

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 a monthly or annual subscription only, the one time payment option with associated support and updates subscription 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, Staciee
- Eliseeva, Anastasia
- Eve, Xnas

John Doe **\$161.98** [Edit] [Delete]

About Documents Messages Bookings Transactions

Pet	Breed	Color
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 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	Color	Size	Weight
3 year(s), 4 month(s) - 19/11/2017	White	Toy	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			Next Booking							
Groom - Mon, 1 Mar 2021 4:00 pm (2 days)			Groom - Sat, 6 Mar 2021 9:30 am (3 days)							
Last 12 months			Past Uninvoiced							
Total #	No Shows	Cancellations	Total #	Total Amount	<div>★ Actions</div>					
143	3	5	15	\$1,723.13						
	Status		Id	Type	Date	Pets	Recurs	Total	Invoice Id	
<div></div>	Future		52846	Groom	6/02/2021	Buster;	<div></div>	\$22.45	300	<div></div>
<div></div>	Checked...		52839	Groom	1/02/2021	Laila; Tex;	<div></div>	\$29.70	300	<div></div>

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%)					
			 Actions					
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

john@doe.com

22 Hemi St, Long B

Notes
John is one of our favori

Send SMS - John Doe

Template: None

Choose Template

Sending to 627 290 1010

Characters: 0

Choose a template or begin typing your message here

Send Message

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, Message Setup, and Message Logs.

Status: Shows that both Email and SMS settings are configured (indicated by green checkmarks). There is a gear icon for "Email/SMS Settings".

Message Setup: This section allows configuring specific messages. It includes a table with columns "Active" and "Name". The "Groom Booking Reminder" is active. Below this, there is a toggle for "Groom Booking Reminder" set to "ON". A note states: "Scheduled to send a given number of days before the booking date." The "Send up to" is set to "2" day(s) before due. The "Message Content" section includes options to "Send using customer's Preferred Contact Method" (selected) or "Send by" (SMS or Email). It also has fields for "SMS Template", "Email Template", "Email Subject", and "Attachment (optional)".

Message Logs: This section shows a list of sent messages. It includes filters for "From" (9/02/2021 to 23/02/2021), "Customer" ((All)), and "Message Type" ((All)). An "Apply" button is present. The table below shows the list of messages:

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

At the bottom of the Message Logs section, there is a note: "Messages sent before using PetLinx 7 can be found in Reporting - General -".

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".

Daycare Prepaid Credits Expiring Message

An email or SMS message can be setup to be sent to the customer automatically when their prepaid credit package falls below a given number of credits or will expire within a given number of days.

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 Template: Customers Sample | Select...

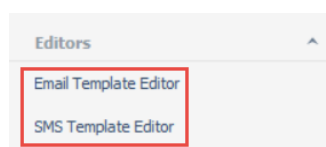
CSV | Text | Excel | Create Mailout

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.



SMS Sender Ids

In most countries* we now enable you to personalize all SMS from PetLinx with your own mobile number or business name as the sender, when using the PetLinx SMS provider. * Excludes users in USA, Canada, New Zealand, South Africa, and Belgium due to local carrier restrictions.

SMS


 This information is used for sending messages by SMS (text messages).


SMS Provider ☐ None ☒ PetLinx ☐ Esendex

User Name

API Key

Sender Id

 A PetLinx Online Sending account is required. [link below to create one, or login to your account](https://petlinx.online-send.com)

 [Send Test SMS](#)

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

Buster's Groom

Id

12

Hair Lengths/Styles

Head

Use thinners to blend, shape

Ears

Pluck, short

Body

1/2 comb, scissor to neaten if not doing FG

Feet/Legs

Shaved feet up past hock or first joint

Tail

Skin/Coat Condition

Good

Shampoo

Flea Shampoo

Conditioner

Own Conditioner

Attributes

☒ Anal Glands
 ☐ Cut Back Dew Claws
 ☐ Cut Front Dew Claws
 ☒ Cut Nails

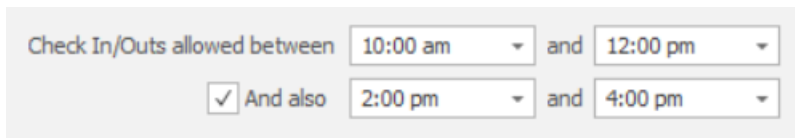
Added 18/07/2018 12:06:07 pm by Administrator, Last Edited 4/03/2021 3:03:01 pm by Administrator

