
ASM3 Manual Documentation

Release 50u

Sheltermanager, Ltd

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FOREWORD

1.1 Introduction

Animal Shelter Manager is a computer package designed to ease the administrative burden of managing an animal shelter, rescue group or animal control facility. It integrates well with existing paper-based systems, and offers a whole host of features, including:

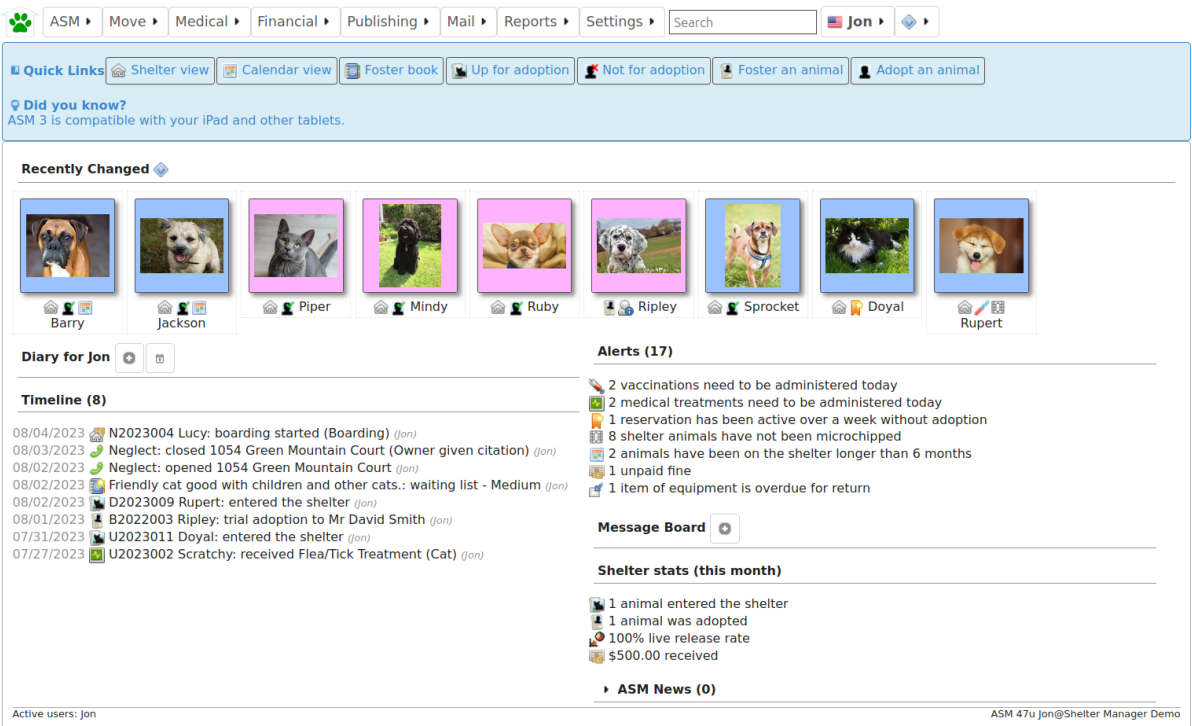
- Adoption history facilities, allowing full animal tracking
- Advanced media facilities for attaching photographs, documents, spreadsheets, videos and sounds.
- Animal control management, including complaints, bite records, dispatch and citations
- Automatic insurance number generation for pet insurer agreements
- Diary management, including medical treatments and vaccinations.
- Full reporting facilities, including auditing, financials, statistics and graphs.
- Complete double-entry book keeping system for account management.
- Request money from customers via third party payment processors.
- Stock control system to manage drugs, food and other items.
- Flexible custom reporting allows editing, saving, emailing, embedding in documents, direct uploading to the internet and conversion to many different word processor formats, as well as built in tools to generate your own reports.
- Form creation facilities for instant generation of adoption paperwork, reservation cards etc.
- Electronic signatures with any touchscreen hardware allow completely paper-free document archiving.
- Web site generation to allow a wider audience to see your animals
- Publishing to adoption websites, including PetFinder.com, AdoptAPet.com and Rescugroups.org
- Automatically update microchip companies, including AVID/PETtrac, AniBase, AKC Reunite, SmartTag, PetLink and HomeAgain
- Lost and found database facilities with intelligent matching system
- Owner and donation management, including UK Gift Aid support, HMRC GiftAid spreadsheet generation, homechecking, banned owners, etc.
- Sophisticated animal search facilities allowing staff to locate animals and records quickly
- Bulk mail shooting, label printing and email facilities based on filtered criteria
- Customisable online forms for adopter/foster/volunteer applications, etc.

GETTING STARTED



The image shows a login form for the ASM system. At the top, there is a green outline of a house with a green paw print inside. Below this, there are three input fields: "SM Account", "Username", and "Password". Under the "Password" field, there is a checkbox labeled "Remember me on this computer". At the bottom, there is a blue button with a small American flag icon and the text "Login".

On starting ASM for the first time, you will be prompted to log in to the system. The default username is “user” with the password “letmein”. If there are no animals in the database, ASM will remind you of these defaults in the dialog.

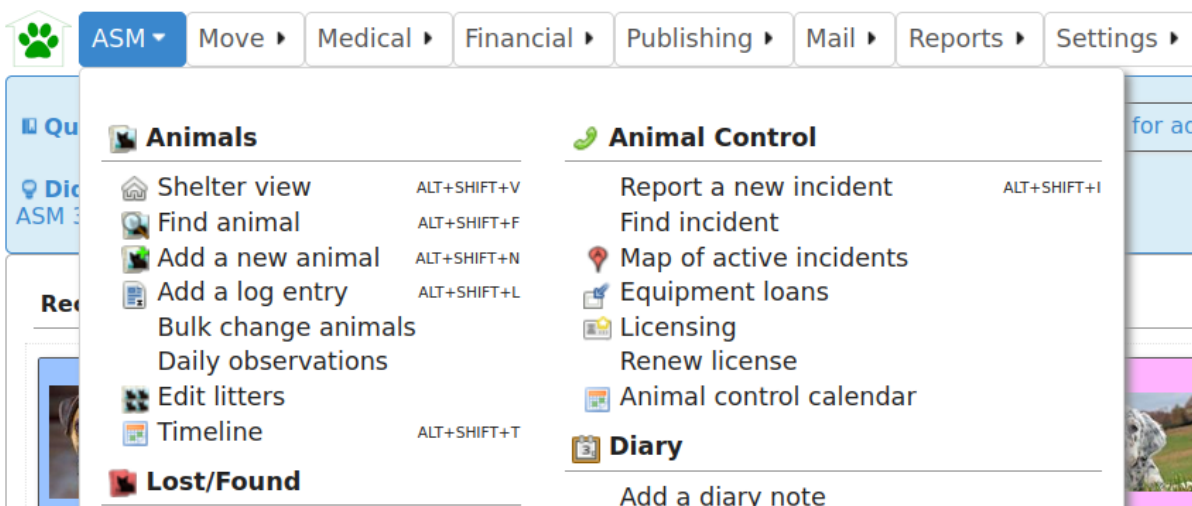


Once logged in, ASM’s home screen will appear. Across the top, a menu bar is used to navigate the system.

At the top right, a keyword search box allows you to quickly locate any type of record within ASM and the user menu shows the currently logged in user, the locale and allows user specific actions to be taken (changing the current user’s password, logging out of the system).

The default landing page shows recently changed animals, alerts for any actions that need to be taken, current diary tasks to be performed today, any messages from other users and news from the ASM website. Additionally, this pane will show a series of user-configurable quicklinks for quickly getting to different areas of the system.

2.1 Menus and Shortcuts



You open screens in ASM by navigating and clicking on menu items. Menu items are laid out across the top of the screen.

2.2 Shortcut Keys

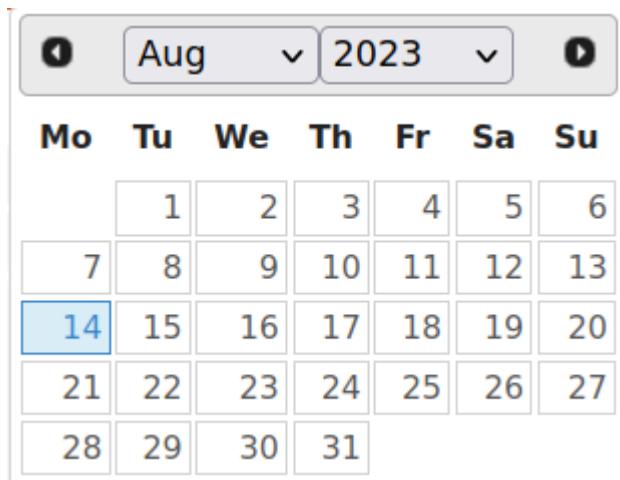
Some of the most common menu commands can be actioned by pressing combinations of certain keys. These keys are known as shortcut keys or accelerators. Pressing these keys is the same as navigating the menu and clicking on them with the mouse.

If a menu command has a shortcut key, it will be displayed at the side of it in the menu. For example, the Add Animal option on the menu can be accessed by pressing ALT+SHIFT+N - this means you hold down the shift and alt keys together, and tap N. It is worth learning these as you will find them much quicker to use when you are proficient with the system.

There are some additional shortcut keys you can use (some depend on which browser you have):

- CTRL+H will return to the home screen
- CTRL+S will save the current screen (animal, person details, etc).
- CTRL+R or F5 will reload the current screen.
- CTRL+W will close the current browser tab
- CTRL+A will select all items on screens that display a table with multiple items (eg: Foster book, Vaccination Book, etc).
- CTRL+LMB (left mouse button) when clicking a link will open that link in a new tab.

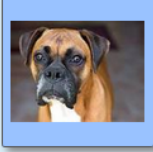
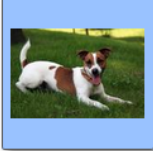
2.3 Dates



It is worth mentioning early on that Animal Shelter Manager has a keyboard user interface for dealing with dates (as well as the more usual calendar). Every field within the system where a date is expected, the following keyboard shortcuts can be used:

- T Today
- Y Today + 1 year
- M Today + 1 month
- W Today + 1 week
- D Today + 1 day
- SHIFT + (YMWD) Today less 1 year/month/week/day
- CTRL + Cursor Keys Move the date selector around (up/down is +/- one week)
- CTRL + PgUp/PgDn go forwards and backwards 1 month.

2.4 Tables

Medical Book						
<input type="button" value="New Regimen"/>		<input type="button" value="Bulk Regimen"/>		<input type="button" value="Delete Regimen"/>		<input type="button" value="Delete Treatments"/>
<input type="button" value="Give"/>						
<input type="checkbox"/>	Name	Animal	Litter	Species	Location	Dosage
<input checked="" type="checkbox"/>	Flea/Tick Treatment		Barry - 11D	Dog	Dog Block 2	1
<input type="checkbox"/>	Flea/Tick Treatment (Dog)		Buster - 5D	Dog	Dog Block 7	1

ASM uses tables to display data throughout the application. You can sort any table in ascending order by clicking on the column heading you wish to sort on. If you click the column heading again, it will be sorted in descending order instead. Hold down shift while clicking to sort on multiple columns at the same time.

A system setting *Settings* → *Options* → *Display* → *Keep table headers visible when scrolling* allows the table headers to float at the top when you scroll the screen if desired.

In addition, if you need to select any items in a table, tickboxes will appear down the left hand side. Any actions you can take on selected items in a table will be via buttons above the table.

The keyboard shortcut CTRL + A can be used to select all items in the currently visible table.

2.5 Initial Setup

Before doing anything else with your new ASM installation, you should now perform the initial configuration of ASM for your shelter. The steps are as follows:

1. If you want to use your own animal classifications, you can use the *Settings* → *Lookup Data* → *Animal Types* to alter the standard ASM ones - ASM assumes your shelter deals with dogs and cats and wants to differentiate between stray, feral and abandoned animals. It also has an extra type for boarding, which allows you to generate separate figures for boarding animals. After doing that, select your new defaults in the correct place on the *Settings* → *Options* → *Defaults* screen.
2. Go to the *Settings* → *Options* → *Details* screen and enter your shelter’s details. You can set all of the systemwide behaviours for ASM and control the format of generated animal codes from the other tabs on this screen as well.
3. Go to *Settings* → *Lookup Data* → *Locations* to setup your available shelter locations. A location can have multiple units, which you list in the “units” box of the location, separated by a comma. Locations can be anything you want - eg: a room, an area of a room, a building. Units are individual areas, pens or cages within that location. For example, you could create a location called “Dog Block A” with units “1, 2, 3, 4, 5” to have 5 numbered pens. When you use shelter view, you can have it group by the location or the location and unit and it will allow you to drag and drop animals between pens and locations to move them around. It will also highlight empty pens so you can see capacity at a glance.
4. Go to *Settings* → *Lookup Data* → *Breeds* - Remove any unwanted breeds and species from the database that your shelter does not deal with.





5. Go to *Settings* → *Reports* → *Browse sheltermanager.com* and install some reports. The “Select Recommended” button allows you to quickly choose our recommended set for installation.
6. Create usernames and passwords for all your shelter staff in the *Settings* → *System User Accounts* screen. Once you have your own username and password, delete the default “user” user. It is advised that everyone has their own username and password rather than using a shared account as it makes it easier to revoke individual permissions or remove the account when staff leave without disrupting everyone else.

2.6 User Settings

The user menu at the top right of the screen shows the currently logged in user. In this menu, the user can find:




Jon

-  Switch to Mobile Interface
-  Change Password
-  Change User Settings
-  Logout

- Switch to Mobile Interface - Change from the desktop user interface to the mobile user interface.
- Change Password - Choose a new login password.
- Change User Settings - Change settings specific to the user.
- Logout - Log out of the system.

The option “Change User Settings” contains the following tabs and settings within them:

Change User Settings

 Save

Preferences
Quicklinks
Signature
Security

Username	Jon
Real name	<input type="text" value="Jon"/>
Email Address	<input type="text" value="jon@mail.com"/>
	<input type="checkbox"/> Make this the default reply address when I send email
Visual Theme	<input type="text" value="Light"/>
Locale	<input type="text" value="(use system)"/>
Shelter view	<input type="text" value="(use system)"/>
Default stock location	<input type="text"/>
Default stock usage type	<input type="text"/>

2.6.1 Preferences

- Username - Current username (cannot be edited).
- Real Name - The users real name.
- Email Address - The users email address, can optionally be set as the default reply address when the user sends an email.
- Visual Theme - Allows the user to set different coloured themes.
- Locale - Allows the user to choose a different language/currency.
- Shelter view - Allows the user to set their own shelter view overriding the system default view if one is set.
- Default stock location - Allows the user to set their own default stock location.
- Default stock usage type - Allows the user to set their own default stock usage type.

2.6.2 Quicklinks

- Quicklinks - Allows the user to create links at the top of the screen to quickly access the parts of the system they use the most.
- Quick Reports - This will add a dropdown menu of selected reports to the quicklinks bar, reports will appear in the menu in the order they are selected here.

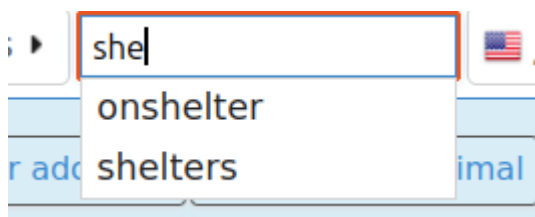
2.6.3 Signature

- Signature - The users electronic signature to be used in document templates.

2.6.4 Security

- Two-Factor Authentication (2FA) - Users can enable 2FA here using the Google Authenticator app, see *Two-Factor Authentication (2FA)*

SEARCH



The search box allows you to search the whole of the ASM database. If you just enter a search term and press enter, all types of record will be searched.

Previous searches will be remembered and ASM will try to suggest searches as you type. You can prefix your term with a code to tell the search to only search a certain type of record.

- a:term will only search animals
- ac:term will only search animal control incidents
- p:term will only search people
- la:term and fa:term will search lost and found animals
- li:num will search issued license numbers
- lo:term will search logs for all records
- vo:code will search issued vouchers
- wl:term will search waiting list entries.

In addition to prefixes, you can add an extra clause to control sorting.

- sort:az will sort alphabetically a to z on name
- sort:za will sort alphabetically z to a on name
- sort:mr will sort by most recently changed
- sort:lr will sort by least recently changed
- sort:as will sort alphabetically a to z on species (only applies to animal records – makes more sense in combination with animal search keywords like “forpublish” or “onshelter”)
- sort:sa will sort alphabetically z to a on species
- sort:rel will sort by most recently changed, but more relevant items will be moved to the top. For example if the search term exactly matches an animal’s name or owner’s surname, they will be considered more relevant and appear first.

There are a number of special keyword terms you can use:

- onshelter (or os) – all on shelter animals
- longterm - all animals who have been on shelter longer than 6 months
- notforadoption – all animals flagged not for adoption

- notmicrochipped - all animals who are not microchipped
- hold – all animals currently being held in case of reclaim
- holdtoday - all animals with a hold that ends today
- quarantine – all animals currently quarantined
- deceased – animals deceased in the last 30 days
- forpublish – all animals available for adoption and matching publishing options
- people – all people
- fosterers, volunteers, shelters, aco, banned, staff, retailers, vets, homechecked, homecheckers, drivers, members and donors – all people with those flags set
- reservenohomecheck - active reservations where a homecheck has not been done
- activelost – all lost animals who have not been found yet
- activefound – all found animals who have not been returned

Eg:

a:Cat sort:az - find all cats, sort by name a:Jack - all animals called Jack


🔍 Animals matching ""

27 results found in 0.02 seconds. Order: Most relevant

Tatters - S2021001 🏠 📄 📷 📍

Female Domestic Short Hair Cat aged 3 years 5 months.


Cattery 4



Sprocket - D2023003 🏠 📄 📷 📍

Male Mixed Breed Dog aged 3 years 10 months.

Dog Block 4



4.1 Shelter View

The screenshot shows the 'Shelter View' interface. At the top, there is a navigation bar with tabs: ASM, Move, Medical, Financial, Publishing, Mail, Reports, and Settings. A search bar and a user profile 'user' are also present. Below the navigation, the main content area is titled 'Test Organisation (4)'. It is divided into three sections: 'Cat Block', 'Dog Block', and 'Shelter'. The 'Cat Block' contains four green boxes labeled 'Pen 1', 'Pen 2', 'Pen 3', and 'Quarantine'. 'Pen 1' contains a card for a cat named 'Jesse'. The 'Dog Block' contains seven green boxes labeled '1' through '7'. Box '3' contains a card for a dog named 'Excitable Collie', and box '4' contains a card for a dog named 'Newton'. The 'Shelter' section contains one empty green box. A dropdown menu is open on the right side, showing a list of filters and modes, with 'Location and Unit' selected.

The shelter view screen (available from the default quicklinks or under *ASM* → *Animals* → *Shelter View*) gives you an overview of all the animals currently on your shelter, broken down by their internal location.

You can use this screen to jump straight to an animal’s record. You can also drag and drop animals to move them between locations quickly. If you have assigned units to the animal (for cage/pen numbers, etc) they will appear next to their name.

A dropdown in the upper right corner allows one of many different modes to be applied.

There are also special modes to show animals in foster homes, either all available homes with those with space highlighted (identified by the capacity field), or all active foster homes only.

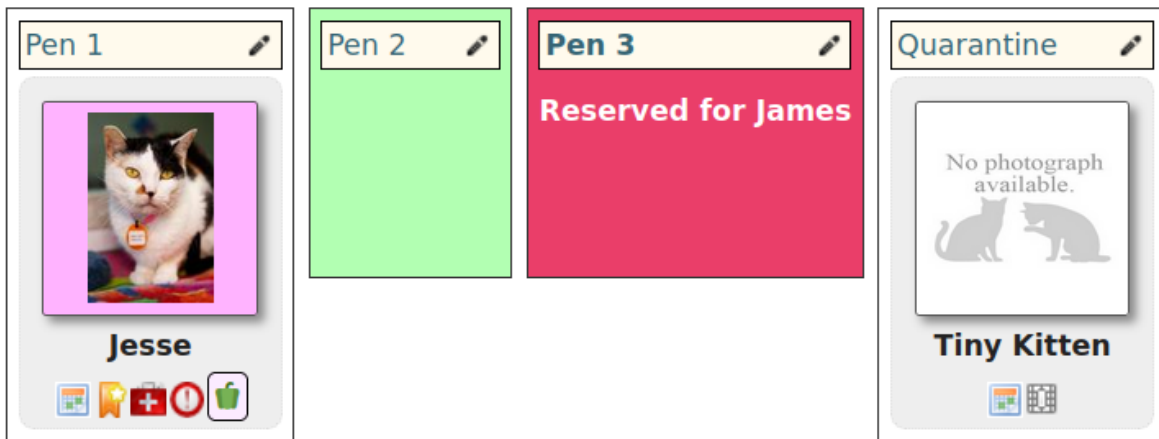
The “Location” modes mostly put animals who are fostered into a special virtual location called “Foster” so that they are separated from your internal locations. There is a mode named “Location (No Virtual)” that does not have this behaviour and shows animals as in the location that they left from if they are on foster, trial adoption or at a retailer.

