



PetLinx™ 7 Tutorial

Using the Boarding Module

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1. Introduction

This tutorial has been designed for first time users of PetLinx, and provides a comprehensive outline of how to use the software and of the many features PetLinx has to offer. This version of the tutorial deals specifically with using the boarding module; for tutorials of the other modules, please look under the PetLinx menu of the Windows start button, or by using the Tutorials ribbon option in the PetLinx program.

Our goal is to have you familiar with working in PetLinx as soon as possible. Some of the many sections that will be covered in this tutorial include starting PetLinx for the first time, setting up runs, run types, and rates, adding customers, pets and bookings, and creating an invoice. Please refer to the table of contents for an in-depth list of topics covered in this tutorial.

We feel that this tutorial will be of the most value to you if it is read while you use PetLinx. It is therefore recommended that you print a copy so that you can easily refer to it.

Occasionally you will come across sections labelled “Desktop Network/Cloud editions only” with content in italics. This tutorial has been created to cover all editions of PetLinx. If you installed the Desktop Single edition then this content will not be applicable to you so please just continue on past this to the next section.

The screenshots shown throughout this tutorial may appear slightly different than the ones you see when you are using PetLinx as they are taken from the Desktop Network edition with USA address formats.

Thank you for your interest in our product. We hope you enjoy using PetLinx, and we look forward to receiving any questions, comments or suggestions you may have.

2. Starting PetLinx for the first time (Desktop editions only)

To start PetLinx, either double click the shortcut labelled **PetLinx 7** on your computer desktop, or choose the **Start / PetLinx / PetLinx 7** Windows menu option.

Setting up your database

If an existing PetLinx 4 , 5 or 6 database is found on the computer then you will be prompted that the database will be upgraded. Please note that once upgraded to PetLinx 7 format, you will not be able to open the database using an earlier version of PetLinx again.

Otherwise if this is the first time that you have run PetLinx on the computer then you will be asked to setup the PetLinx database.

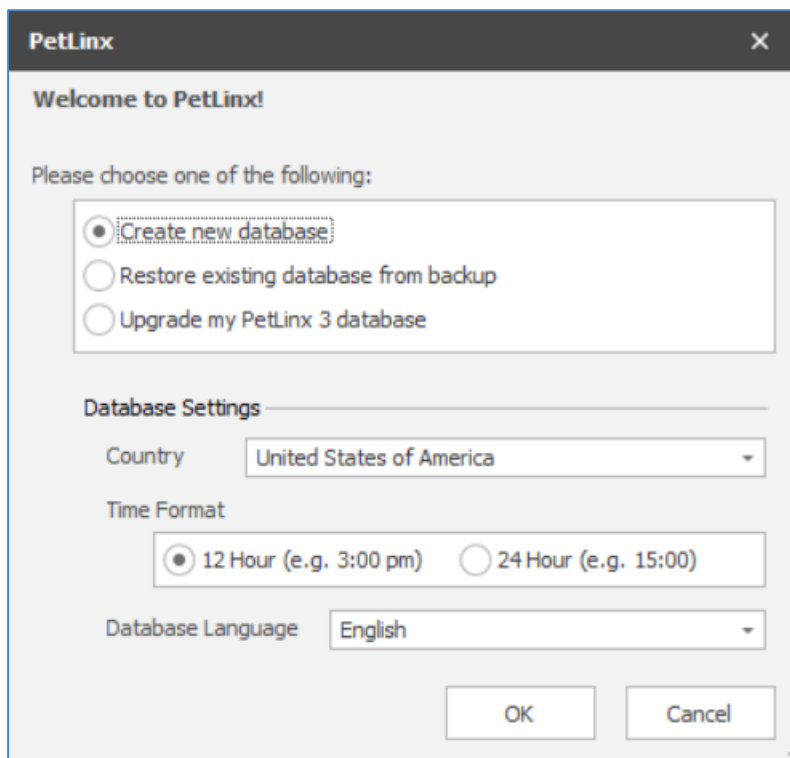


Figure 2.1 The Setup PetLinx Database dialog (from the Desktop Single Edition)

You will want to choose the “Create new database” option, and specify your country and preferred time format. It is very important to select your correct country here as it dictates the format of addresses, and also controls how your tax settings will be configured initially. Also you will need to specify if you use the 12 hour or 24 hour clock format (for example, five in the afternoon may be shown as 5:00 PM in 12 hour format, or 17:00 in 24 hour format). Again it is very important to have this setting correct for your location and it should match the regional time settings as defined in your Windows Region settings. **Note:** The currency symbol to be used in PetLinx is also defined in your Windows Region settings.

Desktop Network edition – connecting to an existing database:

For users of the Desktop Network edition, you will first need to choose the database server that either has an existing PetLinx database, or you wish to create one on. The list of database servers will be all those on your network that have Microsoft SQL Server installed on them (SQL Server is the program that hosts the PetLinx database). The server to choose will typically be like "{Computer Name}\PETLINX"

Choose the option "Connect to existing database" if a PetLinx database has already been installed on the specified computer, and you wish to connect to that database from this computer. Choosing any of the other options will create a database on that computer.

The demo "Nag" screen

If you are using the 30 day demo of PetLinx and have not yet purchased it, then you will be presented with the "Nag" screen. The Nag screen lets you know how many days you have left before the trial period will expire, and also contains information on ordering PetLinx. If you do decide to purchase PetLinx, then the serial number you will be issued with can be entered here under the "Register" button.

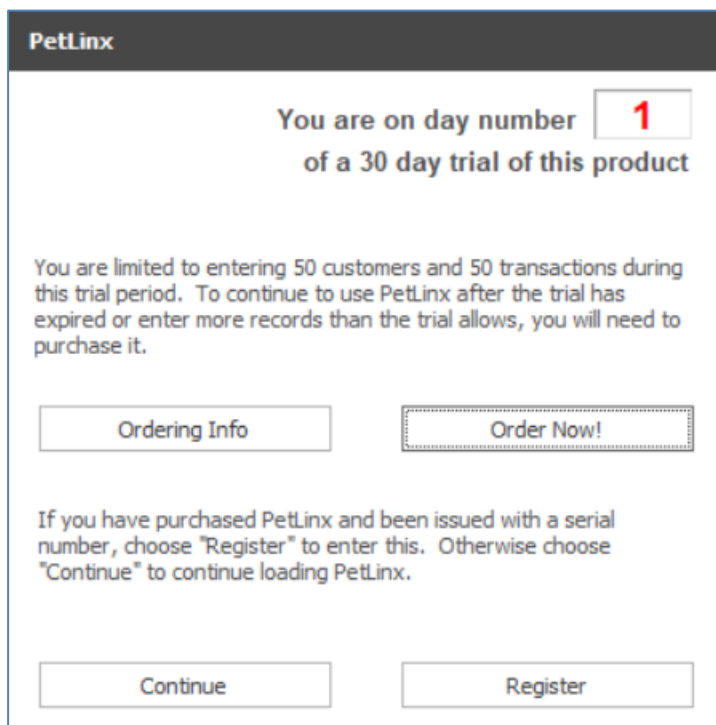


Figure 2.2 The Demo "Nag" screen

If you purchase PetLinx then this Nag screen will not appear. To continue loading PetLinx without purchasing it yet, just click the "Continue" button.

Desktop Network/Cloud editions - Logging in

In the Desktop Network/Cloud editions the login dialog will now display, which controls access to PetLinx.

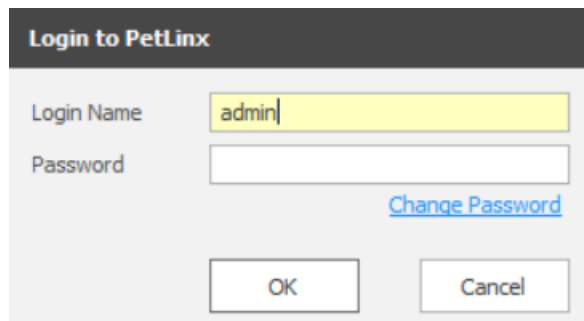


FIGURE 2.3 The Login dialog

If you are the first person to use PetLinx, then you can login by typing **admin** into the user name field, and **petlinx** into the password field (the password for the admin user can be changed later from within the Employees form). Alternatively, if another user has already set up a login for you, you should enter the user name and password they have supplied you with. Click “OK” to continue.

If your user name or password was incorrect, then you will be alerted to this and asked to try again. (Note that the password is case sensitive)

Choosing modules

If you are connecting to a new database then you will be asked to select the modules you want to trial. Simply tick the modules you wish to use then click OK (for the purposes of this tutorial you should ensure that “Boarding” is ticked). While using the PetLinx demo you can access this form again by clicking the **Choose Modules** ribbon button.

