

PetLinx 7 New Features

Here are the main changes and improvements we have made in PetLinx 7, Desktop and Cloud editions. PetLinx 7 is available on subscription only, the one time payment option has been discontinued.

If you are an existing user of PetLinx 6 Desktop or an earlier version purchased with a one time payment; PetLinx 7 is not included in your Support and Updates subscription and requires the purchase of a **paid** monthly or annual subscription.

If you are an existing user of PetLinx 6 Desktop or PetLinx Cloud on a monthly subscription; PetLinx 7 is included in your subscription and is a **free** upgrade.

Customer and Pet Flyouts

Double click a customer or pet in the Customer/Pet List to open their “flyout”. This provides a one-stop shop showing ALL info and stats on the customer/pet and access to all related actions on them. These flyouts replace the old Customers and Pets form which is now considered legacy (i.e. obsolete). While the Customers and Pets form is still available, we encourage you to use the new flyouts instead.

PetLinx v7.00

Menu

Enter text to search...

- Bobber, Bob
- Cayan, George
- Dab, Pav
- Doe, John**
 - Buster
 - Laila
 - Tex
 - Trina
- El, Stacie
- Eliseeva, Anastasia
- Eve, Xnas

John Doe **\$161.98** Edit Delete

About Documents Messages Bookings Transactions

- Buster Maltese White
- Laila Shih Tzu White
- Tex Setter (Irish) Bichon

2 pet(s) deceased/inactive Add New Pet

Mobile: 627 290 1010 Home: 213 814 2709 Work: 215 392 0200 x101 Alternate: 357 554 5322 Jane (wife)

@ john@doe.com Preferred Contact: Email Messages: Opted In Referred By: Facebook

22 Hemi St, Long Beach CA 90801

Notes: John is one of our favorite customers.

Enter text to search...

- *App, *Test
- Aderagisch, Kelsey
- App, Tom
- Appleby, Terrence
- Applegate, Jack
- Bobber, Bob
- Cayan, George
- Dab, Pav
- Doe, John
 - Buster**
 - Laila
 - Tex

Customers Show Non-Active

Buster Maltese Edit Delete

⚠ Excitable

About Photos Vaccinations Groom Styles Bookings

Doe, John

Age: 3 year(s), 4 month(s) - 19/11/2017 Color: White Size: Toy Weight: 0.00

Temper: Excellent Registration #: Microchip #

Vet: ABC Vets

Notes: Beautiful little guy with a great temperament!

In addition to displaying the customer or pet's information, certain flyout pages contain stats. For example on the Bookings page, you'll see how many no shows and cancellations the customer has had.

About	Documents	Messages	Bookings	Transactions	Prepaid Credits				
Last Booking Groom - Mon, 1 Mar 2021 4:00 pm (2 days)			Next Booking Groom - Sat, 6 Mar 2021 9:30 am (3 days)						
Last 12 months		Past Uninvoiced							
Total #	No Shows	Cancellations	Total #	Total Amount					
143	3	5	15	\$1,723.13					
	Status	Id	Type	Date	Pets	Recurs	Total	Invoice Id	Actions
	Future	52846	Groom	6/02/2021	Buster;		\$22.45	300	>
	Checked...	52839	Groom	1/02/2021	Laila; Tex;		\$29.70	300	>

On the Transactions page you'll see figures for revenue from the last 12 months and can easily see how this compares to the 12 months before that.

About	Documents	Messages	Bookings	Transactions	Prepaid Credits		
Revenue							
All Time	Last 12 months	Previous 12 months	Variance				
\$17,386.96	\$4,271.38	\$10,833.44	↓ \$6,562.06 (61%)				
Id	Type	Date	Tip	Total	Payment	Balance	Completed
10003	Invoice	3/03/2021	\$0.00	\$185.85	\$185.85	\$185.85	>
300	Invoice	2/03/2021	\$0.00	\$3,374.49	\$3,374.49	\$3,374.49	

On the Customer About page, click the mobile number or email address to send a quick message. You can choose either an existing message template you have created previously, or just start typing a custom message.

2 pet(s) deceased/inactive

Mobile: [627 290 1010](tel:6272901010)

Email: john@doe.com

22 Hemi St, Long B

Notes: John is one of our favorit

Send SMS - John Doe

Template: **None** Sending to: 627 290 1010

Characters: 0

Choose a template or begin typing your message here

Choosing the Delete option on the Customer flyout now enables you to delete the customer and all their related data without having to delete each booking and pet first as in the past. For those using the Desktop Network or Cloud editions you can control this ability for your users under System Options – Security.

Messaging Center

The Alerts form has been replaced with the all new Messaging Center, providing one area to manage all messages originating from PetLinx. Reminder messages can now be scheduled to be sent automatically, and details of messages sent are lodged under each customer's profile.

The Messaging Center contains the following parts:

Status shows if email and SMS settings have been configured or not, and provides a button shortcut to the System Options - Email and SMS form to change these.