A special “status” mode separates animals who are adoptable from those who are marked not for adoption, those that are reserved and those that are quarantined, held, cruelty cases or other indicators that they should not leave the shelter.

4.1.1 Location and Unit mode

The “Location and Unit” mode will show a box for every unit (units are generally, pens, cages, kennels or runs etc) with the animals occupying them. If a unit is unoccupied, it will be displayed with a green highlight to show it is available. You can drag and drop animals between units in this view to move them around.

Cat Block



An edit icon to the right of the unit’s name allows you to reserve or sponsor a unit. Reserved units appear in red to indicate they are not available. The reserve text entered will be shown.

Species	Cat
Breed	American Shorthair
Crossbreed	<input type="checkbox"/>
Location	Dog Block
Unit	<input type="text"/>
Flags	<ul style="list-style-type: none"> 1 : (available) 2 : (available) 3 : Reserved for Jake 4 : (available) 5 : 2U Test reclaim costs 6 : Reserved for Maximillian 7 : (available) 8 : (available)
Date of Birth *	
Adoption Fee	
Special Pound #	

Units are also shown as reserved when choosing a unit on the animal editing screens.

If an animal is in a sponsored unit, the UNITSPONSOR attribute will be set to the sponsor text in its data when retrieved via the Service API for your website. It will also be available in the \$\$UNITSPONSOR\$\$ token for HTML publishing templates. This allows you to show the sponsor of a kennel/pen with the adoptable animal who is in it.

4.2 Find Animal

ASM has multiple methods of finding animals. The default is the simple screen:

From the single search term, this screen searches all aspects of the animal, including codes, names, breeds, microchip numbers, original owner details, media and movements. Animals are shown irrespective of where they are (the location field displays where the animal is) or whether or not they are dead. When you use the system search box at the top with an a: filter, the simple animal search is what gets performed.

For example, searching for “black” would return animals with black in the name, animals that are black in colour, animals adopted to an owner with the surname black, etc. Results are sorted by relevance, so if the term appears in an animal’s name or code, it will be at the top of the list.

By clicking the Advanced button, you can go to a more sophisticated search screen that allows you to search by animal location and state, age, etc. You can change which find animal screen is shown by default under the *Settings* → *Options* menu.

The Advanced screen allows you to enter detailed searches for groups of animals within your database.

If you press the search button without entering any criteria, you will get a list of all animals on the shelter. This is because the location box defaults to “On Shelter” - if you change this to “(all)” you will get all animals wherever they are.

Once you press the search button, ASM will search through your database and check each record against any criteria you have chosen, and return to you a list of all those that matched. For example, you could quite easily search for all animals of species “Dog” who are still on the shelter, located in a particular location and under 6 months old.

The criteria fields follow one of three types:

- **Drop Down Boxes:** You should select something from the list or the “(all)” entry to specify that you do not want to filter by this criteria.
- **Text Boxes:** The system expects you to type part of a word, name or code etc. For example, typing “ben” in the “Name” box on the find animal screen will return all animals who have “ben” somewhere in their name - eg: Ben, Benji, Benson etc. Some boxes require numbers - the “aged between” boxes require an animal age expressed as a year, or fraction of a year. Entering 0 in the “From Age” box and 0.5 in the “To Age” box will return animals who are six months old and younger.
- **Filter:** The filter dropdown allows selection of a number of options at the same time, such as only including animals that were transferred in from another organisation or housetrained.

4.3 Edit Animal

The animal screen is the one you will certainly use the most often within the system. Across the top, the animal screen has a banner with important information about the animal.

Below the banner, the animal screen is split into a number of different tabbed sections. Clicking these tabs makes that area of the animal active. Because not all of the information is mandatory or applicable to every animal, some of the tabs will show a graphic to highlight that they have information (the graphic varies according to what type of data is available on that particular tab).

4.3.1 Animal Details

The screenshot shows the 'Animal Details' tab for a cat named 'Bisto - U2023006'. The interface includes a top navigation bar with menus like 'ASM', 'Move', 'Medical', 'Financial', 'Publishing', 'Mail', 'Reports', 'Settings', and a user profile for 'Jon'. The main header area displays the animal's name, ID, location ('Cattery 6'), and a red warning box stating 'Not available for adoption (Unaltered)'. Below the header is a tabbed interface with 'Animal' selected, and a toolbar with actions like 'Save', 'Clone', 'Merge', 'Delete', 'Email', 'Document', 'Match', 'Littermates', and 'Share'. The 'Details' section contains two columns of form fields:

- Code: U2023006 (with a 6U dropdown)
- Litter: 000002
- Name: Bisto
- Sex: Male
- Type: U (Unwanted Cat)
- Color: Black and Brown
- Coat Type: Short
- Size: Small
- Weight: 2 lb 0 oz
- Species: Cat
- Breed: Domestic Short Hair
- Crossbreed:
- Location: Cattery
- Unit: 6
- Flags: Select
- Date of Birth: 05/15/2023 (with an Estimate checkbox)
- Adoption Fee: \$150.00

 At the bottom, there are expandable sections for 'Notes', 'Entry', 'Health and Identification', 'Death', and 'Audit Trail'.

The animal details tab contains all the basic information about the animal, including its breed, species, name, age, location within the shelter, identifying code etc.

A number of flags are available from a dropdown, including “Non-Shelter Animal”. Set this flag if the animal is nothing to do with your shelter, but you want to utilise ASM’s facilities in managing vaccinations, registering microchips, etc. This is very useful for shelters that run their own clinics which are open to members of the public. Non-shelter animals are also useful in combination with the courtesy listing flag, which allows you to manage adoption listings for other shelters or owners without having those animals in your figures.

You can also set a “not for adoption” flag, which enables you to hide this animal from the internet publishers. Using the Hold and Quarantine flags will also hide the animal from publishing and add an emblem (a little icon) when you see the animal.

If the “Use Single Breed Field” option is not enabled in the system options (the default), then ASM will display two breed fields with a “Crossbreed” flag you can set. This allows you to choose two breeds for mixed/crossbreed animals. The details page is subdivided into a number of accordion panels to categorise the details. If you have created additional fields for animals under *Settings* → *Additional Fields* then the “Additional” panel will appear.

The “Share” button can be used to publish the animal to various social media sites. A link to a publically viewable version of the animal record will be posted. How that viewable page looks can be tailored by editing the “animalview” template under *Publishing* → *Edit HTML publishing templates*

Unsaved Changes
✕

⚠ You have unsaved changes, are you sure you want to leave this page?

Save and leave
Leave
Stay

Details are treated like a document and when viewing, you get a personal copy. Any changes you make aren't effective until you hit the Save button on the toolbar. If you try to leave the details screen without saving changes, you will be prompted.

4.3.2 Entry

- ▶ Details
- ▶ Notes
- ▶ Additional
- ▶ Entry

Original Owner **Mr Test Testerson - TE000138**

1 Testville
Testfield
Testshire
TEST
9834 983409

test@test.com

Date Brought In

Time Brought In

Entry Category

Transfer In

Picked Up

Pickup Location

Pickup Address

Bonded With

Reason not from Owner

Reason for Entry

- ▶ Health and Identification ✕
- ▶ Death
- ▶ Publishing History

The Entry section contains all the information about how the animal originally entered the shelter, including their background history and the names of the original owner and person who brought the animal in.

When adopting animals out, the system uses this information to track owners who have brought animals into the shelter previously and to warn staff before adopting animals to them.

The right hand side of the screen contains the animals original date of entry to the shelter. This date is used when generating animal figures and auditing reports.

If you are using a US locale, you will also see Asilomar categories. These allow ASM to generate Asilomar figures for your shelter. Asilomar statistics are a standardised way of calculating euthanasia figures for animal shelters across the US.

4.3.3 Entry - Bonded Animals

The bonded with fields allow you to specify upto two animals that this animal can be bonded to. Bonding an animal to other animals has the following effects:

- If the option is on under *Publishing* → *Set Publishing Options* to merge bonded animals into a single record, then only a single record will be displayed via the website tools or sent to adoptable 3rd party websites. The name shown will be a combination of all the bonded animal names, but the rest of the data including description and photos will be from this first animal.
- When the animal is adopted via the *Move* → *Adopt an animal* screen, a warning will be shown and an adoption movement to the same person will be created on all bonded animals at the same time.
- When an online form is received that refers to this animal in a *reserveanimalname* field and “Create Person” is used, reservations will be created for all bonded animals as well as this one.
- When an online form is received that refers to this animal in an *animalname* or *reserveanimalname* field and “Attach Animal” is used, the form will be attached to this animal and the bonded animals automatically too.

4.3.4 Entry History

Date	Code	Category	Coordinator	By	Owner	Transfer In	Hold	Pickup	Asilomar	Reason
04/17/2021	U2023002	Unable to Cope			Mr Surrender Surrenderer				Healthy	

By default, the Entry section contains the original information of the animal’s first intake to the shelter and movements/returns are used thereafter to track animals returning to the shelter.

For most shelters and rescues, this is fine, but some organisations want to enter that data again for repeat visits and generate a new shelter code for the animal.

If you have the option unticked for *Settings* → *Options* → *Remove* → *Remove the entry history section from animal records* then the system will allow you to archive the information on the Entry slider to Entry History so that entry information can be entered each time the animal returns to the shelter.

This can be done with the “New Entry” button on the toolbar.

Clicking the New Entry button does the following:

- Takes a copy of all the information on the Entry slider and adds a row to Entry History (making the section appear if it is the first history record).
- Generates a new shelter code for the animal.
- Copies the returning person, reason and date from the latest returned exit movement on file to the Entry section ready for updates to be made.
- The “Date brought in” field will become read only and show the last time the animal returned to the shelter.

Note: The “New Entry” button will only appear on the toolbar if the animal has at least one returned exit movement on file and there are fewer entry history records than returned exit movements.

4.3.5 Health and Identification

▶ Details

▶ Notes

▶ Entry

▼ Health and Identification

Microchipped 07/03/2023 982765427635653 24PetWatch 📄

Date Number

Tattoo

Altered Date 📄 + 🗑️

Heartworm Tested

Special Needs

Rabies Tag

Health Problems

📄

Current Vet 📄 + 🗑️

Owners Vet 📄 + 🗑️

▶ Death

▶ Audit Trail

The health and identification section is used for entering general information about the animal’s health and veterinary care. The special needs box can be used to indicate that the animal has an ongoing or permanent health problem. Ticking this box will flag this when publishing to the internet and to services like PetFinder.

4.3.6 Death

▶ Details

▶ Notes

▶ Entry

▼ Death 🌈

Deceased Date 08/15/2023

Category Sick/Injured ▼

Euthanized Dead on arrival Owner requested euthanasia

Notes

📄

▶ Audit Trail

The death section is used for capturing information about the animal’s death if it is deceased. The most important field is the deceased date, as a value in this field is used by the system to indicate that the animal is dead.

In addition, an icon will be shown at the side of the death tab if the animal is dead. The animal’s location will also appear as Deceased with the reason. The reason will be shown as “Died off shelter” if the animal was not in the care of the shelter at the time of its death, and the death will not be included in any figures or reports.

4.3.7 Diet

Ruby - D2023006
 Location: **Dog Block**
 Microchip: **985277365627365**
 Added by **Jon** on **07/21/2023**
 Last changed by **Jon** on **08/15/2023**
 Available for adoption

Female Dog aged **3 years 11 months**. Small / 2.4375lb
 Ruby is a really friendly girl, ideal for a family with children and other pets
 Entered shelter: **07/01/2023**
 Left shelter:
 Time on shelter: **6 weeks. (45 days)**

Animal | Vaccination | Test | Medical | Clinic | License | **Diet** | Costs | Payments
 Media | Diary | Transport | Movements | Log

New Diet | Delete

Type	Description	Start Date	Comments
<input type="checkbox"/> Standard	Complete dried food	08/15/2023	

The diet tab is used for capturing information about the animal’s diet. You can set up as many different diet types (under *Settings* → *Lookup Data* → *Diets*) as you like, and then log them here when the animal’s diet changes.

4.3.8 Costs

Bisto - U2023006
 Location: **Cattery**
 Added by **Jon** on **07/20/2023**
 Last changed by **Jon** on **08/02/2023**
 Not available for adoption (Unaltered)

Male Cat aged **13 weeks**. Small / 2lb
 Entered shelter: **05/15/2023**
 Left shelter:
 Time on shelter: **11 weeks. (79 days)**

Animal | Vaccination | Test | Medical | Clinic | License | Diet | **Costs** | Payments
 Media | Diary | Transport | Movements | Log

New Cost | Delete

Daily Boarding Cost On shelter for **79** days. Total cost: **\$79.00**

Type	Date	Cost	Description
<input type="checkbox"/> Board and Food	08/15/2023	\$1.00	


Vaccinations: \$0.00, Tests: \$0.00, Medical Treatments: \$35.00, Transport: \$0.00, Costs: \$1.00, Total Costs: **\$115.00**
 Total Payments: \$200.00, Balance: **\$85.00**

The costs tab allows you to track costs associated with looking after an animal whilst it is in your care. You can assign a daily boarding cost, and ASM will automatically keep track of how many days the animal has been on your shelter and how much it has cost.

In addition, you can add cost types through the *Settings* → *Lookup Data* → *Cost Types* menu and allocate costs for anything else your shelter has spent on the animal (eg: Microchipping). Vaccinations and medical treatments have a cost field that you can set for each treatment and they will be automatically totalled up at the bottom of the costs screen along with a current running cost for all time and a balance, calculated from total costs less any donations allocated to the animal.

By default, when the animal is adopted, ASM will automatically convert the current boarding cost/time into a separate cost record so it can be preserved.

4.3.9 Vaccination



Russo - U2023007

Location: **Cattery** 7

Entered shelter: **05/15/2023**

Left shelter:

Time on shelter: **11 weeks. (79 days)**

Added by **Jon** on **07/20/2023**

Last changed by **Jon** on **08/02/2023**

⚠ Not available for adoption (Unaltered)

Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments

Media
Diary
Transport
Movements
Log

New Vaccination
✖ Delete
✔ Give
Change Date Required

<input type="checkbox"/>	Type	Required	Given	By	Expires	Manufacturer	Rabies Tag	Cost	Comments
<input type="checkbox"/>	FVRCP	09/05/2023						\$30.00	
<input type="checkbox"/>	FVRCP	07/27/2023	07/27/2023	Fenton Veterinary Surgery	09/05/2023	28765		\$30.00	

The vaccination tab is used to track information about any vaccinations an animal requires. An animal can have an unlimited number of vaccination records. For complicated, multi-diary procedures, see Diary Tasks, covered later on.

Use the toolbar to create and modify items in the list. You will be reminded of outstanding vaccinations via the alerts on the home page, or by viewing them under *Medical* → *Vaccination Book*

Vaccinations can also have a cost attached for use with reporting. The cost is for the individual vaccination.


Vaccinations have three date fields:

- Required: This is the date that the vaccine is due to be administered to the animal
- Given: This is the date that the vaccine was actually administered to the animal
- Expires: This is the date that the vaccine “wears off” and needs to be administered again.

Due vaccinations for the purposes of reporting, alerts and the medical book are those that have a required date, but no given date yet.

Expires is a “belt and braces” reminder. The system expects you to set the expires date when you don’t expect this vaccination to be given again during the animal’s stay with the shelter - eg: a booster vaccination that won’t be given again for a year. It means the system can remind you a new vaccination needs administering in the unlikely event that the animal is still in the care of the shelter when the date arrives. To get rid of the alert for an expired vaccination, create a new required vaccination for that animal of the same type.

4.3.10 Test



Tatters - S2021001

Location: **Cattery** 4

Entered shelter: **07/04/2023**

Left shelter:

Time on shelter: **4 weeks. (29 days)**

Added by **Jon** on **07/14/2023**

Last changed by **Jon** on **08/02/2023**

⚠ Not available for adoption (Unaltered)

Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments

Media
Diary
Transport
Movements
Log

New Test
✖ Delete
✔ Perform


<input type="checkbox"/>	Type	Required	Performed	Result	Vet	Cost	Comments
<input type="checkbox"/>	FIV	08/18/2023				\$13.00	
<input type="checkbox"/>	FIV	08/01/2023	08/01/2023	Unknown		\$13.00	

The test tab is used to track information about any medical tests an animal requires. An animal can have an unlimited number of test records.

Items in the test list are saved immediately to the database when you hit the Save button in the popup screen. You will be reminded of tests falling due via the Test Diary report, main screen alerts, or by viewing them under *Medical* → *Test Book*

Tests can also have a cost attached for use with reporting.

4.3.11 Medical



Sprocket - D2023003
Male Dog aged 3 years 10 months. Small / 11.125lb

Location: **Dog Block** 4

Microchip: **972637764**

Entered shelter: **06/02/2023**

Left shelter:

Time on shelter: **8 weeks. (62 days)**

Added by **Jon** on **07/14/2023**

Last changed by **Jon** on **08/03/2023**

Available for adoption

Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments

Media
Diary
Transport
Movements
Log

New Regimen
Delete Regimen
Delete Treatments
Give
Undo
Change Date Required

	Name	Dosage	Started	Status	Cost	Required	Given	By	Comments
<input type="checkbox"/>	Dewormer (Dog)	1	06/06/2023	Active, 1 treatments every 3 months + Unspecified (1/1)	\$4.50	09/07/2023			
<input type="checkbox"/>	Flea/Tick Treatment (Dog)	1	06/02/2023	Active, 1 treatments every 1 months + Unspecified (1/1)	\$4.50	09/03/2023			
<input type="checkbox"/>	Flea/Tick Treatment (Dog)	1	06/02/2023	Active, 1 treatments every 1 months + Unspecified (1/1)	\$4.50	08/03/2023	08/03/2023	Jon	

The medical tab is used to track information about medical treatments an animal is receiving. It is extremely flexible in what it can track and it can handle just about any kind of schedule. You can create medical profiles from *Medical* → *Medical Profiles* and use these as templates for treatment records.

Treatment records are automatically created from regimens. You can edit the regimen by clicking on the treatment name.

As you complete each treatment, ASM will generate the next record in the sequence, until there are none left and the medical record is automatically completed (unless the treatment has an unspecified end, in which case ASM will continue to keep creating treatments until the animal dies).

You can view all outstanding medical treatments at any one time by visiting *Medical* → *Medical Book*, you can also print currently outstanding treatments from here.

Medical records can also have a cost associated with them for reporting. The cost is for the whole medical item (ie. If it's a course of tablets, then the cost should reflect the whole cost of all tablets required for the medical, it is not per individual tablet).

4.3.12 Media

Rupert - D2023009
Male Dog aged 22 weeks.
Medium / 27.0625lb

Location: **Dog Block 11**
Entered shelter: **08/02/2023**
Left shelter:
Time on shelter: **0 days. (0 days)**

Added by **Jon** on **08/02/2023**
Last changed by **Jon** on **08/02/2023**

⚠ Not available for adoption (Unaltered)

Animal | Vaccination | Test | Medical | Clinic | License | Diet | Costs | Payments
Media | Diary | Transport | Movements | Log

Attach File | Attach Link | New Document | Delete | Email | Email PDF | Image | Move

Drop files here...

Example.pdf 08/15/2023 | Surrender Form 08/15/2023 | Image 08/02/2023

The media tab contains documents, images, PDF files and links that have been stored with the animal.

The most common use is for images. Click the attach file button to attach a new file to the animal. When you attach files, they are stored with the animal and you no longer need the original file. Since images are the most common use, the file browser will display previews of images, and if you click an image in the media list, it will be viewed full screen.

The image button menu on the toolbar allows you to transform and manipulate various properties of the image. You can rotate it, convert it to a PDF document (useful for taking photos of paperwork), exclude it from being sent to your website or third party websites and watermark the image.

Watermarking is a process where your logo is copied to the lower right of the image and the animal's name rendered over the lower left - this requires you to upload your logo named watermark.png to *Settings* → *Reports* → *Extra Images*

If the content is a PDF, you can click it to have your browser view it. If the content is an HTML document, then clicking it will open it with ASM's built in word processor for editing and printing.

One or more media elements can be emailed from here.

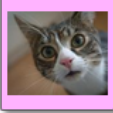
HTML documents can be emailed as a PDF and signed. The Sign button menu allows you to sign on screen with a pen/mouse device, send the document to the mobile signing pad or send an email to someone with a request to sign the document.

You can also attach document and video links (for example, to Google Docs or YouTube videos). Video links and images can have a default set for publishing purposes. If you have the "publish all images" turned on in your publishing options and an animal has multiple images, you can individually choose which ones will be published with the tick/cross icon next to the image icon.

Giving an animal the "Not for adoption" or "Not for publishing" flag on the details tab will ensure that the animal is not included in any website publishing.

Notice that when an animal has media, the tab displays a graphic, indicating there is data under this tab.