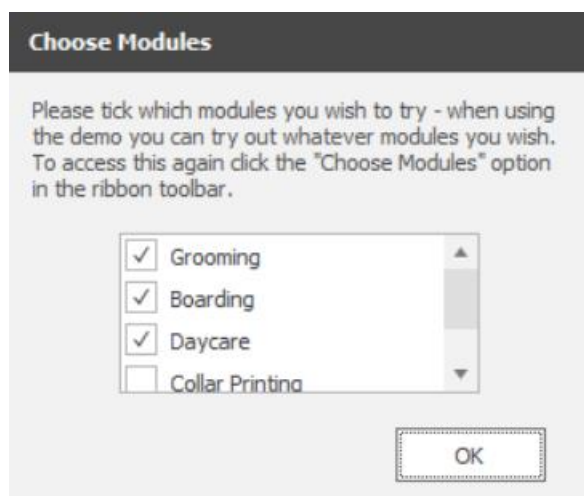

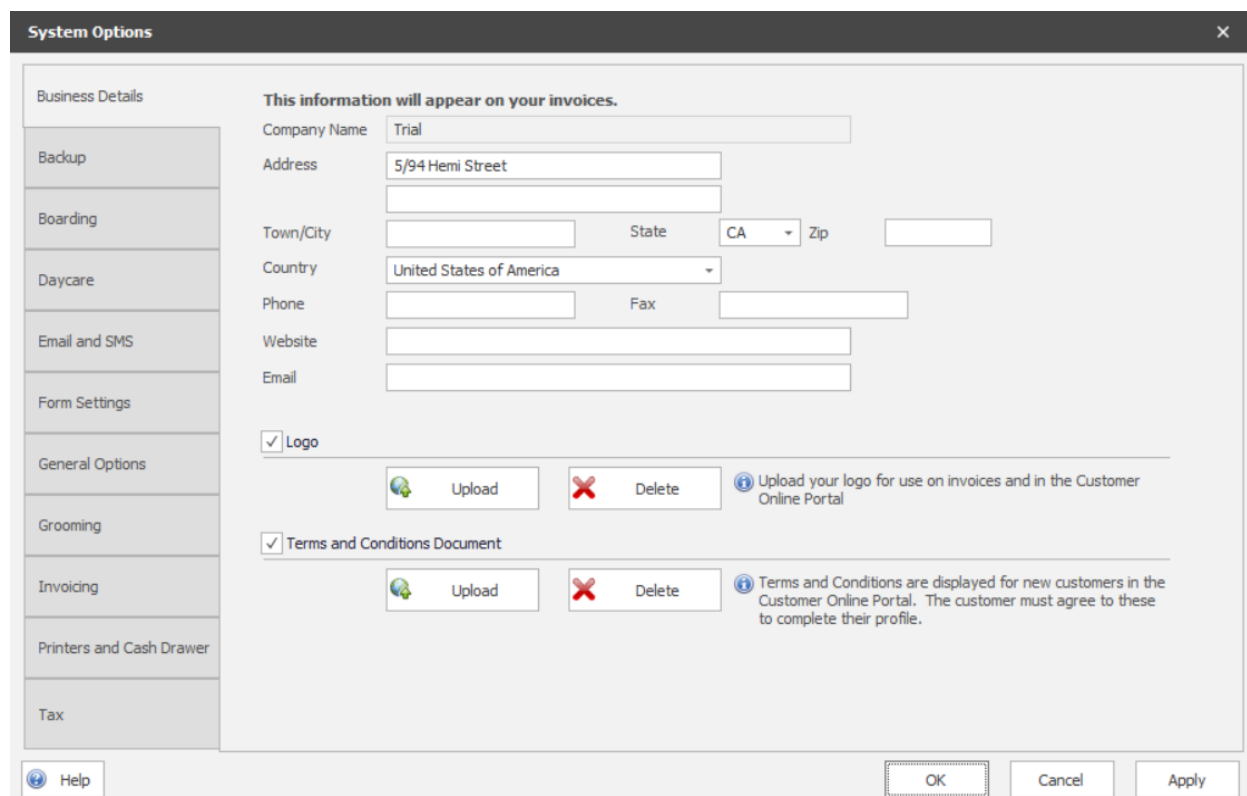


Figure 2.4 The Module Selection dialog

3. Setting system options

The System Options form allows you to define system settings which change how PetLinx works. You can access this screen again by choosing the **System Options** button on the PetLinx Menu. Only the Business Details and Boarding tabs are covered here, please see chapter 13 “Other system options settings” for information on other tabs.

Tip: Notice the  **Help** button at the bottom left of the System Options form? You will find this on most of the forms in PetLinx, clicking the button will take you directly to the relevant section in PetLinx help system for the form you are on.



System Options

Business Details

This information will appear on your invoices.

Company Name: Trial

Address: 5/94 Hemi Street

Town/City: State: CA Zip:

Country: United States of America

Phone: Fax:

Website:

Email:

☒ Logo

Upload your logo for use on invoices and in the Customer Online Portal

☒ Terms and Conditions Document

Terms and Conditions are displayed for new customers in the Customer Online Portal. The customer must agree to these to complete their profile.

FIGURE 3.1 The System Options form

The Business Details tab

The details you enter here will appear on your invoices so make sure all of the fields on this screen are completed with the correct details. **Please Note:** the country you choose controls the formatting of addresses and other information throughout PetLinx, so please ensure you set this correctly.

If you have your business logo stored as an image file on your computer, you can upload it into PetLinx by clicking the logo **Upload** button. The logo will then be displayed in invoices and receipts, as well as in the Online Portal (the Online portal is a website that enables customers to maintain their details and their pet's details themselves, and request new bookings with you; please see www.petlinx.com or email us at sales@petlinx.com for more information on the Online Portal).

A Terms and Conditions document can also be uploaded into PetLinx, which is presented in the Online Portal for new customers to agree to as part of their registration. The Terms and Conditions document must be a plain text file (.txt format).

The Boarding tab

This tab contains information specifically for boarding.

- If you refer to your pet enclosures as something else apart from "Runs" at your business, then you can set this in the "Name of Pet Enclosure" fields i.e. "Unit", "Pen", "Cage", etc. The singular and plural words need to be entered, so for example if you choose "Pen" as the singular word then enter "Pens" as the plural word. Any changes to these names will be used the next time you start PetLinx.
- "Default Check In Time" and "Default Check Out Time" are used when a new boarding booking is created, these are the default values that the booking will use for the check in and out times.
- "Charge by number of {Days/Nights/Hours}" allows you to choose whether bookings are charged by the number of days, nights, or hours making up the booking. For example, a booking checking in on January 1st and checking out on January 2nd would be charged at either 2 days, 1 night, or 24 hours, depending on this setting.
- "Charge {x} days on first day if Check In is after {time}" if ticked, will allow you to select a number of days and a time. If the check in time of a boarding booking is after this time then the first day will carry a charge of the number of days entered. Likewise for the "Check Out" tickbox below this, if ticked and the check out time of a boarding booking is before the selected time (or after the selected time if charging by nights) then the last day will carry a charge of the number of days entered. Note you can override these charges within each booking.
- "Minimum Charge" sets the minimum number of days/nights/hours that a booking will be charged for if it is calculated as being less than that.
- "New bookings book out whole run by default" if ticked will set the "Book Out Whole Room" option on when making a new booking. Bookings with this option set will prevent other bookings being placed in the same run.
- "Create a deposit transaction after booking is created" can be unticked if you do not normally accept deposits for new bookings, otherwise a new deposit transaction will be created automatically upon the creation of each booking.

4. The Main form, menu and ribbon

After clicking “OK” in the System Options form, PetLinx will continue to load and the Main form will then be displayed.

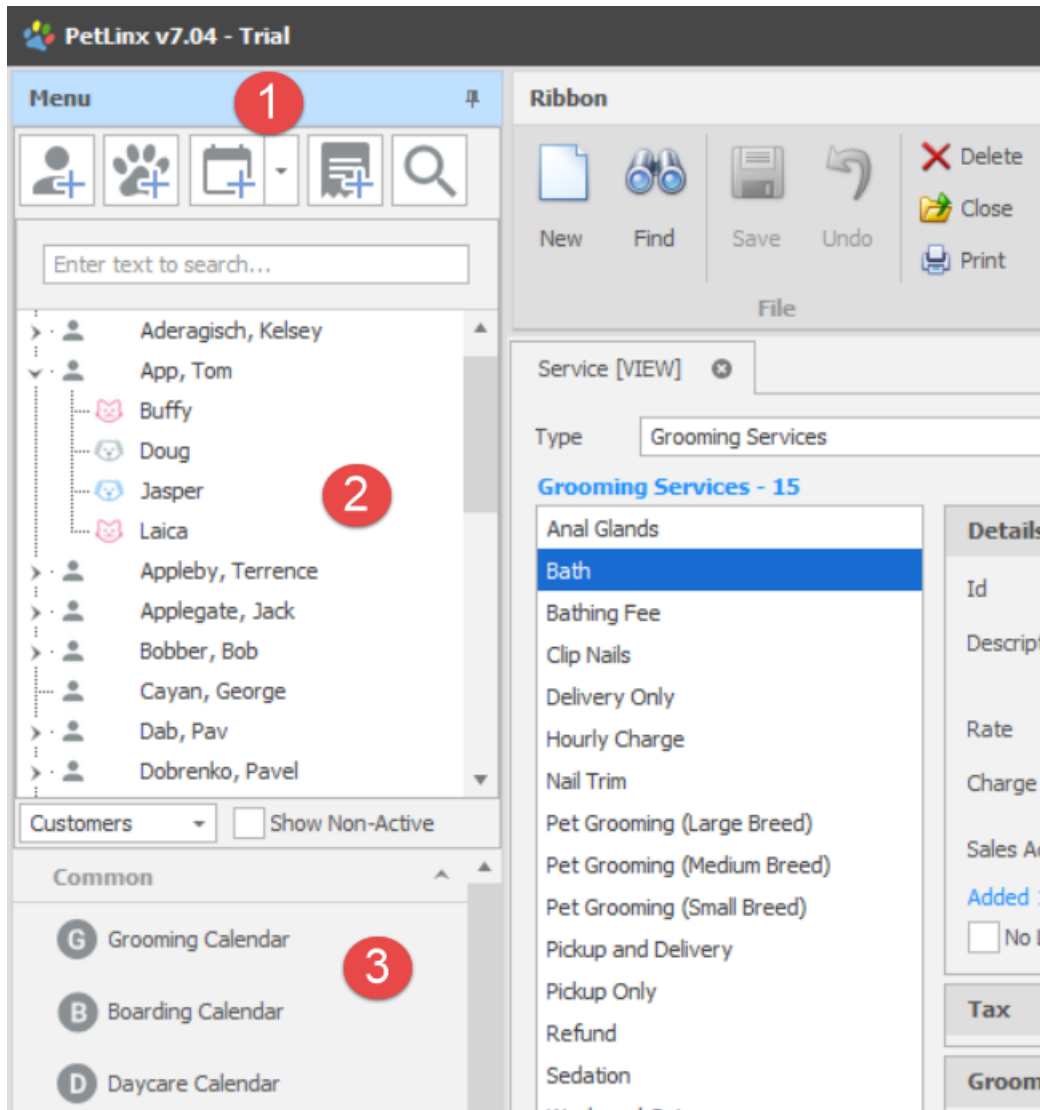


FIGURE 4.1 A portion of the Main form, showing the Menu down the left hand side and Ribbon along the top. Sample customers have been added and the Services form has been opened.

