse button, and dragging the image.

**Note**
Including photos may have a large impact on your storage requirements, especially for backups. Digital images of pets can be between a few thousand to several million bytes in size depending on the resolution of the camera or scanner that created the image file.

### *Run Card*

Below the pet name and owner name are notes and alerts for the run card. You can provide run card information here instead of on the reservation, if desired. Information you provide here will display on every future reservation and folio for this pet.

| | |
|---|---|
| **Notes** | View, type, or change the notes to be printed on the run card. |
| **Alerts** | View, type, or change the text of alerts to be printed on the run card. |

### *Status*

Use these optional fields to specify the pet's status and rating as a customer:

**Status** Select one by clicking its radio button:

| | |
|---|---|
| **Active** | For new pets and those you expect to come in again. |
| **Inactive** | For pets who no longer come in. <br>**Note**: Their names are displayed in the main list, but disabled. You cannot make a reservation for these pets. However, you can view their record and change the status back to active. |

| | | |
|---|---|---|
| **Rating** | Note: If there is already a rating other than Neutral, the tab label displays the color code of the rating.<br>Select a status by clicking its radio button: | |
| | **Preferred** | A pet to give special attention to (green) |
| | **Neutral** | No rating (white) |
| | **Caution** | Indicates a few problems in the past (yellow) |
| | **Unwanted** | Not desirable as a customer (red) |
| **Reason for Rating** | In the text box, type a comment to explain why you chose the rating. | |

If you change the rating from Neutral, you should enter a reason, such as "barks all night" for a status of yellow.

### *Vaccinations*

Below the pet name and owner name is a vaccinations table. You can add or update values to complete the information for each vaccination type:

| | |
|---|---|
| **Required for this species** | This is configured under **Lists** -> **Pet Details** -> **Vaccinations**. It cannot be changed in the per's record |
| **Required for this pet** | Click to place a checkmark if required for this pet. Some pets may not receive certain vaccinations based on their vet's recommendation. Clearing this box means the program won't alert you is this vaccination date is missing or expired. |
| **Vaccination name** | The name of the vaccination or vaccine. |
| **Expiration date** | Enter the date this pet's vaccination expires. |

**Note**
Any time you work with a pet, you will be warned a required vaccinations is expired by a "!".

# Work with Retail Products

## Add your rates for sales tax

KennelSuite supports 2 levels of sales tax for each item. You will assign these rates to individual items when you create the items later. The 2 levels of tax rates are designed to accommodate various local laws. Some examples:

- Both federal and provincial taxes.
- State tax but no city tax.

- Different rates for the same item, such a food being taxed differently for working dogs as opposed to pets. In this case, you must enter the same item twice in the next step, give each a slightly different name and select different tax rates for each.

In the Main Window:

1. Open the **Lists** menu and click **Prices**. This displays the Price Maintenance screen.
2. Select **Tax** from the **Type** list at the top of the Categories & Items list.
3. Enter your local tax rate(s) as percentages. For example, if your tax rate is 6.25%, enter "6.25" and not "0.0625"
4. Click the **Save** button to save the tax rates

## Add your products to the price list

In the Main Window:

1. Open the **Lists** menu and click **Prices**. This displays the Price Maintenance screen.
2. Select **Products** from the **Type** list at the top of the Categories & Items list
3. There are several pre-defined categories. You may use these, rename them or delete them. To add a new category, click the **New Category** button.
4. To add items to a category, select the category name in the list and click the **New Item** button.
5. If you will be using a bar code scanner, you must enter the correct Universal Product Code (UPC) for the item. If you don't enter a code, KennelSuite will create one for you but it will not match the bar code on the label. You should find the UPC on the invoice from your supplier. Or you can read it from the label on the item.

## Set up sales commissions for your employees

Commissions are not available in KennelSuite Basic.

If you choose to compensate your employees with commissions on sales, you must take 2 additional steps.

1. Mark the **Pay Commission** box for each applicable item when you add the item to the price list.
2. Set the commission rate for each eligible employee.
    a. Click **Tools->Security**
    b. Select the employee from the **Users tab**
    c. Enter a percentage for their commission rate. Note that **Sales** commission applies to the person who sells the item (adds it to the res, folio or sales form). In the case of grooming services, the Grooming commission applies to the groomer who did the work.

If your groomers are also receptionists and create reservations, they may earn double commissions. Of course, if Sally is a groomer/receptionist and she makes a grooming booking for Barbara, then Sally earns the sales commission and Barbara earns the grooming commission.

## Beginning a sale

There are 3 ways to sell a product

1. Add to a pet's reservation or folio by clicking the **Products tab** at the top of the res/folio.
2. Sell to an existing owner but don't associate the sale with a pet's visit to the facility.
    a. Select the owner's name in the main list
    b. Click the **Products button** at the top of the main window. You will be asked if you want the sale to apply to the selected owner.
3. Sell to a casual, or walk in, customer. This is an anonymous sale that is not recorded to any person's account.
    a. Click the **Products button** at the top of the main window.
    b. If there is no owner or pet selected in the main list, a blank product sales form will open.
    c. If there is an owner or pet selected but you don't want the sale applied to their account, select the option for **Walk In / Casual** and the sale will be anonymous.

## Selling products

Once a sales form is open (either a reservation, a folio, or a sales form for a casual sale), the remaining process is the same.

There are 2 ways to add an item to the sales form:

1. Using the mouse or keyboard
    a. Select the appropriate **Category** from the dropdown list along the top of the form. This will load the other 2 lists (item code and item description)
    b. Select from either the **item code** of **description** list. This will create a new line on the form that contains the item code, the description and the price. The initial value for Qty will be "1". The extended price will calculate automatically.
    c. Continue this process until all items have been added. If you select the same item twice, a new line will not be created. Instead, the qty for the previously added item will increase by 1.
    d. You can also manually change the quantity and the extended price will calculate when you leave the qty field.
2. Using a bar code scanner. Scanning retail products is very fast, accurate and efficient. If your products are pre-packaged and have a UPC on the label, all you need is a scanner. If you want to print your own bar codes, you'll probably also need to invest in a font.
    a. The ability to scan bar codes is always enabled when a sales form or the Products tab on a reservation or folio, is active.
    b. It is not necessary to select from the category list. Simply scan the bar code on the item and it will be added as a new line item, or the qty of an existing item will be incremented by 1.
    c. If the speaker button is turned on, a sound will play after scanning. The tone will be different depending on whether the scan was successful.
    d. If the scan fails, the most likely causes are that the item code being scanned was not found in the database because you haven't added it yet,

or the bar code on the tag is malformed and can't be read. It's also possible that your scanner is not configured to read the particular style of bar code on the tag.

### Checking out

The check out window is the same as always except for the Walk In / Casual sale. In this case, because it is an anonymous sale, the check out window does not show anything about the owner (previous balance, etc.) and requires the exact payment. It there is an under payment, it goes against the house (your) account. Over payments are always flagged with the difference being "cash back".

### After the sale

Product sales are listed in various reports in the Finance section of the reports menu. Click the Reports button on the main window to see the various product reports.

**Note**

If you will be printing some of your own bar code tags for items that do not come from your distributor with a standard UPC, you must take care. Make sure you are using a bar code font that your scanner can recognize.

Depending on your scanner, you may have to purchase a font. Review your scanner's documentation for the supported fonts and whether the scanner's default configuration needs to be changed to read the font you have selected.

Many scanners do not recognize the simple bar code fonts that come with many programs, such as MS Word. Sometimes the scanner can be programmed to read the font but you may need to obtain a more sophisticated font for commercial applications.

Commercial bar code fonts are generally not free. If your facility is relatively small, some companies offer special low- or no-cost deals.

We have tested the free version of Code39 from this vendor:

http://www.bizfonts.com/ezbarcodefonts

We have no relationship with this company. We just happened to test their font and it seems to work well.

## Work with Veterinarian Records

### Display a list of veterinarians

In the Main Window:

1 Open the **Lists** menu and click **Veterinarians**. This displays the Veterinarians Maintenance screen.

### Create a veterinarian record

1 Display the Veterinarian Maintenance screen.

2 Click **New** and fill in the desired information:

3 Click **Save.**

At **Name/Address** Fill in the blanks for name and street address

If your address format is United States, At **City**/**State**/**Zip** Type in the zip code and KennelSuite will automatically fill in the state and city. If this zip code includes more than one city, open the dropdown list and select the city. If the vet is not in the US, click the **Format** button to select an address format.

