



WOMEN'S ANIMAL CENTER

America's First Animal Shelter

PROCESSING AN ADOPTION

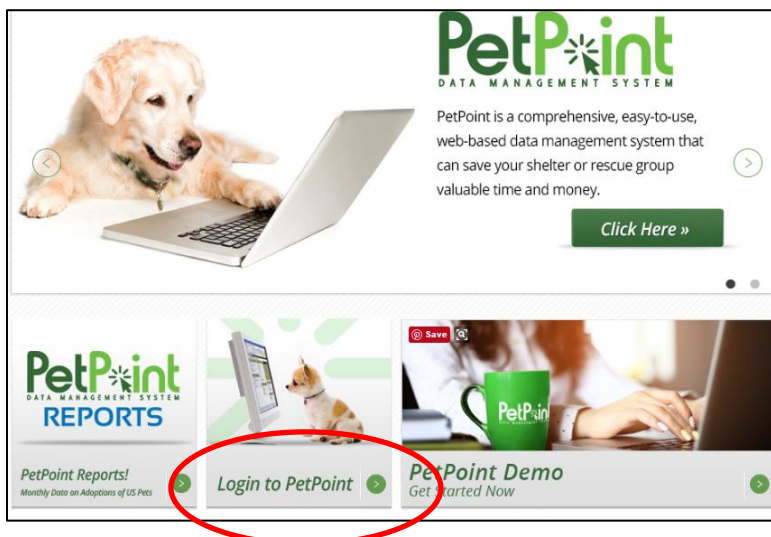
PetPoint is our CRM (customer relationship management) system, designed specifically for use at animal shelters, and while it's fairly user-friendly all things considered, it's still a CRM and has its quirks. There are a whole lot of facets to this system, but since we're focusing on adoptions, we're just going to walk through that particular process.

TABLE OF CONTENTS

Getting Started.....	pg. 2
Inputting Adopter's Information.....	pg. 3
Inputting Animal's Information.....	pg. 5
Inputting Outcome Details.....	pg. 8
Printing Documents.....	pg. 9
Creating a Receipt.....	pg. 12

GETTING STARTED

Go to petpoint.com and click on the Login to PetPoint link at the bottom:

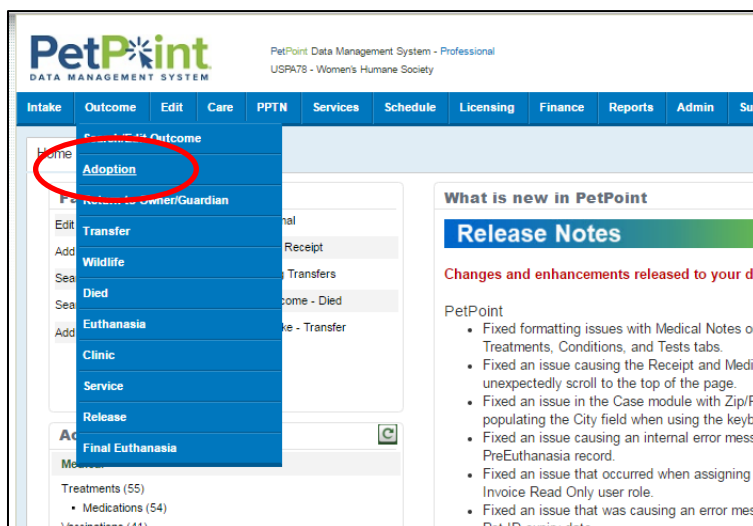


Women's Animal Center Shelter ID is **USPA78**

Your User Name is: **volunteer** The Password is: **Womens1869!**

Once you sign in, you're going to arrive at the home page.

To start an adoption, you're going to click on "Outcome" on the top menu, and choose "Adoption" from the drop-down.



INPUTTING ADOPTER'S INFORMATION

You will be brought to the “Person” screen now.