Message Setup lists the different types of messages available, whether they are to be used or not, and the template and subject to use. For scheduled messages you specify the number of business days before due that they are to be sent. Messages can be chosen to be sent by email, SMS - or both. You can also specify an attachment for any message sent by email.

Message Logs contains a list of messages sent which can be filtered by date range, customer, or message type. All messages sent to a customer can also be viewed on the Messages page of the Customer flyout.

The screenshot displays the PetLinx Messaging Center interface. It is divided into three main sections:

- Status:** Shows that both Email and SMS are enabled with green checkmarks. There is a gear icon for "Email/SMS Settings".
- Message Setup:** A table lists message types with their status (Active/Inactive) and names:

Active	Name
<input checked="" type="checkbox"/>	Groom Booking Reminder
<input checked="" type="checkbox"/>	Online Portal - Board Accept
<input checked="" type="checkbox"/>	Online Portal - Board Decline

Below the table, the "Groom Booking Reminder" is configured with a toggle set to "ON". It is scheduled to send 2 days before due. The "Message Content" section shows options to send via SMS or Email, with templates and subjects defined.
- Message Logs:** A table showing a list of sent messages, filtered by date range (9/02/2021 to 23/02/2021) and customer type (All).

Sent	Customer	Type	Ser
23/02/2021 2:34 pm	Smith, John	Customer	
23/02/2021 2:13 pm	Smith, John	Customer	
19/02/2021 11:11 am	Smith, John	Online Portal - Groom ...	
19/02/2021 11:02 am	Smith, John	Online Portal - Groom ...	
18/02/2021 11:09 am	Shaw, Kate	Daycare Booking Remi...	
15/02/2021 9:30 am	Shaw, Kate	Daycare Booking Remi...	
15/02/2021 9:30 am	Shaw, Kate	Daycare Booking Remi...	
15/02/2021 9:30 am	Newton, Joe	Groom Booking Remind...	
15/02/2021 9:30 am	Shaw, Kate	Groom Booking Remind...	
12/02/2021 3:46 pm	Smith, John	Groom Booking Comple...	
12/02/2021 9:47 am	Shaw, Kate	Daycare Booking Remi...	
11/02/2021 11:25 am	Shaw, Kate	Daycare Booking Remi...	
9/02/2021 10:15 am	Shaw, Kate	Daycare Booking Remi...	
9/02/2021 10:15 am	Shaw, Kate	Daycare Booking Remi...	
9/02/2021 10:15 am	Smith, John	Groom Booking Remind...	

Grooming Completed Message

A SMS message can be setup to be sent to the customer automatically when a grooming booking status is changed to "Checked Out and Completed".

Backup Checks

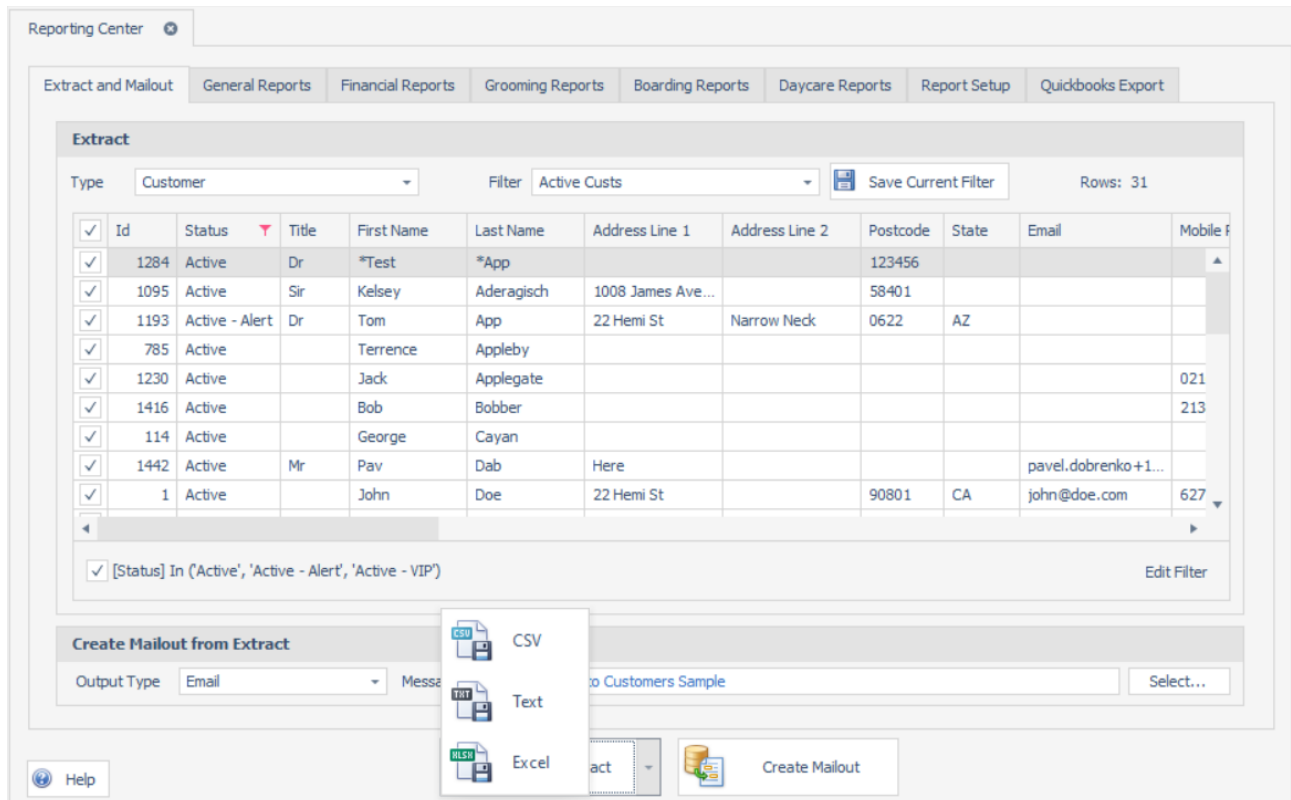
On startup, PetLinx will check for any issues with your backup settings or to remind you if you have not made a backup recently.