The Main form has three different areas:

- The **Menu** runs down the left hand side and is split into a number of sections. They are from top to bottom:
 1. New and Find Buttons: the first four buttons let you quickly add new records for the most commonly used items in PetLinx, they are from left to right: new customer, new pet, new booking, and new transaction (invoice or payment). The 5th button opens the Find Customer form where you can find a customer using name, address, phone number, or pet name.

2. Customer/Pet List: shows the list of customers and pets you have added. Click the arrow next to each customer to display their pets underneath. You can quickly find a customer or pet by typing their name into the box at the top of the list, which filters the list down to those matching your criteria. Click "Clear" to show the full list again. To change the list to instead display pets with their owner listed underneath, change the drop-down from Customers to Pets at the bottom of the list. Clicking "Show Non-Active" displays all customers with a status of Inactive, as well as pets who are now deceased or have been transferred to other owners. Double click a customer or pet to open their "flyout", providing a central location showing all info and stats on the customer/pet and access to all related actions on them.
 3. Form Buttons: These buttons provide access to the various forms in PetLinx. The most commonly used forms are listed in the "Common" group, forms used to configure or set up data items in PetLinx are listed in the "Setup" group, and forms used to design message content and reports are under the "Editors" group.
- The **Ribbon** runs along the top of the Main form and contains a number of buttons grouped together. The **File** group contains buttons that work on the current form, such as adding a new record or saving changes. **Edit** provides you with the cut, copy, and paste options. **Skins** allows you to choose a "skin" to be used throughout PetLinx which changes the colors, fonts, and graphics. **Help** includes links to help, tutorials, and technical support information. And finally **Exit** enables you to exit PetLinx, along with a choice to log off the current user if using the Desktop Network/Cloud editions.
 - The remaining area of the Main form is where the various forms within PetLinx are displayed. Each form you open becomes a "tab" in the Main form so you can open multiple forms and access each form by clicking on its tab.

The **File** group of buttons in the ribbon are used on many of the forms under the "Setup" menu group and require further explanation:



New clears all the fields on the current form and enables you to begin entering a new record. Once you have set the form to New mode the form title will have [NEW] at the end of it.

Other options for New: right clicking on the form and choosing **New** from the menu that appears, or hitting **Ctrl + N** on your keyboard.



Find clears all the fields on the form, after which you can enter criteria into any of the form fields to find matches on the criteria. Once you have set the form to Find mode the form title will have [FIND] at the end of it. After entering find criteria, clicking **Find** again starts the search, and any records matching the criteria will be listed.

Other options for Find: right clicking on the form and choosing **Find** from the menu that appears, or hitting **Ctrl + F** on your keyboard.



Save adds a new record or a record that has been changed to the PetLinx database. Once saved, the form will be set to View mode and the form title will have [VIEW] at the end of it.

Other options for Save: right clicking on the form and choosing **Save** from the menu that appears, or by hitting **Ctrl + S** or **Enter** on your keyboard.



Undo Changes cancels the changes you are making to a record, reverts to the previous record values and sets the form to View mode.

Other options for Undo Changes: right clicking on the form and choosing **Undo Changes** from the menu that appears, or by hitting **Ctrl + Z** on your keyboard.




Delete removes the current record displayed in the form from the PetLinx database.

Other options for Delete: right clicking on the form and choosing **Delete** from the menu that appears, or by hitting **Ctrl + D** on your keyboard.



Close closes the current form.

Other options for Close: right clicking on the form and choosing **Close** from the menu that appears, or by clicking the close button  on the top right corner of the form heading.



Print prints a copy of the current form to your default printer.

Other option for Print: right clicking on the form and choosing **Print** from the menu that appears.

5. Setting up run types and runs

There are a number of areas you will need to setup for boarding, including defining the runs in use in your facility. **Note:** if you changed the name of “run” and “runs” to something else in the Boarding tab of the System Options form, then the new word entered will be used throughout the PetLinx program instead of “run” and “runs”.

The first step is to setup the different **types** of runs you have. These could vary in a number of ways, for example:

- by pet type e.g.: Cattery, Kennel
- by run size e.g.: Large, Small
- by quality or price e.g.: Luxury, Standard

Creating different run types enables you to have different rates for your different types of runs, and prevent the wrong pet type or too many pets being placed into runs.

Run types and runs are maintained in the Runs form. To open the Runs form, click the **Runs** button in the “Setup” section of the Menu (as mentioned previously, if you have changed the name of “runs” the form will be labelled under the new name).

Runs [VIEW] ✖

Run Types

Cattery
Large
Small
Test

Type Name: Cattery
Pet Type: Cat
Maximum Pets: 2
☒ Use in Online Portal

Info: Your Runs should be split into different Run Types if they differ in any of the following ways:

- 1.) By pet type e.g.: Cattery, Kennel
- 2.) By Run size e.g.: Large, Small
- 3.) By quality or price e.g.: Luxury, Standard

Choose New in the ribbon to begin adding a new type, then add new Runs to it either individually or using the Auto-Create tool.

[Help](#)

Cattery Runs

Run Number	Unavailable
* Click here to add a new Run	
→ CAT01	<input type="checkbox"/>
CAT02	<input type="checkbox"/>
CAT03	<input type="checkbox"/>
CAT04	<input type="checkbox"/>
CAT06	<input type="checkbox"/>

Auto-Create

Prefix: CAT
Start Number: 1
End Number: 10

10 Runs will be created, numbered from CAT01 to CAT10



[Create](#)

Info: Use this tool to automatically create new Runs of type **Cattery**. If a Run number already exists it will be skipped.

FIGURE 5.1 The Runs form with sample run types and runs


PetLinx comes with three pre-existing run types, “Large”, “Small”, and “Cattery”. You can change the name of these to something more relevant to your business, or add new run types as follows.


Adding a run type

1. Click the **New**  ribbon button.
2. Type in a run type name, choose which type of pet the run type holds, and enter the maximum number of these pets it can hold. Please note the pet type and maximum pets fields need to be completed accurately as they are used when making a booking.
3. To save the new run type, click the **Save**  ribbon button.

Once run types have been finalised then you need to add each run your business has. PetLinx comes with a number of pre-existing runs under each of the sample run types. Click a run type to see the runs that have been defined already in the grid to the right. As you will see it is best to give all runs of a particular type the same numbering format, i.e. runs using the “Small” run type are numbered SML01, SML02, SML03, and runs using the “Large” run type are numbered LRG01, LRG02. You can delete these pre-existing runs, change the name of them to something more relevant to your business, or add new runs as follows.


Defining runs

1. To Add a run – click in the grid where it says “click here to add a new run”. Enter the new run number then hit the Enter key.
2. To Change a run – click the run required, then change the run number as required.
3. To Delete a run – click the run required, then click the Delete  button on the right of the grid.

To save the changes, click the **Save**  ribbon button.

Using the above methods are fine to add a few runs, but if you have a large facility and needed to create 100 runs for example, this could get quite tiring! The Auto-Create tool enables you to create a batch of runs with one click.

Using the Auto-Create tool

1. In the Auto-Create section, enter the Prefix for the run numbers and choose the start and end numbers. The text below the End Number field explains how many runs and the range of numbers to be created. For example if you wanted to create 50 runs numbered from SML01 to SML05, enter "SML" as the prefix, "1" as start number and "50" as the end number. The text below the End Number field explains how many runs and the range of numbers to be created.
2. Click **Create** to have the runs created, which will then appear in the grid. Any run numbers within the range that had already been added previously will be skipped.
3. To save the new runs, click the **Save**  ribbon button.

6. Defining boarding rates

The rates you charge for boarding are maintained in the Boarding Rates form. The charge for a booking is calculated on a lookup of the standard rates via the size of the pet or run type selected for a booking, then any applicable discounts or surcharges are applied to the rate to end up with the final rate to use. Discounts and surcharges vary your standard rates due to the booking length, season (specified date ranges), or the number of pets in a booking. To open the Boarding Rates form, click the **Boarding Rates** button in the “Setup” section of the Menu.

The screenshot shows the 'Boarding Rates [VIEW]' form. It is divided into two main sections: 'Standard Rates' and 'Discounts and Surcharges'.

Standard Rates Section:

- Charge Method:** Radio buttons for 'Pet Size' and 'Run Type'. 'Run Type' is selected. A note says: 'Run Types can be edited in the Runs form.'
- Within each booking the rate applies:** Radio buttons for 'To the Run selected (additional pets does not change the rate)' and 'To each Pet selected (i.e. 2 pets in a booking = 2 x rate)'. 'To each Pet selected' is selected.
- Table:**

Run Type	Pet Type	Rate
Cattery	Cat	\$15.00
Large	Dog	\$25.00
Small	Dog	\$20.00
- Help:** A button labeled 'Help'.

Discounts and Surcharges Section:


- Additional Pets: 2nd+** (Header)
- Season:** Holidays
- Show Inactive:** A checkbox.
- Additional Pets: 2nd+** (Sub-section header)
- Type:** Multiple Pets in Booking (Dropdown menu)
- Is Inactive:** A checkbox.
- For the:** 2nd (Dropdown menu) pet in a booking ☒ And all pets above this number
- Table:**

Run Type	Old Rate	Change	Amount	New Rate
Cattery	\$15.00	Decrease By	5.00	\$10.00
Large	\$25.00	Decrease By	10.00	\$15.00
Small	\$20.00	Decrease By	7.50	\$12.50
- Help:** A button labeled 'Help'.

Footnote: Specify how the standard rate is DISCOUNTED for the additional pet. e.g. if the first pet is \$30 and two pets are \$50, then the second pet's rate is \$20 - this equates to a Decrease By \$10 on the standard rate.



FIGURE 6.1 The Boarding Rates form, with sample standard rates and discounts/surcharges

Defining standard rates

1. In the “Standard Rates” section, choose to charge using either the pet size or run type used in a booking by changing the Charge Method field, the grid will list either the pet sizes or run types available. If charging by run type you can also choose if the rates apply to the whole run, or each pet in the run.
2. In the grid Rate column, enter the rate for each pet size/run type.
3. Click the **Save**  ribbon button to save the standard rates.

