Paw Partner Business

Features and Tabs on the Business Dashboard

Notes: To get to business page, click on Paw Logo or Mystic Name (not always name)

To access pets and clients pages: click on Name, or Photo, or 3 dots (they all open something different so check out each one to see how it works).

Business Dashboard – Click on upper left button

1) Overview – Daily staff view of current business and pets by date

- Shows checking in/out and current guests
- Open assignment shows full calendar
- To check in or out select Check In and Check Out buttons
- Options button: Move room location, modify/cancel reservation, check out, estimated charges, deposit, messaging to owner
- To access pets info client view, select pets name (feeding, medical)
- To access pets info card, Mystic view, select pets photo
- To access client main page, select human name

2) Tasks – Staff tasks by Job Title – Mystic NOT using these features at this time

3) Reservations – View of all reservations – Mostly Rebecca and Cindy

- Modify or take action by clicking on 3 dots to left of pet (many options)
- Click tabs at top for different views
- Access pets information card, click on pet photo
- Access human/client information card, click on human photo (far right)
- Access human/client home page, click on human name (far right)
- Checking out of pet, you must go to Overview and select Pet under Current or Checking out section and select (Options)
- You can (confirm Reservation) under service, but if you want to take other action “Modify, Cancel, Wait List, etc” click on 3 dots

4) Customers – List of all customers within the system

- Tabs on top for different list of type of customer

- Search box = email, name of human or dog, phone number
- You can manually create a customer at top right
    1. To send an email to a client to have them claim account select 3 dots to left of client after the client is made. Must have email attached.
- Actions for customer, click on 3 dots to left of owner
    1. Create new password (only Cindy for now)
    2. View reservations
    3. Send a message
    4. Notification History
    5. Payment History
    6. Merge customer account (only Cindy for now)
    7. Delete customer account (only Cindy for now)

B. Client/human info card – click on human photo

C. Pet info care – click on pet photo

<u>5) Checkout</u> – Current clients or new client or guest not in system

- Type in human or pet name, select (Select For Customer Or Pet)
- If not in system (Create A New Customer), type in email to see if in system and if not create a new client.
- Or (Checkout As Guest) if NOT in system and you don't have time or they don't want to be in system. Create a Manual invoice.

You can also checkout under "Overview" for the day unless client is NOT in system

<u>6 & 7) Time clock and Schedule</u> (for Staff) – not needed for Mystic at this time

<u>8) Play Groups</u> – Not to be used by Mystic at this time

<u>9 & 10) Groomers and Trainers</u> – Not needed for Mystic

<u>11) Messages</u>, to and from clients;

- Cindy and Rebecca will check for incoming messages not related to daily schedule.
- Caregiver of the day will need to check messages if NOT using personal cell for specific check-in and checkout
- Yes clients in the system and those who do not have an account can send emails. Need to check with texting.

<u>12) Marketing</u>, Cindy needs to review features

13) Updates – software updates by Paw Partner

14) Support – Training videos and How to contact Paw Partner for support

- Everyone needs to review videos here on how to use this tool
- Videos are mixed up for back end features and those used by caregivers. Use training created by Cindy

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Reports

1) Operational Report Cards – this is to be used by Cindy and maybe Rebecca, not sure if/how we will be using it. ??? Go over with Paw Partner then Rebecca and then staff
   - Put in date at top
   - Many different tabs to view reports
   - Not needed at the beginning

2) Staffing – tips, commission and staff hours reports on what we manage in software; not sure how we will be using. Cindy to review how this works with Paw Partner then Rebecca.
   - Tips can be added to payments at checkouts, if CC or Check will be added to the system.

3) Manager – reports on customers, sales, payments, texts, email marketing, reservations, end of day, occupancy.
   - To be used by Cindy

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Staffing

1) Members – All current staff are in system.

2) Scheduling – Work with Rebecca on how and if we want to use this section. If we do this is where we will keep track on who works what day, not hours just the day.

3) Job Types – (done but review with Rebecca), I don't think we will be using this for Mystic

4) Notices – don't think we will be using but review with Paw Partner and Rebecca, I think this is for employees and not contractors

5) Service Hours – Seems to be for Groomer and Training which we are NOT doing

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Settings

(this is where there is a lot of backend business information is updated by Cindy that will be displayed on the clients view)

1) Profile – (done) About Your Business is here if needed to modify (first page of business) includes photos of business.
2) Business –
    - Business info - Done contact phone number is here. Under hours of operation has a text box to include any text we want. I also included to visit our web page. and this is here I added that email is preferred,
    - Customer Options – (done) this is here we identify what the customer sees, right now Payments, Send Message, Report Cards are selected as "ON"
    - Pet Options – weight, Pet Image Icons and Pet colors are selected (review colors to see if any should be added)
    - Staff Options – Idle logout timer, set as Never

3) Integration (Cindy Only Features)
    - Custom Book Now Button, I changed this to Request Reservation but it does not seem to change anything. This if for Mystic Web page and not within PP
        - ??? What is google analytics ID (or is this under interaction)
    - Mobile App Flyer and QR Code, use for Mystic Web page, facebook, emails and other manual marketing
    - ??? Broadly (not sure, but looks like when to send out notifications, review with Paw Partner)
    - ??? IdogCam (not sure, review with Paw Partner)