4.3.13 Diary



Tatters - S2021001
Female Cat aged 3 years 5 months. Small / 6.0625lb

Location: **Cattery** 4
 Entered shelter: **07/04/2023**
 Left shelter:
 Time on shelter: **4 weeks. (29 days)**

Added by **Jon** on **07/14/2023**
 Last changed by **Jon** on **08/02/2023**

⚠ Not available for adoption (Unaltered)

Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments


Media
Diary
Transport
Movements
Log

New Diary
 Diary Task ▾
 Delete
Complete

	For	Date	Completed	Subject	Note	By
<input type="checkbox"/>	NigelM	08/16/2023 17:05:00		Reminder	Carry out task	Jon
<input type="checkbox"/>	Jon	08/15/2023 17:05:00	08/15/2023	Reminder	Carry out a task	Jon

The diary tab shows a list of all diary notes relating to this particular animal. From here you can create new diary notes, as well as modify existing ones.

4.3.14 Transport



Barry - D2023011
Male Dog aged 3 years 3 months. Large / 60.125lb

Location: **Dog Block** 2
 Microchip: **123456789**
 Entered shelter: **06/22/2022**
 Left shelter:
 Time on shelter: **1 year 1 month. (408 days)**

Added by **Jon** on **05/22/2023**
 Last changed by **Jon** on **08/04/2023**

Available for adoption


Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments
Media
Diary
Transport

New Transport
 Delete
 Status ▾
 Document ▾

	Type	Status	Reference	Driver	Pickup	at	Dropoff	at	Miles	Cost	Comments
<input type="checkbox"/>	Adoption Event	New	0001	Miss Karen Wiper 415 Axminster Drive Fenton MO 63026	Miss Judy Pilson 1157 Smizer Mill Road Fenton MO 63026	08/15/2023 16:36:25	Miss Kerry Watson 2112 Fenton Logistics Park Boulevard Fenton MO 63026	08/15/2023 17:15:00	9	\$7.00	Adoption drop off

The transport tab shows a history of where the current animal has been transported to (particularly useful for rescues who have volunteer drivers taking animals to vets from foster homes). Transport can be scheduled and reports exist to find new transports without a driver, etc.

4.3.15 Movements



Buster - D2023005
Male Dog aged 4 years 2 months. Small / 13.375lb

Location: **Dog Block** 7
 Microchip: **927856172**
 Entered shelter: **04/21/2023**
 Left shelter:
 Time on shelter: **14 weeks. (103 days)**

Added by **Jon** on **07/20/2023**
 Last changed by **Jon** on **08/02/2023**

Available for adoption

Animal
Vaccination
Test
Medical
Clinic
License
Diet
Costs
Payments
Media
Diary
Transport

Movements
Log

New Movement
 Delete
 Document ▾

	Type	Date	Status	Returned	Person	Retailer	Movement Number	Comments
<input type="checkbox"/>	Adoption	08/18/2023			Mr Thomas Butler 1555 Larkin Williams Road 07983638615		000009	
<input type="checkbox"/>	Reservation	07/13/2023 00:00:00	Changed Mind		Mrs Alison Peach 990 Horan Drive (555) 555-9987		000008	

The movement tab shows a summary of all movements that the animal has undergone. An animal can have an unlimited amount of movements and the movement tab has its own special toolbar. From here, you can create new movements and jump straight to the owner records for existing movements.

4.3.16 Log

The screenshot shows the animal record for Bella - U2023012. The animal is a Female Cat, aged 3 years 0 months, Medium, 8.1875 lb. Location: Cattery 15. Entered shelter: 07/21/2023. Left shelter: (blank). Time on shelter: 1 week. (12 days). Added by Jon on 07/21/2023. Last changed by Jon on 08/02/2023. A red box indicates: Not available for adoption (Unaltered).

The Log tab is active, showing a table of log entries:

Type	By	Date	Note
History	Jon	08/15/2023 12:57:50	U2023012 Bella: Moved from Cattery-8 to Cattery-15
Weight	Jon	07/21/2023 11:03:54	8.1875 lb
Weight	Jon	06/15/2023 10:59:14	7.1875 lb

The log tab is used for logging additional useful information. You can create as many log types as you want under *Settings* → *Lookup Data* → *Log Types*. You can then create a log entry with a given type for a date and with a comment. This is useful for keeping track of animal weights, bite reports, owner emails, complaints and anything else you can think of.

4.4 Template Animals

It's quite common for shelters to want to assign certain elements to new animals. Whilst defaults for all the drop-downs can be assigned under *Settings* → *Options* → *Defaults*, it's normal to want to be able to assign a set of vaccinations, medical treatments or tests, or a particular diet, or some standard costs to new animals.

To do this, create a new animal record with the vaccination, medical treatments, diets and costs on that you'd like to be assigned to new animals. Make sure that the "Non-shelter" box is ticked so that this template animal is kept away from all reports and figures. Finally, give it the name "TemplateType" or "TemplateSpecies".

If you name the animal TemplateType, the system will look for your template animal when the type of the new animal matches it. Similarly, the species has to match if the template is called TemplateSpecies. Type is preferred over species so if you have a new animal where the type and species match two different templates, the type will "win" and the new animal will get the records from the matching type template.

Where records require dates (for example, the due date on medical treatments or vaccinations), the system will calculate the new date based on the difference between the date brought in field of the template animal and the due/required date of the cloned records in question.

For example:

- Template brought in date: 1st January 2016
- Required date of a vaccination on that template: 10th January 2016
- Day difference: 10 days
- Required date of that vaccination when added to the new animal will be today + 10 days

If the calculated date is in the past, today will be used instead.

When copying from a template animal, ASM will copy the following items to your new animal record:

- The animal's adoption fee amount and description/bio field
- The animal's current vet
- The Hold, Is Not Available For Adoption and Do Not Register Microchip flags

- Any additional flags the shelter has added to the system
- Any additional fields the shelter has added to the system
- Vaccinations
- Tests
- Medical regimens
- Diets
- Costs
- Diary notes

4.4.1 Baby Animals

In addition, you can further define a template animal that will only be applied to baby animals. If the animal's age is under the system default defined "baby split" of 6 months, the system will first look for template animals named `TemplateTypeBaby` and `TemplateSpeciesBaby` before falling back to `TemplateType` and `TemplateSpecies` if they do not exist.

4.4.2 Precedence

If there are `TemplateType` and `TemplateSpecies` matches for the new animal, `TemplateType` will be used. If there are multiple templates of either `TemplateType` or `TemplateSpecies` that match (eg: 2 `TemplateSpecies` animals on file with `species=Cat`) then the first one to be entered will be used and the later on ignored.

4.4.3 Calculating offsets from Date Of Birth

The default behaviour is to have the system calculate the date offset based on the difference between date brought in and the current item, then add it to the date brought in on the new record.

If you would prefer to calculate the offset based on the date of birth and the current item, with it similarly being added to the date of birth on the new record, then you can do this by appending `DOB` to the template animalname, eg: `TemplateSpeciesBabyDOB` to calculate on date of birth for a template that applies to baby animals based on species.

This feature is particularly useful for vaccinations and other medical treatments (eg: first worm/flea treatment, spay/neuter etc) that are first given to juvenile animals at a fixed age rather than based on when they entered your care.

4.5 Bulk Change Animals

The bulk change screen allows you to select one or more shelter animals and set one or more fields to the same value. This is very useful for making a group of animals not for adoption in one go, applying a flag, or moving them all to a different location.

This screen also allows you to create a new log message to be applied to all the selected animals, or to create a new movement for all animals (eg: a fake adoption to get the selected animals off shelter, or if a group are all being transferred to another organisation).

Finally, the delete button on this screen allows you to bulk delete all of the selected animals. Use this option with caution.

4.6 Daily Observations

The daily observations screen offers a quick way of writing structured log messages to animal records.

Use the dropdown at the top right to filter shelter animals by their current location.

Tick the checkbox against each animal that you wish to write an observation for, then update the text/dropdown fields with your observations. When you are done, the save button on the toolbar will record a log message containing the values for all selected animals.

You can edit the observation values that are requested under *Settings* → *Options* → *Daily Observations*

Type	By	Date	Note
History	user	05/23/2023 06:02:21	Eaten=Minimal, Drunk=Half, Toilet=Urine, Exercise/Contact=Took for a 5 min walk,...
Document	service	09/30/2022 10:59:45	E502:56:Document signed - New document
Document	user	09/30/2022 10:58:48	E501:56:Document signing request - New document
History	user	08/04/2022 05:38:34	U2021154 Jesse: Moved from Dog Block to Cat Block

4.7 Litters

Animal Shelter Manager allows you to track litters as they are born (or come into) the shelter. These facilities are used in particular for generating the monthly animal figures report, where the number of litters on shelter for each day of the month is tracked.

Litter Ref	Parent	Species	Starts	Expires	Number in litter	Remaining	Littermates	Comments
<input type="checkbox"/> Q 544 Cat	EE - Olivia - C2023124	Cat	05/29/2023		2	2	EE - Olivia - 124C EE - Orchid - 125C EE - Oliver - 126C	
<input type="checkbox"/> Leflore 137		Dog	05/25/2023		10	10	F - Pluto - 090F F - Polly - 091F F - Pippa - 092F F - Phoebe - 093F F - Percy - 094F F - Pepe - 095F F - Pedro - 096F F - Pancho - 097F F - Penelope - 098F F - Petunia - 099F	

The main screen is accessible from *ASM* → *Animals* → *Edit Litters*. It shows you a list of all currently active litters on the shelter. A litter is deemed active whilst it has no expiry date, or an expiry date later than today.

If an animal is returned from adoption who was part of an expired litter, the litter will not be resurrected and it will remain expired unless you manually remove the expiry date.

The litter holds information about how many animals collectively made it up, who the mother was (if known), what species of animal the litter is and any comments.

Add litter
✕

Litter Reference *

Mother **056F - Cicely** 🔍 🗑️

Littermates 🔍 🗑️

Species

Start date *

Number in litter *

Expiry date

Comments

🗨️

Add
Cancel

4.7.1 Auto Expiry

The system will check all the animals in the litter as part of the overnight batch, and the litter will be automatically given an expiry date in the following scenarios:

- There are no animals who make up the litter left in the care of the shelter
- The animals in the litter are older than 6 months

PEOPLE

In addition to animals, Animal Shelter Manager can track information about people. People represent any person or organisation who has any contact with the shelter, be it staff member, volunteer, care officer, animal adopter/fosterer, etc.

5.1 Find Person

Find Person

Simple | Advanced

Code contains	<input type="text"/>	ID contains	<input type="text"/>
Name contains	<input type="text"/>	Address contains	<input type="text"/>
City contains	<input type="text"/>	State contains	<input type="text"/>
Zipcode contains	<input type="text"/>	Homecheck areas	<input type="text"/>
Phone contains	<input type="text"/>	Email	<input type="text"/>
Created By	(anyone) ▾	Created Since	<input type="text"/>
Jurisdiction	(all) ▾	Flags	Select ▾
Comments contain	<input type="text"/>		
Media notes contain	<input type="text"/>		

Search

The advanced find person screen is used to search for groups of people matching criteria. It works exactly the same as the advanced find animal screen.

You can choose to filter the results to only show people who have the flags you select in the flags dropdown.

5.2 Edit Person

The person screen is also grouped into separate tabbed sections with an information banner. The screen allows you to store contact and classification information for a person, along with payments they make, any useful multimedia, diary notes and animal movements, etc.


Facilities are also supplied to write documents to a person, email them from within ASM and find their address on a map.

5.2.1 Person Types

The Type panel allows you to set various classification flags for the person, along with comments and details on membership to your organisation.

Note: The gift aid registered flag appears for people in the UK. Setting this will default the gift aid flag when creating payments from this person for tracking gift aid claims to HMRC.

5.2.2 Looking For



Mrs Susan Dodds - DO000020
Adopter, Homechecked

Last Movement: **Adoption** + Jasper
1001 Villa Gran Way
Fenton MO 63026
(555) 765-1111

Added by **Jon** on 07/25/2023
Last changed by **Jon** on 07/31/2023

Person
License
Investigation
Citations
Equipment Loans
Boarding
Clinic
Payments
Vouchers
Media
Diary

Movements
Links
Log

Save
Delete
Merge
Document
Looking For
Map
Email

▶ Name and Address

▶ Type

▼ Looking for

Status	Active	Sex	Male
Added		Size	(any)
Expires	07/31/2023	Color	(any)
Aged From	1	Type	(any)
Aged To	5	Species	(any)
Comments Contain		Breed	Golden Retriever
		or	(any)
		Good with cats	(any)
		Good with dogs	Yes
		Good with children	(any)
		Housetrained	(any)
		Flags	Select


▶ Audit Trail

Using the “looking for” panel, you can supply criteria for animals that person is interested in adopting - it’s a cut down version of the advanced find animal screen with just the criteria relevant for a prospective adopter.

Selecting active from the dropdown causes this person’s criteria to be included in the list of actively searching people. You also need to set a date to make the criteria active, and optionally one to make it inactive if you would like to give up looking after a period of time. To view matches for currently active people, run the “Person Looking For” report under ASM->Person->Match Looking For. Because it can be quite intensive, the looking for report is run as part of the daily tasks by ASM so it may take 24 hours for new people to appear. An alert will also appear on the dashboard when matches are found.

Only one set of criteria can be held per person.

5.2.3 Homechecker



Mrs Alison Peach - PE000011

990 Horan Drive
Fenton MO 63026
(555) 555-9987

Added by **Jon** on 07/20/2023
Last changed by **Jon** on 08/02/2023

Person
License
Investigation
Citations
Equipment Loans
Boarding
Clinic
Payments
Vouchers
Media
Diary

Movements
Links
Log

Save
Delete
Merge
Document
Looking For
Map
Email

▶ Name and Address

▶ Type

▼ Homechecker

Homecheck Areas	Homecheck History						
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 30%;">Person</th> <th style="width: 50%;">Comments</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Date	Person	Comments			
Date	Person	Comments					

▶ Looking for

▶ Audit Trail

Animal Shelter Manager allows you to keep a list of your volunteer homecheckers in the person database.

To use this facility, simply set the “Homechecker” flag on the type panel, and add the areas they are willing to check in the Areas box under the Homechecker panel.

It is best to include both the area name and postal/zipcode in the box (eg: Rotherham S60). You can then use the find person screen to enter the name of an area you want to check by postcode or name and you will receive a list of homecheckers who cover that area.

When marking a person as homechecked, you can link to the person record of the person who did the check, and it will show up in their homecheck history.

5.2.4 License

The license tab holds details of animals licensed to this person. This tab can be removed with the option “Disable animal control functionality from menus and screens” in the remove unwanted functionality section of *Settings-Options-Options*.

5.2.5 Investigation

ASM allows you to keep notes on any investigation currently going on against a person. This tab can be removed with the option “Disable animal control functionality from menus and screens” in the remove unwanted functionality section of *Settings → Options → Options*.

5.2.6 Citations

The citations tab holds details of citations and fines given to this person. This tab can be removed with the option “Disable animal control functionality from menus and screens” in the remove unwanted functionality section of *Settings* → *Options* → *Options*.

5.2.7 Equipment Loans

The equipment loan tab holds details of equipment loaned to this person. This tab can be removed with the option “Disable animal control functionality from menus and screens” in the remove unwanted functionality section of *Settings* → *Options* → *Options*.

5.2.8 Payments

ASM also allows you to track payments from people here. Payments are any form of income and can be broken down into classifications, such as adoption fees, donations, specific fundraising donations, sponsorship, etc.

You can use this information to produce financial reports and graphs.

Payments can have a date due as well as a date received and can be assigned a frequency. If the frequency is anything but “One-Off”, ASM will create the next payment in the sequence when you mark the current payment as received. If a payment has a due date of today or older, an alert will be shown on the main screen.

5.2.9 Vouchers

Lots of UK shelters run a voucher system to allow poorer owners on benefits cheaper access to care from their clinics. Vouchers have an issue and expiry date, along with a cash sum. You can set up as many different voucher types as you like to cover different areas of medical care. The voucher tab allows you to log vouchers given to owners here.

Some shelters will give out vouchers to have juvenile animals neutered/spayed or microchipped by the new owner after the animal has been adopted.

5.2.10 Links

The links tab enables you to view every other record in the system that this person is attached to.

5.2.11 Merging People

The merge button on the person screen toolbar allows you to choose another person record to merge into this one.

This is useful, because on occasion, users will key the same person in twice with a slightly different name and/or address and probably adopt an animal to them, etc.

Open the person record that you want to merge into (the one that you want to keep). Hit the merge button and choose the duplicate person record.

ASM will reparent all of the movements, links, media, etc from the duplicate person into the currently open record. When it's finished doing that, the duplicate person record will be removed.

If the target person has any blank contact fields that are present on the duplicate person (address, telephone or email fields), they will be copied from the duplicate before it is deleted.

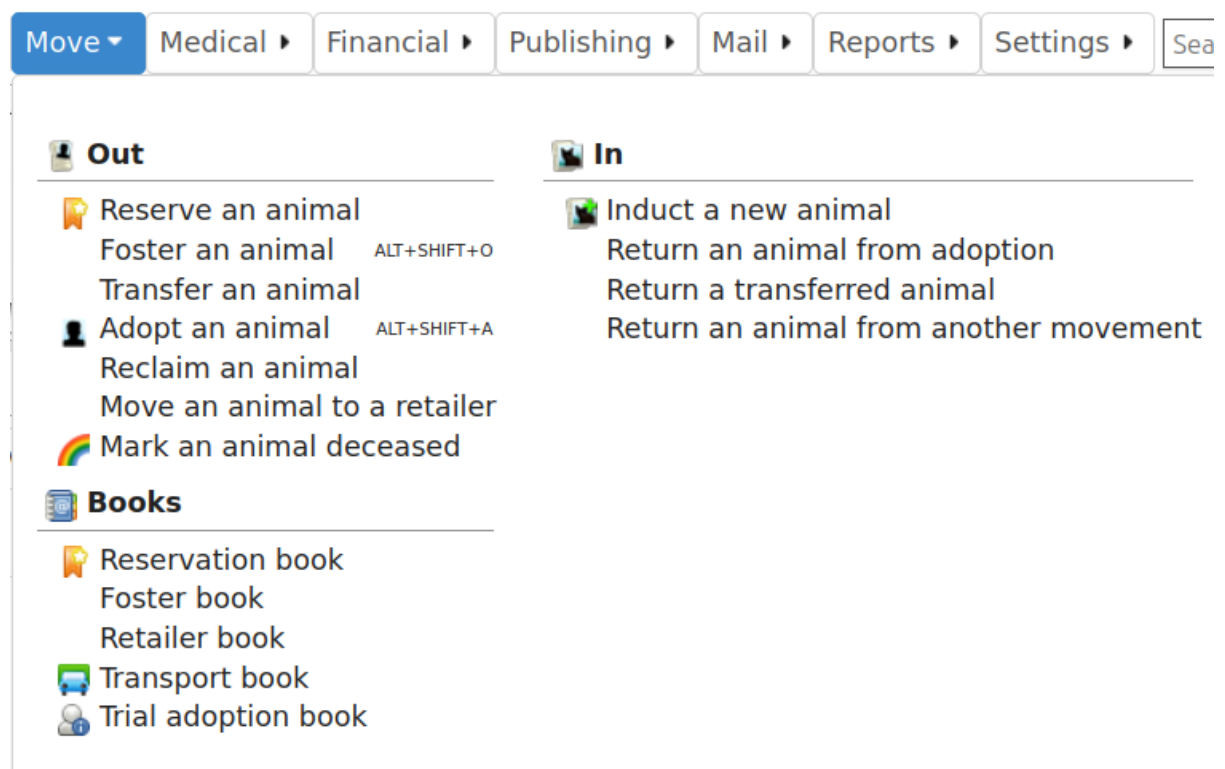
MOVEMENTS

A large part of the administrative duties you will need to perform with Animal Shelter Manager revolve around the movement and reservation of animals.

To start with, it is best to explain how the movement system works; each movement record represents a leaving and returning transaction. You can therefore only have one (or no) active movement record at a time. ie. No more than one unreturned movement. This is because the animal cannot leave the shelter in two different ways without being returned first.

This system allows you to keep track of all the animal's movements over its lifetime to fosters, adopters, etc.

Any method by which an animal leaves your shelter requires a movement record. The only exception is death, which is handled through the animal death tab since it can only occur once.



To make this process easier, you can use the Move menu to quickly create movements for animals. These actions will automatically validate the animal and person to make sure the movement is appropriate, and if the animal is already fostered it will be returned first, if it has open reservations/applications they will be cancelled, etc.

6.1 Reservations

A singular exception to this is reservations - since they are not actually a movement (the animal hasn't gone anywhere) and they represent an adoption intention.

You can have one or more reservations as well as an open movement. You should turn the reservation into an adoption movement when the animal is adopted by the person with the reserve and cancel any other outstanding reservations. If it detects multiple reservations, ASM will prompt and automatically cancel the other reservations for you when you turn one into an adoption using the *Move* → *Adopt an animal* screen.