Once your standard rates have been defined, you should add any discounts or surcharges you require.

Adding a discount/surcharge

1. Click the **New**  ribbon button.
2. In the Discounts and Surcharges section, choose the rate variation type:
 - **Booking Length:** this is based on the length (number of chargeable days) of the booking. You define the range of days to include (tick "No upper limit" to cover any booking above a certain number of days), and choose whether the discount applies to only the days within the day range, or all days of the booking.
 - **Additional Pets in Booking:** this applies to bookings containing more than one pet from the same owner. Choose the number of the pet within the booking (i.e. the 2nd pet will be the second pet selected in the booking) that the discount will be applied to. Tick "And all pets above this number" if the same discount will apply to all subsequent pets in the booking as well, e.g. if the discount is being defined for the 2nd pet and this field is ticked, it will also apply to the 3rd, 4th, 5th, etc. pet in a booking.
 - **Season:** this handles bookings that cover defined date ranges. You can edit the list of seasons and the date ranges they apply to by clicking the **Edit Seasons** button, which opens the Data Lists form.
3. For each pet size or run type shown in the grid, you can choose to increase or decrease the standard rate. Enter the amount of the increase/decrease and whether it is a monetary value or a percentage. The new rate that will be applied is shown in the "New Rate" column.
4. Click the **Save**  ribbon button to save the discount/surcharge.

Repeat the above process for each discount/surcharge you wish to add.

7. Setting up boarding services



The next step is to set up boarding services - within PetLinX, services include activities, feeding, and medication that you provide to your customer's pets while they stay at your facility. To open the Services form, click the **Services** button in the "Setup" section of the Menu.

The screenshot shows the 'Service [VIEW]' form in PetLinX. On the left, under 'Activities - 4', there is a list of activities: Bath, Swim, Walk (Group) (which is highlighted in blue), and Walk (Individual). The main area is titled 'Details' and contains the following fields: Id (36), Description (Walk (Group)), Rate (\$20.00), Charge Type (Fixed Charge), and Sales Account (with a help icon). Below these fields, there is a section for 'For bookings with multiple pets the rate applies' with two radio buttons: 'To each pet (i.e. 2 pets in a booking = 2 x rate)' (which is selected) and 'To the booking (multiple pets does not change the rate)'. There is also a timestamp 'Added 1/07/2019 8:59:43 am by Administrator' and a checkbox for 'No Longer Offered / Obsolete'. At the bottom, there is a 'Tax' section with a checkbox for 'Apply Sales Tax' which is checked.

FIGURE 7.1 The Services form showing sample activities


There are a number of services that come pre-installed with PetLinX, these can be changed or deleted as required to suit your business.

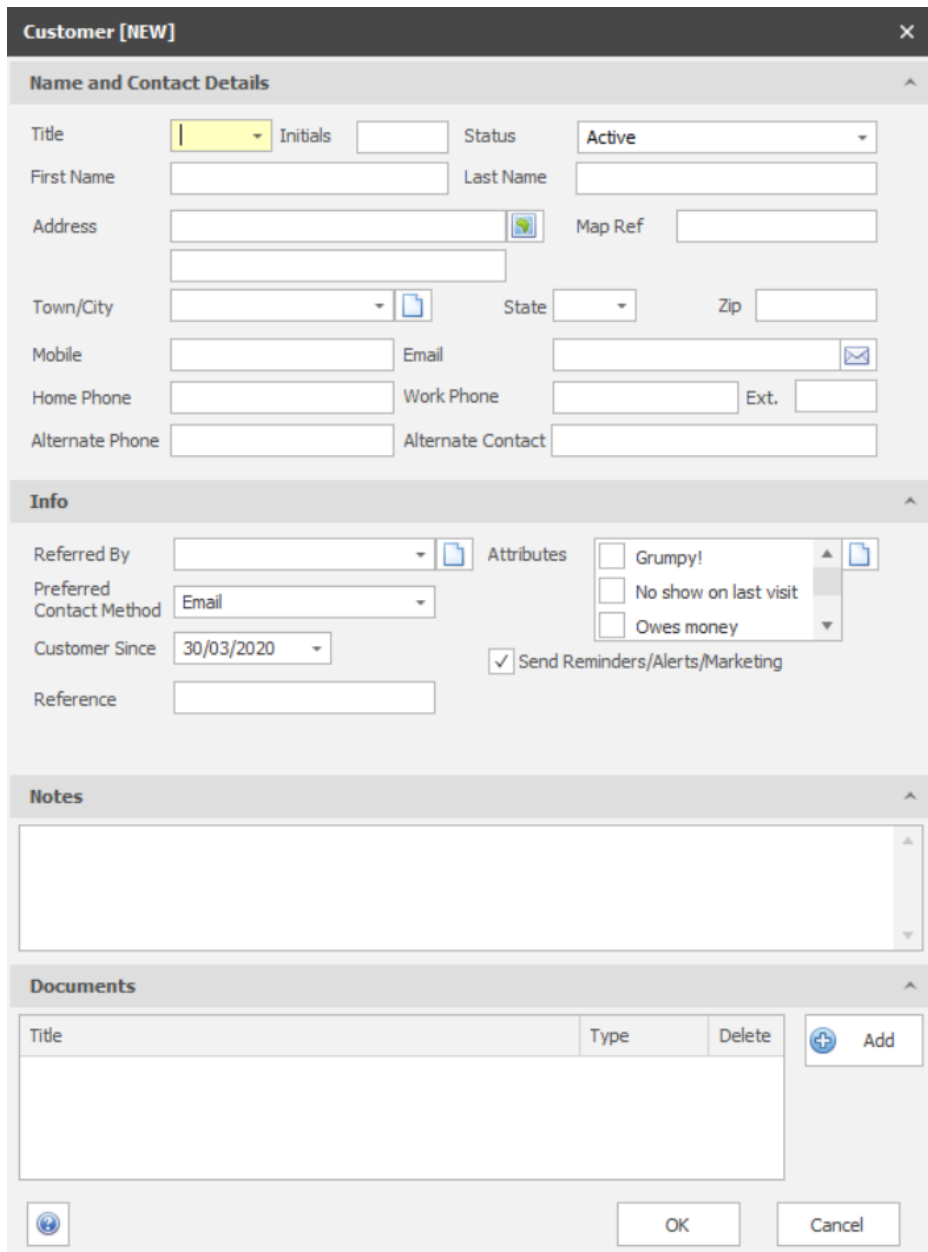
Adding a service

1. Change the Type field to "Activities", "Boarding Services", "Feeding", or "Medications" as appropriate for the service you wish to add.
2. Click the **New**  ribbon button.
3. Type in the description of the service and a default rate – the rate entered here is only a default and can be changed when you add this service to an actual booking. You can also set if the rate applies for each pet in a booking, or once per booking.
4. To save the new service, click the **Save**  ribbon button.

Repeat the above process for each service you provide.

8. Adding a new customer

You're now ready to add your first customer! Click the **New Customer**  button at the top left of the Menu to open the Customer pop-up form. Fill out the name, address, various phone fields, and email as appropriate.



Customer [NEW]

Name and Contact Details

Title Initials Status

First Name Last Name

Address Map Ref

Town/City State Zip

Mobile Email

Home Phone Work Phone Ext.

Alternate Phone Alternate Contact

Info

Referred By Attributes ☐ Grumpy!
☐ No show on last visit
☐ Owes money

Preferred Contact Method

Customer Since ☒ Send Reminders/Alerts/Marketing

Reference

Notes

Documents


Title	Type	Delete
<input type="text"/>		

FIGURE 9.1 The Customer form

Defining attributes

Customers and pets in PetLinX each have an Attributes list. Attributes can be used to record important characteristics about a customer or pet, for example you may want to know if a certain customer often doesn't show up for bookings, or if a pet bites or has

medical problems. Once you have defined the attributes you wish to record, you simply tick the attributes that apply to each customer or pet.

To define new customer attributes, click the New  button to the right of the Attributes list to open the Data Lists pop-up form in “New” mode”.

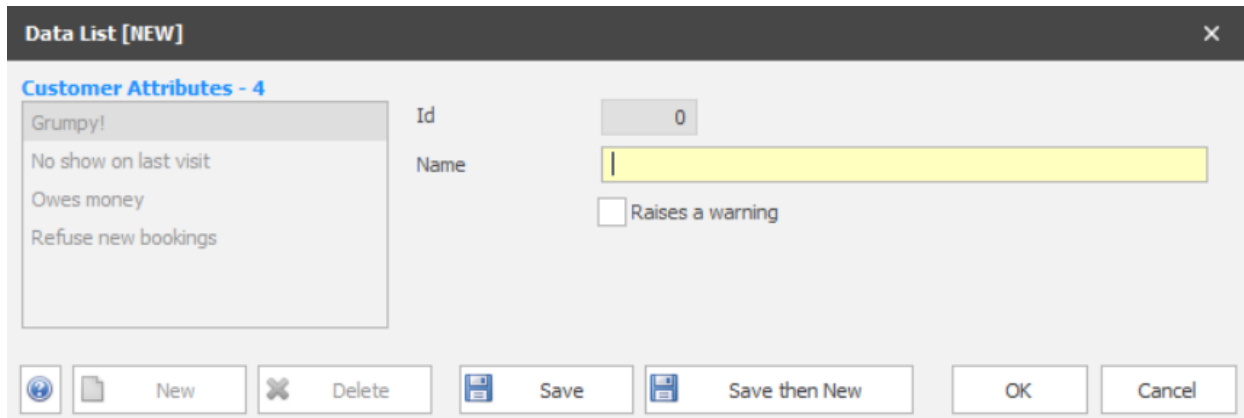




FIGURE 9.2 The Data Lists pop-up form, with Customer Attributes showing

Enter the attribute name and tick “Raises a warning” if you want to be alerted to customers with this attribute when creating a new grooming booking. Click the **Save**  form button when finished. You can also modify existing attributes by changing the name and saving them.

Tip: Opening the Data Lists form by clicking the **Data Lists** option in the PetLinX Menu allows you to edit **all** the different types of data lists used throughout PetLinX.