Outcome - Adoption

Search Person

Person # Person Info

Promotion* Yes ▾

Person Search

Person Search Criteria: Name ▾ First: Middle: Last: Find

☐ Fuzzy Search Clear Person Search

Create New Person

Always to make sure that the person adopting doesn't already exist in the system. We want to avoid creating duplicate records. Just to cover my bases, I usually just search for the first couple letters of both the first and the last name as sometimes, for instance, “David” will actually exist in the system, but he’s listed as “Dave.”

When you click “Find” on the right side of the screen, you’ll likely get a list of results something like this:

Person Search Criteria: Name ▾ First: la Middle: Last: ho Find

☐ Fuzzy Search Clear Person Search

Select	First Name	Last Name	Phone	Phone Type	Address	Address Type	ID Number	ID Type	Person Memo	Case Memo
P18088407	Lauren	Horan	(267) 458-8493	Home	8918 Eastwood Street PHILADELPHIA, 19149, PA - Home	Home			No	No
P23823047	Laurie	Horn	(267) 288-4242	Cell	1781 Whitebriar Road SOUTHAMPTON, 19086, PA - Home	Home	22854457	Driver License	No	No
P25051931	Laurie	Horn	(267) 844-3800	Home	2452 Elfreths Avenue BENSALEM, 19020, PA - Home	Home			No	No
P20158071	Lawrence	Holmquist	(267) 770-9433	Home	14 Islet Road LEVITTOWN, 19057, PA - Home	Home			No	No

1

2

Create New Person

Record Count: 4 10 / Page ▾

If they show up on the list, you’ll want to click the P-Number (1) in the left column. If the name is a match and the address is not, I always confirm that they haven’t lived at that address before creating a new person. If they’re not on the list, however, “Create New Person” (2) at the bottom is your button.

When creating or editing a person in the adoption screen, you'll be brought to the "Person Express" page, which is basic contact information.

The screenshot shows the 'Person Express' form with the following fields and callouts:

- 1: First Name*
- 2: Last Name*
- 3: Address Number*
- 4: Street Name*
- 5: State*
- 6: Address Type*
- 7: Phone Number 1*
- 8: Type* (for Phone Number 1)
- 9: Email Address 1*
- 10: Type* (for Email Address 1)
- 11: Zip Code
- 12: Double arrow button next to Zip Code
- 13: Date of Birth
- 14: ID Number
- 15: ID Type
- 16: ID Issuer
- 17: Association

Other fields include: Person ID (NEW), Salutation, Middle, Suffix, Gender, ID Issue Date, ID Expiry, No Addresses, No Phone Numbers, No Email Addresses, Country (United States), Direction, Street Type, City, City Alias, Jurisdiction, County, Do Not Call, Association Subtype, From, To, Do Not Contact, Add Person, Save, Clear, and Lock Record.

You are required to fill out the bolded/asterisked fields in order to save a record:

1. First Name
2. Last Name
3. Address Number
4. Street Name
5. State
6. Address Type (usually "Home")
7. Phone Number and (8) Type (usually "Cell")
9. Email Address and (10) Type (usually "Personal")

We also want

11. Zip Code: if you enter the Zip Code and choose the State and then click the double arrow (12) PetPoint will autofill "City" and "City Alias"
13. Date of Birth,
14. ID Number
15. ID Type (Dropdown menu, will usually be Driver's License)
16. ID Issuer (Usually the state which issued the Driver's License)
17. Association (Adopter)

Once all that information is entered, click "Save" at the bottom. That saves the any information you've added to the person's record and will bring you the animal search screen.

INPUTTING ANIMAL INFORMATION

Outcome - Adoption - New Person: Laura Horton

Search Person **Animal**

Promotion* No ▾

☒ Create Ownership / Guardianship Record

Animal Search

Animal Search Criteria: Animal Number ▾ Animal #:

Find Advanced Search

Clear Animal Search

The fastest way to find the animal is always going to be the A-Number, which appears on the Kennel Card beneath the photo and name:

Adoption Kennel Card Tel.: 215-750-3100



Adopt and Protect this pet with the 24PetWatch Trial of Pet Insurance. Visit us at www.24PetWatch.com or call 1.877.291.1524. Make sure they can always find their way home with 24PetWatch lost pet recovery services. For more information visit www.24PetWatch.com or call 1.866.597.2424.

