



# PetLinx™ 7 Tutorial

## Using the Online Portal

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# 1. Introduction

The Online Portal at BookMy.Pet provides your customers with a mobile friendly website where they can maintain their details and pet details, and request new bookings with your business. The PetLinX database is synced with the Online Portal so any updates made in either PetLinX or by the customer in the Online Portal will be updated in the other system.

You'll need to turn on the PetLinX Sync process and configure certain settings in PetLinX first before you can start using the Online Portal.

To start, click the **PetLinX Sync** button in the PetLinX Menu to bring up the PetLinX Sync form.

PetLinX Sync
✕

PetLinX Sync is used in conjunction with the BookMy.Pet Online Portal and PetLinX Mobile App. The PetLinX database is synced to an online repository, with any updates made in PetLinX, the portal, or app synced to the other systems. You can choose to use PetLinX Sync with either the Online Portal or App, or both. Please Note: A current PetLinX subscription is required to use PetLinX Sync.

🔔
**Online Portal: ON**

Your Online Portal URL: <https://BookMy.Pet/Test3>

📌 This is your business's online portal web address to provide to your customers.

Online Portal Subscription:

**Monthly Subscription**

Portal & Messaging Settings:

**Settings OK**

Send invitation email to customers who have not registered yet

✓

✓

✓

🛒

Purchase

⚙️

Portal Settings

✉️

Messaging Settings

🔔
**Mobile App: ON**

Set Employees who can use the PetLinX App (logins in the app are via email and password):

	Is App User	Name	Email	Password
→	<input checked="" type="checkbox"/>	Administrator	laz@petlinx.com	***
	<input type="checkbox"/>	Debbie		***
	<input checked="" type="checkbox"/>	Sharon	sharon@petlinx.com	***

Support and Updates Subscription: ✓

**Included**

PetLinX Version: ✓

**Version OK**

Sync: ✓

**Last Sync 16/11/2019 10:09:01 am**

Sync Automatically Every  Minutes

↻

Update

↻

Sync

✖

Clear Online Database

Data	Last Sync
System Options	16/11/2019 10:08:58 am
Data Lists	16/11/2019 10:08:58 am
Vets	16/11/2019 10:08:58 am
Employees	16/11/2019 10:08:58 am
Services	16/11/2019 10:08:58 am
Calendar Days	16/11/2019 10:08:58 am
Runs	16/11/2019 10:08:58 am
Daycare Groups	16/11/2019 10:08:58 am
Customers	16/11/2019 10:08:58 am
Pets	16/11/2019 10:08:59 am
Groom Styles	16/11/2019 10:08:59 am
Grooming Bookings	16/11/2019 10:09:00 am
Employee Unavaila...	16/11/2019 10:09:00 am
Boarding Bookings	16/11/2019 10:09:01 am
Daycare Bookings	16/11/2019 10:09:01 am

FIGURE1.1 The PetLinX Sync form – please note the Mobile App section of this form is not included in this tutorial.

## 2. Setting Up

Once the PetLinx Sync form has opened, click the **Online Portal : Off** switch to turn it on. PetLinx will take a few seconds to create and display your unique Online Portal URL, and check a number of conditions which need to be met in order for the Online Portal to be enabled.

**Your customers will not be able to use the Online Portal until these have been completed (each condition has a green tick beside it):**

- You have a current PetLinx Support and Updates subscription. Click **Purchase** to go to the PetLinx Online Store if it has expired (not applicable for the Cloud edition).
- You have a current Online Portal Subscription. You receive 30 days free use of the subscription when the online portal is first turned on, but will need to purchase a monthly or annual subscription before the 30 days expires.
- The minimum supported version of PetLinx is installed. Click **Update** to install the latest PetLinx update if needed (not applicable for the Cloud edition).
- The Portal Settings are correct, click the button to review these:
  - AutoBackup is turned on (not applicable for the Cloud edition).
  - The grooming and daycare future recurring booking period must be set to 6 months for grooming, 4 months for daycare, or less. The Online Portal allows your customers to book up to 3 months into the future for grooming and daycare, so by leaving the recurring booking period at 4 to 6 months in PetLinx you will ensure all existing customer's recurring bookings have been created and will be reflected in the Online Portal.
  - For each module you use, you will need to set the "Use in Online Portal" field on various items in PetLinx as appropriate:

**Grooming:** Your customers will choose from one or more grooming services, which you indicate in the Services form. Other service fields which impact the Online Portal are "Rate", if a non-zero rate is specified this will show in the Online Portal next to the service name; and "Duration" which decides how much time the booking will reserve when that service is chosen. You can also choose it multiple pets multiplies the duration, or if the duration stays constant irrespective of the number of pets.