Finally click the **OK** button to close the form and return to the New Customer form. You will notice that the Attributes list has been updated with your changes. Tick the attributes that will apply to this customer.

Adding documents

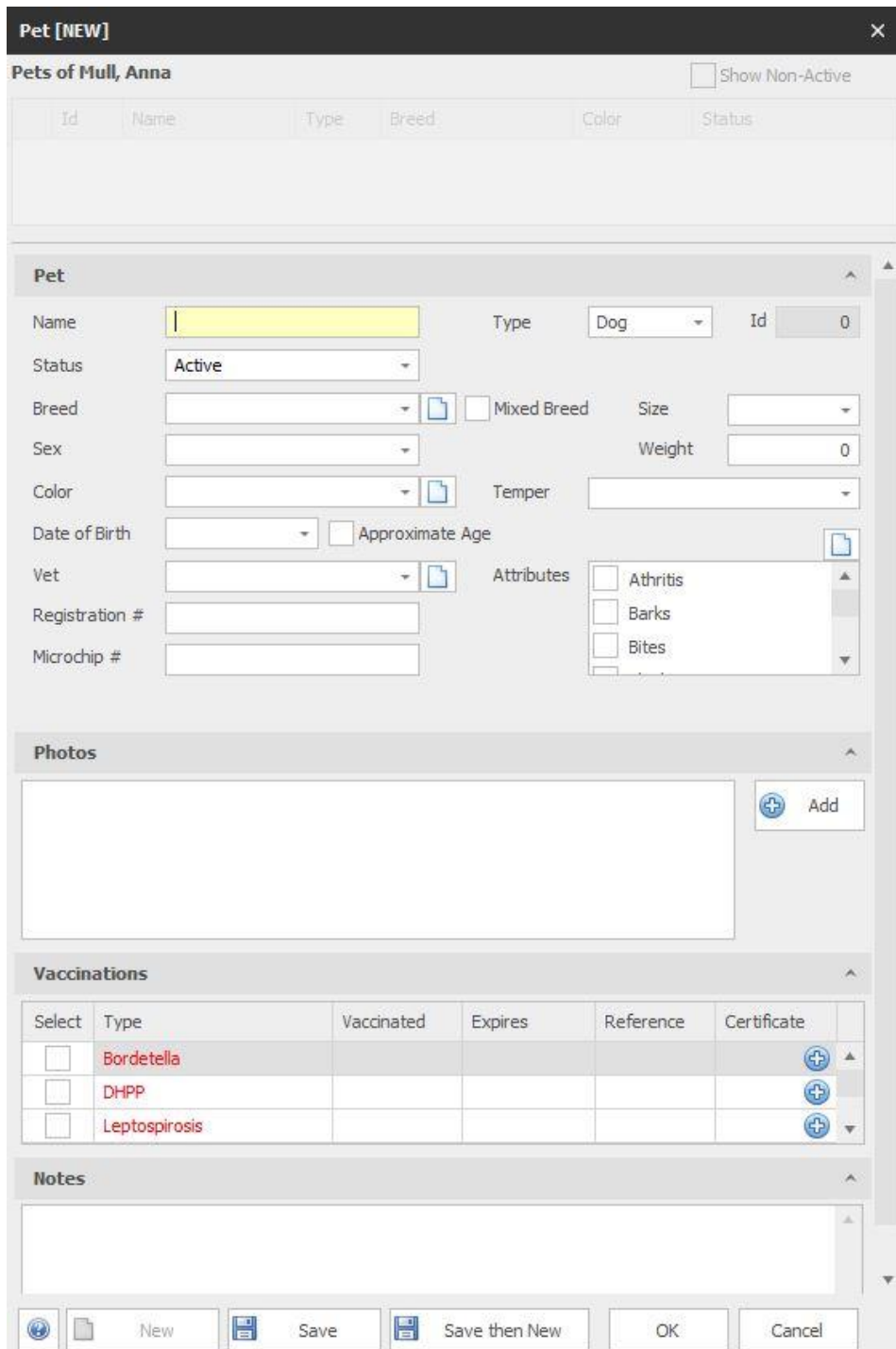
Documents relating to the customer such as a signed agreement or terms and conditions document can added by clicking the **Add**  button in the Documents section. You’ll be prompted to choose a file from your computer, then enter a title for the document and click **OK**. Documents can be viewed again by clicking the hyperlink.

To save the new customer profile, click the **OK** button and notice the customer has been added to the Customer/Pet List in the top left of PetLinX. **Tip:** You can also add a new customer when creating a new booking in the Daycare Calendar form.

9. Adding a new pet

Now that you've added your first customer, you're ready to add one or more pets to them. You will notice that after you clicked OK on the Customer Form, the Pet Form is initiated.

You can also add a new pet at any time by clicking the **New Pet**  button at the top of the Menu.



Pet [NEW] ×


Pets of Mull, Anna Show Non-Active

Id	Name	Type	Breed	Color	Status


Pet


Name Type Dog Id 0


Status Active

Breed  ☐ Mixed Breed Size

Sex Weight 0

Color  Temper


Date of Birth ☐ Approximate Age 

Vet  Attributes ☐ Arthritis ☐ Barks ☐ Bites




Registration #

Microchip #

Photos

 Add

Vaccinations

Select	Type	Vaccinated	Expires	Reference	Certificate
<input type="checkbox"/>	Bordetella				
<input type="checkbox"/>	DHPP				
<input type="checkbox"/>	Leptospirosis				

Notes






  New  Save  Save then New OK Cancel

FIGURE 10.1 The Pet form

Enter the name of the pet, and then move onto the “Type” field. If you choose “Cat” from this field then the “Breed” drop-down will contain a list of cat breeds, likewise choosing “Dog” will fill it with a list of dog breeds. The other fields on this tab should be filled out where applicable.

Adding a new vet

If you know the vet that this pet uses, then you can add this vet to the Vet drop-down. Click the **New**  button to the right of the Vet drop-down to open the Contact form. The Contact form is used to store address and contact details of non-customer companies and contacts of your business.

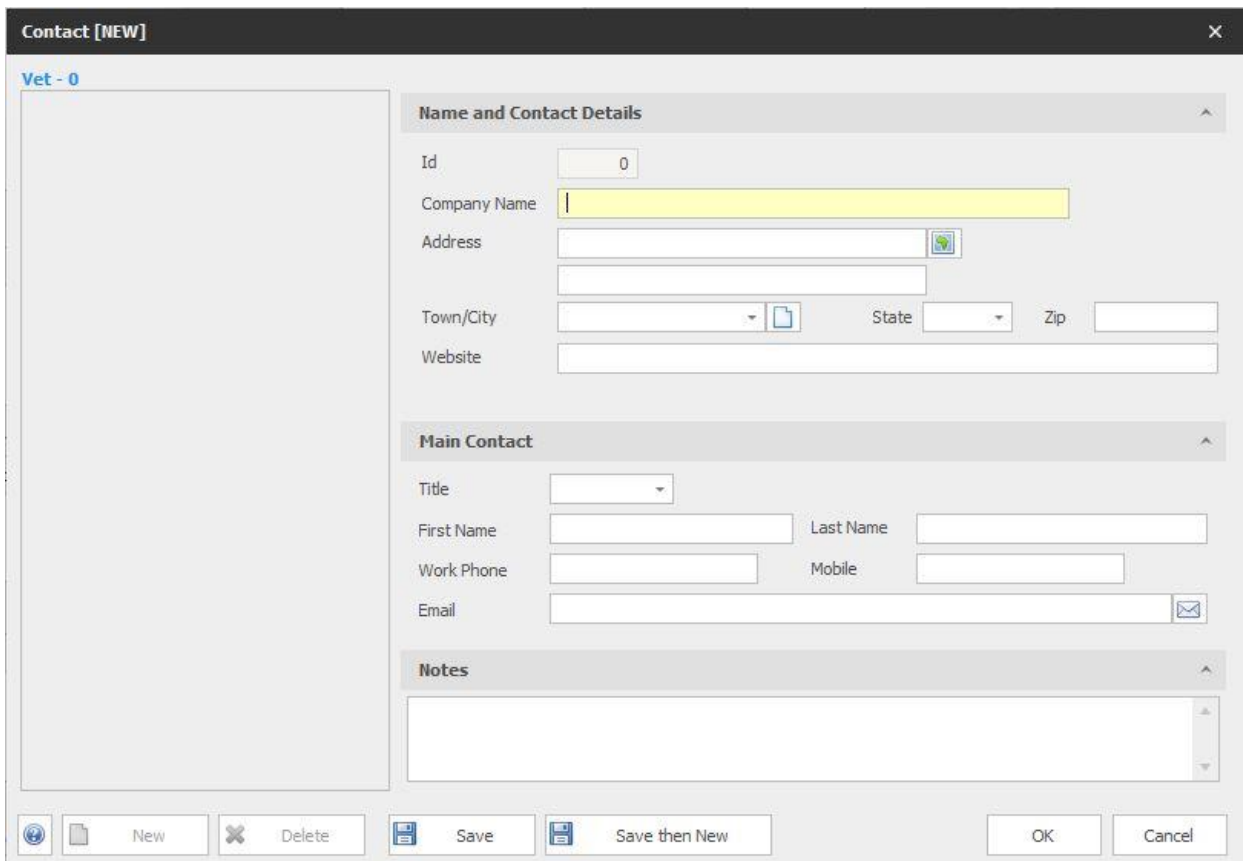



FIGURE 10.2 The Contact form

Enter the vet’s name into the Company Name field, complete the rest of the fields as required, then click the **OK** button which will save the vet entry and return you to the Pet Form. The vet you entered now appears in the Vet drop-down.


Adding pet photos


If you have taken photos of the pet and have them stored on your computer or network, you can add these to the pet by clicking the **Add**  button in the Photos section. This prompts you to choose the photo on your computer and enter a title for it. You can repeat this step to add as many photos of the pet as you wish. **Note:** photos must be under 2MB each.



Thumbnails of each photo will appear in the Photos section. Clicking the thumbnail opens the photo full size in a new window and provides a print option.