24PetWatch
PET PROTECTION SERVICES

 **WOMEN'S HUMANE SOCIETY**
AMERICA'S FIRST ANIMAL SHELTER • FOUNDED 1891

Parker

Animal ID: A35220984 Stage: Pending Medical Assessment Review Date: Location: Shelter/Holding - Dog

Description:
Parker Terrier, Pit Bull/ Mix, Black/ White/, 42.00 pound
Dog 2 y 2 m 0 d DOB: 4/29/2015 Currently Altered: Yes

You can also search by name, but **make sure to choose "Active Only"** and be sure you're choosing the **correct animal!** We often have duplicate names. Again, the easiest way to match is to cross-check the A-Number, but you can also use read through the row to make sure color/breed/age etc. matches up.

Animal Search Express Details Photos/Videos Profile Memos Identifications Vouchers/Waivers Holds Stage/Location

Animal Search Criteria: Name ▾ Animal Name: vargas Site: -- All --

☒ All ☒ **Active Only** ☐ Inactive Only ☐ Fuzzy Search

Find Advanced Search

Select	ARN	Status ^	Stage	Species	Primary Breed	Secondary Breed	Name	DOB	Sex	S/N	Primary Color	Secondary Color	Color Pattern 1	On Hold	Memo	Location	Sub Location
A34011473		Active	Available	Dog	Argentine Dogo		Vargas	5/17/2011	M	Y	White	Black	Spotted	No	Yes	Shelter	Adoptions - Dog

Choose the animal by clicking on the A-Number in the left-most column, and you will be brought to the “Animal Express” screen

You may need to add Microchip information if the animal is not already chipped. The issuer will be 24PetWatch if we gave the chip

Please also take note of the animal’s condition/asilomar as these will come into play later in the adoption

If you’re doing a single adoption, you’ll want to click “Save” at the bottom, to save any information you’ve added to the animal’s profile, and then scroll to the **green tabs** at the top and click “Details” (A)

If you’re doing a double adoption, you’ll click “Save,” and then scroll up to the **blue tabs** and click “Animal Search” (B) to find your second animal, add Microchip information if necessary, and then click “Save” to add that Animal to the Outcome as well.

Search **A** Animal Details

Animal ID's Animal Info

A35131097 Active Saber - Dog Boxer - Brown/White - Brindle
 Available Male - 4-6yrs Adult 5 y 2 m 10 d , DOB: 4/19/2012, Altered: Yes, Size: Medium.
 4C35514B3D Bitten: No Bite History, Danger: No

Print: -- Kennel Card -- -- Documents -- -- Medical Documents --

Jump To: -- Outcome -- -- Edit -- -- Care/Services --

Promotion* No

☒ Create Ownership / Guardianship Record

B Animal Search Express Details Photos/Videos Profile Memos Identifications Vouchers/W

If you've accidentally added an animal to the adoption, you can remove them while on the Animal Tab (Green), and selecting the checkbox next to the animal you'd like to remove and clicking "Remove Selection"

Outcome - Adoption - New										Person: Laura Horton	
Select	Animal #	ARN	Status	Name	Species	Breeds	Outcome Subtype	Status	Status Date/Time	Release Date	Promotion
<input type="checkbox"/>	A35220984		Active	Parker	Dog	Terrier, Pit Bull		New	08/29/2017 04:09:41PM		Offer
<input checked="" type="checkbox"/>	A34011473		Active	Vargas	Dog	Argentine Dogo		New	08/29/2017 04:10:18PM		Offer
Apply Selection Remove Selection 1 Record Count: 2 25 / Page											

Once the animals that are being adopted appear at the top of the page, you can move on to the green "Details" tab at the top of the page.