At **Phone Number** Type in all the phone numbers without any punctuation or spaces. KennelSuite will insert the formatting automatically based on the telephone format you selected under **Tools** -> **Options** -> **Localize.**

### Update a veterinarian record

1 Display the Veterinarians Maintenance screen.

2 At **Name**, open the dropdown list and select the veterinarian.

3 Click **Change**.

4 Update information as necessary

5 Click **Save**

### Delete a veterinarian record

1 Display the Veterinarian Maintenance screen.

2 At Name, open the dropdown list and select the veterinarian.

3 Click **Delete**

## Work with Reservations & Folios

The Reservation and Folio screens display essentially the same information but at different time periods.

- A **Reservation** is scheduled to happen in the future. The owner has made arrangements for the pet to stay in the kennel but the pet has not arrived. A reservation can be changed at any time prior to check in.
- A **Folio** is happening now. The pet has checked in and is physically in the facility. When the pet checks in, the folio is created and the reservation is deleted. A folio can be changed anytime prior to check out.

Every appointment begins with a reservation, even a walk-in appointment. Before you can make a reservation, you need both an owner record and a pet record.

**Note:**
It is not good practice to check a pet in before it has arrived or check it out before it has left. This can cause confusion and possible errors in the owner's account. Remember that KennelSuite was designed to run in real-time.

### Reservation List Screen

This dialog screen opens existing reservations or creates a new reservation.

**Open** To open an existing reservation, select the reservation and click the **Open** button or double click the reservation cell.

**New** To create a new reservation, click the **New** button.

**Cancel** To exit from the reservation screen, click the **Cancel** button.

## Menu Buttons

**Quick Look** Allows you to quickly jump to either: Boarding Forecast, Grooming Schedule, Pets in Kennel and the 10 Day Forecast.

**Save** Saves the current information that was made. You can reopen the screen and change the information at any time.

**Check In** Checks the current pet into the kennel.

*This is available only on the Reservation screen*.

**Check Out** Checks out the current pet from the kennel.

*This is available only on the Folio screen.*

**Quote** Prints a Quotation for a customer before the pet is checked out.

**Run Card** Prints a run card for the pet's visit. Information includes, owner, pet, arrival date, departure date, grooming if scheduled, and diet if selected. Color coded boxes represent if the pet is scheduled for feeding, medication, and/or exercise

## Fields and Check Boxes

### Confirmation

This is the confirmation number for this pet's services. This is a unique number that is assigned when the reservation was created. You cannot change this confirmation number.

- When the pet checks in and the reservation is deleted, the confirmation number is passed to the folio.
- When the pet checks out and the folio is deleted, the confirmation number is passed to the history.

### Location

This displays the location of the pet. You may pre-assign a location for a pet in a reservation or assign the pet a location when the pet arrives in the folio.

### Tax

This displays the total tax for all the taxable services.

### Total

This displays the total charges for the pet's services that you currently have selected in the reservation or folio. Any sales tax that applies to the selected items is included in the total.

### Comments

This area is for adding any special instructions for caring for this pet. Comments can be 254 characters in length.

### Qty

This displays the quantity of each service you have selected.

For example, when you select boarding and then select the check in and check out dates, KennelSuite inserts the correct number of days depending on your charge style.

You can change the quantity at any time prior to check out. You can also use decimals, such as 1.5. To enter a quantity between 0 and 1, begin with "0." You cannot enter negative quantities.

**Price**

The price of services. In most cases KennelSuite will calculate the value for you by looking up the price for the selected service that you set in **Lists** -> **Prices**.

You can also use decimals, such as 1.5. To enter a price between 0 and 1, begin with "0." You cannot enter negative prices.

In some cases, such as when you have chosen to use the Free Day option (**Tools** -> **Options** -> **General** -> **Free Days**), KennelSuite needs to control the individual price in order to make the extended price be correct.

You can tell if KennelSuite has taken control of a price because the field will have a shaded background and you cannot type over the existing value.

**Ext. Price**

KennelSuite calculates the extended price (Quantity x Price) and you cannot change it.

### *Custom Fields*

To make KennelSuite easy to use, it lists the most common services for kennels, which are fixed on the screen. You can always change the wording of these services in Lists.Prices to fit your facility, but you shouldn't change their meaning.

- Boarding
- Daycare
- Bath & Brush
- Bath & Trim
- Nails
- Medications
- Special Diet
- Activities

You can add your own services in **Lists** -> **Prices**. These services you add are available in the drop-down lists at the bottom of each reservation and folio. When you place a checkmark next to the dropdown list you can scroll to your desired service.

You can add your own services. The services you add to KennelSuite are available in the drop-down lists at the bottom of each reservation and folio.

### *Manual Changes*

When a service is selected on a reservation or folio, the price and quantity are automatically calculated.

If you manually change the price or quantity that KennelSuite calculated, it is highlighted on the screen to indicate that a non-standard price is in effect. This highlight can be removed only by letting KennelSuite calculate for itself. This is done by de-selecting the service and then re-selecting it.

## Calendars & Dates

### *In and Out Calendars*

Click the calendars to indicate the dates of the pet's stay in the facility. The top calendar is the day of arrival and the calendar below it is the day of departure.

**Red** days mean the facility is closed on that day. **Blue** days indicate the pet is scheduled to be in the facility.

### *Grooming Calendar*

**Red** days mean the facility is closed that day or the selected groomer is not available. **Blue** days indicate the pet is scheduled to be in the facility.

## Run Card

Information you enter in these fields on a reservation or folio print on the run cards and become part of the pet's file and will appear automatically the next time you create a reservation.

Once a reservation is created, the information in these fields will stay with the reservation and folio even if you change the information in the pet's file.

You can also change this information directly by editing the pet's record.

**Notes**

The maximum length of a run card note is 254 characters. Any notes about the pet or their possessions can be added here.

**Alerts**

The maximum length of an alert is 50 characters. You should keep the alerts short to make sure they can fit on the run card size you are using. Some examples of alerts:

- Deaf
- May bite
- Blind
- Fence fighter
- In heat
- Escape artist
- Doesn't like men
- Won't go on concrete

You should keep the alerts short to make sure they can fit on the run card size you are using.

### *Grooming is Complete*

Check this box when grooming is complete.

## To display a reservation

In the Main window, display a reservation in one of these ways:

- Select the pet's name from the database and click the **Reservation** button. Choose the reservation you want to display and click **Open**.
- If the pet is due in that day, the pet will be displayed on the **Snapshot** tab, double-click the row of pet's information.

## To create a new reservation

In the Main window:

1 Select the pet's name from the Main List and click the **Reservation** button. This displays the Reservations List Screen.

2 Click **New** to display a blank Reservation record.

3 Select the service(s) for the pet, date(s) and any type of special instructions.

4 Click **Save**.

## Update a reservation

In the Main window:

1 Select the pet's name from the Main List and click on the Reservation button. This displays the Reservation List Screen.

2 Select the reservation you wish to update and click **OK**.

3 Update the necessary information in the reservation.

4 Click **Save**.

## Cancel a reservation

In the Main window:

1 Select the pet's name from the Main List and click on the **Reservation** button. This displays the Reservation List Screen.

2 Select the reservation you wish to delete and click **OK**.

3 Click on the **Delete** button. KennelSuite displays a cancel screen.

4 Select the reason of cancellation:

- Kennel error
- No-Show
- By Owner

5 Click **OK.**

## Cancellation Screen

The Cancellation screen allows you to specify how a customer cancelled a visit. No shows and cancellations made less than two days before the check in date are recorded and displayed on the performance tab on the owner screen.

### *Kennel error*

A scheduling error that was made by staff.

### *No-show*

The customer did not bring their pet in on the scheduled day or call to cancel.

### *Cancelled by Owner*

The customer called to cancel the reservation. You can enter the name of the person who canceled to avoid confusion and provide documentation.

## Display today's reservations

You can display today's reservations by the following options:

In the Main window:

- Click the **Snapshot** tab.
- Click the **Report** button and select the **Check in Summary** or **Check in Detail** Worksheet for today's date.

## Display overdue reservations

In the Main window:

1. Open the **File** menu and click **Overdue Check in & Check out**.

**Note**
Each time an administrator or assigned member logs on; they will view the Overdue Check in & Check out screen. This is configured on **Tools** -> **Options** -> **General**.

