PetLinx™ 7 Tutorial

Using the Daycare Module

Table of Contents

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 daycare 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 your daycare groups and session types, 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 on 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.

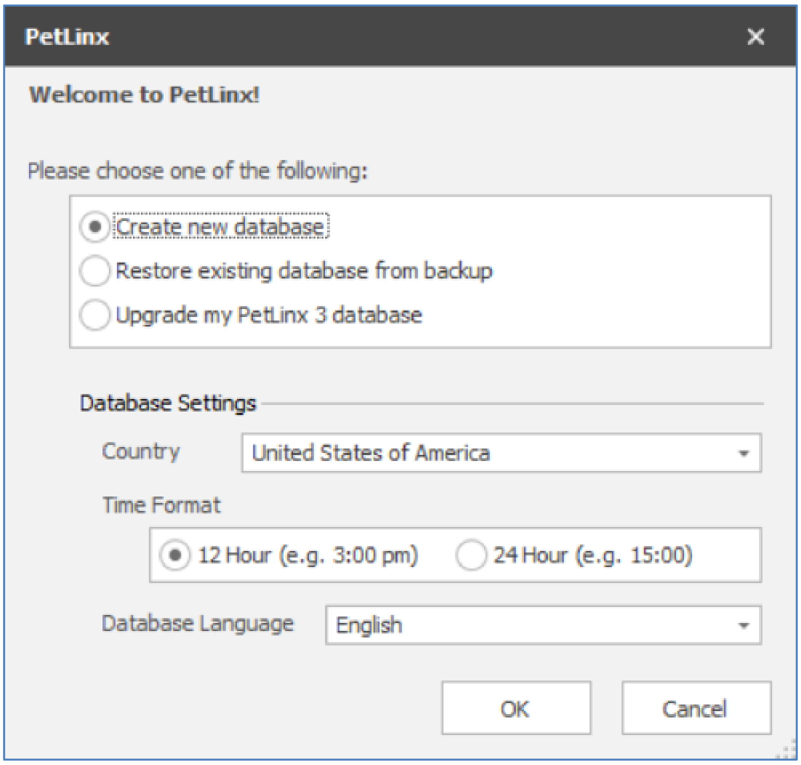


Figure 2.1 The Setup PetLinx Database dialog (from the Desktop Single edition)

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.

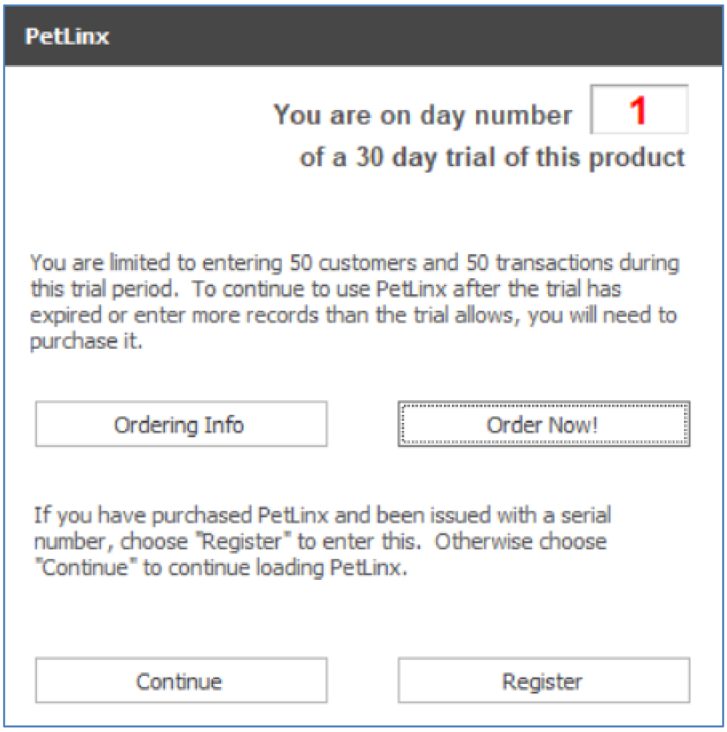


Figure 2.2 The Demo "Nag" screen

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

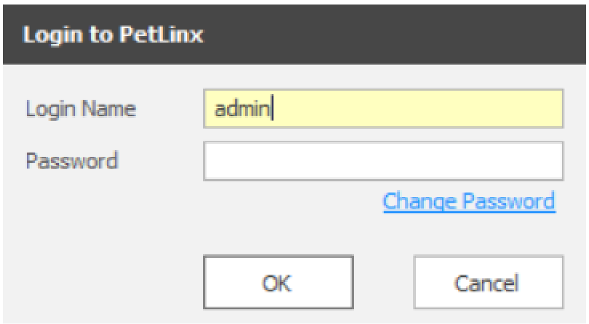


FIGURE 2.3 The Login dialog

*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 "Daycare" is ticked). While using the PetLinx demo you can access this form again by clicking the **Choose Modules** ribbon button.

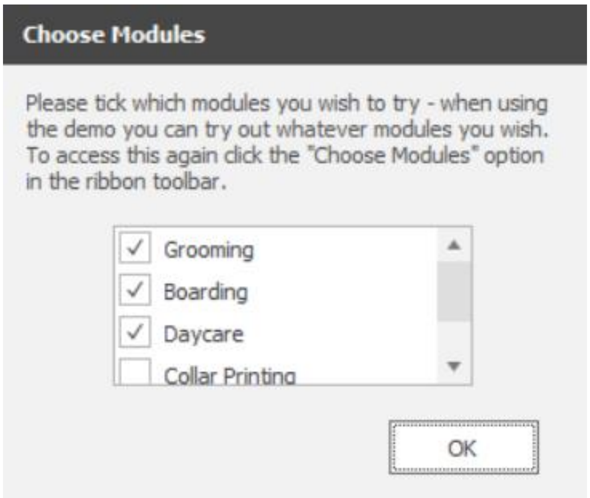
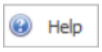


Figure 2.4 The Module Selection dialog

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 Daycare tabs are covered here, please see chapter 14 “Other system options settings” for information on other tabs.

Tip: Notice the 

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.