Inputting Outcome Details

Outcome Details

Record # NEW Status* Completed Status Date/Time* 06/29/2017 04:14:33 PM 1 Record Owner* -- Select -- 2 Site* -- Select --

Outcome Type* Adoption Outcome Subtype* -- Select -- 3 Asilomar Status* -- Select -- Happy Tails Expiry Date 07/29/2017

Jurisdiction -- Select -- Zip Code 19144 State* Pennsylvania City PHILADELPHIA City Alias PHILADELPHIA

Release Status* Immediate Release Scheduled Date/Time 06/29/2017 04:14:33 PM Scheduled With -- Select -- Release Date/Time* 06/29/2017 04:14:33 PM Release By* -- Select --

Created Date/Time	By	Last Updated Date/Time	By
6/29/2017 4:14:33 PM	lhorton	06/29/2017 04:14:33PM	lhorton

Client Communication Consent

Please click the Consent button to enter the person's consent to receiving commercial electronic messaging. 5 Consent

Consent History

Current Client Communication Consent has not been Selected

Please click here review our Privacy Policy.

Please click here for contact and unsubscribe information.
USA - PTZ Insurance Agency Ltd. and Pethealth Services (USA) Inc.
Canada - PTZ Insurance Services Ltd. and Pethealth Services Inc.

Stage & Location Express

Stage -- Select -- Review Date Site -- All -- Location -- Select -- Sublocation -- Select --

6 Submit Outcome Save Details Clear Lock Record

- (1) Record Owner: It's a drop-down menu with names of some of our staff. You'll want to have whichever adoption counselor is there that day with you.
- (2) Site: There's only one option, Women's Animal Center
- (3) Outcome Subtype: almost always going to be "Onsite" for adoptions that you'll be processing
- (4) Release By: again will be whichever adoption counselor is there with you that day..
- (5) Consent: By clicking consent, you'll open a pop-up window where you will choose "Yes," and then click "Close"
- (6) Submit!

Printing Documents

Now it's time to print some documents

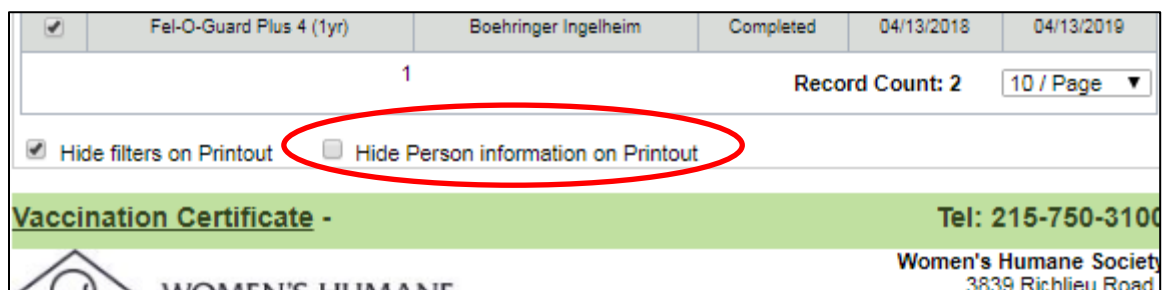
The first document you'll print is the one with the Microchip information on it. To do that, you'll want to click on the green button with the animal's A-Number in the middle of the page.

Search	Person	Animal	Details	Summary
Person Info				
23681251	Amy Loveland	215-736-1137 (Home)	5605 Greenlee Drive MORRISVILLE, PA, United States (Home)	
				Person View Report
Adopter Downloads				
<p>Adoption Staff:</p> <p>Please print and review the Adopter Downloads with the adopter of each animal.</p> <p>Thank you.</p> <div style="border: 2px solid red; border-radius: 50%; width: 100px; margin: 0 auto; padding: 5px; text-align: center;"> A35800566 </div> <p><small>Click the button above for each adopted animal to download the Adopter Downloads PDF file.</small></p>				
Actions				

Then there are three documents to print from the "Medical Documents" dropdown menu, under Actions > Print.