Adding pet vaccination information

You can also store any vaccination information to do with the pet. To do this, go to the Vaccinations and tick the vaccinations that have been applied to the pet. The date the vaccination was applied defaults to today's date and can be changed if required. The Expires date will default to a future date depending on the lifetime of the vaccination (usually a year). You can manually change the date by clicking within the "Vaccinated" or "Expires" field and either type in a new date or choose it from the pop-up calendar.

A reference number can be entered for the vaccination, and also a certificate or proof of vaccination file assigned to it using the  button. Choosing this button prompts you to choose a file from your computer.


Tip: The list of vaccination types can be changed by choosing the **Data Lists** option in the Menu. In the top left corner of the form, change the Type drop-down to "Vaccinations". Here for each existing vaccination type you can change the name, the type of pet it is for, the length of time the vaccination lasts for, and whether it is compulsory for pets using your business to have this vaccination or not. To add new types, click the **New**  ribbon button.

When you have finished entering the pet's details, click the **Save**  button and the pet appears in the list at the top of the form. A second pet can now be easily added to the same customer by clicking the **New**  button.

Once you've finished adding pets for this customer, click **OK** to close the form.

Tip: The customer and pet flyouts combine all data together so you can easily view and manage the customer/pet profiles, bookings, and transactions you have created for them. Open these flyouts by double clicking the customer or pet name in the **Customer/Pet List** in the Menu.

10. Making a boarding booking

We will now make a boarding booking for the customer and pet we have added. This can be done by clicking the **New Booking**  button at the top left of the Menu, or by using the Boarding Calendar form, which we will use for this example.

To open the Boarding Calendar form, click the **Boarding Calendar** button in the “Common” section of the Menu. The Boarding Calendar form gives you an easy method of tracking and maintaining your workload for any given day. It has its own ribbon along the top of the form which enables you to manage your bookings, and to change how you view the bookings.

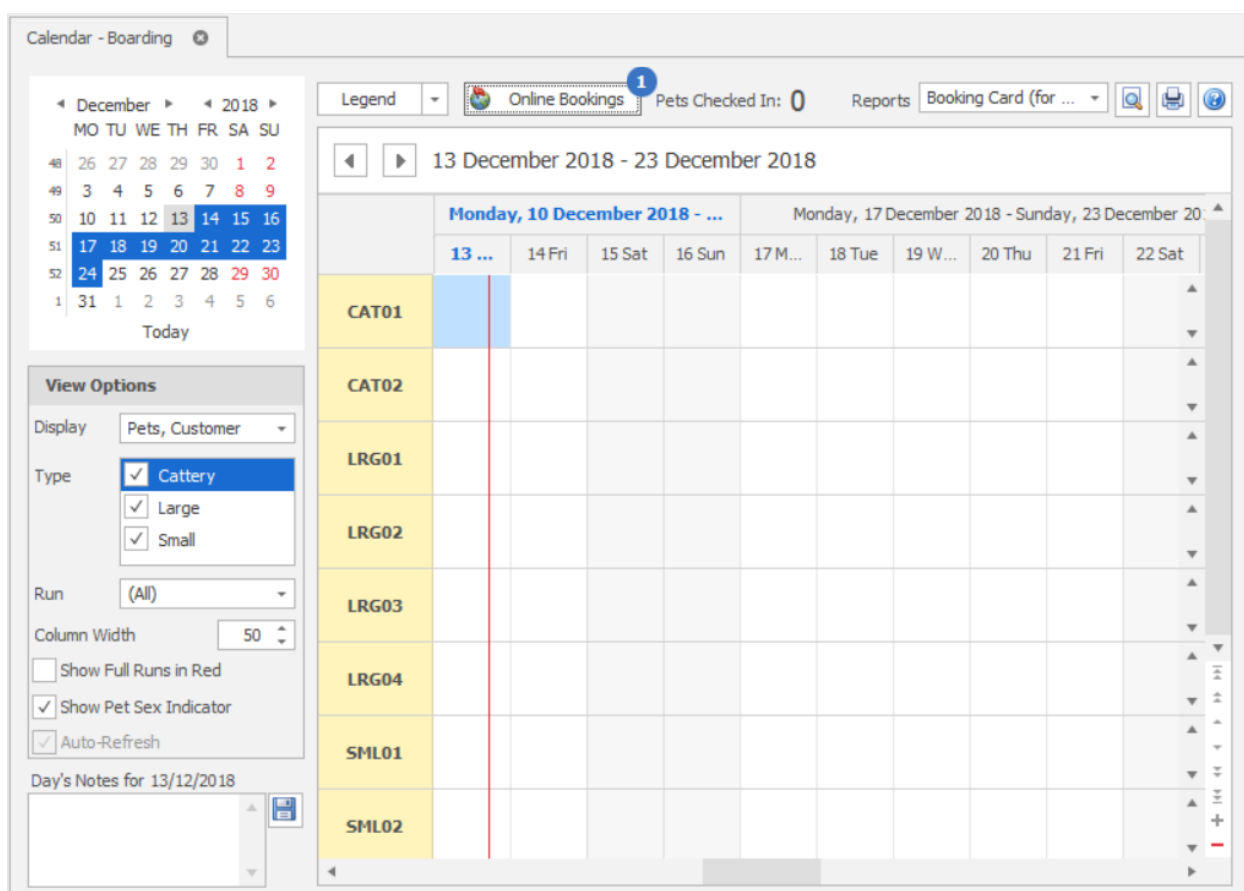








FIGURE 10.1 The Boarding Calendar form, set up with some sample runs

Adding a new boarding booking

1. To make a new booking, first click the required day in the month view (in the top left corner) to view bookings on that day and the next 2 or 3 weeks ahead.
2. In the grid, click in the column of the date that the booking will start, then click the **New**  ribbon button. The Boarding Booking form will appear. The “Date In”, “Date Out”, “Time In” and “Time Out” fields will already be set – these can be

changed if you wish. The number of chargeable days will be worked out based on the dates you have chosen and the various charging options you have set in the System Options - Boarding tab, and these can be overridden if required.

FIGURE 10.2 The Boarding Booking form

3. Select the customer from the Customer drop-down – you can quickly add, edit, or search for a customer by clicking the appropriate button    next to the drop-down. Once the customer has been chosen the Pet grid will be populated with the customer's pets – similar to customers, pets can be added or edited by clicking the appropriate button   next to the grid. Tick the pets that the booking is for in the Pets grid, note that you can tick more than one pet if they will be staying in the same run together, and the run can hold more than one pet.
4. If you have set the boarding options to charge by Pet Size, then the Pets grid will display the rate being charged for each pet per chargeable day - you can override these if required. The Vaccinations column displays the current status of vaccinations for the pet, these can be viewed or edited by clicking the "...". You can also view any attributes or warnings for the pet by hovering the cursor over the entry in the Attributes column.

5. You can optionally choose the run type you wish to place the pets in with the Type drop-down in the “Runs” section. Then click the **Choose Run** button to bring up the Choose Run form showing the available runs for the dates selected.

The Choose Run form is color coded to aid you in selecting the appropriate run(s) for the booking. Please note that you will only see runs suitable for the pets selected in the booking; for example if your booking is for a dog, you will only see runs using a "Run Type" which is setup for dogs, and able to fit the number of dogs selected in the booking. Additionally if you chose a run type in the booking, then the runs shown will only be for that run type.

If a run is available for the whole duration of the booking, then click the run name to have that run selected for each booking day. You can toggle the run selection for each day individually by clicking on the cell where the run and day intersects. Click Ok when finished to return to the Boarding Booking form. If you have set the boarding options to charge by Run Type, then the Runs grid will display the rate being charged for each run per chargeable day - you can override these if required.

Choose Run

Date In: 14/12/2018 Date Out: 24/12/2018 ☐ Show the day before and after the booking

Run Type: (All) [Click a cell to select or unselect the specific Run for that day, or click the Run name to select or unselect that Run for the whole booking.](#)

Run	14 Dec	15 Dec	16 Dec	17 Dec	18 Dec	19 Dec	20 Dec	21 Dec	22 Dec	23 Dec	24 Dec
LRG01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LRG02											
LRG03											
LRG04											
SML01											
SML02											


Legend

Fully Occupied (red) Occupied, Space Available (green) Check Out (purple) Check In (blue)

OK Cancel

FIGURE 10.3 The Choose Runs form; the run “LRG01” has been selected for the duration of the booking

Ticking “Book Out Whole Run” will completely book out the run for the days selected, meaning that no other pets from other bookings will be able to share the run even if there is space available.

6. If you have defined boarding rate discounts/surcharges, they will be checked to see if they apply to this particular booking. If so, they will be displayed in the Discounts and Surcharges grid and the “Boarding Total” amount will be re-calculated. Unticking the “Used” column of a discount/surcharge will prevent it being applied to the booking.
7. To select additional services for the booking, including activities, feeding, and medications, click the New  button on the right of the Additional Services grid. The Boarding Booking Services form will appear and will be set to NEW mode.

Choose the service, the particular pet that the service applies to (leave this blank if it applies to all pets in the booking), and change the rate if needed. If applicable, enter the Quantity of the service (e.g. amount of food or medication) and any other details in the Notes field.

If the service will be a one-off, such as a pet pickup, select the "Occurs Once" option and choose the date it occurs. Otherwise if the service repeats regularly during the booking, select the "Repeat Every" option, and choose the days that the service repeats - "1" means that the service will occur every day, "2" represents a service that occurs every two days, etc. You will also need to select at what time the service occurs during the day from the "Morning", "Afternoon", and "Evening" checkboxes.

Click **Save then New** to save the service to the booking and begin adding another, or **OK** when you have finished adding all services to return to the booking form.

When finished, click **OK** to add the new booking.

Accepting a deposit

Now that the booking has been accepted, the Booking Deposit form will be automatically shown so you can enter in details of any deposit that the customer has paid. Choose the Payment Method, and enter the payment amount in the "Payment" field. Click **OK** to save the deposit and close the Booking Deposit form. You can add further deposits to the booking at any time by right clicking on the booking in the Calendar and choosing the "Add Deposit" option.

Tip: If you don't normally take deposits when creating a booking, you can prevent the deposit form automatically appearing by unticking the "Create a deposit transaction after booking is created" option in the System Options form, Boarding tab.