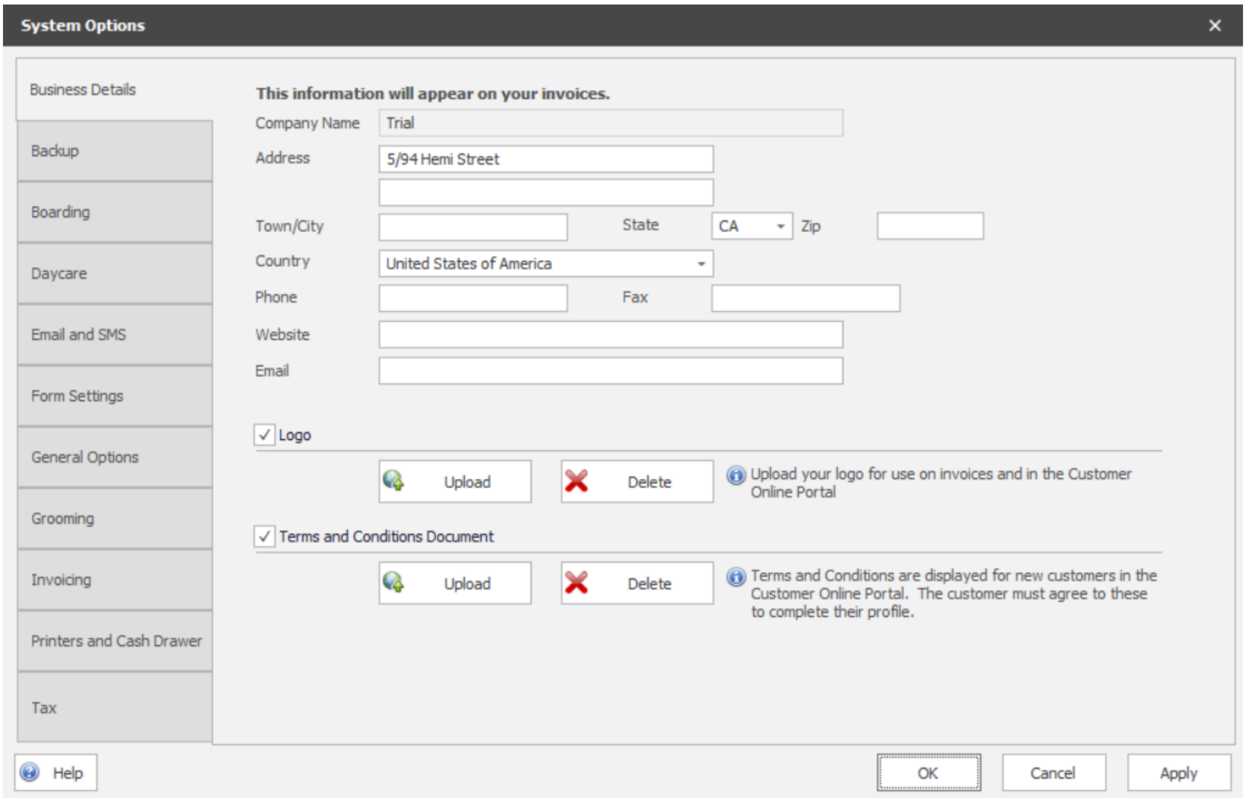


FIGURE 3.1 The System Options form

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 Daycare tab

This tab contains information specifically for daycare.

- Indicate the days your business is open on by ticking or unticking each day as appropriate.
- "Default Session Type" is the type of session that new bookings will be initially set to.
- "Create Recurring Bookings…" dictates how far into the future PetLinx will create new recurring bookings.
- To restrict bookings to only pets of a certain type (i.e. dogs), ensure "Restrict bookings to pet type" is ticked and a pet type selected. If unticked, all pet types (both dogs and cats) will be available to add to a 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.

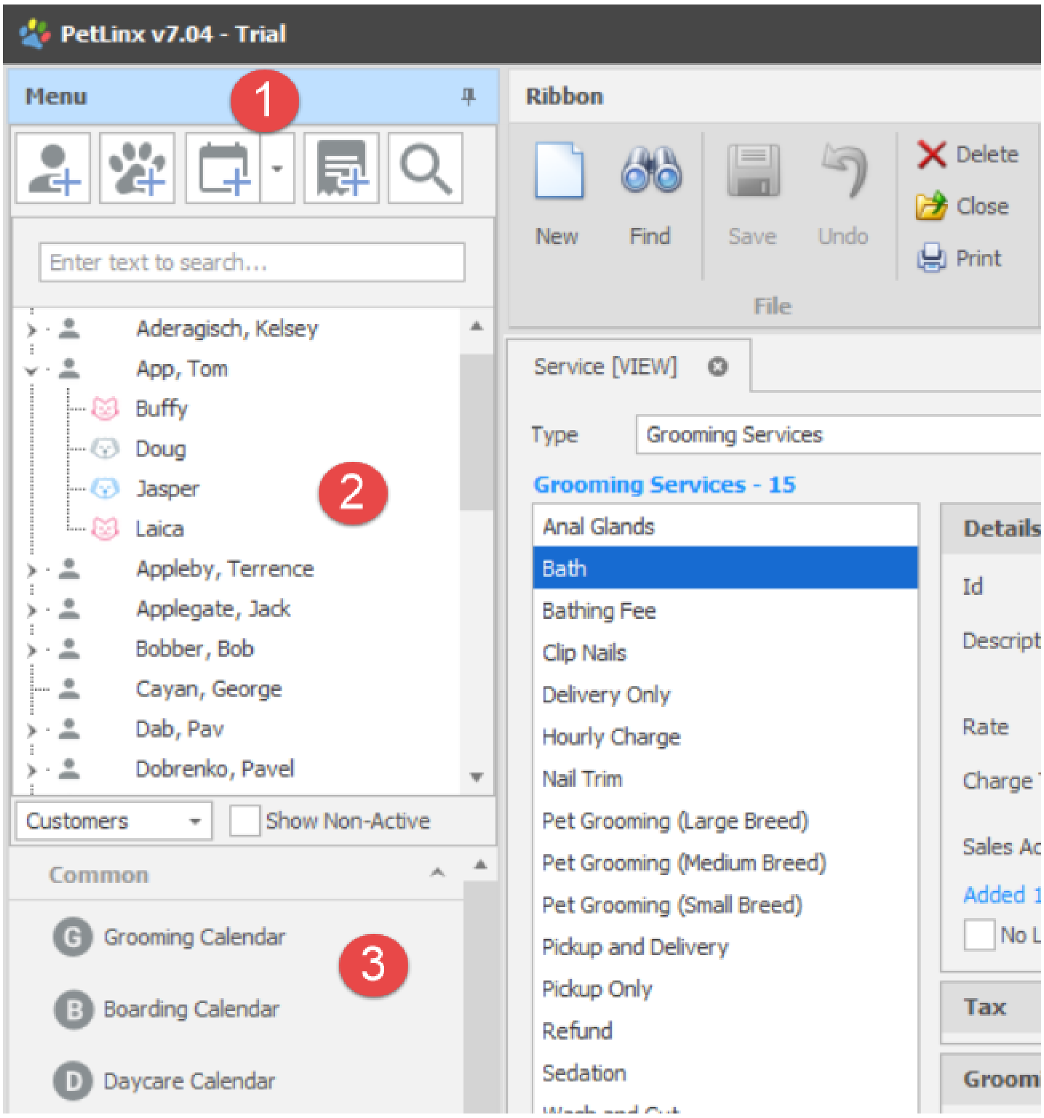


FIGURE 4.1 A portion of the Main form, showing the Menu down the left hand side and Ribbon along the top. Sample customers have been added and the Services form has been opened.

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 daycare groups

There are a few areas you need to setup before you can start taking daycare bookings in PetLinx; the first being Daycare Groups. In PetLinx, Daycare Groups reflect how you organize the pets that book in for daycare sessions. For example, your business may book and group pets:

- by room (Front or Back Room)
- by pet size (Large, Medium, Small)
- by price (Luxury suite, Standard suite)

The groups that you define are then displayed in the Daycare Calendar to help you schedule bookings.

Daycare groups are maintained in the Daycare Groups form, which you can open by clicking the **Daycare Groups** button in the "Setup" section of the Menu.