Person Info		
P28161175	Laura Horton	203-273-2485 (Home)
134 W Duval Street PHILADELPHIA, PA, United States (Home)		Person View Report
Actions		
Jump To:	-- Intake --	-- Edit --
	-- Care/Services --	Issue Refund
Print:	A35746671 - LoLo - Rabbit	Create Receipt
		Contract
Print:	-- Kennel Card --	-- Documents --
		-- Medical Documents --
Animal Info		
A35746671	LoLo	Standard/Standard, Black, Small, 4.02 pound
	Rabbit	2 y 6 m 5 d , DOB: 12/24/2014, Spayed/Neutered: No
	Male	Declawed: None

With each of these, remember to choose the option to “hide person information on printout”



The screenshot shows a record for a vaccine. The top row contains: ☒ Fel-O-Guard Plus 4 (1yr), Boehringer Ingelheim, Completed, 04/13/2018, 04/13/2019. Below this is a table with one row containing the number '1'. To the right of the table is 'Record Count: 2' and a dropdown menu showing '10 / Page'. Below the table are two checkboxes: ☒ Hide filters on Printout and ☒ Hide Person information on Printout. The latter is circled in red. Below the checkboxes is a green header for 'Vaccination Certificate -' with 'Tel: 215-750-3100' on the right. At the bottom, it says 'Women's Humane Society' and '3839 Richlieu Road'.

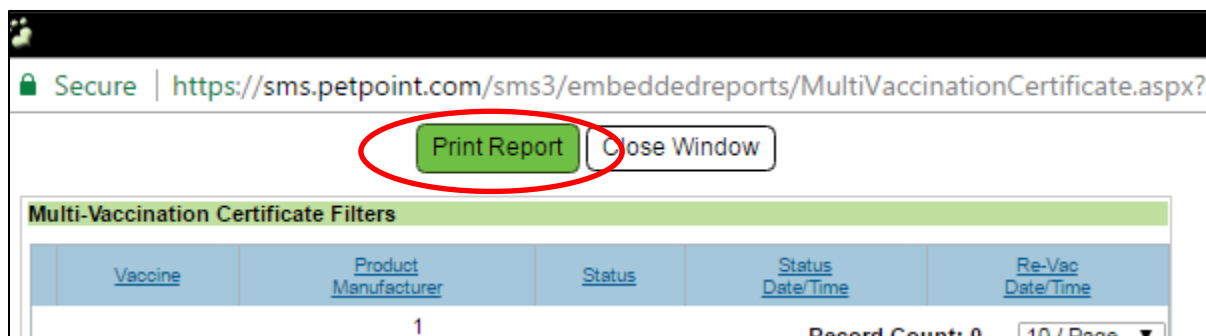
The first is the “Multi-Vaccination Certificate,” which will open a pop-up window. Click “Print Report.”

Next is the “Surgeries Report” or the “Medical Certificate,” depending on whether or not the animal was already spayed or neutered when they came in.

For any animal that was spayed or neutered during their stay here, the ‘Surgeries Report’ will populate with the surgery¹. To print, click the Export icon (looks like floppy disk with a green arrow) and choose “PDF.” That will download a PDF. Open the PDF and print from there.

If it doesn’t populate with anything, they were altered before they came in and you will need to print a “Medical Certificate” instead. You have to choose the exam in which the tech determined that it was either a “neutered male” or “spayed female,” which is usually the first.

Next, print the “Medical Summary Report.” This will have a “Print Report” button at the top.



The screenshot shows a web browser window with the URL [https://sms.petpoint.com/sms3/embeddedreports/MultiVaccinationCertificate.aspx/?/](https://sms.petpoint.com/sms3/embeddedreports/MultiVaccinationCertificate.aspx?/). At the top, there are two buttons: 'Print Report' (green) and 'Close Window' (white). The 'Print Report' button is circled in red. Below the buttons is a green header for 'Multi-Vaccination Certificate Filters'. Below this is a table with columns: Vaccine, Product Manufacturer, Status, Status Date/Time, and Re-Vac Date/Time. The table has one row containing the number '1'. To the right of the table is 'Record Count: 0' and a dropdown menu showing '10 / Page'.