Doe, John [NEW]

Type: **Payment** Current Balance: **-\$709.50** Date: **21/05/2020**

Payment #: **0** Served By: **Administrator**

Notes: **Notes**

Preview Print Email

Payment Surcharge: **\$0.00**

Payment

☐ Split Payment **Deposit for booking #203**

Payment Method: **Payment Method** Ref: **Ref**

☐ Manual Change **Payment** **\$0.00**

☐ Add Change to Balance **CHANGE** **\$0.00**

☒ Incomplete **BALANCE** **\$0.00**

Help Save OK Cancel

FIGURE 10.4 The Booking Deposit form.

If you configured PetLinX to send confirmations in the System Options – Boarding tab, a confirmation of the booking will be sent to the customer at this point. You will notice the booking has been added to the calendar and is green which identifies it as a “Future Booking”, meaning it hasn’t been completed yet. Next we’ll assume that the pet(s) that the booking is for has been brought in, so we’ll set the booking to “Checked In” within PetLinX.

Checking In a booking

To check in a booking, click the booking in the Boarding Calendar form then click the **Status** drop-down in the ribbon and choose “Checked In”. This changes the booking status to “Checked In”, and the color of the booking changes to signify this.

Completing a booking

Once a booking has been completed, you can then set it to completed within PetLinX.

To complete a booking, click the booking in the Boarding Calendar form then click the **Status** drop-down in the ribbon and choose “Checked Out and Completed”. This changes the booking status to “Checked Out and Completed”, and the color of the booking changes to signify this.

11. Creating an invoice

When a customer pays you for one or more completed bookings, or the purchase of products from your business, you can create and print an invoice to give to the customer.

Invoices can be created in the Transaction tab of the Customer flyout, but to invoice a completed boarding booking it is easiest to do it directly in the Boarding Calendar – simply click the booking to be invoiced, then click the **Create Invoice** 💰 ribbon button to open a new blank invoice.

Transaction - Joe Newton [NEW]

Type
Invoice

Current Balance
-\$75.99

Date
13/12/2018

Invoice #
0

Served By
Sharon

Bookings Included

Filter Bookings By
Selected Only

	Id	Date	Type	Pet(s)	Status	Total	Deposits
<input checked="" type="checkbox"/>	128	13/12/2018	Board	Johnny;	Future Booking	\$375.00	\$50.00

Retail Sales

	Code / UPC	Description	Qty	Retail	Disc.	Sales Tax	Total
*	Click here to add a new row						

Sales Tax
\$34.09

SUB TOTAL
\$375.00

Notes

☐ Include Previous Balance
\$0.00

Preview
Print
Email

Tip
\$0.00

TOTAL
\$375.00

Payment

☐ Split Payment

Payment Method
Ref
N/A

Payment
\$0.00

New Linked Payment
Select Linked Payments

Linked Payments
\$50.00

☐ Manual Change

CHANGE
\$0.00

☐ Add Change to Balance

BALANCE
-\$325.00

☒ Incomplete

Save
OK
Cancel

FIGURE 11.1 The Transaction form

The invoice date will default to today's date, which can be changed. You can also set the name of the employee who served the customer, in the "Served By" drop-down.

The booking you had selected in the calendar will be ticked, and you can also add other bookings to the invoice by ticking each booking in the "Bookings Included" section. They will appear shaded yellow when selected for the invoice, and the invoice total will be updated accordingly. The total of any deposits that had been added for the booking will be shown in the "Linked Payments" field and will be deducted from the amount due.


Products (as defined in the Products form) can also be added to the invoice at this stage. Select the item to add from the Description drop-down in the "Retail Sales", and change the quantity and retail price if required.

If the customer had an outstanding balance you could add this into the invoice total by ticking "Include Current Balance" – the customer's current balance is shown at the top of the Invoice/Payment tab. You can also enter the amount of any tips at this stage.

To enter details of a payment from the customer, select the Payment Method, enter a reference number (e.g. credit card authorization number) if required, and enter the amount of the payment. You can enter details of a second payment by ticking "Split Payment", and link existing payments to the invoice by clicking "Select Linked Payments". If the total payment amount is more than the invoice total, then the "Change" field will display the difference that should be returned to the customer. If the customer doesn't receive this amount, tick "Add Change to Balance" to have it added to their current balance.

When you have completed the invoice click **Save** and if you wish to print a copy for the customer, click the **Print** button.

Additional payments by the customer can also be entered by selecting "Payment" instead of "Invoice" in the "Type" field when creating a new Transaction.

Tip: Invoices and payments can be printed using a receipt printer, you can use a barcode scanner to quickly add products to an invoice, you can configure a cash drawer to be opened when an invoice is printed, and you can process payments with a merchant account. See the **Using POS Hardware and Features** topic in the help file (the **Help Topics**  ribbon button) for further information on these.

12. Other things you can do in PetLinx

This completes the PetLinx tutorial. There are other areas in PetLinx that are not covered in this tutorial, including:

- **Reports:** There are many reports available in PetLinx. The **Reporting Center** allows you to print or preview on screen any of the reports using a wide set of criteria. Most of the forms in PetLinx also allow you to print or preview reports that relate to them, for example in the Calendar you can print a booking list for a given day. You can even make your own custom versions of the PetLinx reports, using the "Reports Setup" tab.
- **Products:** If your business sells retail products to customers, then your product range can be defined using the **Products** form. Products can be added to customer invoices in the "Retail Sales" section of the invoice.
- **Employees:** Any employees your business has are recorded in the **Employees** form. If using the Grooming module, this is also where employees can be set up as groomers. Login details for the Desktop Network/Cloud editions of PetLinx are also defined here.
- **Email and SMS Messages:** You can compose email and SMS message templates within PetLinx using the **Email Template Editor** and **SMS Template Editor** forms respectively. Then use these templates to automatically remind customers of their bookings, send a pet a happy birthday message, or remind a customer their pet's vaccination is about to expire. All the various types of messages are configured in the **Messaging Center**, which also contains a message log showing details of messages sent in a given date range.

Please note you must first configure your email provider's settings in order to send emails, and create an SMS account to send SMS (there is a cost per SMS credit).

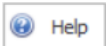
- **Data Extracts and Mailouts:** The Extract and Mailout tab in the **Reporting Center** is used when you want to extract a set of records (e.g. all active customers, all bookings for a given day), and use the extract as a data source for a mailout. Simply choose the output type (email, SMS, print), choose the message template, then click Create Mailout to get your message sent. You can also save your extract to a file in CSV, Excel, or Text format.
- **Mobile App:** A free mobile app is included when you subscribe to PetLinx, which enables you to manage your customers, pets, and bookings all on your Android or iOS device. To install the app, open the app store on your device and search for "PetLinx".

The Mobile App can be trialled at any time using data from a sample company. To request further information on how to do this, please email us at info@petlinx.com.

- **Online Portal (BookMy.Pet):** The Online Portal at BookMy.Pet is a simple to use, mobile friendly website enabling your customers to enter details of their pets and their own contact information, and make new booking requests. Changes made by

the customer at the BookMy.Pet website sync with your PetLinx database, reducing the time you currently spend keeping customer and pet records up to date. Booking requests display at the top of the PetLinx calendars from which you can review, then accept or decline them. BookMy.Pet is very easy for your customers to use and as it's your actual schedule that is presented to them, you'll be able to fill those gaps in your calendar yet prevent being overbooked!

The Online Portal cannot be trialed during the PetLinx trial period, however if you sign up with PetLinx you will then receive 30 days free use of the Online Portal. After the 30 day trial period a subscription is required to continue to use it. To find out further information please see www.petlinx.com or email us at info@petlinx.com.

- **Export to QuickBooks:** If you use QuickBooks in your business, you can transfer your customers, vendors, products, services, prepaid credits, and transactions from PetLinx into QuickBooks whenever you require - just go into the QuickBooks Export tab in the **Reporting Center**.
- **Help:** An extensive help system has been created which explains how to use every feature of PetLinx in detail. Help can be displayed by clicking the **Help Topics** ribbon button, or by hitting the F1 key. Each form in PetLinx also has a Help button  which will be either in the bottom left or top right corner of the form, clicking this will take you directly to the relevant section of the help system. Use the help system if you get stuck when trying to accomplish a certain task. If you're still stuck after consulting help, then please use one of our support options.
- **Technical Support:** Any errors that may occur whilst using PetLinx are recorded. It is recommended that you let the PetLinx technical support team know of these errors by sending a support request, accessed through the **Technical Support** ribbon button. This will enable the technical support team to work towards a speedy resolution to your problem.

For tutorials on using the other modules, please see under the **Tutorials** ribbon option (you will see options for these if you have selected multiple modules to be used in PetLinx) or via the **Start / PetLinx** Windows menu option.

Thank you for your interest in our product. We hope you enjoy using PetLinx, and we look forward to receiving any questions, comments or suggestions you may have. Contact information is listed in the help system or on our website, **www.petlinx.com**.

13. Appendix: All system options settings

A full list of System Options settings and their purpose are explained here. System Options are accessed by choosing the **System Options** button on the PetLinX Menu. For information on the Grooming and Daycare tabs, please read the relevant tutorial. *(Users of the Desktop Network/Cloud editions who do not have the Administrator security level will not have all of the tabs mentioned below).*

The Business Details tab

The details you enter here will appear on your invoices so make sure all of the fields on this screen are completed with the correct details. **Please Note:** the country you choose controls the formatting of addresses and other information throughout PetLinX, so please ensure you set this correctly.

If you have your business logo stored as an image file on your computer, you can upload it into PetLinX by clicking the logo **Upload** button. The logo will then be displayed in invoices and receipts, as well as in the Online Portal (the portal is a website that enables customers to maintain their details and their pet's details themselves, and request new bookings with you; please see www.petlinx.com or email us at sales@petlinx.com for more information on the Online Portal).

A Terms and Conditions document can also be uploaded into PetLinX, which is presented in the Online Portal for new customers to agree to as part of their registration. The Terms and Conditions document must be a plain text file (.txt format).