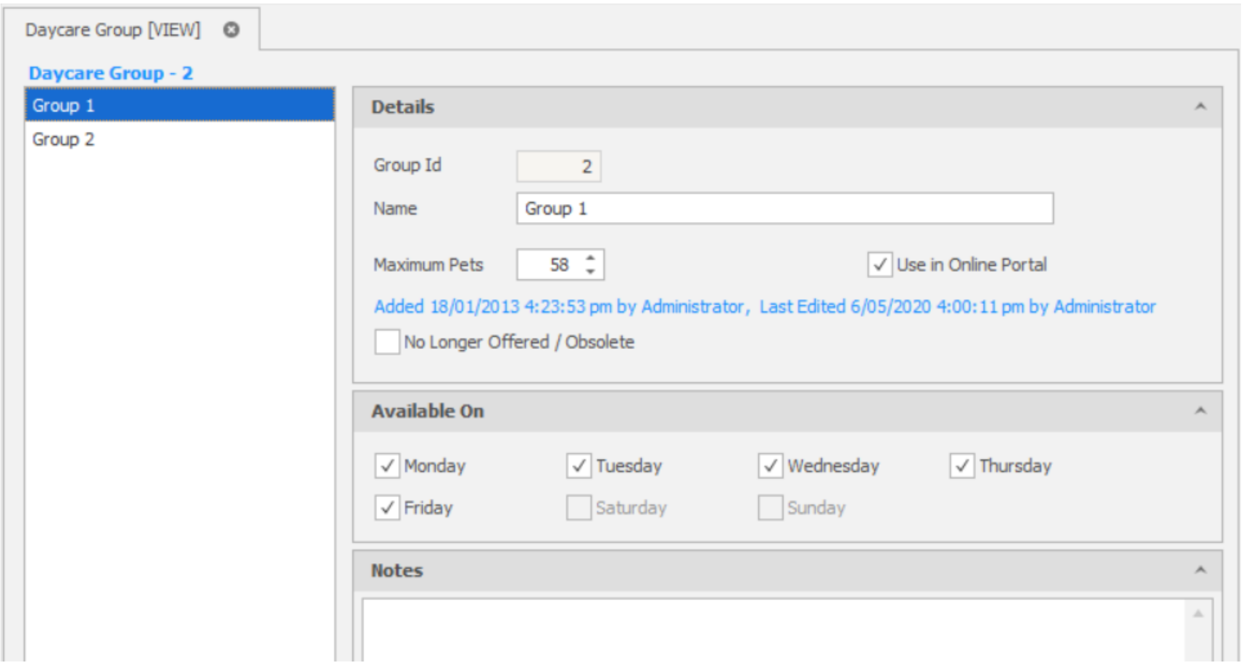


FIGURE 5.1 The Daycare Groups form, showing sample groups

PetLinx comes with two sample daycare groups defined, "Group 1" and "Group 2". You can change these sample groups to something more relevant to your business by doing the following.

Changing a daycare group

1. From the list on the left hand side of the form, click the name of the daycare group that you want to change. The fields relating to this group will be displayed.

2. Change the name in the Name field if required, and set the maximum number of pets that can be booked into the group per day (**Note:** Maximum Pets cannot be more than 58). Tick or untick the days that this group is available on.

3. To save the changes to the daycare group, click on the **Save** ribbon button, or hit the **Enter** key on your keyboard.

You can add new daycare groups as follows.

Adding a daycare group

1. Click on the **New** ribbon button.

2. Type in a name, set the maximum number of pets, and tick or untick the days that this group is available on.

3. To save the new daycare group, click on the **Save** ribbon button, or hit the **Enter** key on your keyboard.

Repeat the above process for each group you wish to add.

6. Setting up daycare session types and services

The next step is to set up the daycare sessions that your business offers, and any additional services - within PetLinx, services include activities, feeding, and medication that you provide to your customer's pets while they stay at your facility. These are done in the Services form, which you can open by clicking the **Services** button in the "Setup" section of the Menu.

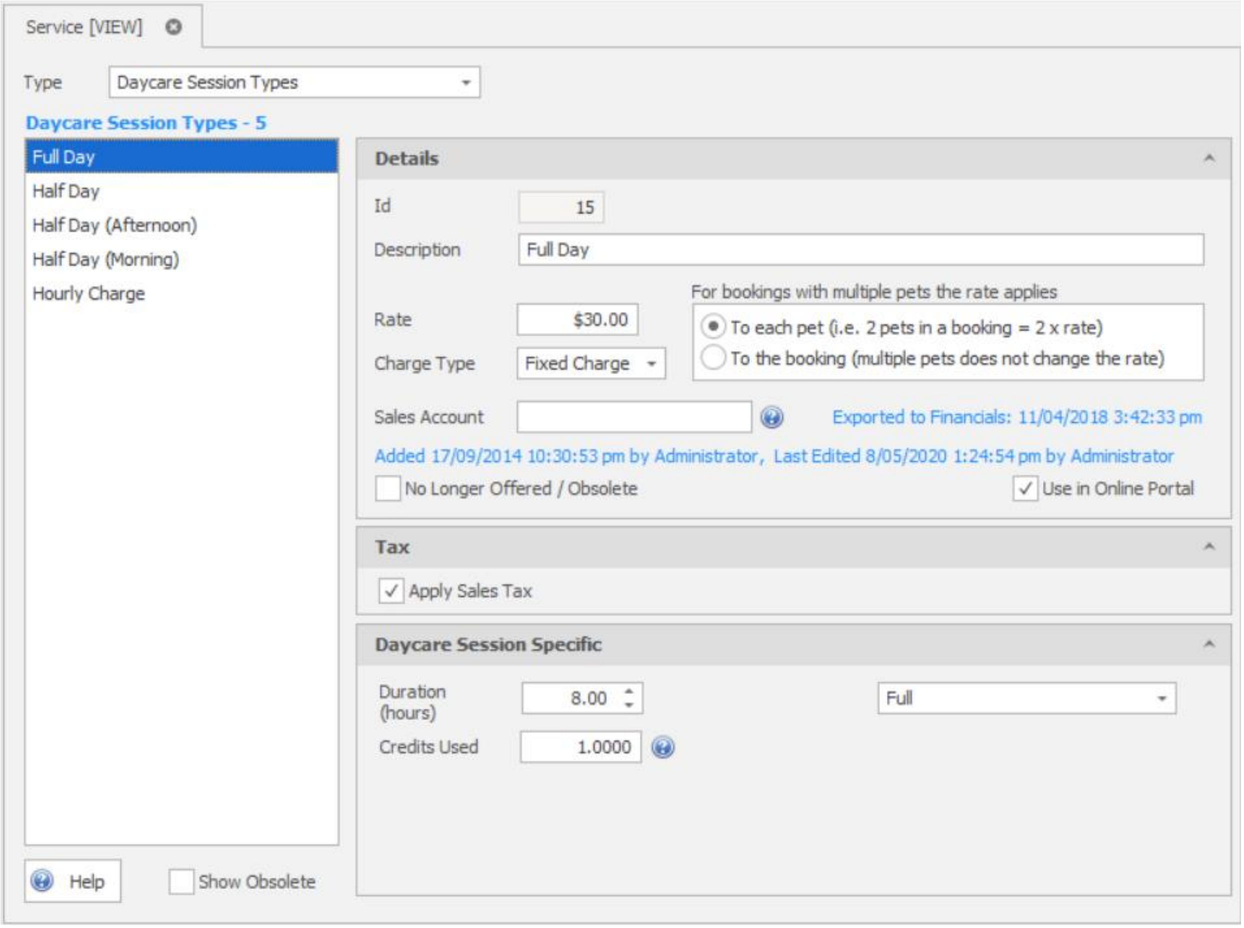


FIGURE 6.1 The Services form, showing daycare session types

Daycare sessions are a special type of service that dictates the type of session provided and related charge of a booking, and is a required entry for each daycare booking. PetLinx comes with five session types defined already: **Full Day**, **Half Day**, **Half Day - Morning**, **Half Day - Afternoon** and **Hourly Charge**. You should change or delete the session types to reflect the type of sessions your business provides.

Changing a daycare session type

1. Change the Type field to "Daycare Session Types".

2. From the list on the left hand side of the form, click the name of the session type that you want to change. The fields relating to this session type will be displayed.

3. Change the description of the session type if required and enter a rate – the rate entered here is only a default and can be changed in an actual booking.

4. The Display Size in Calendar field controls the size of a booking using this session type and provides a quick way to identify the session type in the Daycare Calendar. Note two bookings with the Half Day (Morning) and Half Day (Afternoon) session types respectively will only occupy one space in the day's bookings, as it is assumed the morning booking will be checked out before the afternoon booking is checked in.

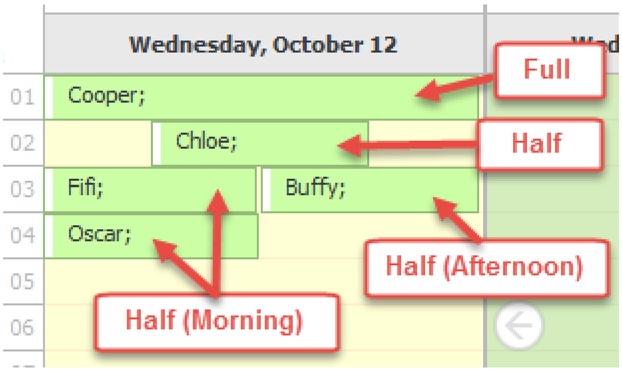


FIGURE 6.2 How the Display Size in Calendar field controls booking sizes in the Daycare Calendar.