## Display future reservations

Use any of the following options to see what is expected in the future

- **Quicklook** -> **Occupancy Forecast**
- **QuickLook -> 2-Week Overview**
- **Reports** -> **Check in Detail Worksheet**
- **Reports -> Check in Summary Worksheet**
- **Reports** -> **Confirmation Worksheet**
- **Snapshot** -> **Today's Reservations**

## Check a pet in

To check a pet in, the pet must have a reservation.

1. Display the pet's reservation. Do this by selecting the pet in the list on the main screen, and clicking the Reservation button. If the pet is expected to check in today, you can also double-click that row in the Today's Reservations list on the Snapshot tab.
2. Verify or add any information.
3. Click the **Check in** button.

## Display a folio

In the Main window, display a folio in one of these ways:

- Select the pet's name from the Main List and click the **Folio** button.
- Display the **Snapshot** tab and double click the row of that pet.

### Update a folio

In the Main window:

1. Open the folio. Do this by selecting the pet in the list on the main screen, and clicking the Folio button. You can also double-click that row in the Pet's In Kennel list on the Snapshot tab.
2. Make the necessary changes.
3. Click the **Save** button.

### Delete a folio

In the Main window:

1. Open the folio.
2. Click the **Delete** button.
3. Click **Yes**.

**Note**
This is a potential security risk. A dishonest employee could fake a checkout, collect the money from the customer, and delete folio. To see which folios have been deleted, click **Reports** -> **Miscellaneous** -> **Deleted Folios**. You must be a member of the Administrators security group to view this report.

## Work with Locations

When you work with reservations and folios, you can assign a pet to a location or leave it blank and KennelSuite will assign it a "?", which means unknown. Before you can assign a pet to a location you must name the locations in your kennel in **Tools** -> **Options** -> **Locations**.

KennelSuite also displays a water faucet next to the location box. This location selector is often called a mode.

#### *Modes*

There are two modes for the location selector on reservations and folios. KennelSuite will try to help you by selecting the mode that makes the most sense according to what you are doing, but you will want to switch between the modes to accomplish your goals.

 Open means all locations will be displayed

 Restricted means only locations that are available for the range of dates you selected will be displayed

### Assigning Pets to Locations

When you create a new reservation, the location is blank and the filter button displays a dripping faucet/tap, which means only available locations are listed. You may choose to pre-assign the pet to a location or leave it blank.

A location is available only if it is unoccupied for each date in the range you selected on the calendars.

If you are assigning multiple pets to one location, the open mode should be used.

KennelSuite allows you to assign one location for multiple pets by using the open mode of the locator.

Display the first pet's folio or reservation:

1 Assign the first pet to the location and make any other changes to the reservation or folio and then save it. If you are working with a reservation, you may also click the Check In button.

2 Open the reservation or folio for the next pet.

3 Click the faucet/tap button, next to the location box, to change the mode to *open*. This causes the location assigned to the first pet to be included in the list.

4 Choose the same location as for the first pet, make any other changes and then save or click the check in button.

5 Repeat this for each pet that will be sharing the location.

## Schedule Meds, Exercise, and Feeding

The procedures of scheduling Medication, Special Diets, and Exercises are similar. A dialog box will appear when you check one of these services to schedule the medication, feeding or exercise with instructions.

### Scheduling Medication

KennelSuite allows you to store a pet's medication schedule and instructions in their reservation or folio. Each medication and special instructions will be display on the medication worksheet for the selected date and time.

1 Click the medication checkbox on the reservation or folio.

2 This will display the medication dialog.

3 Select the medication from the dropdown list. If the med is not listed, you can type it in. To add the medication for future use, go to **Lists** -> **General** -> **Medication**.

4 Put a checkmark by the selected dates the medication is to administered or click the **Everyday** button if the medication is given everyday.

5 Select the time(s) of day the pet is scheduled to receive the medication.

6 Add any instructions for giving the medication in the Special Instructions box. For example, "Will only take in cheese".

7 If the pet is on more than one medication, click the Next button to display a blank page. Repeat steps 3 thru 5.

8 Click **OK**.

### Scheduling Special Diets

KennelSuite allows you to store a pet's diet and instructions in their reservation or folio. Their diet will be display on the Special Diet worksheet on the dates and times that you assigned their feeding. It can also display on the run card if you have Special Diet selected to be included in **Tools** -> **Options** -> **Printing & Cash Drawer**.

1 Click the Special Diet checkbox on the reservation or folio.

2 This will display the Special Diet dialog.

3 Select the Special Diet from the dropdown list. If the diet is not listed, you can type it in. To add the diet for future use, go to **List** -> **General** -> **Speical Diet**.

4 Put a checkmark by the selected dates or click the **Everyday** button.

5 Select the time of day (Morning, Noon, or Afternoon) the pet is scheduled to eat.

6 Add any instructions for the pet's diet in the Special Instructions box. For example, "Please add 1 cup water and mix".

7 If the pet is on more than one diet, click the **Next** button to display a blank page. Repeat steps 3 thru 5.

8 Click **OK**.

### Scheduling Exercise

KennelSuite allows you to store a pet's exercise schedule in their reservation or folio. Their exercise will be display on the Exercise worksheet on the dates and times that you assigned their exercise.

1 Click the Exercise checkbox on the reservation or folio.

2 This will display the Exercise dialog.

3 Select the Exercise from the dropdown list. To add the exercise for future use, go to **Lists** -> **Prices**.

4 Put a checkmark by the selected dates the pet is to have exercise or click the **Everyday** button if the pet is scheduled to have exercise everyday.

5 Select the time(s) of day the pet is scheduled to have an exercise.

6 Add any instructions for the pet's exercise in the Special Instructions box. For example, "No excessive running, has sore left leg".

7 If the pet is scheduled for more than one type of exercise, click the Next button to display a blank Exercise dialog. Repeat steps 3 thru 5.

8 Click **OK**.

To change an activity price, you must open the scheduler. It's can't be changed directly on the reservation or folio.

## Make Grooming Appointments

### To make a grooming appointment

It's important to create an appointment by following a certain order.

1 From the main list select the pet to be groomed.

2 Open a reservation or folio.

3 Select one of the grooming service checkboxes.

4 Select the groomer from the drop-down list if you have multiple groomers. The calendar may change to indicate the availability of the selected groomer.

5 Click the day you want for the appointment. You cannot make any appointments on red days, which indicates grooming is closed, the specified groomer is not scheduled to work that day, or the groomer has restricted new appointments for the day.

6 Click **Details** to find an available time

7 Select an appointment time from the dropdown list. Only the selected groomer's available times are listed.

8 The program will automatically select the promise time based on the default duration you chose in the Options dialog. You may change the promise time but it can't be earlier than the appointment time or later than the selected groomer's work schedule.

9 Add any comments or instructions in the Comments box and click **Save** or **Check In**.

**Note**

A grooming appointment cannot be saved unless it includes valid data for the following:

1. A grooming service
2. A groomer
3. An appointment date
4. An appointment time
5. A promise time

## Grooming Status

The status refers to the combination of the grooming service, the date selected on the grooming calendar, and the groomer selected in the Associate list on a reservation or folio. If the date on the calendar is black, the status will be "open", which means you can book a grooming appointment.

If the selected date on the calendar is red, the status will indicate one or more of the following conditions:

· **Kennel is closed**. This means the facility is not open for business so you may assume that there are no groomers working on that date.

See **Tools->Options->Days & Times**

· **Grooming is closed**. The selected groomer is not working on the selected date. It may be because she doesn't work on that day of the week or that she is on holiday on the selected date.

See **Tools->Options->Grooming**

· **No more reservations**. This means the selected groomer is working on the selected date but has overridden the schedule to refuse more bookings.

See **Quick Look->Grooming Schedule**.

· **No More Bath & Trims**. This means that Bath & Trim (or whatever name you may have substituted for the default) is selected and the selected groomer has overridden the schedule to refuse more trims.

See **Quick Look->Grooming Schedule**.

A groomer can override an individual day's schedule by opening the grooming schedule, clicking the date in the list, and selecting from the popup menu. This feature gives a groomer control of each day's schedule.

For example, if she knows she needs to leave work early on a certain day, she can mark the day "no more reservations" when the bookings reach the number she can complete in the allotted time. Or she may wish to limit the number of scissor trims but leave the schedule open for more baths. In this case she would mark the day "No more Bath & Trim".