Note: ASM calls reservations what some shelters call “adoption applications”. You can have as many open applications on an animal as you like with an appropriate status, but only one will ever become the animal's adoption.

In order to help with adoption application tracking, a reservation can be created that is not yet linked to an animal. The option *Settings* → *Options* → *Movements* → *Allow reservations to be created without an animal* needs to be turned on to support this.

6.2 Retailer Movements

ASM has a special kind of movement called a “retailer” movement. This movement should be used if your shelter sells animals through retailers (pet shops, etc.).

To use this, you need to create at least one person on the system with the “Retailer” flag set. When an animal goes to a retailer, you create a retailer movement, moving the animal to the retailer (you can use *Move* → *Out* → *Move an animal to a retailer*).

Animals at retailers are still classed as on the shelter for reporting purposes, however you may then use the additional retailer reports to generate information about retailers (inventories, volumes moved, average time, etc)

When an owner adopts the animal and the paperwork is received by the shelter, you should return the animal from the retailer movement, create the real owner record and adopt the animal to it. If you use *Move* → *Out* → *Adopt an animal* and the animal is at a retailer, ASM will take care of this for you.


Movement records also hold a “from retailer” field, which allows you to identify a successful adoption to an owner through a particular retailer. As long as you use the Adopt an animal process, ASM will set this for you.

If you do not want to use retailer functionality, you can turn off the retailer feature under the *Settings* → *Options* screen.


6.3 Trial Adoptions

If you have enabled the option under *Settings* → *Options* → *Movement* for “Our shelter does trial adoptions”, then when you adopt an animal, either from the movement screens or *Move* → *Out* → *Adopt an animal* then a checkbox will appear allowing you to flag that the adoption is a trial and when the trial ends.

Some shelters commonly call this process “Foster-to-adopt”.

Movement Type	Adoption 
Movement Date	08/16/2023
	<input checked="" type="checkbox"/> Trial
Trial ends on	09/15/2023

Animals who are on a trial adoption will appear under *Move* → *Books* → *Trial adoption book*

Trial adoption book						
Type	Date	Coordinator	Trial ends on	Species	Animal	Person
<input type="checkbox"/> Trial Adoption	08/01/2023		09/02/2023	Dog	 Ripley - 3B	Mr David Smith 82 Larkin Williams Road Fenton MO 63026

When the trial ends, an alert will be shown on the home screen, which you can use as a reminder to contact the owner and either get the animal returned or make the adoption permanent. There are reports you can also install from the repository to view active or expired trial adoptions.








You make an adoption permanent by simply unticking the trial box in the movement record.

6.4 Movement Books






ASM has a set of movement books that can be used for conveniently viewing animals who are currently off the shelter or reserved.

Move ▾
Medical ▾
Financial ▾
Publishing ▾
Mail ▾
Reports ▾
Settings ▾
Sea





Out

-  Reserve an animal
-  Foster an animal ALT+SHIFT+O
-  Transfer an animal
-  Adopt an animal ALT+SHIFT+A
-  Reclaim an animal
-  Move an animal to a retailer
-  Mark an animal deceased

Books

-  Reservation book
-  Foster book
-  Retailer book
-  Transport book
-  Trial adoption book

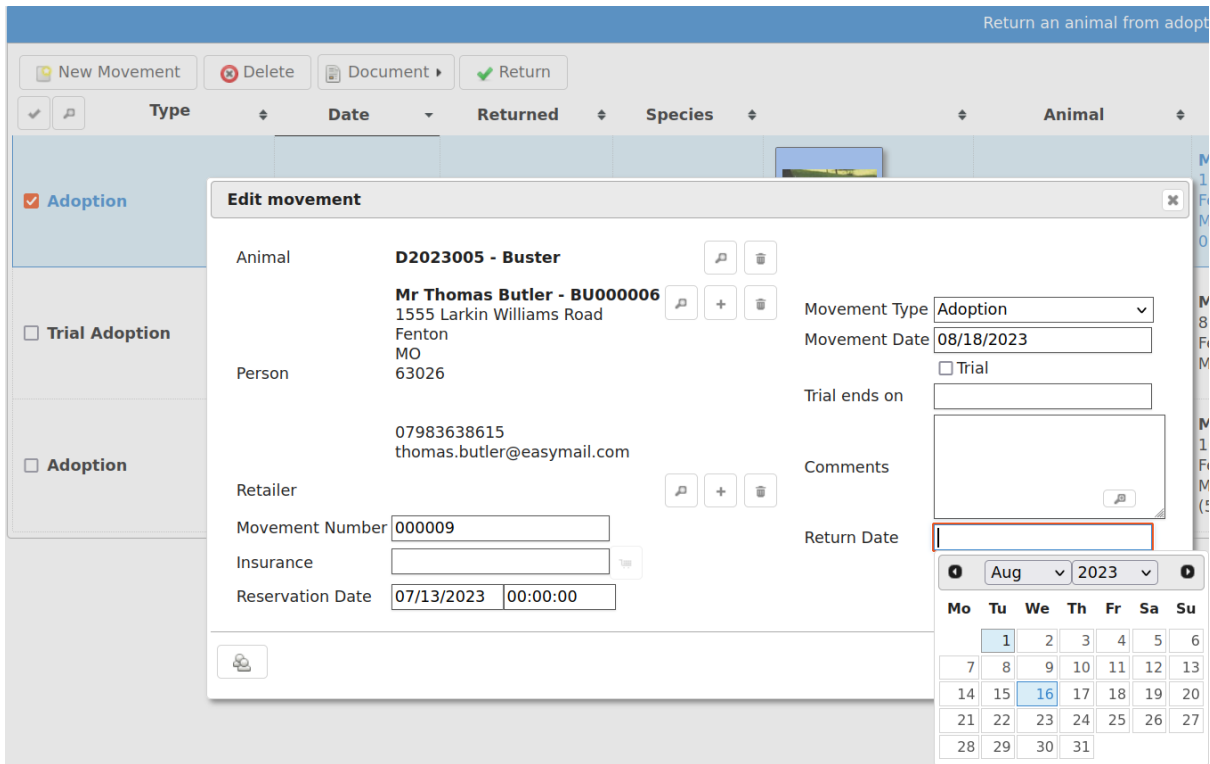
In

-  Induct a new animal
-  Return an animal from adoption
-  Return a transferred animal
-  Return an animal from another movement

They are:

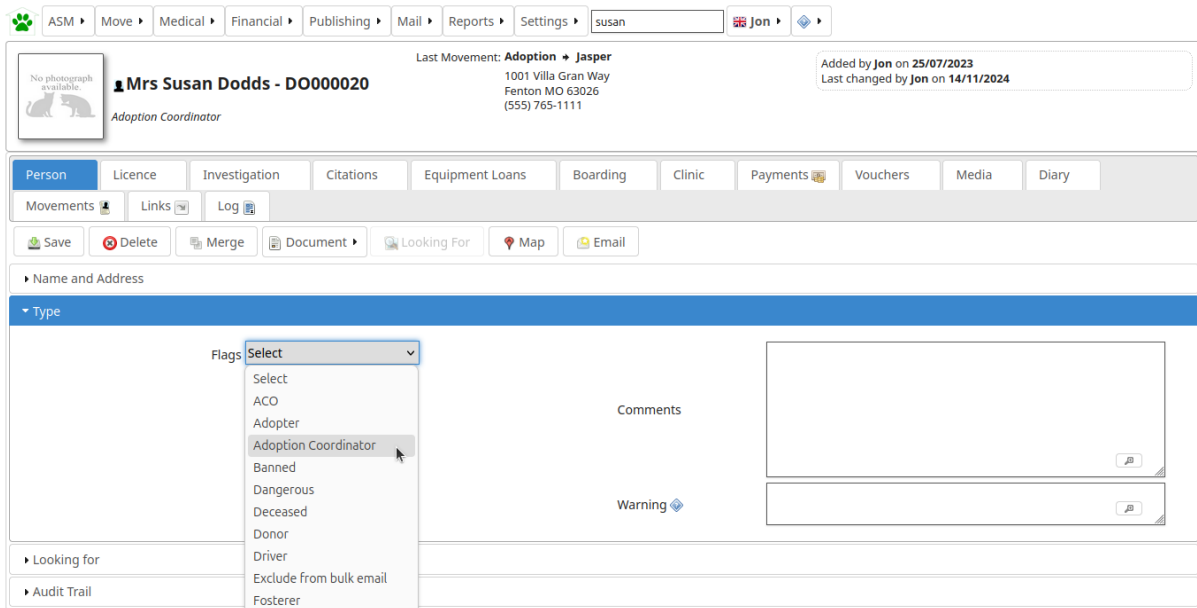
- Reservation book
- Foster book
- Retailer book
- Trial adoption book
- Return an animal from adoption (shows adoptions in the last 30 days)
- Return a transferred animal (shows transfers in the last 30 days)
- Return an animal from another movement (escaped, stolen, released, reclaimed animals in the last 30 days).

Conceptually, all the books work in exactly the same way – they show sets of animal movements off the shelter for different reasons. You can quickly link to the animal or people records or return the animal from the movement back to the shelter. To do that, simply open the movement and set a return date (or use the Return button).



6.5 Adoption Coordinators

The adoption coordinator feature allows animals to be assigned to a staff member to handle the adoption process. Person records should first be created for these members of staff with the “Adoption Coordinator” flag.



Animals can then be assigned an adoption coordinator within the entry section of their record.

[ASM](#) ▶ [Move](#) ▶ [Medical](#) ▶ [Financial](#) ▶ [Publishing](#) ▶ [Mail](#) ▶ [Reports](#) ▶ [Settings](#) ▶ [Jon](#) ▶

Tatters - S2021001

Female Cat aged 4 years 8 months. Small / 6.0625kg

Location: **Cattery**

Adoption Coordinator: **Mrs Susan Dodds**

Microchip:
Entered shelter: **04/07/2023**
Left shelter:
Time on shelter: **1 year 4 months. (499 days)**

Added by **Jon** on 14/07/2023
Last changed by **Jon** on 14/11/2024

Available for adoption

Animal
Vaccination
Test
Medical
Clinic
Licence
Diet
Costs
Payments
Media
Diary
Transport
Movements

Log
Save
Clone
Merge
Delete
Email
Document
Match
Littermates
Share

▶ Details

▶ Notes

▶ Additional

▼ Entry

<p>Mrs Susan Dodds - D0000020</p> <p>1001 Villa Gran Way Fenton MO 63026 (555) 765-1111</p> <p>sue.dodds@mail.com</p>	<p>Date Brought In * <input type="text" value="04/07/2023"/></p> <p>Entry Type <input type="text" value="Stray"/></p> <p>Entry Category <input type="text" value="Stray"/></p> <p>Jurisdiction <input type="text" value="Local"/></p> <p><input type="checkbox"/> Picked Up</p> <p><input type="checkbox"/> Hold until <input type="text"/></p>
--	---

In shelterview the adoption coordinator view displays animals grouped by their adoption coordinatoors.

[ASM](#) ▶ [Move](#) ▶ [Medical](#) ▶ [Financial](#) ▶ [Publishing](#) ▶ [Mail](#) ▶ [Reports](#) ▶ [Settings](#) ▶ [Jon](#) ▶

Shelter Manager Demo (23)
Adoption Coordinator

Miss Karen Wiper (5)

Buster D2024001

Charlie D2023007

Freddie D2023008

Jackson D2023010

Kiki U2023001

Mr Thomas Butler (7)

Larry H2023002

Mindy H2023002

Roach H2023001

Rupert D2023009

Sally H2023003

Sam D2023001

Sprocket D2023003

Mrs Jenny Fisher (3)

Bisto U2023006

Doyal U2023011

Marlon U2023005

Mrs Jenny Smith (5)

Piper U2023010

Rhubarb U2023004

Ruffles U2023003

Russo U2023007

Sasha S2023003

Mrs Susan Dodds (3)

Scratchy U2023002

Slinky U2023009

Tatters S2021001

Online form applications which contain an animalname or reserveanimalname field can be emailed automatically to the adoption coordinator responsible for the selected animal. This option can be enabled by clicking the pencil icon next to the form, then checking the “Email adoption coordinator” box. For more information on using online forms, see *Online Forms*

Adoption coordinatoors can also receive automated email notifications when a signing request connected to one of their adoptions has been completed. The feature “Notify adoption coordinator when documents are signed” can be enabled in the *Settings* → *Options* → *Documents* screen.

Edit online form
✕

Name

Redirect to URL after POST

Person Flags

Auto Process

Retain for

Email submissions to

Email adoption coordinator

Email fosterer




Send confirmation email to form submitter

The reservation book contains a column for the adoption coordinator, clicking on the column header will sort the reservations by coordinator to help them work through reservations for their animals.

ASM ▶ Move ▶ Medical ▶ Financial ▶ Publishing ▶ Mail ▶ Reports ▶ Settings ▶ susan
Jon ▶

Reservation Book

New Movement
Delete
Document
To Adoption
Cancel
Email

✓	Type	Date	Status	Home Checker	Coordinator	Species	Breed	Animal	Person	Comments
<input type="checkbox"/>	Reservation	13/11/2024 00:00:00	More Info Needed		Mrs Susan Dodds	Cat	Persian	 Scratchy - U2023002	Miss Kerry Parkinson 1812 Alvarado Drive Fenton MO 63026	
<input type="checkbox"/>	Reservation	11/11/2024 00:00:00	More Info Needed		Mrs Jenny Smith	Cat	Burmese	 Piper - U2023010	Mr Andrew Lister 1236 Montevale Court Fenton MO 63026 (555) 515-9077	
<input type="checkbox"/>	Reservation	14/11/2024 00:00:00	More Info Needed		Mrs Jenny Smith	Cat	Domestic Short Hair	 Russo - U2023007	Keith Brown	

The adoption coordinator can be added to document templates using the Coordinator wordkeys. For a full list of wordkeys, see [Appendix: Wordkeys](#)

DOCUMENTS

Animal Shelter Manager has extensive document abilities for creating forms and letters. The system also includes its own web-based word processor for handling this.

To create a document for use with the system, you can manage templates under *Settings* → *Document Templates*. You embed keys in your document that will be substituted with real data when a document is generated. For a complete list of document keys, see *Appendix: Wordkeys*

Keys follow the format <<[Keyname]>>. For example, putting the tag <<AnimalName>> in your document will cause it to be substituted for the animal's name.






The screenshot shows the animal details page for Rupert - D2023009. The animal is a Male Dog, aged 22 weeks, Medium size, with a weight of 27.0625lb. The location is Dog Block 11, entered on 08/02/2023. The toolbar includes buttons for Save, Clone, Merge, Delete, Email, Document, Match, Littermates, and Share. The 'Document' dropdown menu is open, showing a list of templates: adoption_form.html, cat_assessment_form.html, cat_cage_card.html, cat_information.html, dog_assessment_form.html, dog_cage_card.html, dog_information.html, fancy_cage_card.html, half_a4_cage_card.html, microchip_form.html, petplan.html, and rabies_certificate.html.






























A number of places in the system have toolbars with generate document buttons, you can find these:

- On the animal details screen (creates documents with animal, person and movement information, useful for adoption paperwork)
- On the person screen(creates documents with person information)
- On the payments tab (creates documents with person, payment and animal information, useful for invoice and receipt templates)

However you choose to create the document, the process is the same. You select your document template from the dropdown list.


File Edit View Insert Format Tools Table






 sans-serif 8pt
 B *I* U A

ANIMAL ADOPTION FORM

Reference Number 11D
Adoption Number None



Title, First Names & Surname: **Mr Paul Wilkins paid**

Address & Postcode: **2391 Cassens Drive, 63026**






Daytime Telephone Number: Evening Telephone Number: **(555) 556-1010**






























DECLARATION

Once you have selected the template, the document will be generated and opened in the word processor, ready for editing and printing. If you hit the save button in the word processor, the document will be saved to the appropriate media tab of the animal/person you generated the document for.

You can also use the PDF button on the toolbar to generate and open a PDF of the document. This is useful as PDFs will be consistent across different machines running different operating systems and with different fonts installed.

File Edit View Insert Format Tools Table






 sans-serif 8pt
 B *I* U A

ANIMAL ADOPTION FORM

View this document as a PDF

7.1 PDF Directives

You can embed directives in your document to give some hints to the PDF engine. These should take the form of HTML comments, embedded in `<!--` and `-->`, and can be inserted by going to Tools->Source Code in the document editor:

```
<div><!-- pdf papersize a4 --></div>
```

To set the papersize to a4. Other options are a3, a5 and letter:

```
<div><!-- pdf papersize exact 89mmx36mm end --></div>
```

To set the papersize to an exact measurement (in this case 89mm x 36mm width x height, which is the size used by the Dymo 450 label printer):

```
<div><!-- pdf orientation landscape --></div>
```

To set the orientation to landscape. Portrait is the default but can be explicitly set too. Note that setting an orientation will override any papersize exact directive.

Use the margins directive to set the PDF margins:

```
<div><!-- pdf margins 2cm 2cm 1cm 1cm end --></div>
```

Margins are in the order top, bottom, left then right.

The PDF engine will scale the document to fit the page horizontally based on the widest element in it. Use the zoom directive to override this behaviour and specify a scaling amount (this sets a zoom CSS value on the body element):

```
<div><!-- pdf zoom 130% end --></div>
```

Most of these options are to wkhtmltopdf, a PDF renderer based on webkit (the engine used by the Chrome and Safari web browsers). An alternative, simpler PDF engine can also be used by specifying:

```
<div><!-- pdf renderer pisa --></div>
```

7.2 Email Tokens in Document Templates

When creating email document templates it is possible to include an email subject by using the `{{SUBJECT}}` token with custom text or a word key, see *Appendix: Wordkeys*

```
{{SUBJECT This is about <<AnimalName>>}}
```

The following tokens can also be used to add email addresses to the template:

```
{{TO example@email.com}}
{{FROM example@email.com}}
{{CC example@email.com}}
{{BCC example@email.com}}
```

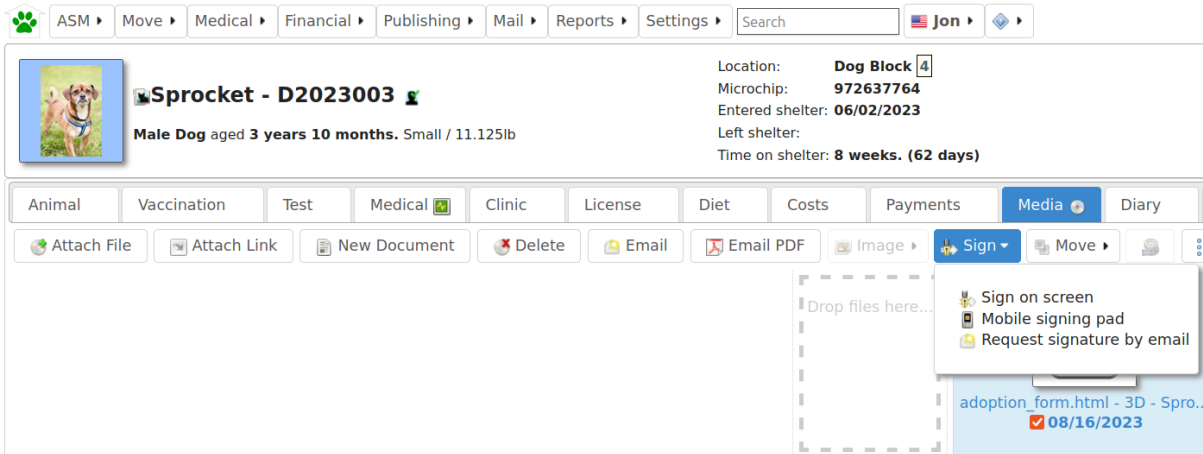
Note that the TO token will be ignored if you are using this template with a mail merge.

More than one email address can be included by adding the address separated by a comma:

```
{{BCC example@email.com, example2@email.com}}
```

7.3 Electronic Signatures

Warning: Electronic signatures are only supported by ASM's built in HTML-based word processor. They cannot be used with OpenOffice templates.