**Daycare:** Define which daycare session types the customer can choose from in the Services form. Daycare groups which you want to be available for booking into are indicated in the Daycare Groups form. The number of spaces available to be booked in the Online Portal is calculated by the total number of spaces of the portal daycare groups you have indicated, minus any existing bookings in those groups.

**Boarding:** Define which run types the customer can choose from in the Data Lists form (choose "Run/Unit Types" in the "Type" drop-down). The

number of spaces available to be booked in the Online Portal is based on the number of runs that are unbooked, for those portal run types you have indicated.

- No duplicate or invalid email addresses. Your customers will sign in with the email address that has been stored with their customer record, so these need to all be correct. Click the **Report** button to display a list of emails that need correcting, which you can then print.

## Optional Settings

There are a number of other optional settings you can change under the **Portal Settings** button.

- "Email me when a customer makes a new booking request" sends you an email whenever a customer books in the Online Portal. You will always be notified in the PetLinx calendars and the customer will always receive an email when booking, irrespective of this setting.
- "Enable customers to add/change their pet's vaccination details" - untick this option if you do not want your customers to change their pet's vaccination details within the Online Portal (for example, if you will control any change of vaccination status yourself within PetLinx).
- "Prevent registrations from new customers" if ticked will prevent customers who are not already in your PetLinx database from registering on the Online Portal. New customers will be directed to contact you directly for registration. Customers who are already in your PetLinx database will still be able to register using the email that is linked to their profile.
- "Enable bookings for" lets you control which modules your customers can make booking requests for in the Online Portal. At least one module must be ticked.
- "Message to display to customer after a booking request" enables you to enter a message for the customer to view once they book in the Online Portal.

## Enabling Selection of Groomers

If using the Grooming module you can choose whether to let your customers choose a groomer when booking, or book without selecting a groomer. To specify which groomers are available for selection, close the Online Portal form and open the Employees form. For each groomer, tick the employee's **Enable this groomer to be selected when booking** option in the Grooming section. You can also specify the name which will be shown to the customer. If you have at least one groomer selected to be available in the Online Portal, then the customer will be able to choose that groomer and see that groomer's schedule to make a booking. There is also an "Any" groomer which combines all the groomers schedules and shows availability in a timeslot if at least one of the groomers is available at that time.

If you would rather not allow your customers to choose a specific groomer, simply don't tick the Online Portal option for any of the groomers. This will prevent the Groomer selector

being shown in the Online Portal and the schedules of **all** groomers you have defined in PetLinX will be combined when calculating availability.

## Messaging Settings

Messages are sent to your customers from PetLinX when you accept or decline a booking request. These are setup under the **Messaging Settings** button.

For each module you use, choose to either send an email or SMS based on the customer's "Preferred Contact Method" field, or to always send an email and/or SMS. You will need to specify a subject for emails, and also select different templates to use for the content for booking acceptances and declines. These templates are created in the Email Template Editor and SMS Template Editor; when creating a new template there you will need to set the template type to Grooming Booking, Boarding Booking, or Daycare Booking as appropriate when prompted.

The screenshot shows the PetLinX Email Template Editor interface. At the top, there is a ribbon with three tabs: 'File', 'Mail Merge', and 'Insert'. The 'Mail Merge' tab is active, showing four buttons: 'Set Template Type', 'Insert Merge Field', 'Show All Field Codes', and 'Show All Field Results'. Below the ribbon, the 'Email Template Editor' window is open, displaying the BookMy.Pet logo and a sample email template. The template text is as follows:

**Dear «PetName»**

We're pleased to accept your online booking request on «ApptDate» at «ApptTime\_12Hour»!

We look forward to seeing you then.

Regards,  
The team.

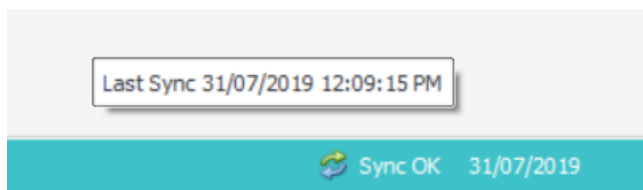
### 3. Syncing

Once you have a green tick besides every condition in the Online Portal form, you'll then be able to sync your PetLinx database with the Online Portal - click the **Sync** button to do this. The very first time you sync may take up to 10 minutes to complete depending on the size of your database. Once the initial sync is completed, your Online Portal is enabled and ready to be used!