¹ Please feel free to log in to PetPoint and see the difference. For reference, Shay A35550924 was altered here, while Moe A35806726 was already neutered when he came in.

The final document you'll need to print before you create the receipt is the contract, which you'll find back on the Summary page of the outcome.

Jump To: -- Intake -- -- Edit -- -- Care/Services --

Print: A35746671 - LoLo - Rabbit

Print: -- Kennel Card -- -- Documents -- -- Medical Documents --

Issue Refund Create Receipt **Contract** Animal View Report

You need the adopter to initial, sign and date the adoption contract:

I promise to give my animal a good home, not to sell it or give it away, and return it to The Women's Humane Society (The Society) if I no longer want it, or at the demand of an officer of The Society if in his/her judgment it is not properly treated.

I understand that my newly adopted pet received core vaccines when it arrived at the shelter. I understand that my pet may require additional vaccines at the time of adoption and in that event, a follow up exam will be scheduled for my new pet at the Women's Humane Society Veterinary Hospital. The Society will cover the cost of the scheduled exam; however I will be responsible for any additional costs including vaccines and medications. X_____

Blood tests for Feline Leukemia and Canine Heartworm are recommended. Costs for these tests, vaccinations or drugs will require an additional fee. I am responsible for such charges. X_____

I understand that the Society cannot always predict that my newly acquired pet will remain without symptoms of illness; therefore, I understand if my pet becomes ill within the first week of its adoption, it is entitled to a free examination at the Women's Humane Society Veterinary Hospital. I also understand that I am responsible for any and all expenses incurred should my pet become ill and require the attention of a Veterinarian not affiliated with the Women's Humane Society Hospital. X_____

No refund, credit or replacement shall be given for an animal that has been lost, stolen, injured or killed due to the adopter's negligence. Should my new pet become sick beyond the means of recovery within the first week of its adoption, a credit or refund of the adoption may be given or a replacement pet may be adopted. X_____

I understand that at the time of the adoption, I become fully responsible and liable for all actions of my new pet. The Women's Humane Society can make no guarantees as to the temperament of the animal and has put forth its best effort to screen out temperamental animals by using basic behavior evaluation prior to placing animals up for adoption. X_____

Signature of Adopter _____ Date: _____

Please contact our adoptions department at 215-750-3100 if you have any questions or concerns post-adoption.

Creating a receipt

The receipt is probably the trickiest part of this whole thing, and the most finicky. If it's giving you trouble, just (X) out of the window and try again.

First, click the "Create Receipt" button on the right- hand side of the Outcome Summary page.

The screenshot shows the 'Create Receipt' form. At the top, there are navigation buttons: 'Jump To: -- Intake --', '-- Edit --', '-- Care/Services --', 'Issue Refund', 'Create Receipt' (circled in red), 'Contract', and 'Animal View Report'. Below these are 'Print:' buttons for 'A35746671 - LoLo - Rabbit', '-- Kennel Card --', '-- Documents --', and '-- Medical Documents --'. The main form is divided into two sections: 'Animals on Receipt' and 'Receipt Items'. The 'Animals on Receipt' section has a table with columns: Select, Animal ID, Name, Species, Primary Breed, and Delete From Receipt. A row shows 'A35746671 - LoLo - Rabbit' with a 'Delete' button. A red box labeled '1' highlights the 'Select' button. The 'Receipt Items' section has a light blue background and contains several input fields: 'Site: -- All --', 'Animal Type: -- Select --', 'Age Group: -- Select --', 'Item Type: Outcome - Adoption', 'Category: -- All --', 'UPC Code: []', 'IRN#: []', 'Item Name*: -- Select --', 'Unit Price: 0', '# of Units: 1', 'Animal ID: A35746671 or [] not for an animal', 'Discount %: 0', 'Discount Amount: 0', 'Discount Reason: -- Select --', 'Tax 1 Code: -- Select --', 'Tax 1 Amount: 0', 'Tax 2 Code: -- Select --', 'Tax 2 Amount: 0', 'Sub Total: 0', and an 'Add' button. Red boxes with numbers 2 through 8 highlight specific fields: 2 (Item Type), 3 (Item Name*), 4 (Unit Price), 5 (Discount %), 6 (Discount Amount), 7 (Discount Reason), and 8 (Add button).