5. To save the changes to the session type, click on the **Save** ribbon button or hit the **Enter** key on your keyboard.

Session types you do not offer can be deleted by clicking the session type name in the list then clicking the **Delete** ✕ button in the ribbon.

There are a number of additional services that come pre-defined with PetLinx, these can be changed or deleted as required to suit your business or you can add new services.

Adding a service

1. Change the Type field to "Activities", "Daycare 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 in an actual booking.

4. To save the new service, click the **Save** ribbon button or hit the **Enter** key on your keyboard.

Repeat the above process for each service you provide.

7. Defining daycare rates

The rates you charge for daycare are maintained in the Daycare Rates form. The charge for a booking is calculated on a lookup of the standard rates via the daycare session type selected for a booking, then any applicable discounts are applied to the rate to end up with the final rate to use. Discounts vary your standard rates based on the number of pets in a booking. To open the Daycare Rates form, click the **Daycare Rates** button in the "Setup" section of the Menu.

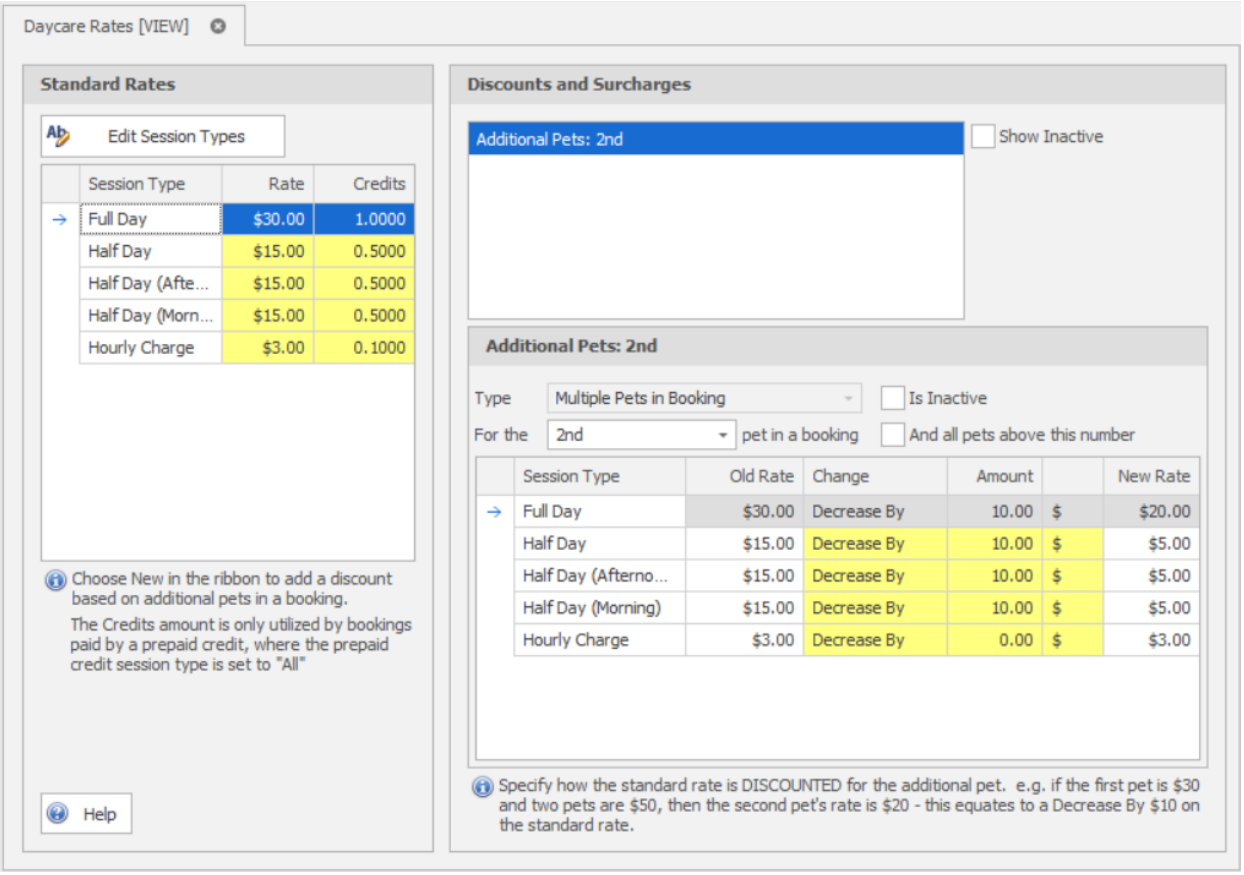


FIGURE 7.1 The Daycare Rates form, showing sample standard rates and discounts

Defining standard rates

1. In the "Standard Rates" section, enter the rate for each session type. The Credits column is used when you create a prepaid credit (see next section) that can be used by any session type, and details how many credits to use. For example if you have a prepaid credit with 10 credits, it could be used up by 10 full day sessions or 20 half day sessions. So you would set Credits Used to "1" for the full day session and "0.5" for the half day session.

2. Click the **Save** ribbon button to save the standard rates.

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

Adding a discount

1. Click the **New** ribbon button.

2. Choose the discount type:

   - **Multiple 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.

3. For each session 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 on the **Save** ribbon button to save the discount.

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

8. Setting up prepaid credits

Prepaid Credits in PetLinx are used if you offer the ability for customers to prepay for a certain number of daycare bookings or for an unlimited number of bookings within a fixed period of time. The range of Prepaid Credits you offer first needs to be defined in the Prepaid Credits form, which you can open by clicking the **Prepaid Credits** button in the "Setup" section of the Menu.