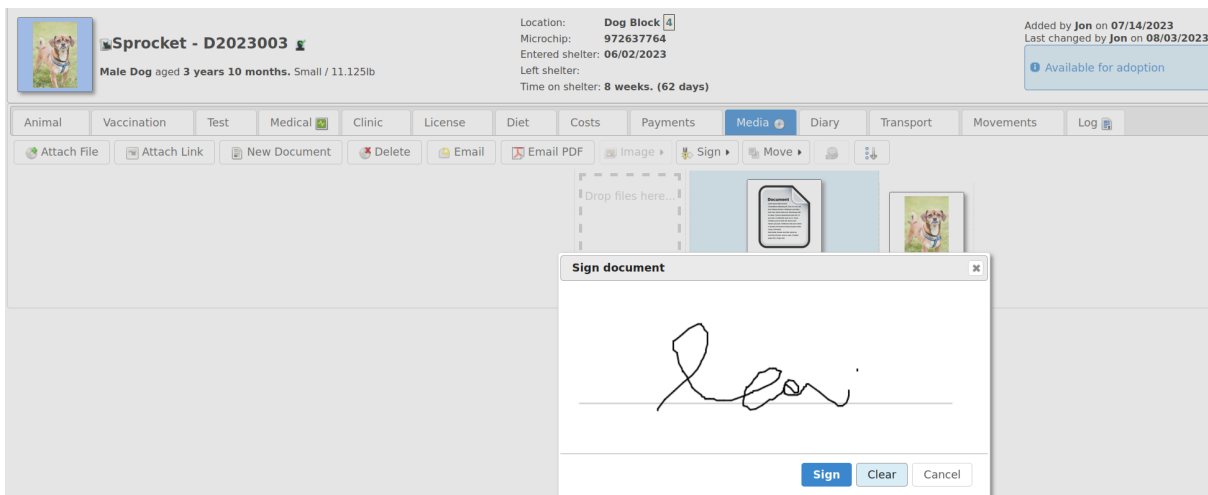
ASM allows you to add electronic signatures to documents. Signed documents are read only and cannot be edited. A cryptographic hash for the signed document is calculated and stored separately so that any future tampering can be detected.

There are multiple methods of adding signatures to documents:

- “Sign on screen” menu item in the media tab (using a touchscreen monitor, wacom tablet, lightpen, other mouse-like device or if you are using a tablet computer)
- “Signing Pad” mode of the mobile interface for any external touchscreen device (iPad, iPhone, Android phone/tablet, etc).
- “Request signature by email” menu item in the media tab, which sends an email to the recipient of your choice (defaults to the current person if this is a person’s media tab) with links for them to follow to sign the selected documents with their own touchscreen device.
- A signature that has been pre-stored for the currently logged in user (necessary for a staff signature in addition to the main signatory).

To use, select the documents you’d like to sign and click the “Sign” dropdown on the toolbar of the media tab. ASM allows you to use any generic mouse or touchscreen hardware and mobile touchscreen devices as signing pads - you do not need to buy expensive custom hardware.

Note: Once signed, a document cannot be edited. A maximum of two signatures can be recorded in a document - one for the signatory and one for the current system user.



To control the size and location of the signature:

- Add the token <<Signature>> where you’d like the signature to appear.

- You can set a pixel width of 100, 150, 200 or 300 (the default is 150) in the token, eg: <<Signature300>>
- When a document is generated from your template, a placeholder image of the correct size will appear where you inserted the token.
- The document signing module will replace the placeholder image with the signature after the document is signed.

If your document template does not contain a signature token, the signature will be attached to the document as a footer along with the date and time the document was signed.

ANIMAL CENTRE No. & ADDRESS:	Shelter Manager Demo Address Tel: Telephone
------------------------------	---



08/16/2023 14:46:32

In addition, an icon will appear next to the document on the media tab to indicate that the document has now been signed.

Costs
Payments
Media
Diary
Transport

PDF
Image
Sign
Move

Drop files here...

adoption_form.html - 3D - Spro...

08/16/2023

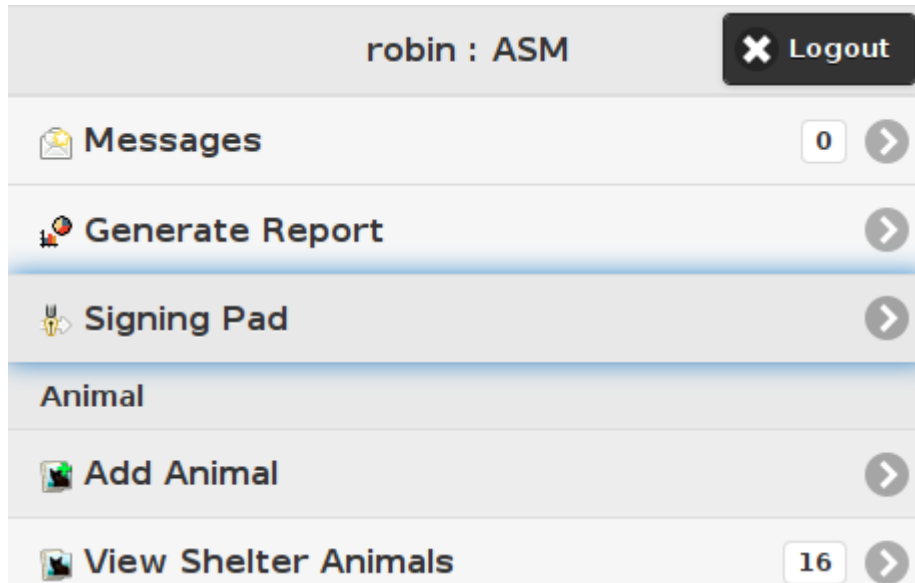
07/14/2023

7.4 Mobile Signing

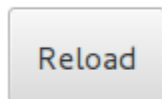
The “Mobile signing pad” menu item allows you to mark the document for signing in the mobile interface.

If you visit ASM’s mobile interface on any mobile/tablet device, you can use the “Signing Pad” link in the mobile interface to go into signing pad mode.

Warning: The mobile interface must be logged in with the same user account as the person who clicked the “Signing Pad” button on the media tab. This prevents users signing other’s documents and eliminates confusion in multi-site use.



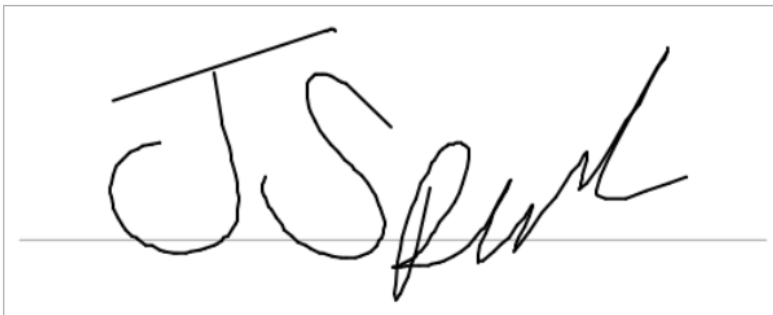
Waiting for documents...



Once in signing pad mode, the interface waits for documents to sign. When documents are received, they can be reviewed in the mobile interface with a signature pad below for the person to sign. This is useful for adoption and other paperwork and allows you to keep contracts in a completely electronic manner without the need for paper. You can still print off signed documents or email them in PDF form to adopters directly.

Signing: adoption_form.html - 5U - Lynx

[View Document](#)



Once signed, this document cannot be edited or tampered with.


7.5 User Signatures

It is quite common for documents to require a member of staff signature as well as the main signatory (eg: new adopter/volunteer/etc.). In order to add a second signature to a document, the user's signature must be stored within the system. This means the system can insert the user's signature into the document which can then be signed using the signing pad - it isn't currently possible to add multiple signatures to a single document using the signing pad.

Each user can store their own signature in the "Change User Settings" page, accessed under the user menu (the menu with the logged in user's name at the top right of the screen).

Change User Settings

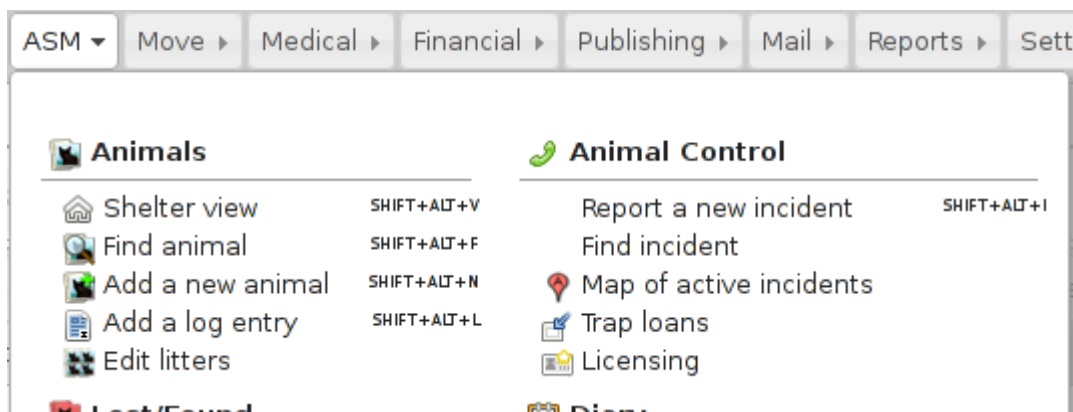
Username	robin
Real name	<input type="text" value="John Smith"/>
Email Address	<input type="text"/>
Visual Theme	<input type="text" value="(use system)"/>
Locale	<input type="text" value="(use system)"/>

Signature	
-----------	--

You can add a placeholder for the current user's signature in your document templates with the <<UserSignature>> wordkey. This will insert the signature at 150px width into the document as an image. You can use the same 100, 150, 200 or 300 suffix to control the size of the user signature.

ANIMAL CONTROL

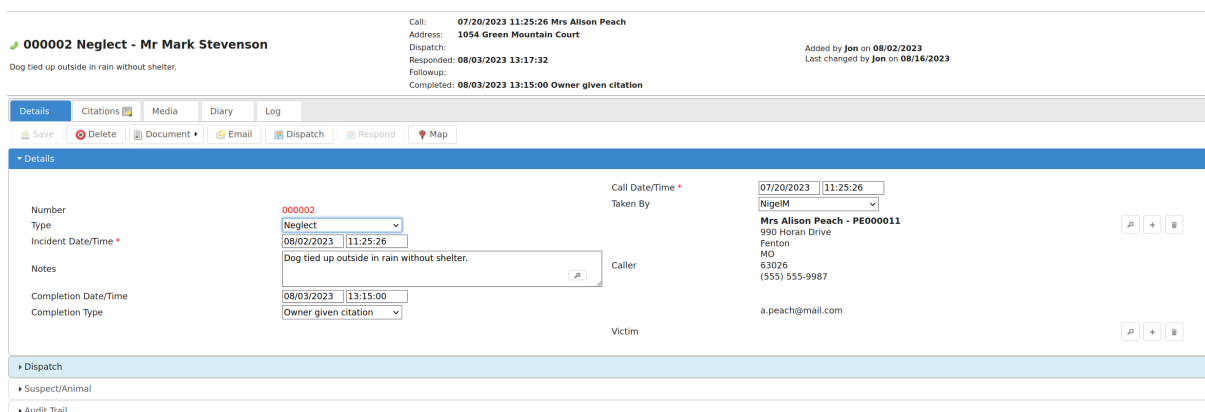
8.1 Incidents



If your shelter deals with them, ASM allows you to track animal control incidents. Animal control incidents store information about the initial telephone call, dispatch of officers, the owner/animal being cited, citations, fines and any victim.

Use the find incident menu item to locate incidents, or use the main database search with the ac: prefix.

8.2 Incident Details



The incident details screen logs the type of incident, the call information, the victim, notes and completion.

8.3 Dispatch

000002 Neglect - Mr Mark Stevenson
Dog tied up outside in rain without shelter.

Call: 07/20/2023 11:25:26 Mrs Allison Peach
Address: 1054 Green Mountain Court
Dispatch: 08/03/2023 13:17:32
Responded: 08/03/2023 13:17:32
Followup:
Completed: 08/03/2023 13:15:00 Owner given citation

Added by Jan on 08/02/2023
Last changed by Jan on 08/16/2023

Details

Citations

Media

Diary

Log

Save

Delete

Document

Email

Dispatch

Respond

Map

Details

Dispatch

Address:

City:

State:

Zipcode:

Pickup Location:

Jurisdiction:


Dispatched ACO:

Dispatch Date/Time:

Responded Date/Time:

Followup Date/Time:

Followup Date/Time:



Suspect/Animal

Audit Trail

Dispatch covers the address an officer was sent to, along with who was dispatched and when they responded. A minimap is shown to the location and a followup date and time can be set for reporting and the system will also remind you when it is due with an alert on the home page.

A “pickup location” can also be chosen here from the system’s available locations (edit them under *Settings* → *Lookup Data* → *Pickup Locations*). You can use these as a jurisdiction for incidents and animals entering the shelter.











8.4 Suspect/Animal and Citation

The screen can also store upto 3 suspects the incident refers to, along with some basic information about the animal(s) causing the incident (optionally, you can link to an animal record here if the animal is taken into the shelter or you can use a non-shelter animal to store more information if required).

The citation tab allows brief information about any citations given relating to the incident along with any fines levied. Fines can have a due and paid date. If the due date passes without being paid, it will appear on reports and as an alert on the home page.

8.5 Alerts

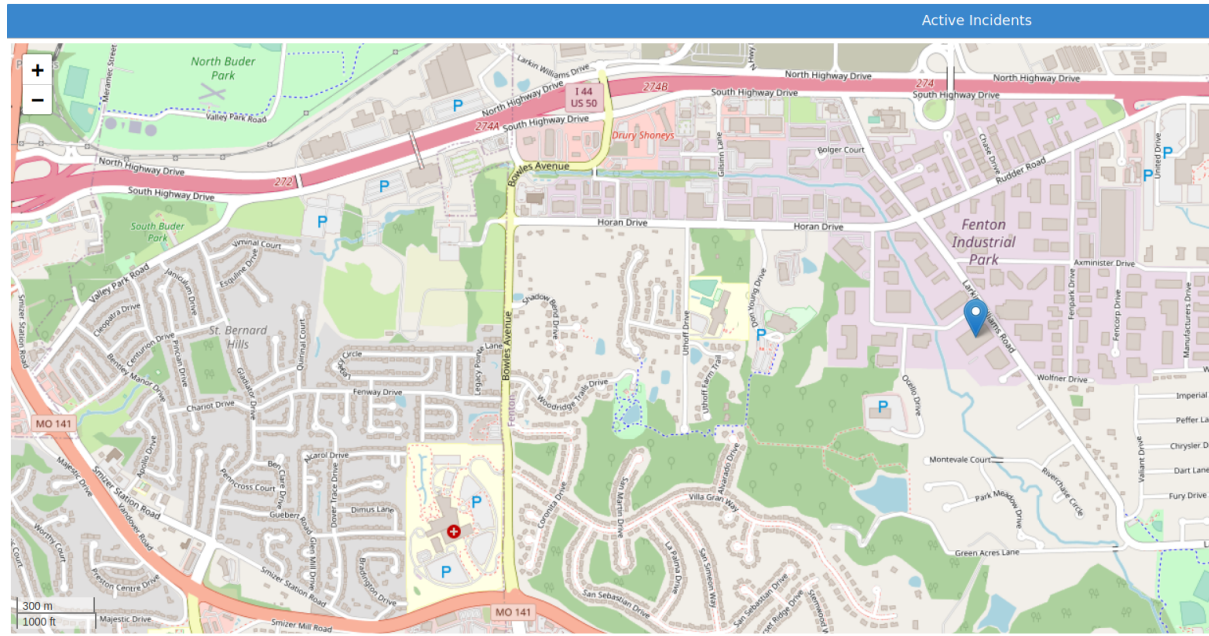
Alerts (19)

-  1 vaccination needs to be administered today
-  1 medical treatment needs to be administered today
-  1 person with an active reservation has not been homechecked
-  2 reservations have been active over a week without adoption
-  8 shelter animals have not been microchipped
-  2 animals have been on the shelter longer than 6 months
-  1 unpaid fine
-  1 undispached animal control call
-  1 incomplete animal control call
-  1 item of equipment is overdue for return

The animal control module will raise alerts for unpaid fines, calls that have not yet resulted in dispatch, calls that do not have a completion date and code, incidents that are due for followup today and traps due for return.

8.6 Map of active incidents

ASM can also plot you a map of currently active animal control incidents. This can be useful for route planning, spotting trends, etc.



8.7 Equipment Loans

ASM can keep track of traps or equipment loaned to people along with deposit amounts (if your shelter does trap/equipment rental, you can also use the payments tab to track rental payments). Active loans can be viewed from the menu and an equipment loan tab will appear on each person record.

Equipment Loans						
Type	Person	Date	Number	Deposit	Due	Returned
<input type="checkbox"/> Cat Box	Mr Andrew Lister	07/31/2023		\$15.00	08/03/2023	

Loans have a due date and return date. If the due date goes past today without a return date, the record will be highlighted and an alert shown on the home screen.

8.8 Licensing

Similarly, ASM can track animal licenses issued to owners. The license will appear on the license tab of both animal and person. License records hold the number, the type of license, the fee and the issue and expiry dates. Payments for licenses should be tracked under the animal/person payment tab.

It is very common for licensed animals to not be shelter animals (ie. Never form part of the intake of the shelter). In this situation, the animal record for the licensed animal should have the “Non-Shelter Animal” box ticked appropriately on its record with the original owner set to the current owner. It is also possible to not include an animal link and just put a few details in the comments field instead if you deal with enough licenses to make creating non-shelter animal records unfeasible.

Licensing									
<input type="button" value="New License"/> <input type="button" value="Renew License"/> <input type="button" value="Delete"/> <input type="button" value="Document"/> Issued in the last month ▾									
<input type="checkbox"/>	Type	Person	Animal	License Number	Fee	Issued	Expires	Comments	
<input type="checkbox"/>	Altered Dog - 1 year	Mrs Alison Peach	 Kiki - 1U	168762543	\$0.00	08/15/2023	08/15/2024		
<input type="checkbox"/>	Altered Dog - 1 year	Mr Donald Walker	 Lucy - 4N	0632921614	\$150.00	08/16/2023	08/16/2024		


The licensing screen has a number of filters that can be set by clicking the dropdown in the upper right corner. Licenses issued and expiring over a period can be selected.



You can search for licenses by their number in the main ASM search box. You can also use the li: prefix to only search license numbers.



BOARDING

The boarding interface is used to administrate the boarding of animals, create due payments and invoice customers. Animals with an active boarding record will automatically move into the pre-selected shelter location on the check-in date and out again when the check-out date is reached.

Boarded animals will appear in shelter view with a boarding emblem next to their name.



 ASM ▾ Move ▾ Medical ▾ Financial ▾ Publishing ▾ Mail ▾ Reports ▾ Settings ▾


Lucy - N2023002 
Female Dog aged 5 years 3 months.



Animal	Vaccination	Test	Medical	Boarding 	Clinic	License	Diet
<input type="button" value="Log"/> 							
<input type="button" value="New Boarding"/>		<input type="button" value="Delete"/>		<input type="button" value="Create Payment"/>			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Type ▾	Check In ▾	Check Out ▾	Person ▾		
<input type="checkbox"/>	Boarding		06/01/2023 00:00:00	06/08/2023 00:00:00	Miss Jasmine Sinclair	D	

9.1 Boarding Book


The boarding book located under the financial menu allows you to conveniently view boarding animals by selected periods and status.


 ASM ▾ Move ▾ Medical ▾ Financial ▾ Publishing ▾ Mail ▾ Reports ▾ Settings ▾ Jon ▾

Boarding Book

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Type ▾	Check In ▾	Check Out ▾	Person ▾	Animal ▾	Location ▾	Fee	Active ▾
<input type="checkbox"/>	Boarding		06/23/2023 00:00:00	06/30/2023 00:00:00	Miss Kerry Parkinson	Ripley - 2B 	Dog Block <input type="text" value="14"/>	\$140.00 (7 days at \$2	Active Starting today Starts in next 3 months Ending today Ended in last 3 months
<input type="checkbox"/>	Boarding		06/20/2023 00:00:00	06/28/2023 00:00:00	Mr David Smith	Monty - 1N 	Dog Block <input type="text" value="10"/>	\$160.00 (8 days at \$2	

Selecting an entry and clicking the create payment button allows you to create a due payment based on the daily boarding fee and number of days boarded. You can then use the payment screen to request electronic payment from the customer or produce an invoice.