# Checking Out

The Check Out screen allows you to check the pet out of the kennel, take care of payment, and print a receipt or an invoice for the owner.

The boxes with a shaded background contain calculated values and cannot be edited.

Charges can be changed only in the folio.

## Check a pet out

To check out a pet, it must have a folio (be checked into your facility).

1 Open the pet's folio.

2 Verify charges are correct.

3 Click the **Check out** button. You will now see the Check out Screen.

## List of Charges

The left side of the window contains a facsimile of the customer receipt. If you are doing a multi-pet checkout, the charges for each pet are listed and each pet's information is separated by a colored horizontal line.

If there are sales taxes charged, a tax line is included. If you have not configured KennelSuite to charge sales tax or if there are no taxable charges for the pet's visit, then the tax line does not appear.

## Current Charges

The total charges for all pets being checked out are listed here.

## Previous Balance

If there is a balance on the owner's account, it is shown. You can see details of a previous balance by clicking the **View Account** button.

If the previous balance is not zero, or especially a negative number, you should investigate the reason for the balance.

## Total Charges

The total due for THIS FOLIO

## Previous Balance

The existing balance on the OWNER'S ACCOUNT

## Total Due

The amount that will make the OWNER'S ACCOUNT zero

## Taking a Payment

The various forms with which an owner can pay their charges are listed here. Each form of payment must be completely filled out to continue the check out.

- Cash

- Check
- Credit Card
- Travelers Check/MO
- Gift Certificate

The Check Out window includes information about balances on the owner's account but its purpose is to accept payment for the folio(s) being checked out. If you enter the payment that is due for the folio, the previous balance will remain. If you enter the amount due at the folio and they pay for their previous balance, the balance will be zero.

## Over/Under Paid

The difference between the total charges for this folio and the amount being paid *now*.

Since the amount you enter as a payment can be used for more than one purpose, you must decide what you want to do.

KennelSuite doesn't know why the owner has a balance on their account. Maybe it's an advance payment for the charges on this folio. Maybe it's a deposit to hold a future reservation(s). Maybe it's both. Maybe they overpaid by mistake sometime in the past.

KennelSuite can't decide how to apportion payments you receive so you must do the thinking.

- If the customer wants to pay for only this folio, collect the amount in Total Charges.
- If they want to settle their account, collect the amount in Total Due.
- If Total Due is a negative number, maybe you want to give them money back.
- If the negative number is a deposit for a future reservation, you probably want to keep on their account.
- If the negative number is a deposit for *this* reservation, you probably want to apply it to this folio.
- Etc.

If Previous Balance is not zero, you probably want to click the View Account button to learn why there is a balance on the account. Then you can ask the customer what they want to do.

### *Under Paid*

If the Total Payments are less than the Total Charges, the difference is displayed here. The amount is always shown in red for visibility.

**Apply to owner's account**

If you click this button and then complete the checkout, the amount underpaid is applied to the owner's account (unsecured credit extended by you). This increases the amount the owner owes you.

**Apply to house account**

If you click this button and then complete the checkout, the amount underpaid is applied to the facility's account. This reduces the amount the owner owes you but no money is exchanged.

This option should be used if you want to forgive the unpaid amount, perhaps because the customer is dissatisfied or you want to give a special discount for some other reason.

### *Over Paid*

If the Total Payments are greater than the Total Charges, the difference is displayed here. The amount is always shown in red for visibility. This balance will display in the owners account as a credit for future use.

**Cash back**

Click this button to tell KennelSuite that you are giving cash back to the owner. This will appear on the owner's account as Cash Back and is used to balance the transaction as well as provide an audit trail.

**Apply to owner's account**

Click this button to tell KennelSuite to apply the extra amount to the owner's account. This will appear on the owner's account as Advance Payment and will reduce the amount the owner owes you.

This can also be used to pay down a balance but, since it will appear as Advance Payment, you may prefer to enter payments only for the current charges to complete the check out. You can then begin a new transaction to accept the additional payment as Received on Account. From the main window click the Account tab and then the Receive Payment button.

The end result of accepting the extra amount here or on the Receive Payment window is the same: the owner's account will be paid down. The only difference is the way the payment is classified, which is just informational and does not affect any functions in the program.

## Printing at Check out

### *To print a receipt*

If you have selected a receipt printer in **Tools** -> **Options** -> **Printing & Cash Drawer**, this checkbox is enabled. If it is checked, a receipt will print. If the customer does not want a receipt, uncheck the box.

### *To print an invoice*

If you have selected a system printer for invoices in **Tools** -> **Options** -> **Printing & Cash Drawer**, this checkbox is enabled. If it is checked, an invoice will print. If the customer does not want an invoice, uncheck the invoice box.

## Checking out multiple pets

The Multiple Checkout screen allows you to check out more than one pet at a time to receive one total and one invoice.

In the Main window:

1. Click on the owner of the pets you wish to check out. Notice the **Folio** button becomes a **Check Out** button.
2. Click the **Check Out** button.
3. Click **OK**, to confirm the pets to be checked out.
4. You will now see the Checkout Screen.

**Note**
When checking out multiple pets, the entire process will be canceled if there is a problem with any of the folios, such as the check out date is in the future.

## Recurring Appointments

To make it easier to create future reservations for regular customers, you can create copies (clones) of a current reservation or folio. You can clone reservations up to 1 year into the future.

To clone the current settings:

1. Open a reservation or folio
2. Select the service details (meds, diets, activities, etc,)
3. Click the **Clone** button
4. Select the future date(s)

This will create a new reservation for each date you selected. All details will be copied *except* the dates and frequencies for services like meds, diets and activities.

You must manually adjust the individual items (meds, diets, etc.) on each future reservation. KennelSuite can't do this for you because:

- It must add the items to the new reservation as it is being initialized, which is before you have selected the range of dates
- Even if it knew the dates of the new reservation, it can't know why you selected the specific date sequence (twice a day, every other day, etc.) on the previous visit.

Each new reservation will have:

- The same check-in and –out date
- All services, notes, comments, etc. from the cloned source
- If there were meds, diets or activities, each will have the correct times of day but only the check-in date will be selected

## Work with Surcharges

If you have enabled deadlines for boarding based on the times of the day, KennelSuite will compare the actual time (from the computer's clock) to the applicable deadline time during check-in and –out events.

If the actual time is beyond a deadline, KennelSuite will prompt you and ask how you want to handle the situation. You can:

- Add an extra day to the boarding charge.
- Add an extra half-day to the boarding charge.
- Add the standard surcharge that applies to the event (after hours, early check-in, late-check-out). This will select the appropriate item on the Adjustments tab of the reservation or folio.
- Do nothing

If you choose to let KennelSuite change the quantity of the boarding service, the reason for the change will not be noted anywhere and you may need to explain to the owner why the number of boarding nights/days don't seem to agree with the calendar dates.

If you let KennelSuite add a standard surcharge, i.e., Early Check-in, Late Check-out or After Hours, then that item will appear to the customer as a separate charge.

You can manually add an extra charge by clicking the Adjustments tab on the main screen, and you can manually change both the quantity and price on a reservation or folio to suit your needs.

**Note:**
If FlexRates are active, the extra day and extra half-day options are not available.

## Recall Previous Details

When a pet is checked out, KennelSuite saves the details about some of the services

- Grooming
- Activities
- Medication
- Diet

The next time you create a reservation for the pet, KennelSuite checks to see if there is anything saved from the last visit. If so, you will be asked if you want to include any of these saved details.

**Notes:**

- The dates and frequencies are not included when the previous details are added so you must manually select the dates for each. KennelSuite cannot do this for you because the details are added as the blank reservation is being created and you haven't yet selected any dates, and because KennelSuite can't know why you chose certain dates in the past (every day, every other day, etc.)
- Only the details from the last visit are saved. This means that if Meds were scheduled on the last visit but not on the current visit, the next time you make a reservation for the pet, no previous medication details will be automatically available.
- Prices are retrieved from the current price list and therefore may be different than the previous price.

## Work with Past Appointments

After a pet has been checked out, the folio becomes a history, which cannot be changed.

### Display a pet history

In the Main window:

1. Select the pet's name from the main list.
2. Click the Reports button
3. Select the Pet History report

**Note**

Histories cannot be changed. Once a pet checks out, the record of the transaction becomes permanent. You can enter a correction, and a reason for the correction, by clicking the Adjustment button on the Account tab on the main screen.