Reporting Center - Extract and Mailout

The Mailouts tab has been upgraded and renamed to Extract and Mailout. You now have complete control over what data is included to be sent in a mailout, and can also export data to a number of different formats.

In the Extract area you choose the type of extract which then displays the records in the grid below, e.g. customers, pets, bookings. You can then click the column headings to sort the extract by that column, or choose the filter option in the right hand side of each column to filter the extract down using criteria you specify. Filters can be applied to multiple columns, and you can save a filter so you can call it up again at a later time. Extracts can be exported at any time to Excel, CSV, or Text format.

Extracts can also be used as the basis for a mailout. Simply choose the output type (address label, email, SMS, or print), choose the message template, then choose Create Mailout – it's as simple as that.



Reporting Center

Extract and Mailout | General Reports | Financial Reports | Grooming Reports | Boarding Reports | Daycare Reports | Report Setup | Quickbooks Export

Extract

Type: Customer | Filter: Active Custs | Save Current Filter | Rows: 31

Id	Status	Title	First Name	Last Name	Address Line 1	Address Line 2	Postcode	State	Email	Mobile
1284	Active	Dr	*Test	*App			123456			
1095	Active	Sir	Kelsey	Aderagisch	1008 James Ave...		58401			
1193	Active - Alert	Dr	Tom	App	22 Hemi St	Narrow Neck	0622	AZ		
785	Active		Terrence	Appleby						
1230	Active		Jack	Applegate						021
1416	Active		Bob	Bobber						213
114	Active		George	Cayan						
1442	Active	Mr	Pav	Dab	Here				pavel.dobrenko+1...	
1	Active		John	Doe	22 Hemi St		90801	CA	john@doe.com	627

[Status] In ('Active', 'Active - Alert', 'Active - VIP') | Edit Filter

Create Mailout from Extract

Output Type: Email | Message: Customers Sample | Select...

Export Options: CSV, Text, Excel

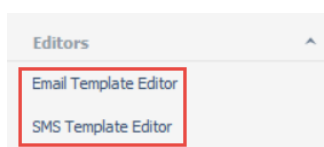
Create Mailout

Reporting Center – PDF Export

All reports in the Reporting Center can now be exported directly to files in PDF format.

Email and SMS Editors

Letters are now known as templates in PetLinx and as such, the old Letter Editor has been replaced with separate Email and SMS Template Editors. These editors have a more simplified layout and no longer include non-applicable ribbon buttons, for example the SMS Template Editor does not have options to change the font or insert images.



Groom Style Changes

We've simplified the groom style layout, removing little used fields and adding a couple of new ones.

Fields removed include Trim Type, Warts/Moles, the Ears drop-down, and the drop-downs for the existing Hair Length fields. Don't worry if you had data in these fields, they have been moved instead to the Notes field or to the relevant Hair Length text fields in the case of the drop-downs.

Fields added are Ears and Tail text fields. You can now enter instructions for lengths and styles split into 5 areas: Head, Ears, Body, Feet/Legs, and Tail.

Groom Style

Name Id

Hair Lengths/Styles

Head

Ears

Body

Feet/Legs

Tail

Skin/Coat Condition

Shampoo

Conditioner

Attributes

- Anal Glands
- Cut Back Dew Claws
- Cut Front Dew Claws
- Cut Nails

Added 18/07/2018 12:06:07 pm by Administrator, Last Edited 4/03/2021 3:03:01 pm by Administrator

Notes

Add bow

PetLinx Cloud – Dropbox Integration

We have supported the use of Dropbox with Petlinx Cloud for a while now, as an easy way for you to share files that you can then add into PetLinx, such as pet photos or customer documents. In PetLinx 7 we've extended the use of this to include exporting extracts and reports in PDF format. You can turn on the Dropbox integration and find more information about it in System Options – General.