Miss Kerry Parkinson - PA000004

30 Charles Street
London N1

Added by **Jon** on **23/06/2023**
Last changed by **Jon** on **23/06/2023**

Person
Licence
Investigation
Citations
Equipment Loans
Boarding
Clinic
Payments
Vouchers
Media
Diary
Movements

Links
Log

New Payment
Delete
Receive
Receipt/Invoice

Type	Method	Frequency	Due	Received	Receipt No	Amount	Fee	VAT	Animal	Comments
<input checked="" type="checkbox"/> (blank)	Cash	One-Off	29/06/2023		00000003	£140.00	£0.00	£0.00	Ripley - 2B	

Due: £140.00

9.2 Boarding Calendar

Calendar View

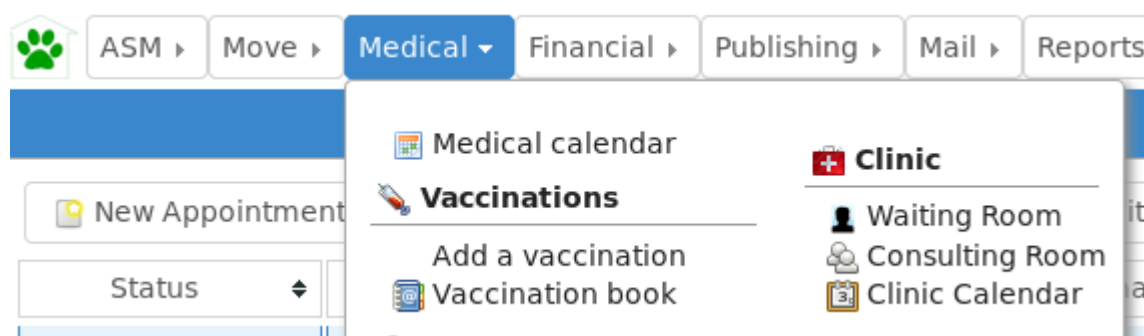
Diary
 Vaccination
 Medical
 Test
 Boarding
 Clinic
 Payment
 Incident followup
 Transport
 Equipment loan

< Today >
June 2023
Month Week Day List

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1 12a Dog Block:11 - Lucy	2	3	4
5 Dog Block:11 - Lucy	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20 12a Dog Block:10 - Monty	21	22	23 12a Dog Block:14 - Ripley	24	25
26 Dog Block:10 - Monty	27 Dog Block:14 - Ripley	28	29	30	1	2

The boarding calendar is a calendar view, showing day, week and month breakdowns of animals boarding at the shelter. The location assigned to that animal for boarding is shown so that you can look for overlap and double-bookings. Clicking on the animals name in the boarding calendar will take you to the boarding tab of that animals record.

The clinic interface is used to administrate appointments for an on-site clinic, manage the waiting room and produce invoices for customers.



10.1 Waiting Room

Status	For	Person	Animal	Appointment	Arrived	With Vet	Complete	Amount	VAT	Reason	Comments
Waiting	user	Elizabeth Martz	Adopted Cat - U2017006	14:05	14:03 (39 mins)			£0.00	£0.00		
Scheduled	user	Casey Pierce	Adopted Dog - A2015001	14:50				£0.00	£0.00	Dog off its food	

The waiting room screen shows all appointments that are due today. New appointments can be added here, and a selection of buttons at the top allow appointments to quickly advance through the statuses and perform actions.

- Refresh - reloads the list of appointments so that changes made by other users are visible.
- Waiting - use this toolbar button when a person arrives for their appointment. Until they are with the vet, the Arrived column will show the length of time they have been waiting in minutes as well as the arrival time.
- With Vet - use this toolbar button once the vet has called the person into the consulting room (this button is also available there, so that the vet can update the status depending on your workflow).
- Complete - used to mark the appointment as complete. Complete appointments will appear greyed out.
- Document - allows a document to be generated from a template with appointment data substituted for tokens. A default “clinic_invoice” document template is included for producing invoices from appointments.
- Create Payment - creates a payment record for the person the appointment is for. You can create either a received or due payment so that ASM’s normal payment processes can then be followed and reported on.

To the right of the status on every appointment is an invoice icon. Clicking it will take you to a screen where you can edit the invoice items for that appointment.

10.2 Consulting Room

The screenshot shows the 'Consulting Room - user' interface. At the top, there are navigation tabs: ASM, Move, Medical, Financial, Publishing, Mail, Reports, Settings, and a search bar. Below this is a toolbar with buttons for 'New Appointment', 'Delete', 'Refresh', 'Waiting', 'With Vet', 'Complete', 'Document', and 'Create Payment'. A dropdown menu is set to '(all)'. The main table has columns for Status, For, Person, Animal, Appointment, Arrived, With Vet, Complete, Amount, VAT, Reason, and Comments. Two rows are visible: one for a 'Waiting' appointment for Elizabeth Martz at 14:05, and one for a 'Scheduled' appointment for Casey Pierce at 14:50.

Status	For	Person	Animal	Appointment	Arrived	With Vet	Complete	Amount	VAT	Reason	Comments
Waiting	user	Elizabeth Martz	Adopted Cat - U2017006	14:05	14:03 (40 mins)			£0.00	£0.00		
Scheduled	user	Casey Pierce	Adopted Dog - A2015001	14:50				£0.00	£0.00	Dog off its food	

The consulting room screen is identical to the waiting room screen, however it only shows appointments that are for the currently logged in user. It is intended for use by vets, so they can see who is currently waiting for them in the waiting room and quickly handle details of their clients for the day.

10.3 Clinic Calendar

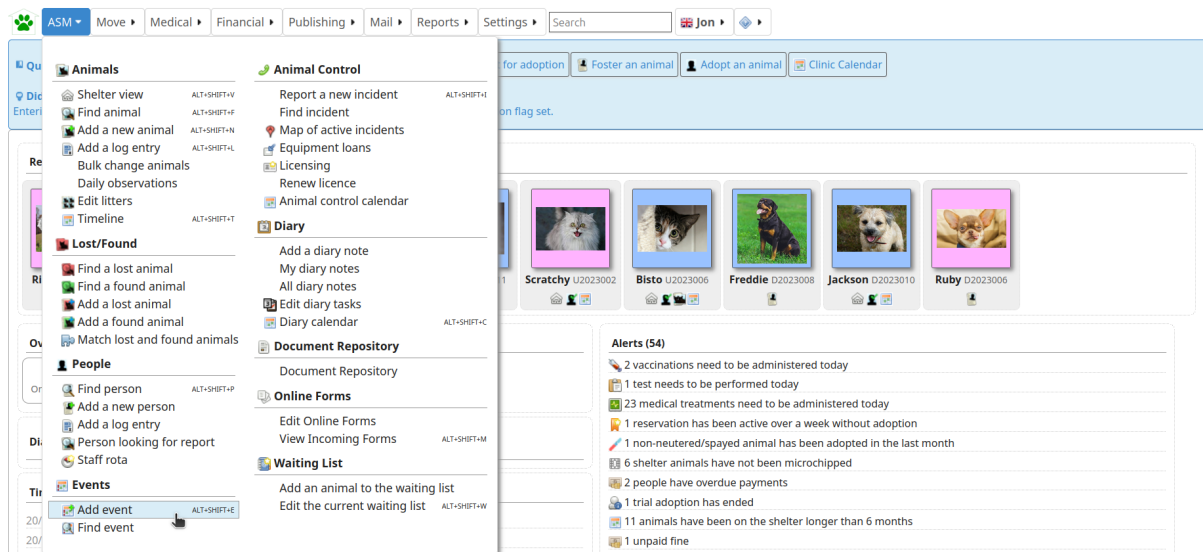
The screenshot shows the 'Clinic Calendar' interface. At the top, there is a dropdown menu set to '(everyone)'. Below this are navigation buttons for 'Today', 'Month', 'Week', 'Day', and 'List'. The main calendar view shows the month of May 2018. The days of the week are labeled: Mon, Tue, Wed, Thu, Fri, Sat, Sun. The calendar shows appointments for various days: Monday 30th (12:28p Casey Pie, 12:28p Elizabeth), Tuesday 1st (12:52p Casey Pie), Wednesday 2nd (9:09a Casey Pier), Friday 18th (3:25p Elizabeth I), and Sunday 20th (2:05p Elizabeth I, 2:50p Casey Pier).

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30 + 12:28p Casey Pie + 12:28p Elizabeth	1	2	3	4	5	6
7	8 + 12:52p Casey Pie	9 + 9:09a Casey Pier	10	11	12	13
14	15	16	17	18 + 3:25p Elizabeth I	19	20 + 2:05p Elizabeth I + 2:50p Casey Pier
21	22	23	24	25	26	27

The clinic calendar is a full calendar view, showing day, week and month breakdowns of appointments. By default, appointments for all vets are shown, but you can choose a particular vet from the dropdown to see just their calendar.

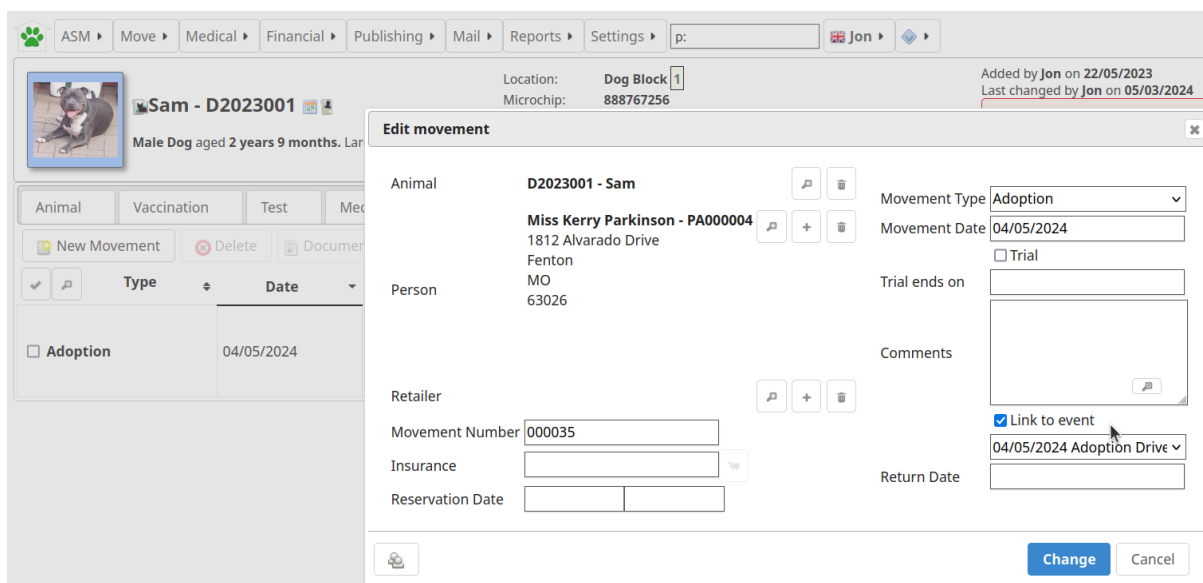
Clicking on appointments in the clinic calendar will open the person's record on the clinic tab, allowing you to make any changes to their appointments.



ASM allows you to create events such as fundraisers and adoption drives. You can create and search for events in the events section of the ASM menu.





11.1 Adoption Events

Animals can be added to events and a count kept of completed adoptions by linking the adoption movements to the event.




Event		Animals							
Add Animal Add from List Remove Arrived End active foster Refresh		All							
Arrived	Animal	Location	Age Group	Species	Colour	Litter	Comments	Last Fosterer	Adopted
<input type="checkbox"/> 04/05/2024 09:00:00	 Sam - D2023001 888767256	Dog Block::1	Adult	Dog	Brown and White				<input checked="" type="checkbox"/>
<input type="checkbox"/> 04/05/2024 09:00:00	 Barry - D2023011 123456789	Dog Block::2	Adult	Dog	Brown and White				<input type="checkbox"/>

Active foster movements can be ended by selecting animals and clicking the “End active foster” button. This enters the event start date as the return date on the selected animals foster movements.

Event		Animals							
Add Animal Add from List Remove Arrived End active foster Refresh		All							
Arrived	Animal	Location	Age Group	Species	Colour	Litter	Comments	Last Fosterer	Adopted
<input type="checkbox"/> 04/05/2024 09:00:00	 Sam - D2023001 888767256	Dog Block::1	Adult	Dog	Brown and White				<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 04/05/2024 09:00:00	 Barry - D2023011 123456789	Foster::Peter & Sarah King	Adult	Dog	Brown and White			Peter & Sarah King (555) 567-3322	<input type="checkbox"/>

At the end of the event, the list can be filtered to display the animals with foster movements that were ended for the event that now need to be fostered again.

Event		Animals							
Add Animal Add from List Remove Arrived End active foster Refresh		Need new foster							
Arrived	Animal	Location	Age Group	Species	Colour	Litter	Comments	Last Fosterer	Adopted
<input type="checkbox"/> 04/05/2024 09:00:00	 Barry - D2023011 123456789	Dog Block::2	Adult	Dog	Brown and White			Peter & Sarah King (555) 567-3322	<input type="checkbox"/>

11.2 Event Website Integration

Event information can be added to your website using the `html_events` service call, for more information on this please see [Service API](#)

LOST AND FOUND

Animal Shelter Manager also provides a database of lost and found animals. This is ideal for shelters who maintain lost and found records, where members of the public phone up to report their animal lost.

Find Lost Animal			
Number	<input type="text"/>	Contact Contains	<input type="text"/>
Microchip	<input type="text"/>		
Area	<input type="text"/>	Zipcode	<input type="text"/>
Features	<input type="text"/>	Age Group	(all) ▼
Sex	(all) ▼	Species	(all) ▼
Breed	(all) ▼	Color	(all) ▼
Lost from	<input type="text"/>	Lost to	<input type="text"/>
Found from	<input type="text"/>	Found to	<input type="text"/>
Include found	No ▼		

The Find Lost Animal screen works just like the other find screens within Animal Shelter Manager; you enter criteria at the top, run the search and results appear at the bottom. You can filter lost animals by a number of criteria, including species, area in which they were lost and lost between two dates.

You can open the Find Lost Animal screen by navigating to *ASM->Find Lost Animal*.

Mr Peter King & Mrs Sarah King

Lost: Young Adult Cat / Somerset Ridge Drive
Black face and body, white feet.

Date Lost: **08/14/2023**
Date Reported: **08/16/2023**
Comments:

Added by **Jon** on **08/16/2023**
Last changed by **Jon** on **08/16/2023**

Details
Media
Diary
Log

Save
Delete
Document
Match
Email

▼ Details

<p>Number: 000001</p> <p>Date Lost *: <input type="text" value="08/14/2023"/></p> <p>Date Reported *: <input type="text" value="08/16/2023"/></p> <p>Age Group: <input type="text" value="Young Adult"/></p> <p>Sex: <input type="text" value="Female"/></p> <p>Species: <input type="text" value="Cat"/></p> <p>Breed: <input type="text" value="Domestic Medium Hair"/></p> <p>Color: <input type="text" value="Black and White"/></p> <p>Features: <input type="text" value="Black face and body, white feet."/></p> <p>Area Lost: <input type="text" value="Somerset Ridge Drive"/></p>	<p>Zipcode: <input type="text" value="63026"/></p> <p>Date Found: <input type="text"/></p> <p>Microchip: <input type="text" value="982736527386738"/> 24PetWatch</p> <p>Comments: <input type="text"/></p> <p>Contact *: <input type="text" value="Mr Peter King & Mrs Sarah King - KI000013"/> 1461 Larkin Williams Road Fenton MO 63026 (555) 567-3322 p.king@mail.com</p>	<p>Mr Peter King & Mrs Sarah King - KI000013 1461 Larkin Williams Road Fenton MO 63026 (555) 567-3322 p.king@mail.com</p>
--	---	---

▶ Audit Trail

As with other Animal Shelter Manager screens, the Lost Animal screen is divided into tabs. Lost Animals may also have media attached, as with regular Animal records.

The screen has its own toolbar, from which you can delete the current record, save your changes and perform a match computation just for the current lost animal.

The found animal screens are identical to the lost animal screens. The only difference is that certain fields have the reverse meaning (ie. Found date instead of lost date).

12.1 Matching Lost and Found

Once you have your databases of lost and found animals, Animal Shelter Manager provides facilities to run a match and attempt to work out if any of the animals reported found could tie up to those reported lost.

To view the previous results of matching, go to *ASM->Match Lost and Found Animals*.

Note: Note that because this report can take a while to run if you have a lot of records, ASM will run it overnight as part of its batch processes. It may therefore take upto 24 hours for changes to be reflected.

If you run the Match by pressing the Match button on any lost, found or shelter animal, the report will be rerun immediately for that animal and you will see live data. You do not have to wait for this to update, only the main match report for all animals runs overnight.

12.2 Scoring

ASM uses a heuristic scoring algorithm to determine how close the match is between the lost and found animal (or similar shelter animal, which it will also check for if the option is set).

Where the system compares two user defined pieces of text (eg. Distinguishing features), the system will represent the final score as the number of words from the lost animal field that appeared in the found animal field, expressed as a fraction of the total points available for that field.

For example, suppose I had a lost animal with “white paws, bell” for the distinguishing features. If there was a found animal with features “white paws, torn ear and a bell”, that would constitute a 100% match on that particular field because every single word from the lost animal field appeared in the found animal field.

If I had a found animal with “white paws, no collar” for the distinguishing features, that would constitute a 66% match, because the match was 2/3 words.

By default, the system scores lost/found matches in this manner (all of these point values and how many points are required to appear can be changed in *Settings->Options*)

- 5 points - Same Species (note, if the species is not the same, any potential match will be abandoned regardless of whether other fields are a match - while reporters might not be good at observing the breed, age or sex of an animal, they should not have a problem with species!)
- 5 points - Same colour
- 5 points - Same age group
- 5 points - Same breed
- 5 points - proportional match based on words of Area Lost/Found (ie 5 points maximum for 100% match of all words in Area Lost being present in Area Found)
- 5 points - Postcode match
- 5 points - proportional match based on words of Distinguishing Features
- 5 points - Same Colour
- 5 points - Found within 2 weeks of being lost

It therefore follows that 45 points is a 100% overall match.

Because some of the found animal fields are not present for animals on the shelter, the following comparisons are used:

- Date Brought In is used as Date Found
- Original Owner address is used for area found
- Original Owner postcode is used for Postcode area found.

WAITING LIST

Animal Shelter Manager offers you a complete replacement for your paper-based waiting list, tracking owners who want to surrender animals to your shelter when space is available.

It holds information about contacts, the type of animal, whether the owner can afford to make a donation, diaries, logging for phone calls and emails, etc.

Most importantly, the waiting list is capable of assigning an urgency rating to entries and automatically increasing that rating after a configurable amount of time has elapsed to ensure that a queue system can be adhered to.

To open the waiting list screen, go to *ASM* → *Edit the current waiting list* or press **SHIFT+ALT+W** if your browser supports it.

The screenshot shows the 'Waiting List (1)' interface. At the top, there are search filters: Priority Floor (Lowest), Species ((all)), Name Contains, Description Contains, Include Removed (No), and Size ((all)). Below the filters are action buttons: New Waiting List Entry, Delete, Remove, and five color-coded highlight buttons (purple, pink, green, yellow, cyan). A Refresh button is also present. Below the buttons is a table with the following columns: Rank, Name, Address, Home Phone, Email, Date Put On, Time On List, Removed, Urgency, Species, Size, and Description. The table contains one entry:

Rank	Name	Address	Home Phone	Email	Date Put On	Time On List	Removed	Urgency	Species	Size	Description
1	Mr Paul Wilkins	2391 Cassens Drive	(555) 556-1010	paul.wilkins@mail.com	08/02/2023	2 weeks.		Medium	Cat	Medium	Friendly cat good with children and other cats.

Entries are colour coded according to how urgent they are.

Additionally, you can use the highlight buttons to mark interesting entries in upto 5 different colours for other staff members. Each item is given a rank according to how urgent it is and how long it has been on the list. This can be used to tell people where they are on the waiting list. The report *Average Time On Waiting List* can tell you how long people are waiting on average to get their animals into your shelter.

You can effectively run separate waiting lists per species (turn the option on under *Settings* → *Options* on the Waiting List tab) as for most shelters, whether you can take a dog isn't affected by how many cats you have waiting for example. With this option on, the rankings are calculated separately for each species.

To add a new entry to the waiting list, click the new waiting list button if you are currently viewing the waiting list or select add an animal to the waiting list from the *ASM* menu. You will be presented with a waiting list entry form to complete.

Add waiting list

Species	<input type="text" value="Cat"/>	Can afford donation?	<input type="checkbox"/>
Size	<input type="text" value="Large"/>	Urgency	<input type="text" value="Medium"/>
Date put on *	<input type="text" value="08/16/2023"/>	<div style="border: 1px solid #ccc; height: 100px; padding: 5px;"> <div style="display: flex; justify-content: flex-end; align-items: center; gap: 10px;"> <input type="text" value=""/> </div> </div>	
Description *	<div style="border: 1px solid #ccc; height: 100px; padding: 5px;"> <div style="display: flex; justify-content: flex-end; align-items: center; gap: 10px;"> <input type="text" value=""/> </div> </div>		
Entry reason	<div style="border: 1px solid #ccc; height: 100px; padding: 5px;"> <div style="display: flex; justify-content: flex-end; align-items: center; gap: 10px;"> <input type="text" value=""/> </div> </div>		
		Contact *	<div style="display: flex; gap: 5px;"> <input type="text" value=""/> <input type="text" value="+"/> <input type="text" value=""/> </div>

Create and edit

Create

Reset

In addition to the usual add/edit/delete buttons, the waiting list screen allows you to filter the entries that you see according to a particular species, contact name fragment or urgency rating. As with other Animal Shelter Manager tables, you may sort the entries by any column - just click the column name at the top of the list.

If you change your filtering options, click the Refresh button to reload the list with your new filtering options.

As mentioned before, the urgency update period is configurable (see later chapter for configuring the waiting list). By default, the update period is set to 14 days, so every fortnight, each waiting list entry will advance one urgency rating until they get to “High”.

Once an entry reaches “High” it will stay there. The “Urgent” rating can only be set by users and is for extremely high priority waiting list entries.