PetLinx will continue to sync automatically in the background whenever PetLinx is running, you can adjust the time between syncs to as little as 5 minutes. Any changes made in PetLinx will be synced to your Online Portal, and vice-versa.

If you any reason you want to remove your data from the Online Portal (for example if you no longer wish to use it), click **Clear Online Database**. This will delete all your online data, but your PetLinx database will not be affected. Click **Sync** again after clearing your online database to re-sync your database to the Online Portal.

The status of the sync is always displayed in the bottom right corner of PetLinx, either "OK" or "OFF" if there is a problem. If the status is showing as OFF then open the Online Portal form to review the reason. Hovering over the sync status displays the last time that the sync was run.



## 4. Using BookMy.Pet and Reviewing Bookings

We recommend testing the Online Portal with yourself as a sample customer first to ensure it is configured as you require it. In the Online Portal form, click your Online Portal URL to go to your business's BookMy.Pet web page. Note your business contact details are shown at the top of the page, you can also add your logo and also a terms and conditions document (text format only) that new customers must agree to in order to register. These are set in the System Options - Business Details tab of PetLinx. You'll notice items such as grooming services, run types, and daycare sessions that have been synced from PetLinx, and the booking calendars should reflect the days and times when you are booked out.

**If you are already entered as a “customer” in PetLinx:** In PetLinx locate your customer record and click **Send Online Portal Invite**, and after a short while you should receive a message that an email has been sent to you.

The screenshot shows a customer record form with the following fields and options:

- Info** section:
  - Referred By: Magazine Ad
  - Preferred Contact Method: Text Message
  - Customer Since: [empty]
  - Reference: [empty]
- Attributes** section:
  - No show on last visit
  - Owes money
  - Refuse new bookings
  - Send Reminders/Alerts/Marketing
  - Send Online Portal Invite** (highlighted with a red box)

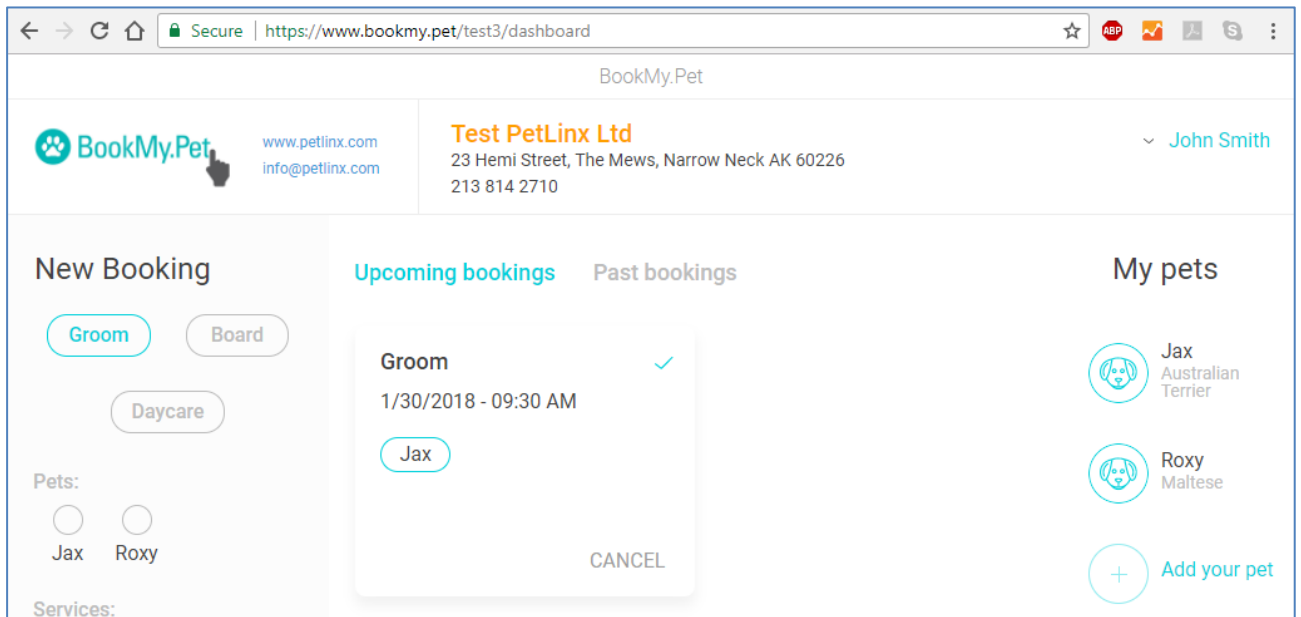
Once you receive this email, click the link in it which will take you to the "Existing Customer Registration" page in BookMy.Pet. Enter your email address and a password, then click **Register**. A confirmation email will be sent to you; click the link in the email and you'll be returned to BookMy.Pet with a message stating your registration has been confirmed. Click the **Sign In** button in the top right of BookMy.Pet and login with your email and password. All going well you should then see a list of your pets and any bookings linked to your customer record.