When a pet checks in or out, KennelSuite records the current date and time from the computer's internal clock, plus the name of the person who is currently logged in.

Because KennelSuite allows you to do some things in the past (play catch-up) the date and time recorded may not be the same as indicated.

On the history screen KennelSuite displays the date & time you *said* (reported) the event happened as well as the actual time from the computer's clock.

Let's say an owner dropped a pet off after the kennel closed last night. The computer was off so you took the pet in and made a note to enter the information today.

When you check the pet in with KennelSuite, you will say the check in happened yesterday. KennelSuite will warn you that the check in date is in the past but you can ignore it because that is what you intend.

When the pet finally checks out, the history screen will show the *reported* check in to be one day earlier than the *actual* check in.

# Work with Accounts

The owner account is only accessible to members of the Administrators, Managers, and Receptionists security groups. The owner's account displays all previous transactions, payments of services, and their current balance.

## Display an account

In the Main window:

1. Select the owner's name from the Main list.
2. Click the **Account** tab.

**Note**

You cannot edit the account information screen. The only way the account information is updated by is an adjustment, payment, or a pet is checked out.

## Make an adjustment

You can make an adjustment to an owner's account if needed. Adjustments do not involve the exchange of money.

1. Display the owner's account.
2. Click the **Adjustment** button.
3. Enter a positive number to reduce the amount a customer owes. Enter a negative number to increase the amount a customer owes.
4. For example, if a customer has a credit of ($10.00), enter a -10.00 to make a zero balance. If a customer as a balance of **$10.00**, enter a positive 10.00 to make a zero balance.
5. Type in the explanation of the adjustment in the Comment Field and click **OK**.

### Receive advance payment

1. Display the owner's account
2. Click the **Payment** button.
3. Select the type of payment and enter in the amount.
4. Select the purpose of the payment:

    **Paid on Account:** Select this if you are receiving money for a non zero balance.

    **Deposit:** Select this if your customer would like to put money down for their pet's reservation or if you request a deposit for a holiday reservation.

    **Advance Payment:** Select this if your customer would like to pre-pay for their pet's stay.

    **Refund:** Select this if you owe your customer money.

5. Type in the explanation of the payment in the Comment Field if needed and click **OK**.

## Work with Prices

### Category Screen

This screen allows you to add a new category. For example, if you offer retail at your facility, click the new category button and add "Retail".

**Type**

Select the service you wish to add the new category to:

- Adjustments
- Tax
- Services
- Products

**Category**

Type in the new category you wish to add.

**Status**

Select one of the following:

- **Active** Select to activate the item.
- **Inactive** Select to inactivate the item if the service is not used, this will disable the item displaying it in gray.

**Note:**
The Boarding category should contain only items that mean "spending the night". These items are eligible for FlexRate pricing and the program uses the dates on the calendars to calculate the quantity.

The only place these services are available is the first checkbox on reservations and folios.

## Item Screen

The Add and Change Item Screen allows you to add a new pricing item or change an existing item. Any new item you add will be available from the three dropdown list on reservations and folios.

### *Category*

Select the category in which you want to add an item.

### *Name*

Enter a name for the item. This is what will appear on the screen from the dropdown list and on invoices.

### *Abbreviation*

Enter an abbreviation for the item if desired. This is used in some printed and on-screen reports such at the Grooming Schedule. Keep the abbreviation short (6-7 characters). Space is limited on some screens and reports.

### *Description*

This is optional; you can describe the item if desired.

### *Taxable*

Check this box to make the item taxable.

Service items are either taxable or not. Product items have 2 levels of tax. For a product, select none, one or both tax levels. To set the tax levels

1. Select **Tax** from the Type list
2. Enter your tax rates in the appropriate boxes.

For product taxes, KennelSuite calculates the tax cumulatively. For example, if Tax 1 is 10% and Tax 2 is 5%, and you have marked a product to use both taxes, the rate will be 15%.

If you have the same product that may have different tax rates depending on the situation, you must enter the product twice as a separate items with different names. For example, if food sold to pets has a different rate than food sold to working dogs, you can make Tax 1 the standard rate and Tax 2 the working dog rate.

If your local tax laws are complex, it may be a good idea to set your base price to include the sales tax rather than having KennelSuite calculate the tax separately.

#### *Charge Style*

| | |
|---|---|
| Boarding **By Day** or **By Night** | If you select by day, the pet will be charged for both the arrival day and the departure day regardless of the times of day. |
| Medication **By Day** or **By Dose** | If you charge by day, the pet will be charged the medication fee for each different med no matter how many times per day it is given.<br>If you charge by dose, the pet will be charged each time the med is given. |
| Diet **By Day** or **By Meal** | If you charge by day, the pet will be charged the diet fee for each meal no matter how many times per day it is given.<br>If you charge by meal, the pet will be charged each time a meal is given. |

### UPC/Product code

Each item that you sell must have a product code. In addition, if there must be a different code for each different price level. When FastPath and FlexRate pricing levels are combined, each service can have as many as 12 different prices, which means 12 different product codes.

KennelSuite doesn't care about the value of the code other than each code must refer to only one combination of product and price.

The product codes are assigned when you define prices (**Lists** -> **Prices** -> **View/New Item**). There are 3 alternatives:

- Enter your own code
- Use the Universal Price Code (UPC) that is printed on standard retail items
- Let KennelSuite create a code for you. If you add a price for an item but don't enter a product code, KennelSuite will create a unique code for you when you click the Save button.

The product code identifies an individual item/price combination, which means that there can conceivably be an infinite number of codes for the same item. The number of codes depends on how many prices you have assigned for an item. For example, "boarding – flat rate" will have a different code than "boarding – small" or "boarding – Airedale"

If you have pre-packaged products for sale, each will probably have a UPC assigned by the distributor or manufacturer. You should use these codes because it will provide consistency in your numbering scheme. More importantly, it will allow KennelSuite's retail module to accurately read the UPC with a bar code scanner.

### FastPath™ Pricing

FastPath lets you set multiple prices for the same item. When you select an item on a reservation or folio by clicking the checkbox, KennelSuite searches for the most appropriate price. It does this, in order, from the most important to the least important level. When you select an item on a reservation or folio, KennelSuite knows who the pet is, its breed, and its size.

#### *FastPath levels*

- **Pet:** You can set a price for an individual pet. This is the first price that FastPath checks. If you have set a price at this level, FastPath selects it and does not look further for a price.

You can use the Pet level pricing to give a discount to a certain pet or for multiple pets boarding together, perhaps because it belongs to a favored owner, or to charge a little more because the pet requires more attention. If there is no price set under Pet, KennelSuite will go to the next level to find the appropriate price.

- **Breed:** You can use this level to charge different prices based on the pet's breed. This is the second place FastPath looks for a price if it didn't find one at the Pet level. Some breeds may require special care or caution when you work with them and you can set a breed price to get a little extra for your trouble.

  If you set a breed price, and there is no pet price, then KennelSuite selects the breed price and does not look further. If the breed price is blank, FastPath checks for a size price.

- **Size:** Many kennels charge by the size of the pet. When you added the pet to KennelSuite, you selected a size. If you set a price at the size level, and if there are no prices set at the breed or pet levels, KennelSuite will select the size price.

  For example, if you charge a different boarding rate for small than large dogs, you want to select each under size and set the appropriate prices.

- **Flat Rate:** This is the lowest level. If there are no prices set at the higher levels, KennelSuite will select the flat rate price. Flat rate means that all pets are charged this price for the service you have selected.

**Note**

At the Size, Breed and Pet levels, "zero" is not the same as "blank". A blank price tells the program to keep looking. A price of zero tells it that there is no charge and it stops looking.

If you don't set a price at *any* of the FastPath levels, KennelSuite will charge "zero" and you can enter your own price anytime before the pet checks out.

## FlexRate™ Pricing

In addition to KennelSuite's regular FastPath pricing, version 7 includes a new dimension called FlexRate. You can assign individual days of the week, or different dates (or ranges of dates) to a different FlexRate level: Standard, Economy or Premium. Each level can have a different price.

A date takes precedence over a weekday when the price is calculated. For example, if you have set each Wednesday to have an Economy price, and you have set each day between December 20 through January 2 as a Premium day, then each Wednesday in that date range will be a Premium day.