The first section is "Animals on Receipt"

Click the (1) Select button next to the animals being adopted. **For adoptions with multiple animals, you will need to choose one at a time, but please make sure to choose both!**

The next section is "Receipt Items"

The "Item Type" (2) defaults to "Outcome-Adoption," which is perfect for the first receipt item you'll add, which is the adoption fee.

From the "Item Name" (3) drop down, choose the animal to autofill the (4) Unit Price. **Leave the unit price alone.**

If there's a discount, you can enter either the (5) Discount Percent or the (6) Discount Amount, and then choose from the (7) Discount Reason drop-down – will usually be "Adoption Special." The tax will autofill, then you click (8) Add.

You may need to add additional items. Below are the most common ones and which "Item Type" (2) to find them under. You may need to adjust the price for the small and medium second-hand carriers.

Items	Category	Notes
Adoption Donation	Donation	
Iver-Hart Blue 1-25 6 pk	Medication	6 month supply Heartworm medication for dogs up to 25 lbs
Iver-Hart Green 26-50 6 pk	Medication	6 month supply Heartworm medication for dogs 26 to 50 lbs
Iver-Hart Brown 51-100 6 pk	Medication	6 month supply Heartworm medication for dogs 51 to 100 lbs
Vectra Canine 3D	Medication	6 month supply flea/tick medication
Vectra Feline Kittens	Medication	6 month supply flea/tick medication
Vectra – Cats over 9 lbs	Medication	6 month supply flea/tick medication
Vectra – Cats under 9 lbs	Medication	6 month supply flea/tick medication
Cardboard Carrier	Retail Sales	Temporary carrier for adopters who didn't bring their own
Small Second Hand Carrier	Retail Sales	The carrier (small) we sell to adopters who didn't bring one
Medium Second Hand Carrier	Retail Sales	The carrier (medium) we sell to adopters who didn't bring one
Guardian Gear Collar 6 - 10 in.	Retail Sales	The collar (size 6-10 in) we sell to adopters who didn't bring one
Guardian Gear Collar 10 – 16 in.	Retail Sales	The collar (size 10-16 in) we sell to adopters who didn't bring one
Guardian Gear Leash 48 in.	Retail Sales	The leash we sell to adopters who didn't bring one
FELV/FIV/Heartworm Test	Outcome – Adoption	For the FELV/FIV test
Heartworm Test	Outcome – Adoption	For Heartworm Test

Once you've added all the items, the next section is "Payment Details"

The screenshot shows the 'Payment Details' section of a software interface. It contains various input fields for payment information, including Site, Cash Drawer, Receipt Date, Receipt By, Reference, Total Current Receipt, Cash Paid, Check Paid, Debit Paid, Credit Card Paid, Gift Card Paid, Voucher #, Voucher Type, Voucher Subtype, Voucher Paid, Change Given, Previous Balance, and Balance. There are also buttons for 'Submit Receipt', 'Void', 'Override', 'Append', 'Clear', and 'Spell Check'. The form is divided into sections by green headers: 'Payment Details' and 'Receipt Notes'.

Numbered callouts in the image:

- 1: Site dropdown menu
- 2: Cash Drawer dropdown menu
- 3: Total Current Receipt input field
- 4: Credit Card Paid input field
- 5: Balance input field
- 6: Submit Receipt button

Site (1) will be "Women's Animal Center." Cash Drawer (2), again, will be whichever adoption counselor you're working with that day. Enter the amount paid in the box for the payment method (3). If they are paying with a card, choose whichever Type (4) (Visa/AmEx/etc.). The Balance (5) should read 0.00. Then click "Submit Receipt" (6) at the bottom.

Once you click "Submit Receipt" a "Print Receipt" button will show up. If it doesn't, you've missed something, so double check the receipt before trying again.