The Backup tab (desktop edition only)

This tab provides you with information on when the last full backup of the PetLinX database was done (the first time you run PetLinX this will be set to a default value), using the PetLinX Database Manager program. This program can be opened via the Windows **Start / PetLinX / Database Manager** menu option or from the shortcut labeled **PetLinX Database Manager** on your computer desktop. To keep your database safe and secure, you should perform regular backups of the PetLinX database using this program and store the backups on a USB drive or some other storage device away from your business premises.

You can also control aspects of the AutoBackup feature in the Backup tab. When enabled, AutoBackup will make copies of your database while you work, which are stored in the AutoBackup folder. By default this folder is set to **c:\program files (x86)\petlinx4\AutoBackup**, but can be changed to any valid folder.

Tip: If you use a cloud storage facility such as Dropbox, you can select your DropBox folder as the AutoBackup path to have PetLinX backup to the cloud as you work.

You can change how often AutoBackup runs by changing the "Run AutoBackup Every" fields. The "Keep AutoBackup files for up to" fields dictate how long the AutoBackup backup files are stored before they are deleted from the AutoBackup folder.

The Boarding tab

This tab contains information specifically for boarding.

- If you refer to your pet enclosures as something else apart from "Runs" at your business, then you can set this in the "Name of Pet Enclosure" fields i.e. "Unit", "Pen", "Cage", etc. The singular and plural words need to be entered, so for example if you choose "Pen" as the singular word then enter "Pens" as the plural word. Any changes to these names will be used the next time you start PetLinX.
- "Default Check In Time" and "Default Check Out Time" are used when a new boarding booking is created, these are the default values that the booking will use for the check in and out times.
- "Charge by number of {Days/Nights/Hours}" allows you to choose whether bookings are charged by the number of days, nights, or hours making up the booking. For example, a booking checking in on January 1st and checking out on January 2nd would be charged at either 2 days, 1 night, or 24 hours, depending on this setting.
- Charge {x} days on first day if Check In is after {time}" if ticked, will allow you to select a number of days and a time. If the check in time of a boarding booking is after this time then the first day will carry a charge of the number of days entered. Likewise for the "Check Out" tickbox below this, if ticked and the check out time of a boarding booking is before the selected time (or after the selected time if charging by nights) then the last day will carry a charge of the number of days entered. Note you can override these charges within each booking.
- "Minimum Charge" sets the minimum number of days/nights/hours that a booking will be charged for if it is calculated as being less than that.
- "New bookings book out whole run by default" if ticked will set the "Book Out Whole Room" option on when making a new booking. Bookings with this option set will prevent other bookings being placed in the same run.
- "Create a deposit transaction after booking is created" can be unticked if you do not normally accept deposits for new bookings, otherwise a new deposit transaction will be created automatically upon the creation of each booking.

The Email and SMS tab

If you wish to send messages by email and/or text (SMS) messages from within PetLinX, then this section must be completed.

Email: "Email Display Name" should be your name as you want it to appear to the recipients of your email, and "Email Address" of course is your email address. "SMTP Server Name", "Port", "User Name", "Password", and "Enable SSL/TLS" are needed for PetLinX to connect to your email system to send the emails; if you are unsure what to enter in here, make them the same as the settings in your email application (i.e. Outlook, Eudora) or contact your ISP (Internet Service Provider) for help (ask for the "SMTP settings").

Once you have entered your settings, click "Send Test Email" to have PetLinx attempt to send an email to yourself.

SMS: You first need to create an account on our platform, known as PetLinx Online Send, at <https://petlinx.online-send.com/>. Then choose "PetLinx" as the provider ("Esendex" is a legacy option no longer actively supported), enter the user name you created and API key which is found at the top right of the PetLinx Online Send website. If you are in the USA or Canada we also recommend purchasing a dedicated number as per the instructions.

You will be given a number of free credits to test with, further credits will need to be purchased at the PetLinx Online Send website to continue using the SMS service.

The Form Settings tab

This tab contains settings relating to the forms used in PetLinx.

For users of the Desktop Network/Cloud editions of PetLinx, please note that the changes that you make in this screen will only affect your logon.

- The "Confirmations" section allows you to choose whether to be prompted when doing certain tasks within PetLinx.
- "Field Colors" sets the color of read-only fields and the current field in the PetLinx forms.
- "When PetLinx Starts" controls what forms are opened and other actions are taken when PetLinx starts.
- "Open a single copy of each form" prevents PetLinx from opening multiple copies of a form each time you click the form button in the Menu.
- The options under "Customers and Pets form" apply to a legacy form used in previous versions of PetLinx.
- For the Calendar forms, if "Prompt about past uncompleted bookings when opening" is ticked you will be prompted about any uncompleted bookings when you open a calendar, which you can then view and update the status of. "Prompt to include past uninvoiced bookings when invoicing" indicates whether you will be prompted to include all past uninvoiced bookings (if any) when invoicing a booking for a customer.
- If "Prompt about expired or missing compulsory vaccinations" is ticked you will be alerted when updating a pet or making a booking if the pet's compulsory vaccinations are not up to date.

The General tab

This tab contains settings for using times in PetLinx and other miscellaneous settings;


- "Time Format" controls how times are shown in PetLinx i.e. 4'oclock in the afternoon will be "04:00 pm" when 12 Hour is chosen or "16:00 if 24 Hour is chosen.
- "Time Intervals" controls the interval between times available in the time drop-downs used in PetLinx. For example setting this to 15 minutes would provide times of 9:00, 9:15, 9:30, 9:45, etc, to be available when setting times for bookings.
- "Restrict Time Fields" enables you to restrict the times available in the time drop-downs used in PetLinx to those that are relevant to your business. For example setting the first time to 6am and the second time to 8pm would mean you wouldn't see any times in the night after 8pm and before 6am being listed in the time fields.
- "Default Customer Contact Method" is used when creating a new customer, the "Preferred Contact Method" field defaults to this.
- "Restrict Time Fields" enables you to restrict the times available in the time drop-downs used in PetLinx to those that are relevant to your business. For example setting the first time to 6am and the second time to 8pm would mean you wouldn't see any times in the night after 8pm and before 6am being listed in the time fields.
- "Use Products and Retail Sales", if ticked enables the maintenance of products and adds the ability to add retail sales of products to invoices.
- (Desktop editions only) - "File Storage" determines if files such as pet photos and customer files are stored in the PetLinx database, or on disk. We recommend leaving this setting as is to store files in the database.
- (Cloud editions only) - "Use Dropbox for uploads and downloads" enables you to use Dropbox to easily access files within PetLinx. Follow the instructions to get this setup.

The Invoicing tab

This tab contains settings used when creating and printing invoices and payments.

- "Next Invoice/Payment Number" is the number to use for the next invoice or payment created in PetLinx.
- "Show Tip Field" if unticked will hide the Tip field from being shown on the Invoice tab and printed invoice (applicable for countries where tips are not normally paid).
- "Set Bookings to Completed when added to an invoice" if ticked will automatically change the status of all bookings added to an invoice to "Checked Out and Completed", if their status is still set to "Future Booking" or "Checked In".
- "Use Linked Payments" if ticked enables payment records to be "linked" to an invoice, useful if invoices can be paid off by the customer making multiple payments.
- "Number of copies to print" - when the "Print Invoice" button is clicked on the Invoice tab, this controls how many copies will be printed.

- "Title" is printed at the top of the invoice and can be changed to whatever is required, for example certain countries require invoices to have the title "Tax Invoice".
- "Show Boarding Charge Rate" controls whether the daily boarding charge rate is calculated and shown on the printed invoice.
- "Show Tax Number" if unticked will hide the Tax Number from being shown on the printed invoice.
- "Footer Message" is printed at the bottom of the invoice and can contain any message that you want to display here, such as a thank you message.

If you reside in the USA you will notice a "Payment Processing" section where you can choose to process payments using a merchant account. If you are interested in finding out more, please click the Help  button in the bottom left hand corner of the form.

The Printers and Cash Drawer tab

This tab allows you to choose the paper size and printer to use for printing reports and invoices, and also enables a cash drawer to be setup.

For users of the Desktop Network/Cloud editions of PetLinx, please note that the changes that you make in this screen will only affect your logon.

- The "Reports and Letters Printing" section enables you to choose whether to print reports and letters at Letter or A4 size, and also choose the printer that PetLinx will use. If this will be your Windows default printer then leave the setting as "* Default Printer".
- The "Invoice and Receipt Printing" section enables you to choose whether to print invoices and receipts at Letter/A4 size, or using a receipt printer. The printer to be used should be selected here, if it will be the Windows default printer then leave the setting as "* Default Printer". See the "Using a Receipt Printer" help topic for further information on setting up a receipt printer.
- The "Cash Drawer" section enables you to configure a cash drawer to be used with PetLinx. See the "Using a Cash Drawer" help topic for further information on setting up a cash drawer.

The Security tab (Desktop Network/Cloud editions only)

The Security tab enables or disables various capabilities of PetLinx users who are in the "General User" security group (as specified in the Employees form).

The Tax tab

This tab allows you to configure taxes to be used throughout the system.

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- "Tax Number" is your business' tax number, and appears on your invoices (although you can hide this in the System Options Invoicing tab). Depending on your country this may be labelled as something else, i.e. ABN in Australia, GST Number in New Zealand.
- "Prices are Exclusive/Inclusive of Tax" dictates whether tax is included in service and product prices, or excluded and added onto the prices.
- The rest of the fields on the Tax tab will be set to a default based on the country you chose when PetLinx was first started. You can change any of these options including the name of the tax, the tax rates for use by products and services, and you can also tell PetLinx to use a second tax by ticking the "Use Tax 2" tickbox (for Canadian customers, this allows you to setup GST and PST). Please note for each tax you use, you must enter a tax rate for both products and services. If one of the rates is not used, enter zero in the tax rate (for example, if products have a 10% tax rate, but services do not incur tax, enter 0 in the "Service Tax Rate" field).
- If "Use Tax 2" is ticked, you have the option of setting whether the tax is compounded. Tick the "Tax 2 is Compounded" tickbox if tax 2 is based on the price plus tax 1, or leave it unticked if tax 2 is based solely on price excluding tax 1.