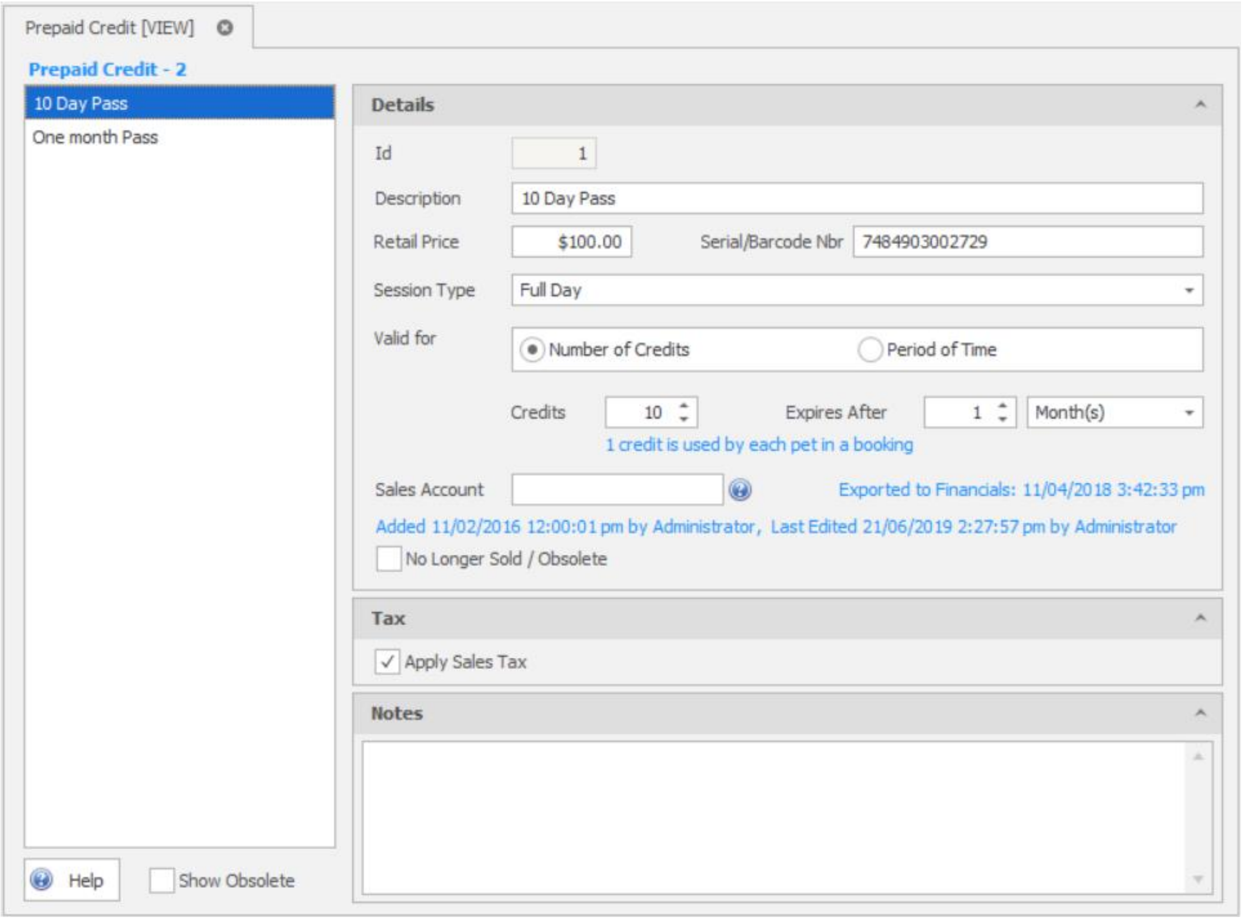


FIGURE 8.1 The Prepaid Credits form with sample prepaid credits

Adding a prepaid credit

1. Click on the **New** ribbon button.

2. Type in the description of the prepaid credit and the retail price – the price entered here is only a default and can be changed when a customer purchases the prepaid credit.

3. Choose the session type that the prepaid credit will be used for, if applicable. If you select a specific session type then only bookings with that session type can use the prepaid credit. With a session type specified, one credit will be used by each pet in a booking. If you leave session type as "(All)", then any session type

can be used and the number of credits used is based on the "Credit" setting in the Daycare Rates form.

4. Tick "Number of Credits" or "Period of Time" as appropriate for the prepaid credit you are adding. The Number of Credits option allows a fixed number of credits, with any unused credits expiring after the "Expires After" period has elapsed from the purchase date. The Period of Time option allows unlimited bookings until the defined "Time" period has elapsed from the purchase date.

5. When done, click the **Save** ribbon button or hit the **Enter** key on your keyboard.

Repeat the above process for each prepaid credit you provide. How to assign a prepaid credit to a customer is covered in chapter 12 of this tutorial, "Creating an invoice".

9. Adding a new customer

You're now ready to add your first customer! Click on 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.

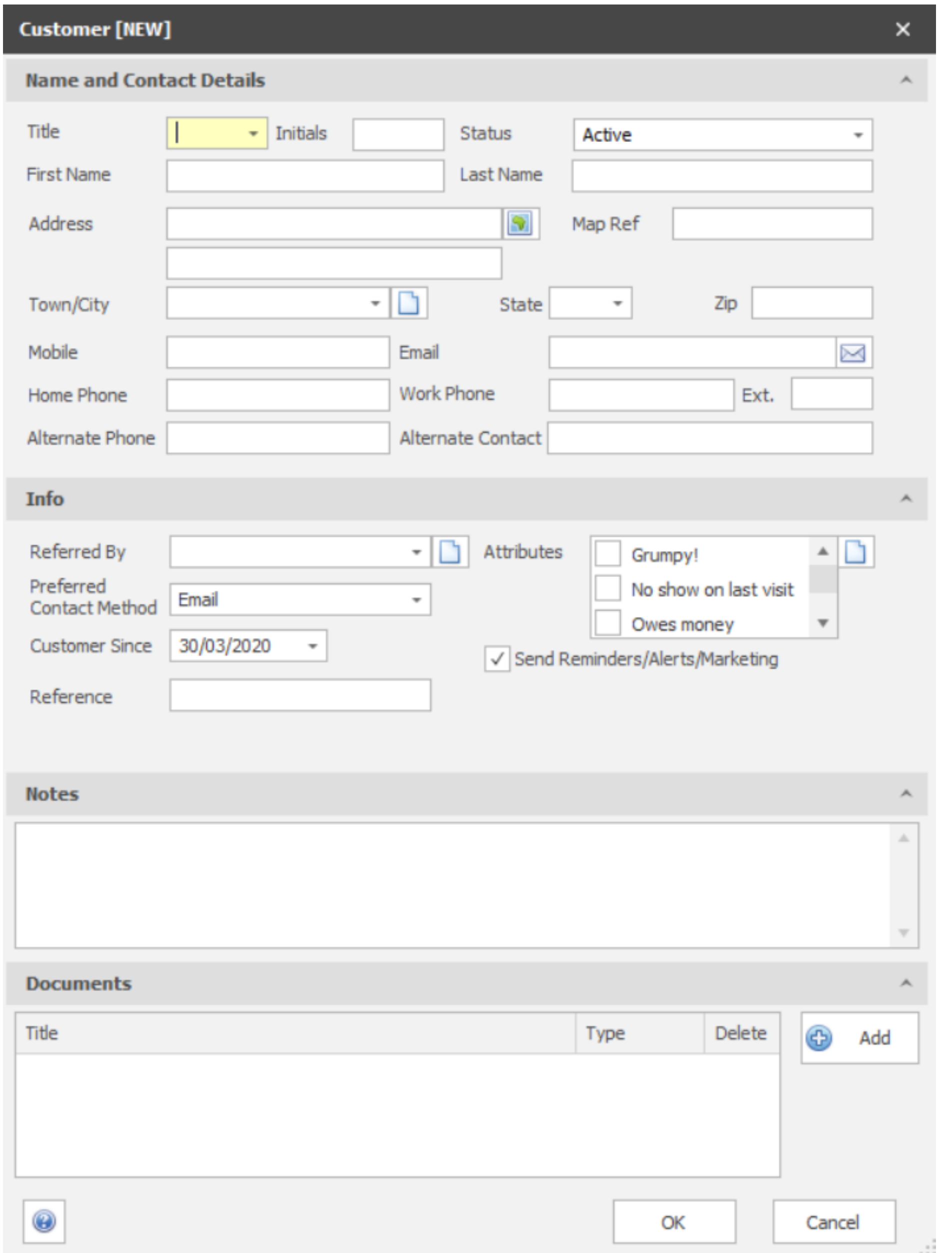


FIGURE 9.1 The Customer form

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”.

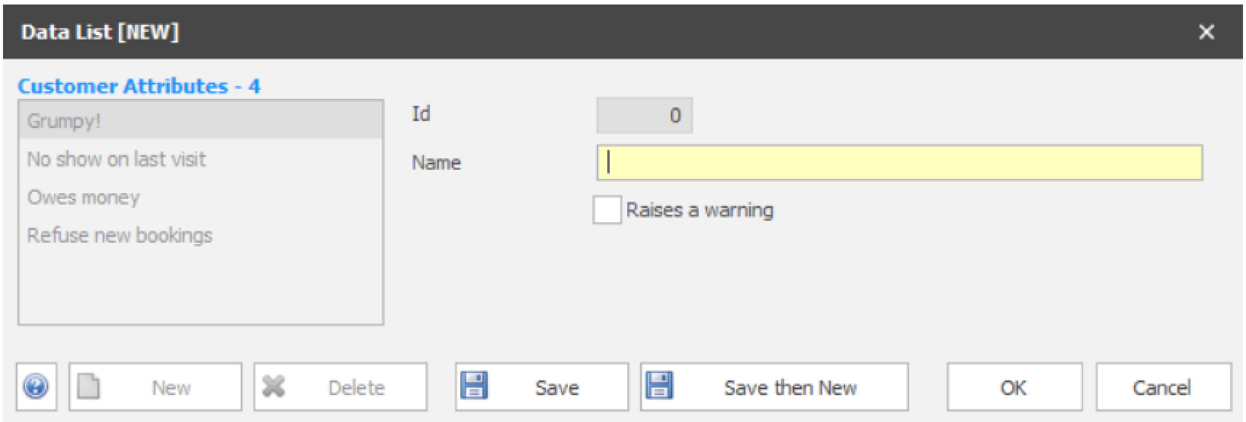


FIGURE 9.2 The Data Lists pop-up form, with Customer Attributes showing

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 on 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 on 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 on 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.