To configure FlexRates:

1 Enable

   a. Click **Lists** -> **Prices**

   b. Select a Boarding service

   c. Click **View Item**

   d. Mark the **Use FlexRates** box

   e. Click **OK** to exit the Prices dialog

2 Set Days & Dates

a. Click **Tools** -> **Options** -> **FlexRates**

b. Select the FlexRate levels

Once you have enabled FlexRates and set the days and dates, KennelSuite will automatically calculate the correct mix of prices for the boarding services on reservations and folios.

If FlexRates is active, the boarding items on receipts, invoices and quotations, will be listed on separate lines so you and your customer can easily see the different quantities and prices for each FlexRate level.

### *FlexRate indicator*

The boarding charges for a single visit may be comprised of many different rates depending on how you have configured FastPath, FlexRates and Free Days.

Since there is only one space each for quantity and price on the reservation and folio screen, it may be necessary for KennelSuite to display an average of the prices. If this is the case, both the quantity and price fields will be disabled and can't be manually changed. KennelSuite must control these fields.

You will also notice a small graphic next to the Extended Price field that explains how the price was derived. Click the graphic for details.

**Note:**
FlexRates are available only for Boarding services

## Categories and Items

| | |
|---|---|
| **Type** | Choose the type of price you want to set: Services, Other Charges or Sales Tax. |
| **New Category** | Click this button to add a new category, such as Retail. |
| **New Item** | Click this button to add a new item under a category. |
| **View Category** | Click this button to view a category to make any changes. Categories with closed padlocks are required by the program and cannot be deleted. |
| **View Item** | Click this button to view an item to make any changes. Items with closed padlocks are required by the program and cannot be deleted. You may change the name but your should not change the meaning because the program knows what they are. |

## Sales Tax

Once you have set your sales tax, KennelSuite will automatically tax every service unless noted.

In the Main window:

1 Open the **Lists** menu and click **Prices**.

2 In Type, select **Sales Tax** from the dropdown list.

3 Enter your percentage of sales tax.

4 Click **Save** and **OK**.

#### *Untaxed Service*

Some regions may not charge sales tax on all services, to make sure this service is not charged you will need to uncheck the taxable under each item.

In the Main window:

1 Open the **Lists** menu and click **Prices**.

2 Select the service that you wish to be untaxed.

3 Click on the **View Item** button

4 Uncheck Taxable and click **OK**.

### Adjustments

The Surcharge Screen allows you to add a new pricing item that is an extra charge, such as late check in, after hours, medicated bath, etc.

The surcharges you add will be listed when you click the Surcharges button on a pet's reservation or folio. This charge will be added to the pet's account at check out.

In the Main window:

1 Open the **Lists** menu and click **Prices**.

2 In Type, select **Other Charges** from the dropdown list.

#### *To Set a surcharge price*

1 Select the surcharge you wish to set the price for.

2 Enter the price and click the **Save** button.

#### *To Add a surcharge item*

1 Select Surcharges.

2 Click the **New Item** button.

3 Type in the new surcharge and any additional information.

4 Click **OK**.

5 Enter the surcharge price.

6 Click **Save**.

#### *To Change a surcharge*

1 Select the surcharge you wish to edit.

2 Click the **View Item** button.

3 Make the necessary changes.

4 Click **OK**.

### Product Mover

If you have been using an older version of KennelSuite that didn't support retail products, you may have added products under one or more of the services categories. This utility will help you move items that are listed as a service into the products list.

1. On the **left pane**, locate your product items
2. Mark the box next to each item you want to move

3. On the **right pane**, select the category to which you want to move the items you marked in the left pane
4. You can click the **New Category** button above the right pane to create a new product category if none of the default product categories suit your needs
5. Click the **right arrow** button to move the items.
6. If you made a mistake, you can mark the items in the right pane and click the left arrow to move them back to a service category.

## Work with Groomer Commissions

Commissions are not available in KennelSuite Basic

Grooming services can pay commissions to groomers who work for commissions.

To configure commissions:

1 Click **Tools** -> **Security** -> **Users**. Select a groomer.

2 Enter a commission rate (percentage) for the groomer

3 Click **Save**

4 Click **Lists** -> **Prices** and select a grooming service

5 Click the **View Item** button

6 Select **Pay Commission**

The groomer will now accrue commission for each commissionable service. Click **Reports** -> **Finance** -> **Commissions**

## Working with Groomer Skills

The skills-matching feature is useful in shops with more than one groomer, and the groomers have different abilities and training. By using this feature, you can avoid assigning a task to a groomer who is not qualified.

Each grooming service can have a set of skills that you feel are required to do the job. Each groomer can have a set of skills that you feel the groomer possesses.

When you assign skills to both grooming services and individual groomers, only those groomers who have the skills necessary to perform the selected service will be listed on reservations and folios. If more than one grooming service is selected, only the groomers with the skills to perform all the services are listed.

### Add Skills

1 Click Lists -> General Lists

2 Click the **Skills** tab

3 Add the skills that are important to you

4 Click **Save**

### Assign Skills to a Service

1 Click **Lists** -> **Prices**

2 Select a grooming service

3 Click **View Item**

4 Mark the skills in the list that you feel are required to perform the service.

### Assign Skills to a Groomer

1 Click **Lists** -> **Security** -> **Users**

2 Select a groomer

3 Click **Change**

4 Mark the skills in the list that you feel the groomer possesses

## Work with User Security

This does not apply to KennelSuite Basic, which does not have user security.

Users and Groups are important security features of the Professional and Enterprise levels of KennelSuite. In order to use the program each user must identify themselves with a login name and an optional password.

Each user belongs to one or more groups. Groups have different levels of access to features of the program. Here is a short list of examples of privileges:

- **Administrators** can do and see everything. The Administrator user is a member of this group and cannot be changed or deleted.
- **Managers** are almost equivalent to administrators, but they cannot see all the financial information or the Deleted Folios report. They do have permission to view and print the Daily Transaction Summary and Detail, Administrator's Account, and Services Price List. They have authorization to change the facilities configuration (**Tools** -> **Options**) and items in the Price screen.
- **Receptionists** can do everything for daily operations. The only financial information they can see are the End of Day worksheets. They have no access to the configuration (**Tools**->**Options**) and cannot change or edit the Price screen or user security.
- **Groomers** can control their own schedules but they cannot access other groomers' schedules, create reservations, check pets out, etc. They have no access to financial or marketing reports.
- **Staff** is restricted in viewing only information relating to the pets. They can view and print the reports and worksheets for them to do their job, but they have no access to anything else, including personal information about owners.

Each user should belong to only one group with the exception of Groomers who also have other duties, such as receptionist or manager. In this case make the user a member of the Groomers and one additional group.

**Note:**
Each group has all the permissions of the group(s) below, with the exception that *only members of the Groomers group can be scheduled for grooming appointments.*

### Manager Restrictions

Members of the Managers group can work with user security with some restrictions. Managers cannot perform these functions:

1 Add someone to the Administrators group

2 Remove someone from the Administrators group

3 Clear an administrator's password.

4 Delete an administrator

Only the Administrator user or another member of the Administrators group can perform these functions.

## Managing Users

Only members of the Administrators and Managers groups are able to add or change user security.

Users can later change their own password.

**Note**
No one, not even an administrator, can access another user's password. An administrator or manager can remove (clear) another user's password but they can never discover the actual password.

### *Add a user*

In the Main window:

1 Open the **Tools** menu and click **Security**.

2 Click the **Users** tab, and then click the **New** button. This displays the New User screen. It contains a blank form for a user record.

3 Add the required information.

4 Assign the user to a group membership.

5 Click **Save** or **Apply**.

6 Continue registering users, if desired.

### *Add or Change a password*

Only the current use can change his password. Members of the Administrator and Managers groups can clear the password but can't change it.

In the Main window:

1 Open the **Tools** menu and click **Security**.

2 Enter in Old Password, if previously assigned.

3 Enter in New Password and Verify.

4 Click **OK**.

**Note**
Passwords are case sensitive. If you can't login with your password, check your Caps Lock key.

### *Clear username password*

In the Main window:

1 Open the **Tools** menu and click **Security**.

2 Click the **Users** tab.

3 At User, open the dropdown list and select the user whose password you want to clear.

4 Click the **Clear Password** button and click **OK**.

### *Delete a user*

In the Main window:

1 Open the **Tools** menu and click **Security**.

2 Click the **Users** tab.

3 At **User**, open the dropdown list and select the user whose record you want to delete.

4 Click the **Delete** button and click **OK**.

If KennelSuite does not allow you to delete a user, this means the user is assigned for a future reservation, such as grooming. Future reservations must be changed before this user can be deleted.