GENERAL DIARY

The general diary is an extremely flexible diary based system that can track anything task-based in nature. You use it to set reminders for a particular date and time.

Each user of the system has their own view into the general diary and they can monitor both diary notes that have been issued to them by other staff members and diary notes that they have created for other staff members. If you have email addresses for your user accounts and you've configured the system email account, you can have the system email everyone's diary notes to them each day.

14.1 Add a new diary note

Add diary ✕

i Diary notes need a date and subject.
Times should be in HH:MM format, eg: 09:00, 16:30

For	<input type="text" value="Jon"/>
Date *	<input type="text" value="08/17/2023"/>
Time	<input type="text"/>
Completed	<input type="text"/>
Subject *	<input type="text"/>
Note	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>

To add a new diary note to the system, navigate to *ASM* → *Diary* → *Add Diary Note*.

You will be presented with the diary note screen. The first thing to fill in is who the note is for. There is a drop down list at the top of the screen, listing all the system users and roles. If you select a role, all users who have that role will receive the note.

Select a date and time to remind the person.

Note: Note that the time field is not actually used for anything by the system, it is simply shown on the diary entry when it is printed off and in calendar view. Diary notes will appear on the main screen for the user once the day on the note reaches today.

Enter a subject and the actual text of the diary note next. Leave the completed field blank. This field will be the date the diary note was actioned by the person the note is for, and they should come back and complete it when they have done whatever the diary note is for (even if it is just acknowledging that they have read the note).

14.2 Viewing my diary notes

To view the diary notes for the current user, or created by the current user, go to the home screen or navigate to *ASM* → *Diary* → *View My Diary Notes*.

A filter in the top right corner of the page will allow you to choose between different groups of notes to be displayed, such as “Incomplete notes upto today”. You may edit them to mark diary notes for you completed, or even amend diary notes you have created for other people. If you choose to view “All notes upto today”, completed notes will be greyed out and overdue incomplete notes will appear with the date and subject in red.

If you are not a superuser and the diary note was not created by you, you will not be permitted to change the subject and note text. Instead, you can add comments if necessary.

14.3 Diary calendar

August 2023							Month	Week	Day	List
Mon	Tue	Wed	Thu	Fri	Sat	Sun				
31	1	2	3	4	5	6				
7	8	9	10	11	12	13				
		Dewormer - Jacks								
14	15	16	17	18	19	20				
		5:05p Reminder	Flea/Tick Treatme Flea/Tick Treatme Flea/Tick Treatme +3 more	FIV - Tatters						
21	22	23	24	25	26	27				
						Flea/Tick Treatme Flea/Tick Treatme				
28	29	30	31	1	2	3				
						Flea/Tick Treatme				
4	5	6	7	8	9	10				
	FVRCP - Russo		Dewormer (Dog)							

The diary calendar allows you to see your uncompleted diary notes on a daily/weekly or monthly calendar view.

14.4 Printing the diary

To print off the general diary for all outstanding notes (notes upto and including today), install and run the Diary (all users) or Diary (current user) reports from *Settings* → *Reports* → *Browse sheltermanager.com*

Diary (all users)

NigelM

08/16/2023 17:05:00

1S - Tatters [Cattery] Reminder

Carry out task

You will be shown a report of currently outstanding diary notes, grouped by who the notes are for and sorted into date order (oldest notes will be shown at the top of the list to be done first).

14.4.1 Diary Tasks

In addition to the normal facilities offered by the general diary, Animal Shelter Manager allows you a special type of diary note, called a “Diary Task”. A diary task is a group of diary notes that can be added to the system at relative dates with variable information applicable to animals.

This sounds far more complicated than it is, so let us use an example:

Suppose your shelter runs its own clinic and they need to know when young animals need to be neutered. The problem with a regular diary note in this scenario is that there are two reminders that need to go together - the first is that the animal must be starved before the operation, as well as a reminder for the operation itself.

The solution is to create a diary task with two task items - one for the starving and one for the neutering the following day. Diary task items do not have a concept of a date - they are expressed as a day value relative to today, called a day pivot. This is because diary tasks are templates for creating diary notes.

In the example above, we would create a new diary task called “Starve and Neuter”. The task would have two items on its list (diary tasks can have an unlimited number of items); one for the starving and one for the neutering. The day pivot on the starving will be a 9999 - this value means that the system should ask the user for the actual date to go on that task when they apply it to the animal (after all, you can book a neuter operation for any time). The day pivot on the operation will be a 1 - because it occurs one day after the starving. This is because diary tasks are cumulative - each one is performed in order and the day pivot is taken relative to the date on the task that ran before it.

If we created another task for after the operation, say “Check on the animal in a week”, then we would set the day pivot to 7, because the task comes after the operation and it should generate a reminder 7 days from the operation.

The next thing to look at is the content of the data itself - it’s alright having a task that says “Starve Animal” and “Neuter Animal”, but how do you know which animal? Simple, the wordkeys we use when generating documents can also be embedded in the subject and note text of a diary task, to be replaced by the real thing when the task is executed.

This means that the subject of the starve task could be “Starve <<ShelterCode>> <<AnimalName>>” for example, which would give the note the animal’s shelter code and name in the subject line, so you knew which animal the diary note referred to.

Even if your task has only one item, diary tasks are still handy to use because they can be called up and attached to animals very quickly without the need for the user to type a whole new note.

14.5 Create a new diary task

For	Index	Day Pivot	Subject	Note
<input type="checkbox"/> Vet	0	1	Starve Barry D2023011	Starve Barry for neuter op
<input type="checkbox"/> Vet	1	1	Neuter Barry D2023011	Carry out op
<input type="checkbox"/> Vet	2	7	Check Barry D2023011	7 Day check on Barry

Diary tasks can be edited under *ASM* → *Diary* → *Edit Diary Tasks* and attached to animals or people from the diary tab on their records.

To add a new task, click on the new button. A screen asking for the name of the diary task will appear, along with a list of task items below it and another toolbar. Use the task items toolbar to add, edit and delete task items. Optionally, you can specify whether you want this diary task to be applicable to animals or people.

ACCOUNTS

Animal Shelter Manager includes a full, double-entry book keeping system to manage your shelter's accounts.

To access the accounts module, go to *Financial* → *Accounts*, hit the toolbar button or press SHIFT+ALT+X if your browser supports it.

Accounts						
New Account		Delete		Only active accounts		
Code	Type	Description	Reconciled	Balance		
<input type="checkbox"/> Asset::Premises	Asset	Premises		\$0.00	\$0.00	
<input type="checkbox"/> Bank::Current	Bank	Bank current account	\$640.00	\$1,540.00		
<input type="checkbox"/> Bank::Deposit	Bank	Bank deposit account	\$0.00	\$0.00		
<input type="checkbox"/> Bank::Savings	Bank	Bank savings account	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Board	Expense	Animal board costs	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Electricity	Expense	Electricity Bills	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Food	Expense	Animal food costs	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Gas	Expense	Gas Bills	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::MedicalSupplies	Expense	Medical supply expenses	\$0.00	\$300.00		
<input type="checkbox"/> Expenses::Phone	Expense	Telephone Bills	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Postage	Expense	Postage costs	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Stationary	Expense	Stationary costs	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::TransactionFee	Expense	Transaction fees	\$0.00	\$0.00		
<input type="checkbox"/> Expenses::Water	Expense	Water Bills	\$0.00	\$0.00		
<input type="checkbox"/> Income::Adoption	Income	Adoption fee donations	\$0.00	\$0.00		
<input type="checkbox"/> Income::Boarding	Income	Boarding Fees	\$140.00	\$140.00		

ASM will show you a list of all accounts on the system, with current balances. ASM comes preloaded with a basic set of accounts you can use to get started. The use of Type::Name when creating codes for accounts is just a convention, and you are free to use anything you like. It is quite a useful convention though, as it enables you to see at a glance the account type and ASM will group accounts of the same type together when showing you lists and dropdown boxes.

If you've never used a double entry book-keeping system before, the basic idea is that you have a collection of transactions. Each transaction contains a source account and a destination account - this means that you are always moving money from one account to another.

Accounts can be real, such as bank accounts, credit cards, loans, etc. or purely for accounting purposes ("nominal" accounts to use the correct terminology). You create income and expense accounts to categorise how money enters and leaves your shelter.

For example, to pay an electricity bill, you would create a transaction that takes the money from your real current account, and moves it to your electricity expense account.

Because every transaction has two sides, this system enables you to easily see what is being spent on electricity (for example), or how much money has been made via various income sources.

Transactions - Bank::Current

Show transactions from to Reconciled

Date	R	Description	Account	Credit	Debit	Balance
<input type="checkbox"/> 06/01/2023		Miss Karen Wiper + D2023006 - Ruby [00000006]	Income::Donation	\$1,000.00	\$0.00	\$1,000.00
<input type="checkbox"/> 07/14/2023	R	Boarding - Lucy (7 days at \$20.00) Miss Jasmine Sinclair + N2023004 - Lucy [00000001]	Income::Boarding	\$140.00	\$0.00	\$1,140.00
<input type="checkbox"/> 07/17/2023	R	Miss Kerry Parkinson [00000002]	Income::Donation	\$300.00	\$0.00	\$1,440.00
<input type="checkbox"/> 07/17/2023	R	Mr Chris Sponsor + D2023011 - Barry [00000003]	Income::Sponsorship	\$100.00	\$0.00	\$1,540.00
<input type="checkbox"/> 07/17/2023	R	Mr Chris Sponsor + D2023011 - Barry [00000004]	Income::Sponsorship	\$100.00	\$0.00	\$1,640.00
<input type="checkbox"/> 07/17/2023		Microchips	Expenses::MedicalSupplies	\$0.00	\$300.00	\$1,340.00
<input type="checkbox"/> 08/01/2023		Miss Kerry Parkinson + U2023006 - Bisto [00000007]	Income::Donation	\$200.00	\$0.00	\$1,540.00
<input type="checkbox"/> 08/17/2023	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="button" value="Add"/>

When adding transactions, ASM already knows which account you were looking at, so it prompts you for the other side of the transaction. You can also specify whether it is a deposit or a withdrawal to determine which way the money is going.

15.1 Reconciliation

Reconciliation is the process of checking a real bank account statement against your computerised accounts. It is simply a flag that you have verified the transaction. You can blanket mark all transactions reconciled up until today's date from the account screen as a handy shortcut.

From both the accounts and transaction list screens, you can tick the checkboxes in the leftmost column to select multiple transactions/accounts.

15.2 Inactive Accounts

Accounts can be marked inactive. When an account is inactive, it does not appear in the main list of accounts (unless you select "All accounts" from the filter at the top right). It is also not available when adding new transactions, but existing transactions to and from that account will still be preserved and viewable.

15.3 Payments

ASM already knows about your payments and by default will save you time when entering accounts. When you create a payment type category, ASM will automatically create a matching nominal income account for it.

When you add a new payment to the system, ASM will automatically create a matching transaction, taking the money from the payment type nominal account and moving it to the account of your choice (see *Settings* → *Options* → *Accounts* where this account can be specified). The default destination account for payments is the first bank account listed if you do not change it.

15.4 Reporting

ASM does not include accounting reports by default. Instead, you can install them under *Settings* → *Reports* from sheltermanager.com. You will find the standard Balance Sheet and Profit and Loss reports for the accounting system.

STOCK CONTROL

Animal Shelter Manager includes a stock control system for managing stores of drugs, food and other items.

Before using the module, you should set up locations for your stock under *Settings* → *Lookup Data* → *Stock Locations*. Locations help subdivide your stock to assist with the stock taking process. A useful convention (similar to account codes) is to use a separator for child locations so they appear together in lists. For example, you could create locations called “Office”, “Office::Shelves” and “Office::Desk”, which would all appear together in the list of available locations and be able to hold their own list of stock.

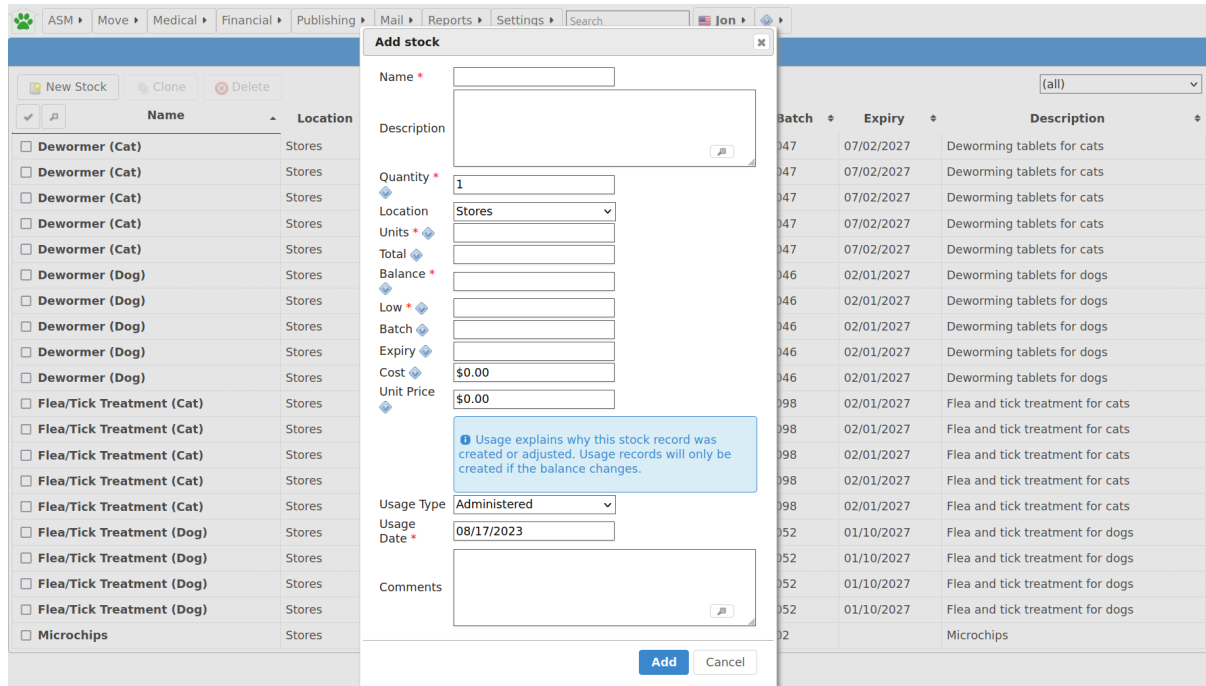
To view and add to current stock levels, go to *Financial* → *Stock levels*

Name	Location	Unit	Balance	Cost	Unit Price	Batch	Expiry	Description
<input type="checkbox"/> Dewormer (Cat)	Stores	Tablet	3 / 3	\$12.00	\$4.00	2047	07/02/2027	Deworming tablets for cats
<input type="checkbox"/> Dewormer (Cat)	Stores	Tablet	3 / 3	\$12.00	\$4.00	2047	07/02/2027	Deworming tablets for cats
<input type="checkbox"/> Dewormer (Cat)	Stores	Tablet	3 / 3	\$12.00	\$4.00	2047	07/02/2027	Deworming tablets for cats

Listed are all stocks for all locations on the system. You can use the dropdown on the right-hand side to only show stock in a particular location. Stocks will be highlighted in red if their expiry date has passed (as well as an alert). Similarly, stocks will appear faded out if their balance has dropped to zero and there are no items left.

If you are familiar with the stock card approach to drug management, this is an electronic version of that system. With stock cards, each container gets a card (a stock record in ASM) that tracks how many items started and remain in that container, along with a note each time the stock was used.

16.1 Adding new stock



Use the “New Stock” button to add a new stocked item. Each stocked item is assumed to be a container of “total” items as described by the “units” field. The “balance” field is the amount remaining in the container and will decrement as the stock is used. You can also set an expiry date and batch number for drugs and perishable goods. In addition, if you set a “quantity”, this is the number of records to create if you have multiples of the same item.

So, for example, you have 5 boxes of metacam chewable tabs, each box contains 10 tabs:

```
Name: Metacam 1mg chewable tablet
Description: Box of 10 1mg chewable meloxicam tablets
Quantity: 5
Location: Stores
Units: 1mg chewable tablet
Total: 10
Balance: 10
```

Every time the level of a stock changes (the balance) or a stock is newly created, a “usage” record for that item is also created that explains why that stock has changed with a stock usage type/category. You can also add some comments.

The system will remember items you have previously entered and the name and unit fields will autocomplete suggested values for you as you type.

16.2 Using stock (manually)

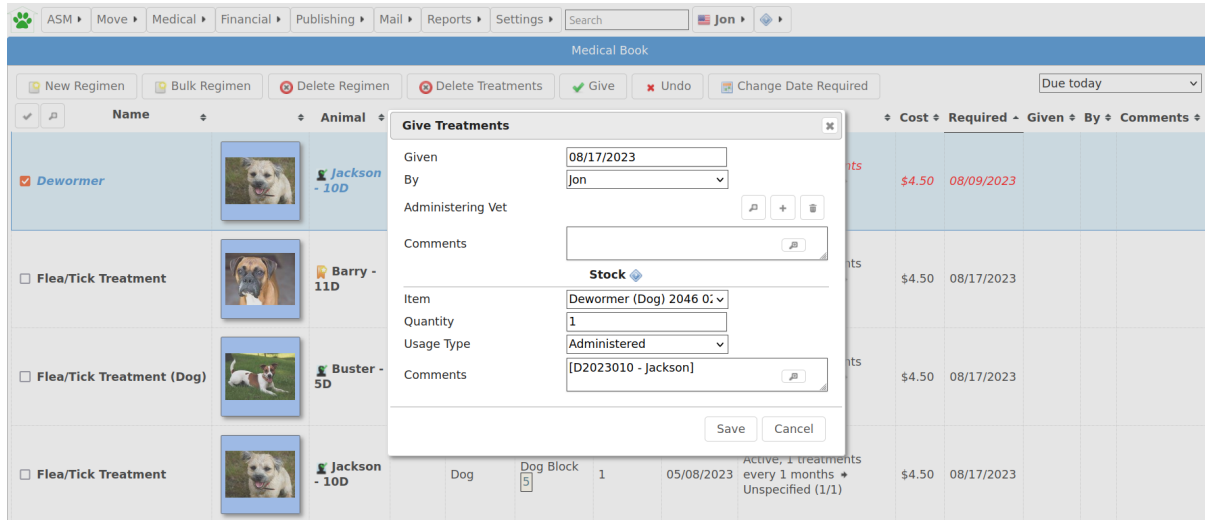
To use stock, you can simply open up the stock record by clicking its name in the list of current stocked items and adjusting the balance. When you change the balance of an existing record, the usage fields will appear to prompt you to create a usage record to explain why this stock record has changed.

If the stock has expired and is to be thrown away, set the balance to zero and use the “wastage” usage type so that reports can calculate how much stock has been wasted. When loading stock screens and items for selection, any stocked items with zero balances will be hidden from view.

16.3 Using stock (medical, tests and vaccinations)

As a shortcut, when you are performing tests or administering vaccinations and medical items through the tabs on the animal record or via *Medical* → *Test Book*, *Medical* → *Vaccination Book* or *Medical* → *Medical Book* the system will prompt you to deduct stocks for the test/vaccination/treatment.

When you hit the “Give” or “Perform” button on any of those screens, a dialog will appear to prompt you for the date the test was performed or treatment/vaccination administered and usage information to decrement an appropriate stocked item.
















However many treatments/vaccinations/tests were selected to be marked given or performed, only one stock deduction will be made so you should make sure the deduction covers all the selected items.

16.4 Stock alerts

The system will produce alerts on the front screen when you have stocked items that have either expired or are due to expire in the next month.

Alerts (28)

-  1 vaccination needs to be administered today
-  7 medical treatments need to be administered today
-  1 boarding animal leaving today
-  1 person with an active reservation has not been homechecked
-  2 reservations have been active over a week without adoption
-  8 shelter animals have not been microchipped
-  2 animals have been on the shelter longer than 6 months
-  1 unpaid fine
-  1 undispatched animal control call
-  1 incomplete animal control call
-  1 item of equipment is overdue for return
-  1 item of stock has expired
-  1 item of stock expires in the next month

16.5 Products

ASM allows you to create product records for all of the items that you buy and manage as stock. Think of them as templates that can be used to quickly create stock levels.

In addition to this, the products screen will show you the total that you have in all stock levels for each product as well as giving you a convenient method to move or consume stock levels based on the product.

The “Usage” button allows you to view all usage records for stock levels connected to the product.