10. 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.

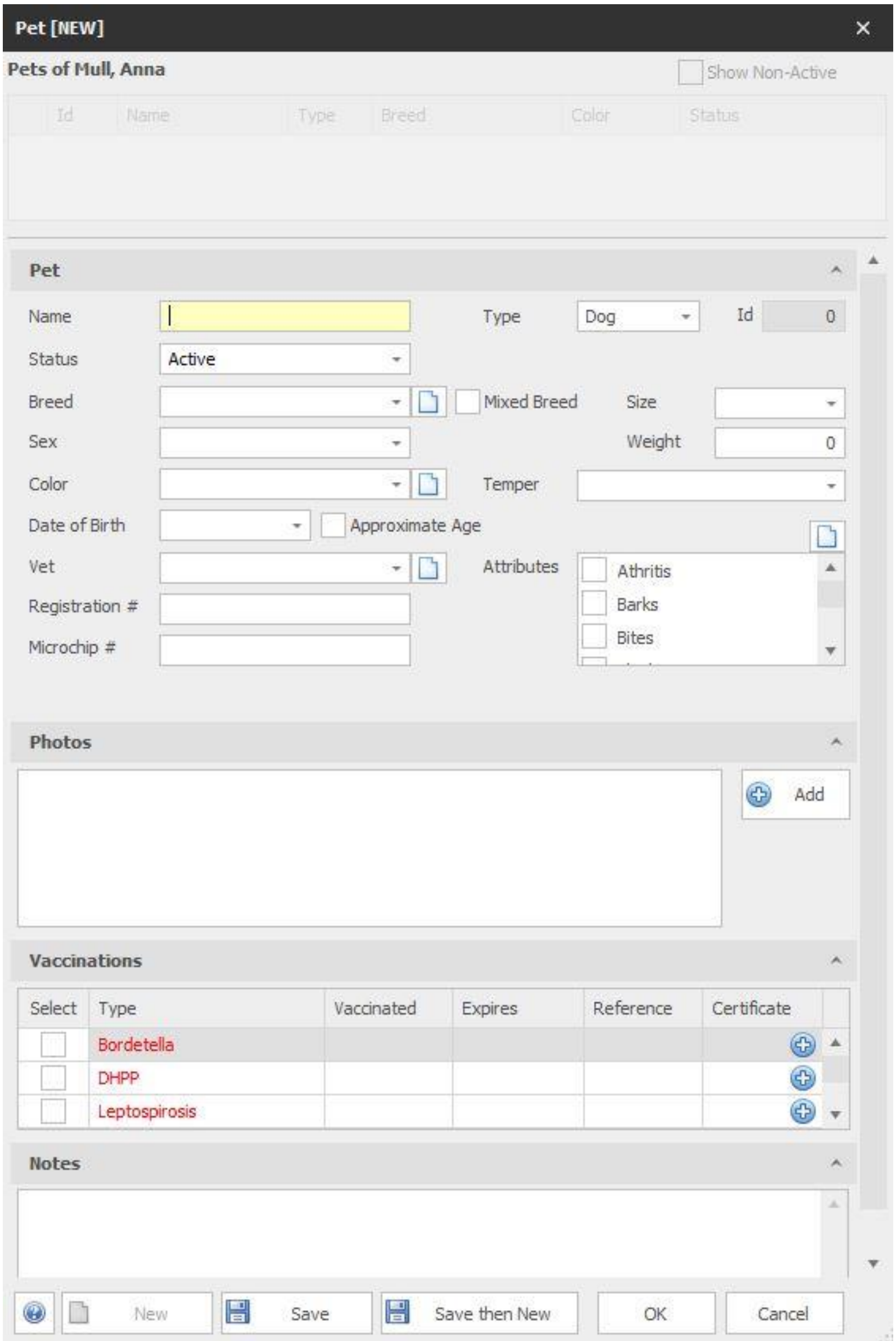


FIGURE 10.1 The Pet form

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.

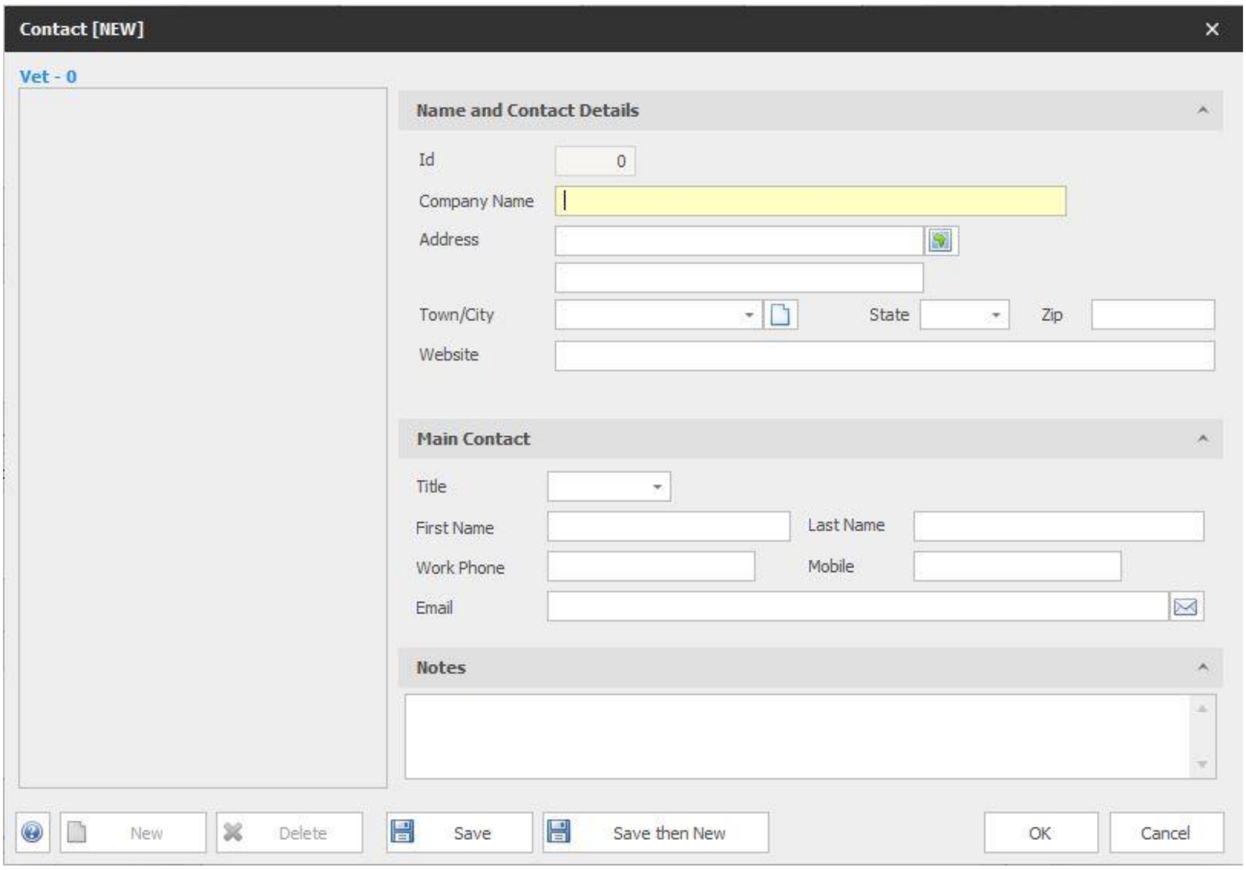


FIGURE 10.2 The Contact form

Enter the vet’s name into the Company Name field, complete the rest of the fields as required, then click on 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** 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 on 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.