You can use the **Send Online Portal Invite** button on select customer records to send invites to them as well, before turning on the option to let all your customers know of your online portal.

**If you are NOT entered as a “customer” in PetLinx:** Click the **Register** button in BookMy.Pet, and enter your details and add one or more pets. Once you've added at least one pet you will receive an email confirming your registration.

Once you're registered, make a sample booking – it should be easy enough to do without instructions needed, as this is what your customers will be doing too. Once you've made a booking you'll be taken to the dashboard where you can review your upcoming and past bookings.





Upcoming bookings can be cancelled up until the day before they are scheduled for by clicking the **Cancel** button in the dashboard. The customer is required to enter a reason for the cancellation.

Back in PetLinx, booking or cancellation requests made by customers display in the Calendar matching the booking type (i.e. the Grooming Calendar shows grooming booking requests). After the sync completes, the "Online Bookings" section of the Calendar will open automatically to display any new or existing pending booking or cancellation requests. New or cancelled bookings can only be made in BookMy.Pet for future dates, bookings due today cannot be cancelled or booked.

For each **New** booking, choose from one of the three options:

- **Review** - this displays the booking enabling you to view it's details and make any changes you require. If you accept the booking you may need to complete certain parts such as choosing a groomer, selecting a run, or choosing a daycare group. Choose **Accept** to accept the booking and have it added into your Calendar, and your acceptance email/SMS will be sent to the customer. Alternatively, choose **Decline** and your decline email/SMS will be sent to the customer instead.
- **Delete** - deletes the booking without notifying the customer. Use this option to get rid of test bookings or bookings made erroneously.
- **Decline** - declines the booking and sends your decline email/SMS to the customer.

Online Bookings										
New (4)				Cancelled (1)						
	Id	Date	Time	Customer	Pets	Services	Review	Del...	Decline	
→	52247	14/06/2019	10:30	Eliseeva, Anastasia	Trent;	Pet Grooming (Mediu...				
	52285	3/07/2019	12:00	Smith, John	Jax;	Bath; Clip Nails;				
	52290	30/07/2019	09:30	Smith, John	Jax;	Pet Grooming (Small ...				

Click the **Cancelled** button if you have cancellations to review. For each booking, choose either:

- **Accept** – accept the cancellation request and cancel the booking.
- **Decline** - decline the cancellation request. The booking will stay as a future booking in PetLinx.

Online Bookings									
New (4)			Cancelled (1)						
	Id	Date	Time	Customer	Pets	Reason	Accept	Decline	
→	52264	24/12/2019	13:00	Smith, Laurence	Rover; Jasmine;	Sorry, I can't make this time anymore!			

## Advising your customers of BookMy.Pet

Once you are happy with the setup of your Online Portal and ready to tell your customers about it, go into the Online Portal form and tick the **Send invitation email...** field at the bottom. The next time the sync runs, each customer with an email address in your database will have an invitation email sent to them, inviting them to start using BookMy.Pet. This will continue for each customer you add in PetLinx with an email address in future. **Please Note:** emails will not be sent to customers with statuses "Inactive" or "Active - Alert", or that have "Send Reminders & Marketing Messages" unticked.

New customers who are not in your PetLinx database will be able to register themselves and add their pet details at your Online Portal. However if they enter an email address or mobile number that already exists in your database, they will be prevented from registering to avoid creating duplicate customer records.

**Publicize your Online Portal everywhere!** Add your unique BookMy.Pet link to your website, include it on your email signature, or include it as a in your social media accounts. For a BookMy.Pet logo to use with your link please download from <https://www.bookmy.pet/images/bookmypetlogo.png>.