4) Reservation
   - Review requirement and question Settings with Rebecca but looks ok for now
   - This is how we customize the reservation process for Mystic

5) Holidays – no holidays created at this time

6) Facility – Areas have been created for Mystic, review with Rebecca
   - Software needs Facility area to link to Kennels and also Play groups
   - This is how the kennels are listed on the drop-down under reservations and options. Example: I made all main rooms link to A-Main Room Kennels to put them at the top

7) Servies – Types of Boarding services have been Created for Mystic. Easy to update. Customers will choose what service they want.
   - Example: Boarding – Dog Group Play

8) Kennels – Names of Kennels, Created and linked to Facility area,
   - Example :Green Room, Kennel 1 is also linked to Facility Area of E – Green Room

9) Pricing – Created, done
   - Servies – done
   - Add ons – Medical support and training (does not show up for client)
   - Discounts – we can revise, review with Rebecca
     - I think part of this is done with PP
     - Need to always include Active dates as we have to have separate dates that do not include school breaks (I have updated to Christmas 2026)
     - Family dogs MUST be checked in together and sharing a room to get family discount.
   - Fees – done, except after 1:00 fee, problem is software is not able to separate out 4 nights or less or longer then 5 nights….need to review
   - Packages, Not needed
   - Retail Items, Not needed
   - Archived – settings that we don't need anymore, no action on our part

10) Messaging (email and texting with the PP software and client)
  - Includes reservation Reminders, right now it is 3 days before, we only get on reminder.
  - Would like more than one reservation reminder. I would like 7 days, 3 days and day before. I have a software request submitted.

11) Questions – Created
  - These are the questions at owner must answer with each reservation, review with Rebecca
  - These show up on run card, they have lower case while it looks like all words are capital
  - Make sure everything on our check in form is also here if not elsewhere, done
  - ??? What is the difference with Create Custom Question at top right corner and Create New Boarding Question at bottom of Boarding Tab
    - If there is a difference, where does the questions come up for the client

12) Payments – Review with Rebecca
  - Right now we just have: Bill to Account, Check , Cash and Credit Card (cash, package credit and user credit is defaulted)

13) Pet Card – review selections with Rebecca
  - Includes what will be printed on Pet Card and Run card (including questions)
  - Need to see what really shows up on Run Card and what shows up on Report card to owner
  - Right now Pet and Medical Into but not the Log is shown on Run Card
  - Report Card, not being used at first, need to learn more about it.
  - Pet Detect Collar Printer, I think is to print custom collars, we do not have this tool so will not be using.

14) Templets (under Settings) (Review with Rebecca)
  - All emails, text and push have been updated, Cindy to keep reviewing
  - All of these need to be revised NOT to include calling for rescheduling, need to say to use the tool to request a new date. Email for other communication.
  - Email Templates, seem fine as is with some minor changes, need to review as we go forward
    - Business and Boarding

        - Changed all "Your Pet" to {$pet_name}, make sure the emails are correct
        - Changed call us to contact us, may need to ask them to use the tool to reschedule and not contact us.
        - Review the New Pet Created Profile (under Business), include instructions on how to update pet info and that this is where emergency contacts are located (or under Person account)
        - Customer Notify - Activate Your Account email, under Business needs reviewing
            - This email is for current clients that we have created an email account with that they need updating profile and adding pet
        - Need to add info about how to pay someplace
    - Push Notification Templates, need reviewing but ok at first
        - Review under Business and Boarding tabs
    - Agreement Templates
        - Medical Directive, updated agreement version, need to update PDF and provide to clients who can upload with messaging or provide manual copy
        - Pet Service Agreement, questions got moved to each reservation question (mixing and walks)

    - Reservation Notice Template (done but check again)
        - Business (Done) (shows up when a client clicks on Make Reservation tab on main page) (includes that they must be current client or send email to Info@Mystic)
            - Then they select Boarding tab under information box
        - Boarding (Done) (shows up when a client clicks on Boarding Tab (main Page or under Make Reservation) (includes that they must be current client or send email to Info@Mystic)
            - Do we need more detail on how to fill out request? I think we will be telling people on how to schedule on the email we send from Info@Mystic
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Manager

1) Tools
    a. Activity Log - includes all updates to Paw Partner Mystic Site

b. Customer Notify – Disabled until live, need to review later. I think this is if we create a manual account and we want the customer to claim it. Cindy to review.
c. Data Export- CSV format for business data (clients, pets, reservations, etc)
d. Check in lock, only used if we want to limit staff on checking in pets
e. Time Clock Lock, not used for Mystic as we are contractors
f. ??? Reservation Prerequisites – Not sure but I don't think its something we will use.

2) Recycle bin – deleted actions that will save for 28 days
3) ??? Pending – not sure but looks like something for staff?
4) ??? Payments – need to review as we go live, but looks like the ability for Cindy and Rebecca to search by customer about payments