11. Making a daycare booking

We will now make a daycare 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 Daycare Calendar form, which we will use for this example.

To open the Daycare Calendar form, click the **Daycare Calendar** button in the "Common" section of the Menu. The Daycare Calendar form gives you an easy method of tracking and maintaining your bookings 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.

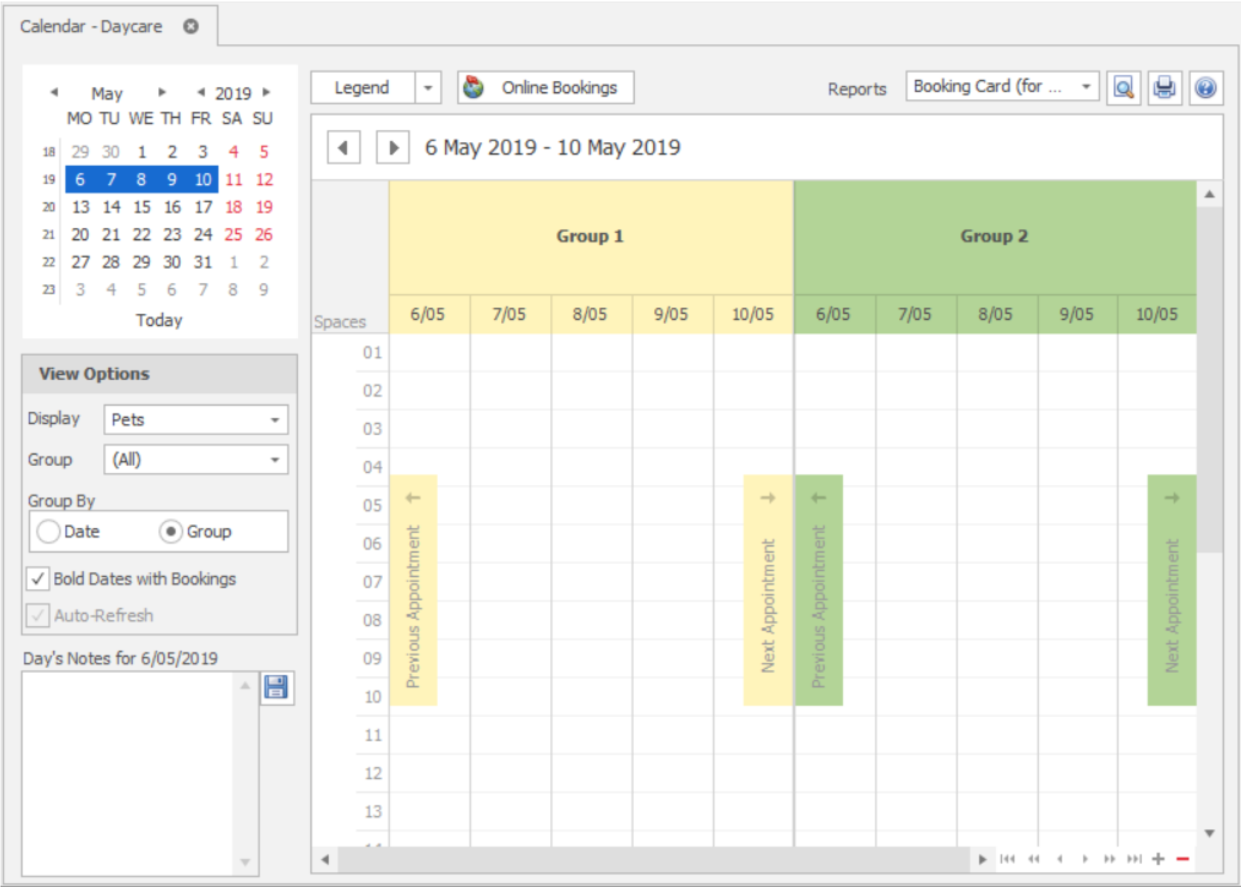


FIGURE 11.1 The Daycare Calendar form, set up with two sample daycare groups

Adding a new daycare booking

1. To make a new booking, first click on the required day in the month view (in the top left corner) to view bookings on that day.

2. In the grid, click in the column of the daycare group that you want to put the booking in, then click on the **New** ribbon button. The Daycare Booking form will appear. The "Date" and "Group" fields will already be set – these can be

changed if you wish. Select the Session Type of the booking i.e. Full Day, Half Day or Hourly Charge.

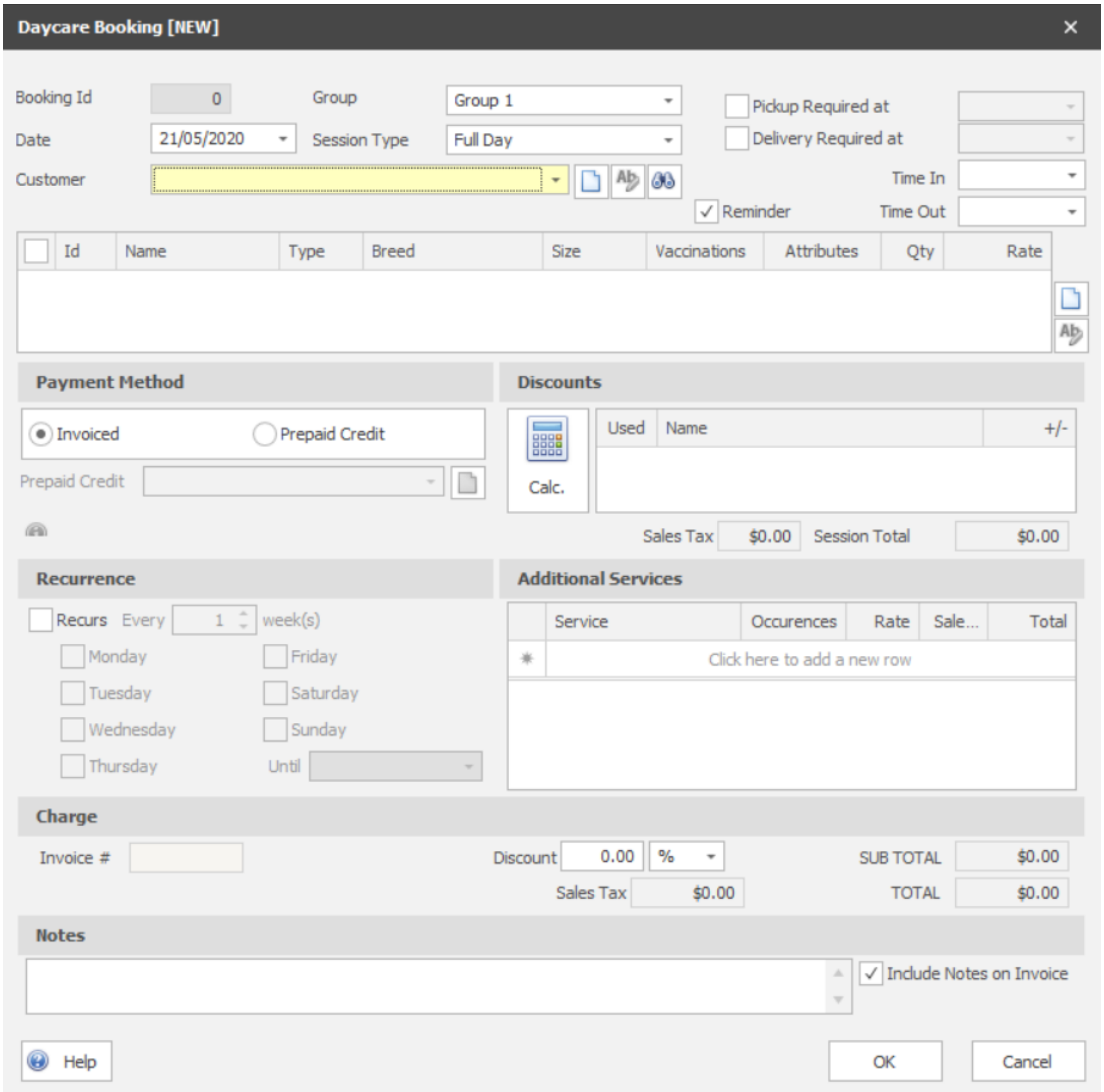


FIGURE 11.2 The Daycare Booking form

3. Select the customer, and the “Pets” grid will be populated with the selected customer’s pets - tick the pets that the booking is for. The Pets grid will display the rate being charged for each pet, based on the session type selected. You can override these rates if required and also the quantity (e.g. if making a 4 hour booking, the “Session Type” would be Hourly Charge and you would change the “Qty” column to 4).