## User Details

### *Full Name*

This is the regular name of the user, for example "Mary Smith".

### *User Name*

This is what you enter into the login dialog when KennelSuite first starts.

The general convention is to use the first initial plus the last name up to a maximum of 8 total characters. It's good to keep it short so it's easy to type but be careful to avoid ambiguity. If you give Mary Smith the login name of "mary", it may cause confusion. Even if you have only one Mary, that could change in the future. Logins names like "msmith" are better. If you happen to hire someone named Michael Smith, you can include his middle initial, e.g., "mksmith".

### *Password*

When you create a new user, you may assign a password. Once the user has been created, only that user can change the password. The administrator and members of the Administrators group can clear a user's password but they cannot view or change it.

### *Commission Rate*

Enter a percentage. This applies only to groomers. If this groomer performs a commissionable service, the Commissions report will tell you how much she has earned.

See also: Work with Prices & Work with Groomer Commissions

#### *Associate ID*

This is a unique number identifying the employee (associate). It is required by the program but, if you don't use employee IDs at your facility, you can leave it blank and the program will create one for you. This ID is printed on the groomer commission report.

#### *Grooming Skills*

If this user is a groomer, and if you want to use the Skills Matching system, select the skills she possesses. If you have assigned required skills to a grooming service, this groomer won't be eligible to perform that service unless she has the matching skills.

#### *Group Memberships*

Assign the appropriate membership based on this user's job function, as discussed at the beginning of this topic.

### Lock Out

To lock someone out of the system but preserve their account, you can change their password to something they don't know.

1. Login as a member of the Administrators group
2. Click **Tools** -> **Options** -> **Security**
3. Select the **Users** tab
4. Locate the user in the list
5. Click the **Clear Password** button
6. Login as that user
7. Click **Tools** -> **Options** -> **Security**
8. Click the **Login Password** tab
9. Leave the Old Password box blank
10. Type a new password in both the New Password and Verify boxes.
11. Click **OK**

**Note:**
See the **Security** topic under **Tools** in the **Menus** chapter for more information

## Work with Mailing Lists

KennelSuite offers the ability to create mailing list that are based on different criteria. You can also print mailing labels as a return address for your facility.

### Create mailing labels

1. Open the **Tools** menu and click **Labels and Exports**.
2. At **Type**, click **Labels**.
3. At **Search**, select from the list a group of customers to create labels for.

For some groups of customers, you must supply further information, such as dates, cities, etc. Fields for these are displayed when you select a group of customers.

1 At **Size**, select the stock number of your labels.
2 Click **View** to display the sheet of labels.
3 Click **Print** to print the labels.

### Export a mailing list to a file

1 Open the **Tools** menu and click **Labels and Export**.
2 At **Type**, click **Export**.
3 At **Include field names**, click to deselect if you do *not* want the field names on the first line of the file.
4 Click the checkbox at **Auto update** to display the size of each mailing list automatically at **Status** as you select it. (Otherwise, you can click **Update** each time you want that information.)
5 At **Search**, specify which group of customers to put on the mailing list.

For some groups of customers, you must supply further information, such as dates, cities, etc. Fields for these are displayed when you select a group of customers.

6 After you click **OK**, complete the **Export** dialog to specify the destination for the file.

### Create return address labels

1 Open the **Tools** menu and click **Labels and Export**.
2 At Type, click Return address.
3 At **Qty**, type the number of labels you want to print.
4 At **Size**, select the stock number of your labels.
5 Click **View** to display the sheet of labels.
6 Click **Print** to print the labels.

## Reports

Reports are a valuable shortcut to managing, tracking and completing your everyday and monthly tasks. A multitude of reports are available that cover a complete range of information. You can View a report or Print a report.

Some reports, such as the Owner Account and Pet History, depend on the owner or pet selected in the list on the main screen when the report list opens.

Depending on which security group the current user belongs to, different reports will be included in the list. Members of the Administrators group can see all reports. Members of the other groups are limited in what they can see. In general, they can see only the reports they need to do their job.

# Report Security

This is a matrix of which reports are available to each security group.

With KennelSuite Basic there is no user security so anyone using the program belongs to the Administrators group.

**A** = Administrators

**M** = Managers

**R** = Receptionists

**G** = Groomers

**S** = Staff

| | A | M | R | G | S |
|---|---|---|---|---|---|
| **Worksheets** | | | | | |
| Activities | o | o | o | o | o |
| Check In Detail | o | o | o | | |
| Check In Summary | o | o | o | | |
| Check Out Summary | o | o | o | | |
| Confirmation | o | o | o | | |
| Diets | o | o | o | o | o |
| Grooming | o | o | o | o | |
| Medications | o | o | o | o | o |
| **Status** | | | | | |
| Kennel Report | o | o | o | | |
| Pets in Kennel | o | o | o | o | o |
| **Forecasts & Schedules** | | | | | |
| Boarding Forecast | o | o | o | | |
| Forecast by Location | o | o | o | | |
| **Extra Services** | | | | | |
| by Check In Date | o | o | o | | |
| by Check Out Date | o | o | o | | |
| **Finances** | | | | | |
| Accounts Payable | o | | | | |
| Accounts Receivable | o | | | | |
| Accounts with Non-Zero Balances | o | | | | |
| Commissions | o | o | | | |
| Daily Transaction Detail | o | o | o | | |
| Daily Transaction Summary | o | o | o | | |
| Owner Account | o | o | o | | |
| Price List, Products | o | o | o | | |
| Price List, Services | o | o | o | | |
| Sales Summary | o | | | | |
| Sales Summary, Forecast | o | | | | |
| Sales Summary, Products | o | | | | |
| **Marketing** | | | | | |
| Customers by City | o | o | | | |
| Referrals | o | o | | | |
| Revenue by City | o | o | | | |
| Revenue by Size | o | o | | | |
| Top Spenders | o | o | | | |
| **Miscellaneous** | | | | | |
| Breed Counts | o | o | o | | |
| Cancellation Detail | o | o | o | | |
| Cancellation Summary | o | o | o | | |
| Deleted Folios | o | | | | |
| Events | o | o | | | |
| Owners | o | o | o | | |
| Pet History | o | o | o | | |
| Pets by Breed | o | o | o | | |
| Pets by Veterinarian, Detail | o | o | o | | |
| Pets by Veterinarian, Summary | o | o | o | | |
| Veterinarians | o | o | o | | |

# Viewing & Printing Reports

Reports provide information about your finances, daily tasks and other data. After you open a report, you can print or cancel to return to the main window.

## To select a report

1 In the Main window, click the **Reports** button.

2 Select the report you wish to view and click the **View** button.

## To print a report

All reports are available as a hard copy.

1 In the Main window, click the **Reports** button.

2 Select the report type you wish to print and click the **Print** button.

3 Verify the printer you wish to print to and click **Print.**

## To select a worksheet

Worksheets provide information about your daily tasks and along with other data. When you select a worksheet, you will need to specify a selected date and a Time of Day for the desired worksheet. When you open a worksheet, you can print or cancel to return to the main window.

1 In the Main window, click the **Reports** button.

2 Select the worksheet you wish to view and click the **View** button.

3 Click the **date** and **time of day** on the Report Day calendar. (Time of Day applies only for the Medication, Special Diet, and Exercise worksheets), click **OK**.

## To print a worksheet

It is ideal for your staff to work with hard copies. They can handle an authoring task by initialling the medication worksheet when complete or your receptionist can confirm holiday reservations by checking off the Confirmation report.

1 In the Main window, click the **Reports** button.

2 Select the report type you wish to print.

3 Select the printer you wish to print to and click **Print**.

# End of Day Reports

This feature provides an easy way to print a batch of reports. Mark the reports you want and click the Print button.

You may not find every report you want but this includes the most common choices. You cannot add your own reports to this feature.

# Finance Reports

**Sales Summary**

When a pet checks out, all charges on the folio are recorded and appear on this report. It doesn't matter whether you have been paid for the services. KennelSuite considers them to be sales.