Notes

Add bow

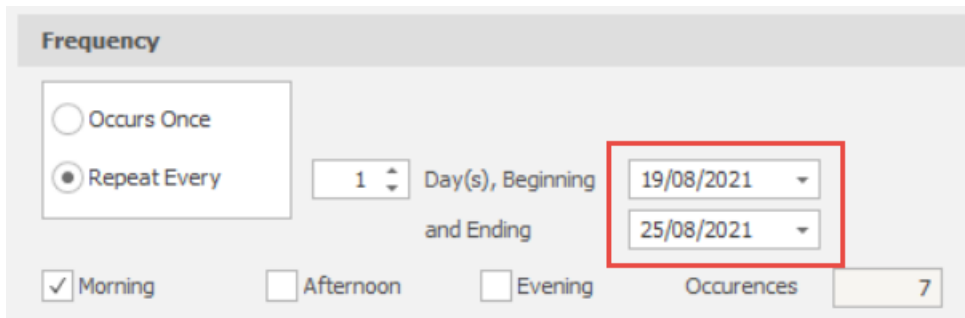
Boarding Changes

In System Options – Boarding you can specify one or two time ranges for when check in/outs are restricted to.



Check In/Outs allowed between 10:00 am and 12:00 pm
☒ And also 2:00 pm and 4:00 pm

For boarding services that repeat you can now specify the exact dates that the service will begin and end on.



Frequency

☐ Occurs Once
☒ Repeat Every

1 Day(s), Beginning 19/08/2021 and Ending 25/08/2021

☒ Morning ☐ Afternoon ☐ Evening

Occurrences 7

Daycare Prepaid Credit Changes

The prepaid credits expired or running low warning icons will no longer show on the Calendar if the customer has already purchased a new prepaid credit package.

After the last credit of a prepaid credit package is deducted on a booking, any future bookings using that package will be automatically updated to use a new prepaid credit package if one has been purchased.

New Payment Processing Integration

We've introduced a brand new integration with Global Payments to enable easy processing of payments within PetLinx. This has many advantages over the legacy TSYS integration:

- Available in USA and Canada
- Works with either PetLinx Desktop or PetLinx Cloud
- Process sales, refunds, and voids all within PetLinx
- Option to securely store customer cards so you can debit them at any time
- Uses the latest industry leading payment device (supplied by Global Payments) to accept swipe, chip, or contactless payments
- Payment device prompts customer to add a tip (either a % of total or \$ amount)

A merchant account with Global Payments is required to use the integration, you can find out more and register with them at <https://lp.globalpaymentsintegrated.com/referrals/petlinx/>

Archive Process

There are two archive processes we've added which when enabled, will run in the background once a month.

The first process does a cleanup of your database and moves data older than a specified number of years into an offline section of the database, ensuring your database is kept running optimally.

The second process sets an inactive status on any customers or pets who haven't used your services in a specified number of years, so your lists of customer and pets are limited to those that are active. An additional option removes photos and vaccination certificates from inactive pets to help conserve disk space.

Both or either of these options can be turned on under System Options – Backup and Archive.



☒ Archive data (bookings, transactions, etc) older than years

☒ Set customers and pets inactive if they have had no activity in the last years

☒ Remove photos and vaccination certificates from inactive pets (recommended to conserve disk space)

BookMy.Pet Online Portal Changes

The customer can choose the check in and out times for their booking (refer to the Boarding Changes section above for notes on how to limit these times).

The “Any” groomer can be removed for grooming bookings, so the customer must choose a named groomer from the list for their booking.

The time interval between available timeslots shown when the customer makes a grooming booking can be changed, e.g. choose from 0.5, 1, 1.5, 2, etc hours.

PetLinX Desktop - 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.

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.