4. Leave “Payment Method” as Invoiced for now – once the customer has purchased a prepaid credit you can change this option to Prepaid Credit, and select the credit to be used. Please see the next chapter “Creating an Invoice” for information on having a customer purchase prepaid credits.

5. If you have chosen multiple pets and you have defined daycare rate discounts for these, they will be checked to see if they apply to this particular booking. If

so, they will be displayed in the Discounts grid and the “Session Total” amount will be re-calculated. Unticking the “Used” column of a discount will prevent it being applied to the booking.

6. You can set the booking to recur every week by ticking “Recurs” and ticking the days to recur on, and optionally specify an end date to stop the recurrence on. Adjusting the number in the “Weeks” field makes the recurrence every 2, 3, 4 weeks as specified.

7. To select additional services for the booking, choose the service from the Service drop-down, and change the number of occurrences and rate if required. Move off the row in the Services grid to add it to the booking. You can add as many additional services to the booking as you wish.

When finished, click **OK** to add the new booking - if you configured PetLinx to send confirmations in the System Options – Daycare 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. You can add new bookings into each group per day until all the spaces for the group are full.

Next we’ll assume that the pet(s) that the booking is for have been brought in, so we’ll set the booking to “Checked In” within PetLinx.

Checking In a booking

To check in a daycare pet, click on the booking in the Daycare 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 pet’s booking has been completed, you can then set it to completed within PetLinx.

To complete a booking, click on the booking in the Daycare 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.

Note: If the booking you are completing is being paid for by a prepaid credit, the required number of credits would be deducted at this point.

12. Creating an invoice

When a customer pays you for one or more completed bookings, or purchases products or prepaid credits 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 grooming booking it is easiest to do it directly in the Grooming Calendar – simply click the booking to be invoiced, then click on the **Create Invoice** $ ribbon button to open a new blank invoice.

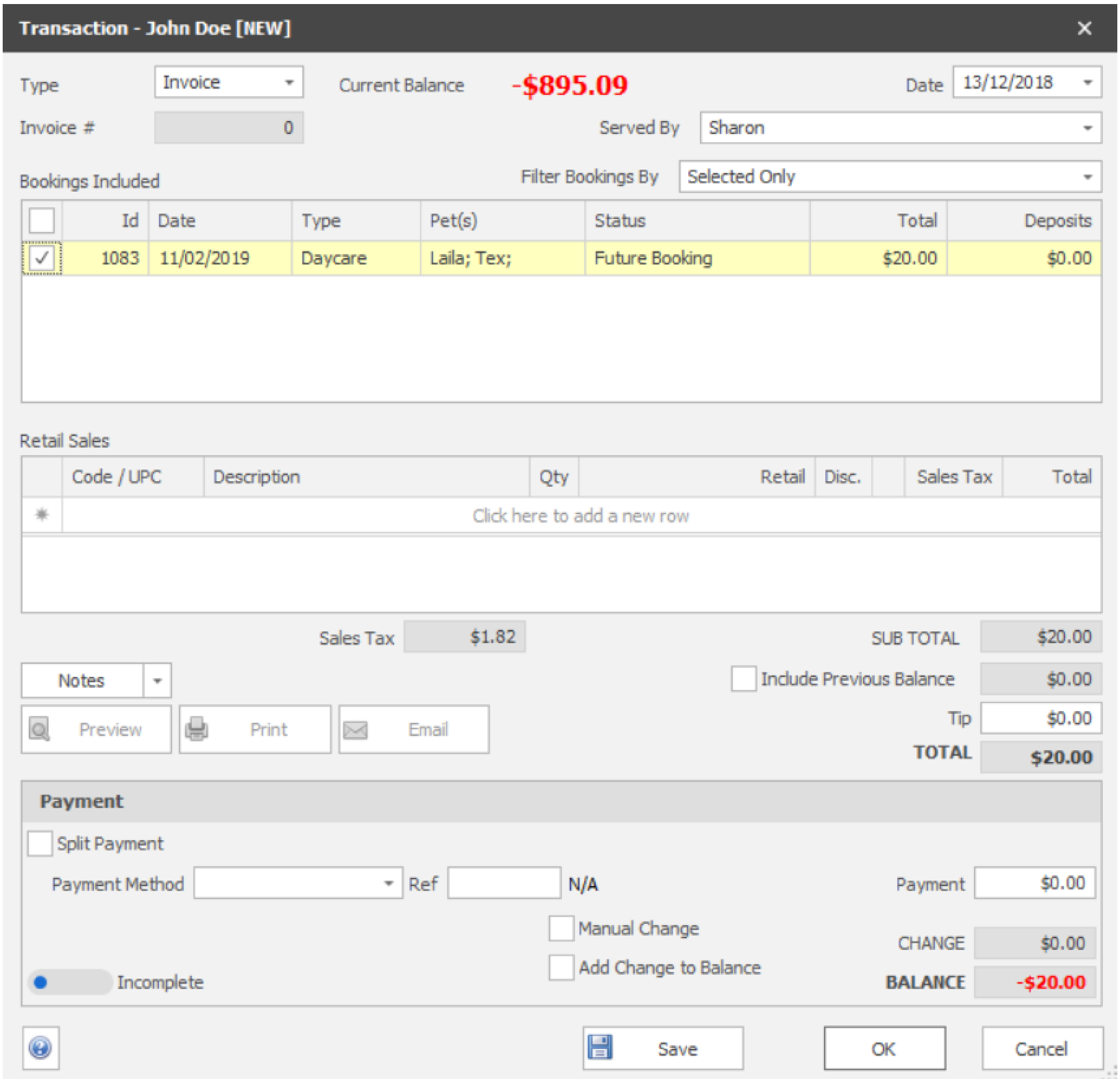


FIGURE 12.1 The Transaction form

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.

Prepaid Credits and 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. Once the invoice is saved, any prepaid credits purchased become available for use in the customer's daycare bookings. You can view a list of all prepaid credits purchased by a customer, by clicking the **Prepaid Credits** tab on the Customer flyout.

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 on 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.

13. 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 trialled 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**.

14. 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 Boarding 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 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 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 labelled **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 Daycare tab

This tab contains information specifically for daycare.

- Indicate the days your business is open on by ticking or unticking each day as appropriate.

- "Default Session Type" is the type of session that new bookings will be initially set to.

- “Create Recurring Bookings…” dictates how far into the future PetLinx will create new recurring bookings.

- To restrict bookings to only pets of a certain type (i.e. dogs), ensure "Restrict bookings to pet type" is ticked and a pet type selected. If unticked, all pet types (both dogs and cats) will be available to add to a 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;

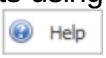
- "Time Format" controls how times are shown in PetLinx i.e. 4'oclock in the afternoon will be "04:00 pm" when 12 Hour is chosen or “16:00 if 24 Hour is chosen.
- "Time Intervals" controls the interval between times available in the time drop-downs used in PetLinx. For example setting this to 15 minutes 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 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.

- "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.