This report is normally printed at the end of each month and the summary numbers are given to the accountant or manually transferred to your main accounting program

**Daily Transactions**

These show the payments, such as cash, check, credit card, etc., received on a certain day. They do not include house charges because nothing is received when you extend credit.

This report is normally printed at the end of each day and is used for making bank deposits and balancing the till.

**Accounts Receivable, Payable & Non-Zero Balances**

These reports show the difference between the sales and the payments received and are used to generate invoices and monitor credit balances for deposits, advance payments, etc.

**Owner Account**

This shows the details of all transactions by the selected owner for the range of dates you specify. Information includes the employee who handled the transaction, pet, owner, purpose of the transaction and amount.

**Price List**

This is your price list. Because KennelSuite offers so many options for pricing, it may be useful to review this periodically and look for inconsistencies in the range of prices you have set.

## Forecasts & Schedule Reports

**Boarding Forecast**

The expected occupancy on the selected date. The pets are grouped by their species and by the date they are expected to arrive. The **Count** column summarizes the number of pets in each group.

**Boarding Forecast by Location**

The expected occupancy on the selected date. The pets are grouped by their pre-assigned location. The first column indicates whether the pet is arriving, departing, or staying through the date.

**Extra Services**

These reports list special services that are scheduled for the selected date. "Extra Services" means they are services you have added to the program.

Since you created them, KennelSuite doesn't know what they are. It just knows what you have named them, how much they cost, whether they are taxable, etc. Since KennelSuite doesn't know about what the service means, it is limited in its ability to create reports. The Extra Services reports simply list information about the owner and pet for the dates you have selected.

For example, if you add a new service called "Delivery", you can run this report for a certain day and it will list all the pets that are scheduled to be delivered to their home.

## Marketing Reports

**Revenue by City**
**Customers by City**
**Revenue by Size**
**Top Spenders**

### Referrals

These reports provide marketing and demographic information that may be useful.

## Miscellaneous Reports

### Deleted Folios

This lists all deleted folios and should be reviewed periodically to be aware of the practices at the front desk. *Only members of the Administrators group have access to this report.*

### Events

This lists the contents of the event log and may be useful when troubleshooting certain situations. It may be very large. To print a limited range of pages, click the small printer icon at the top of the report instead of the large printer button at the top of the window.

### Pet History

This lists the details about the selected pet's previous visits to the facility.

### Owners

This lists details about owners and their pets. It may be very large. To print a limited range of pages, click the small printer icon at the top of the report instead of the large printer button at the top of the window.

### Veterinarians

This lists details about the vet's you have defined.

### Pets by Veterinarian (Summary)
### Pets by Veterinarian (Detail)

This lists all pets grouped by their vet. This is most useful if you have converted data from another program to KennelSuite and want to eliminate duplicates.

### Pets by Breed

This similar to Pets by Vet. This is most useful if you have converted data from another program to KennelSuite and want to eliminate duplicates.

### Cancellation (Summary)
### Cancellation (Detail)

This lists information about owners who have been no-shows or have cancelled within 48-hours of their reservation. Excessive cancellations may be a good reason to change the owner's rating to Caution or Unwanted.

### Breed Counts

This is a simple count of the distribution of the pets by their breed.

## Status Reports

### Pets in Kennel

These are the pets that have checked in and are physically in the facility.

When you view the report, it is displayed as a list that can be sorted by clicking a column title.

When you print the report, it is listed in order of the pets' locations. This is useful for walking through the facility to make sure everyone is in their expected place at the end of the day. Some kennels take this report off-site along with the backup disc in order to have quick list of the animals in case of a fire or other calamity in the kennel that night.

**Kennel Report**

These are the pets that were in the facility on the selected date for any reason. This report conforms to the requirements of the Pennsylvania dog law.

## Worksheets

The worksheets are used by the kennel staff to perform their normal duties. Since the worksheets are specific to the day and time of day the task should be done, they relieve your staff of the need to think too much. You can give the worksheets to the kennel staff on a certain shift and tell them "if it's on this worksheet, do it, initial it when it's done, and return the worksheet to me."

The worksheets should be printed immediately before each shift begins. This guarantees that the information is current. For example, it's okay to print the next morning's worksheets as part of the end-of-day routine because the kennel is closed and no pets will be checking in or out. But you should avoid printing an afternoon worksheet on the previous day or in the early morning because pets may check in or out and the information on the worksheet will be incorrect.

**Check-In Summary**
**Check-In Detail Worksheet**
**Check-Out Worksheet**

These give information about the pets that are expected to arrive or depart on a certain day.

**Confirmation**

This lists the pets that are scheduled to be boarding over a selected date. It does not include pets already checked in that will be there over the selected date. This report is normally run for a major holiday, for example December 25, you can call the owners to confirm their reservation. It also includes a warning (!) if there is a problem with any of the pet's vaccinations being expired.

**Medication**
**Special Diet**
**Exercise/Activities**

These worksheets display the schedule for a specific date and time of day. To ensure accuracy, these worksheets should be printed immediately before they are used.

**Grooming**

This worksheet displays a schedule of pets to be groomed on a specific date.

# Contact Us

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In order to receive adequate technical support, you must have a connection to the internet and e-mail.

You must also have a fundamental understanding of how to operate your computer, which includes saving e-mail attachments, and locating files and folders on your computer.

Our technical support for KennelSuite is free but it does not include help with basic tasks relating to the use of Microsoft Windows or your e-mail program.

# Appendix

## Troubleshooting CD Backup

**How a Backup Works:** When you click File->Backup from Plane, it performs a two part function. Plane first does a maintenance, which cleans up your database, then it checks six components before it can write to your device.

- Does the drive exist?
- Is the drive ready?
- Is the backup device writable?
- Does the media (disc) have the correct volume label? (if checked in Tools->Options->File Locations)
- Is the backup location different than the regular database location?
- Is there enough space on the backup drive?

If any of these tests fail, you will get an error message. Normally if you get an error message it is from the second part of backing up. Plane is asking Windows the six questions and Windows will reply to Plane if one or more are not responding.

Can we fix this? No, unfortunately Plane cannot check the device driver or the drive. If there are problems, it must ask Windows to perform these tasks.

Before pursuing to the solutions listed below, please make sure that you have the following:

- Enough space on the disc
- A formatted CD-RW disc
- Backup location is configured correctly in Tools->Options->File Locations

**Solutions:** If you receive an error backing up and you have your configuration set correctly, here are a few tips.

- Change your backup location in Tools->Options->File Locations to your local disc (C:\) and do a backup from Plane. If the backup completes, the problem pertains to your drive or device driver (not KennelSuite).
- Manually backup KennelSuite's data in Window's explorer. Open windows explorer and find the file, ps.mdb (default path: C:\Program Files\Plane Software\KennelSuite). Select the ps.mdb and drag it onto your back up device. If you need assistance on finding your file ps.mdb, please contact us.
- If you cannot manually copy the ps.mdb onto your back up device, see if you can copy any file (other than Plane) onto your device.
- Make sure your database (file ps.mdb) is not selected as read-only. Right click on ps.mdb and select properties. The read-only attribute should not be checked.
- Contact your device driver's manufacturer, they may have instructions on how to do backups with their software.
- Update the CD software from the driver's manufacturer and get the latest Windows updates (http://windowsupdate.microsoft.com).

**CD Checklist** If you have trouble backing up from KennelSuite to a CD, make sure all the following are in order.

- The CD drive can write to a CD (CD-RW). The drive that came with your computer may be able to read CDs but not write to them.
- You are using rewritable discs. They will be labeled CD-RW (or perhaps CD+RW). Discs labelled CD-R will not work.
- You have installed the correct software that enables your drive to write to rewritable discs. Windows cannot do this on its own. You need to install special software. This software makes the CD-RW drive "look like" a regular hard disc to Windows. Windows XP has some limited capability to write to a CD but this is not sufficient. You must install the special software.

  Some CD-RW drives include this software on the CD that comes with the drive. Some do not. At Plane Software we use **Easy CD Creator** from **Roxio** (www.roxio.com) to easily write to our CD-RW drives.

  KennelSuite CANNOT write your backup to a CD-RW without the correct software that enables your drive.
- The CD-RW disc has been formatted. Formatting a disc prepares the blank media for writing. After the CD-RW software is installed, you should format ach disc by opening My Computer, right-clicking on the CD-RW drive, and clicking Format from the popup menu.

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