The screenshot displays the 'Products' management interface. At the top, there is a navigation bar with menu items like 'ASM', 'Move', 'Medical', 'Financial', 'Publishing', 'Mail', 'Reports', 'Settings', and a search field. Below this is a 'Quick Links' section with buttons for 'Shelter view', 'Calendar view', 'Foster book', 'Up for adoption', 'Not for adoption', 'Foster an animal', 'Adopt an animal', 'Clinic Calendar', and 'Medical calendar'. The main area is titled 'Products' and contains a table with columns: Name, Unit, Balance, Type, and Barcode. Two products are listed: 'Canned Cat Food' (Can, 24 (low at 5), General) and 'Pigs Ears' (g, 500 (low at 5), General, Barcode 1). An 'Add product' dialog box is open in the foreground, containing the following fields:

- Name:
- Product type: General (dropdown)
- Barcode:
- PLU:
- Description:
- Tax Rate: Tax Free (dropdown)
- Active: Yes (dropdown)
- Supplier: (with add, delete, and refresh icons)
- Supplier code:
- Purchase Unit: unit (dropdown)
- Cost price: \$0.00
- Unit: purchase unit (dropdown)
- Unit price: \$0.00
- Low: 0

Buttons for 'Add' and 'Cancel' are at the bottom of the dialog.

REPORTS

Animal Shelter Manager offers some highly detailed reporting facilities that fall broadly into the following categories.

All reports are accessed from the Reports top level-menu. By default, ASM does not install with any reports. You must install them from *Settings* → *Reports* → *Browse sheltermanager.com* – this requires your ASM server to have access to the internet. There’s an “Install Recommended” button you can use to choose the default set to install.

Some of the standard, most useful reports you should install are:

- Long Term Animals: Produces a detailed report of animals who have been in the shelter longer than three months.
- Shelter Inventory: Outputs total figures for every animal on the shelter, broken down by species and their location within the shelter.
- Detailed Shelter Inventory: Identical to the Shelter Inventory, except it provides details of the individual animals as well.

02/02/2011 | Unable to Afford | C2011017 | 9778745937495 | Ace | C (Cat) | Cat | 13 years and 9 months | Male | Cat Isolation | Asa Whitaker

Total Animals Returned From Adoption: 27

Animals Transferred In

Date	Reason	Code	Microchip	Name	Type	Species	Age	Sex	Location	Owner
03/09/2007	Stray	D2007299		Casey	D (Dog)	Dog	8 years and 6 months.	Female	No Locations	Ms. Jean Layman
06/02/2008	Stray	C2008020		Kalista	C (Cat)	Cat	5 years and 0 months.	Female	Yellow Room	
07/02/2008	Stray	C2008024		Stella	C (Cat)	Cat	4 years and 0 months.	Female	Yellow Room	Ms. Deborah Osbourne
01/03/2008	Unable to Afford	C2008030		Chloe	C (Cat)	Cat	7 years and 0 months.	Female	Yellow Room	Ms. Veta Knappenberger
17/03/2008	Stray	C20080041		Lucy	C (Cat)	Cat	1 years and 0 months.	Female	No Locations	Mrs. Carolyn Johnson
17/03/2008	Stray	C2008040		Mesa	C (Cat)	Cat	4 years and 6 months.	Female	No Locations	
27/05/2009	Owner unable to keep	C2009094		Terry	C (Cat)	Cat	7 years and 9 months.	Female	No Locations	Donna Jobe
02/02/2011	Unable to Afford	C2011017	9778745937495	Ace	C (Cat)	Cat	13 years and 9 months.	Male	Cat Isolation	Asa Whitaker

Total Animals Transferred In: 8

Total Animals In: 1870

Animals Out

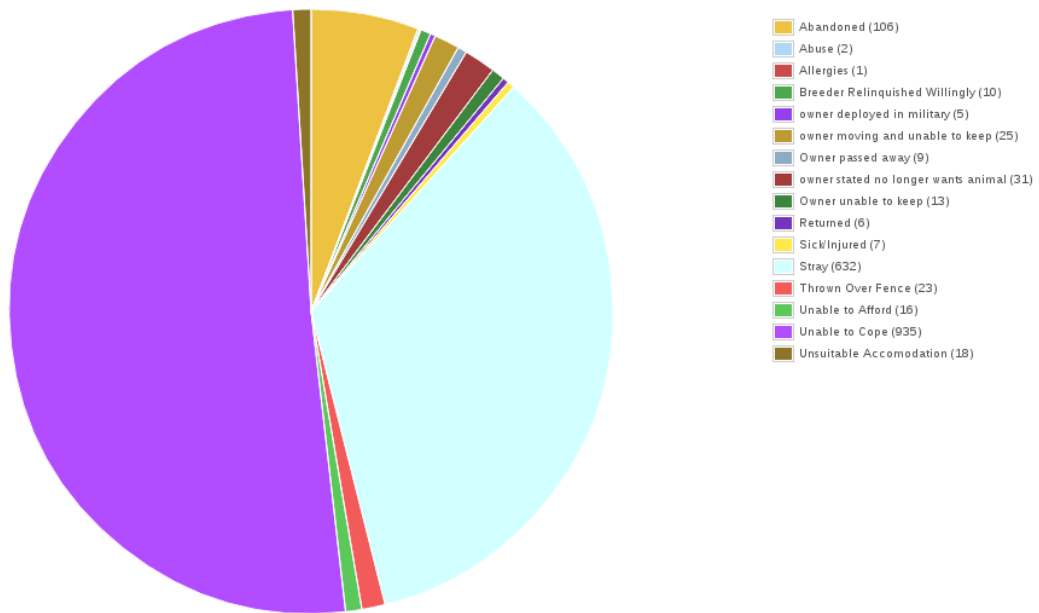
Animals Adopted

Date	Reason	Code	Microchip	Name	Type	Species	Age	Sex	Location	Owner
13/12/2007		C2007186		Snowball	C (Cat)	Cat	11 years and 0 months.	Female	No Locations	Karen Everetts
02/01/2008		C2007095		Memphis	C (Cat)	Cat	14 years and 10 months.	Female	No Locations	Lisa Hancock

- In/Out: Shows a detailed listing of all the animals that entered or left the shelter between two dates.
- In/Out Summary: Identical to the In/Out report, but only shows the bottom line totals without information about the actual animals.
- Animals Returned Within Six Months: Produces a detailed report of animals who were returned to the shelter within six months of adoption (allows you to select a date range to filter the animals down to when they were adopted).
- Animals Returned After Six Months: Functionally the same as Animals Returned Within Six Months, except it only shows animals who were returned after six months of adoption.

- Returned Animals Report: Produces a detailed report of animals (complete with full adoption histories) who have been returned between the two dates specified.
- Animal Death Reasons: Produces a report listing all the reasons for which animals have died on the shelter.
- Monthly Donations: Charts donations taken for animals brought into the shelter and adopted to new owners over the selected year (as well as arbitrary donations).
- Monthly Donations By Species: Same as monthly donations, but only for a particular species and does not include arbitrary donations.
- Monthly Adoptions By Species: Charts the number of adoptions of a particular species over a selected year.
- Monthly Adoptions By Locations: Charts the number of adoptions of a particular species over the different shelter locations over a selected year.

Animal Entry Reasons



- Animal Entry Reasons: Charts the different reasons for animals entering the shelter over the selected year.
- Animal Return Reasons: Charts the different reasons for animals being returned to the shelter over the selected year.

17.1 Customising Reports

In addition to the stock reports provided by the sheltermanager.com repository, it is possible to create your own, using a simple language called “SQL” (short for “Structured Query Language”). SQL is a language for retrieving and formatting information - underneath, ASM uses this language to talk to its database (Either MySQL or PostgreSQL - as the names imply, they all talk SQL).

The reports editing screen is located under the Settings menu, any reports you create will integrate into the Reports menu. You can also use this screen to rearrange and rename existing reports and charts in the system. You can also assign “view roles” to reports. If you assign one or more view roles, then only users in those roles will be able to run the report and see its output.

In addition to just creating queries, you can then format how the data is transformed and displayed to you in the format of a report. Again, this is done through the use of another language - HTML (HyperText Markup Language). This is the same language used for creating web pages on the internet.

The report editor has a button to automatically run your query and generate the HTML for you in a simple table format. It is worthwhile running this and then modifying the HTML afterwards.

The editor will highlight the syntax of both languages for you, and if you press F11, will allow you to edit in full screen mode. For SQL, you can use CTRL+SPACE to get context-sensitive help with ASM's tables and columns.

For some excellent beginner tutorials on both SQL and HTML, see www.w3schools.com

17.1.1 SQL Keys

What happens if you want to create a report that needs to request specific information from the user before running - eg: To filter between two dates, or only show animals of a particular species, etc?

ASM offers SQL preprocessor instructions to allow you to substitute system information, or information requested from the user at report generation time.

- \$USER\$ - Substitutes the current user's name.
- \$LOCATIONFILTER\$ - Substitutes the current user's location filter (a comma separated string of internal location IDs) or a list of all internal location IDs if the user does not have a location filter.
- \$SITE\$ - Substitutes the current user's site ID (multi-site only).
- \$CURRENT_DATE\$ - Substitutes today's date in an appropriate string SQL format for the current database. This saves you having to use NOW() or CURRENT_DATE() or various other SQL functions specific to one database. Note that the user's timezone is applied to the date/time.
- \$CURRENT_DATE_TIME\$ - Substitutes the date and time now in an appropriate string SQL format for the current database. Note that the user's timezone is applied to the date/time.
- \$CURRENT_DATE-X\$ - The same as CURRENT_DATE, but subtracts X days.
- \$CURRENT_DATE+X\$ - The same as CURRENT_DATE, but adds X days.
- \$CURRENT_DATE_FDM\$ - Returns the first day of the current month.
- \$CURRENT_DATE_LDM\$ - Returns the last day of the current month.
- \$CURRENT_DATE_FDY\$ - Returns the first day of the current year.
- \$CURRENT_DATE_LDY\$ - Returns the last day of the current year.
- \$PARENTKEY\$ - Substitutes the field value named in the report calling this subreport. For example, a report could pass an Animal ID as the parent key to a subreport for filtering data correctly. When you use this key in your report SQL, ASM assumes that this report is a subreport and will not display it on the menu.
- \$PARENTARGX\$ - Substitutes argument X passed to the subreport. For example, a subreport generated with {SUBREPORT.Myreport.ID.ShelterCode.AnimalName} could access the parent AnimalName field with \$PARENTARG3\$. When you use this key in your report SQL, ASM assumes that this report is a subreport and will not display it on the menu.
- AS money[fieldname] - If you alias an output field so that it has the prefix "money" as its name, the report engine will make sure it's formatted as a currency and assume that its value is a whole integer money amount (where 1 is 1 cent/pence/etc).
- AS [fieldname]n2br - If you alias an output field so that it has a suffix of "n2br" as its name, the report engine will translate line breaks in the column data to HTML
 tags so that they show on the report.

17.1.2 ASK

Ask is quite a detailed key, which requests information from the user at generation time. The basic syntax is this:

```
$ASK [TYPE] [Message]$
```

Note: If you are substituting any kind of string value (ASK DATE or ASK STRING), you must wrap the ASK key inside string delimiters (the apostrophe ') otherwise you will get SQL errors.

The types are outlined below:

- \$ASK DATE message\$ - requests a date from the user. A popup is displayed containing the message and the user is given an ASM date control to use to select the date. The value substituted is the date selected by the user in SQL string format appropriate for the database you are using.
- \$ASK LOOKUP message|value1,value2,value3\$ - requests one from a selection of fixed lookup values from the user.
- \$ASK NUMBER message\$ - requests a numeric value from the user. A box is popped up containing the message and the user is given a standard text box to enter the number in. They will not be allowed to continue until a valid number is entered. The value returned is the number.
- \$ASK STRING message\$ - requests a string value from the user (eg: Name, Address, etc.). A box is popped up containing the message and the user is given a text box to enter the string in. The value substituted is the string.
- \$ASK ANIMAL\$ - requests a shelter animal. The value substituted is the animal ID.
- \$ASK FSANIMAL\$ - requests a foster animal. The value substituted is the animal ID.
- \$ASK ALLANIMAL\$ - requests any animal. The value substituted is the animal ID.
- \$ASK ANIMALS\$ - requests one or more shelter animals. The value substituted is a comma separated list of animal IDs, useful for putting in an IN clause (eg: AnimalID IN (\$ASK ANIMALS\$))
- \$ASK ANIMALFLAG\$ - requests an animal flag.
- \$ASK ENTRYCATEGORY - requests an entry reason/category from the user.
- \$ASK LITTER\$ - requests a litter identifier. A popup displays a list of the recent, active litters on the system. The value returned is the litter ID as a string.
- \$ASK LOCATION\$ - requests an internal location from the user.
- \$ASK LOGTYPE\$ - requests a log type from the user.
- \$ASK PAYMENTMETHOD\$ - requests a payment method.
- \$ASK PAYMENTTYPE\$ - requests a payment/donation type from the user.
- \$ASK PERSON\$ - requests a person. The value substituted is the person ID.
- \$ASK PERSONFLAG\$ - requests a person flag.
- \$ASK SITE\$ - request a site.
- \$ASK SPECIES\$ - requests a species from the user. A popup is displayed containing a dropdown of all species on the system.
- \$ASK TYPE\$ - requests an animal type from the user.

Note: ANIMAL, FSANIMAL and ALLANIMAL are identical in the desktop interface. They produce different choices in the mobile interface.

17.1.3 VAR

VAR works just like ASK, the only difference is that instead of substituting the value into the SQL, it stores it to a variable name. You can then substitute the variable multiple times in your SQL:

```
$VAR <varname> [TYPE] [Message]$
```

The VAR tag should appear in your SQL before you reference the variable created. The variable is substituted with \$@varname\$

This example shows a list of animals of a selected species brought in after the given date. The species and brought-in-after variables could be reused as many times as we like:

```
$VAR species SPECIES$
$VAR broughtinafter DATE The date the animals were brought in after$
SELECT AnimalName, DateBroughtIn FROM animal
WHERE SpeciesID=$@species$ AND DateBroughtIn >= '@broughtinafter$'
```

17.1.4 CONST

CONST allows you to declare a constant value for later use in your query:

```
$CONST name=value$
```

A constant must have a name and it can be accessed with \$name\$ (it does not require the @ prefix like variables).

This example shows a list of all adopted animals and assigns the adoption movement type 1 to a constant:

```
$CONST MOVEADOPT=1$
SELECT AnimalName FROM animal WHERE ActiveMovementType = $MOVEADOPT$
```

17.1.5 Report Grouping and Calculation

In addition, ASM allows you to do a number of transformations to the output HTML. You define a number of “blocks” to your reports. Anyone who has used a reporting tool (eg: Microsoft Access or Crystal) will recognise these.

- \$\$HEADER ... HEADER\$\$ - The topmost section of the report should be entered here.
- \$\$FOOTER ... FOOTER\$\$ - The bottom most section of the report should be entered here.
- \$\$BODY ... BODY\$\$ - The main section of your report where the detail goes.
- \$\$GROUP_<field> .. GROUP\$\$ - Optional grouping level. If you want to group by a particular field in the formatted output, you should add a group block. Within the group block you must also define a \$\$HEAD and \$\$FOOT section.
- \$\$NODATA ... NODATA\$\$\$ - A special block to output if the report query returns no data.
- \$\$HTMLHEADER ... HTMLHEADER\$\$\$ - Override the report template HTML header and supply a new one instead.
- \$\$HTMLFOOTER ... HTMLFOOTER\$\$\$ - Override the report template HTML footer and supply a new one instead.

For example, to group on the OwnerName field:


```

$$GROUP_OwnerName
$$HEAD
<h2>$OwnerName</h2>
$$FOOT
<p>Number of owners with name '$OwnerName': {COUNT.OwnerName}</p>
GROUP$$

```

ASM also offers a number of calculation instructions you may use in group \$\$FOOT blocks and the main \$\$FOOTER block. These are:

- {SUM.<field>[.round]} - Calculates the total of a given field for a group. Optionally, you can specify the number of decimal places to round to.
- {COUNT.<field>[.distinct]} - Returns the number of records in the group. If the optional distinct parameter is set, returns the number of unique values of <field> within the group.
- {AVG.<field>[.round]} - Calculates the average of a group, based on the total of the field and the number of records. Optionally, you can specify the number of decimal places to round to.
- {MIN.<field>} - Shows the smallest value for a given field in a group
- {MAX.<field>} - Shows the largest value for a given field in a group
- {FIRST.<field>} - Returns the first value for a given field in a group
- {IMAGE.<animalid>[.seq]} – (also valid in \$\$BODY) Returns a URL to the preferred image for the given animal ID. Animal IDs can be a \$field from the selected data. If the optional sequence number is given, then a link to image seq (where seq is a 1-based count) for the animal is output instead. If seq is invalid, or the animal doesn't have a preferred image the default system nopic.jpg file is used instead.
- {CHIPMANUFACTURER.<chipno>} - (also valid in \$\$BODY) Returns the name of the microchip manufacturer of the given chip number.
- {QR.<animalid>[.size]} – (also valid in \$\$BODY) embeds a QR code with a link to this animal's record for mobile devices. If size is not set, then 150x150 is used. Eg: {QR.\$ID.200x200}
- {QRS.<animalid>[.size]} – (also valid in \$\$BODY) embeds a QR code with a link to this animal's adoptable page via the animal_view service call (the animalview template is used to display the page). If size is not set, then 150x150 is used. Eg: {QR.\$ID.200x200}
- {LAST.<field>} - Returns the last value for a given field in a group
- {PCT.<field>.<value>[.round]} - Returns the percentage of rows in the group where field <field> matches value <value>. Optionally, you can specify a number of decimal places to round to. Eg: {PCT.Sex.1.2} Would show the percentage of male animals in the group, rounded to 2 decimal places.
- {PCTG.<field>[.round]} - Returns the number of rows in the group as a percentage of all the rows in the report.
- {SQL.<sql command>} - executes the SQL and outputs the value of the first field. Eg: {SQL.SELECT COUNT(*) FROM animal}. This tag is also available in the \$\$BODY block and can be used in conjunction with the field tags to produce a subquery. Eg: Suppose you wanted to show the number of movements attached to a particular animal without doing a group query with an inner join to adoption. You could just use {SQL.SELECT COUNT(*) FROM adoption WHERE AnimalID = \$ID}
- {SUBREPORT.<title>.<parentkey>[.<parentarg>]} - executes the custom report with [title] and with the [parentkey] being the name of a field from the current report data to pass down to the subreport. The report output is embedded in the current report. You can use the \$PARENTKEY\$ field in the subreport to access this value for filtering your data.

Note: You can nest reports to an unlimited depth. You can pass an unlimited number of fields to a subreport, accessible as \$PARENTARGX\$ where X is the number of the argument you want to access in the subreport query.

Here is an example report to show all animals currently on the shelter, with their picture, grouped by their internal location and giving totals for each:

```

SELECT animal.ID, animal.AnimalName, animal.ShelterCode, internalLocation.LocationName
FROM animal
INNER JOIN internallocation ON
animal.ShelterLocation = internallocation.ID
WHERE animal.Archived = 0
ORDER BY internalLocation.LocationName

$$HEADER
HEADER$$

$$GROUP_LocationName
$$HEAD
<h2>$LocationName</h2>
<table>
<tr>
<th>Name</th>
<th>Code</th>
<th>Picture</th>
</tr>
$$FOOT
</table>
<p><b>Total at $LocationName: {COUNT.AnimalName}</b></p>
GROUP$$

$$BODY
<tr>
<td>$AnimalName</td>
<td>$ShelterCode</td>
<td><img src={IMAGE.$ID} width=300 height=200 /></td>
</tr>
BODY$$

$$FOOTER
FOOTER$$

```

17.2 Charts

Charts work just like the reports. The difference is that instead of generating HTML, you just choose a chart type from the type dropdown.

ASM will dissect the results of the query in the following way to generate a graph, depending on whether your query returns two or three columns.

17.2.1 Two column variant

1. Each row in your result data becomes a point on the X axis
2. The first column in each row is assumed to contain the name used for the label on the X axis. Only string data should be used for the first column.
3. Each subsequent column is assumed to be a piece of data at that point on the X axis (and thus gives the Y axis its scale). Only numeric data can appear in columns after the first one.
4. The fieldname of each column after the label column is used to denote the data on the legend.

For example, this SQL will produce a graph that shows the amount of donations from animal movements each year. Following our scheme, the Year column being first is the X axis label, TotalAmount is the first datapoint for that item on the X axis:

```
SELECT YEAR(DateReceived) AS Year,
SUM(ownerdonation.Donation) AS TotalAmount
FROM ownerdonation
WHERE MovementID > 0
GROUP BY YEAR(DateReceived)
ORDER BY Year
```

Would produce data that might look something like:

Year	TotalAmount
2004	59840
2005	61893
2006	51039
2007	55984

Note: Graphs use a relative scale, interpreted from the data. If all of your column data is the same value, then the graph will not display because it has no variance.

17.2.2 Three column variant

1. Each row in your result data becomes a point on the X axis
2. The first column in each row is assumed to contain the name used for a series.
3. The second column in each row contains the X axis label.
4. The third column contains the value for the Y axis and must be numeric.

For example, this SQL produces a graph that shows the number of donations made for over a year by internal location. Each location becomes a series with a set of data points for each month of the year:

```
SELECT i.LocationName,
MONTH(ad.MovementDate) AS bimonth,
COUNT(ad.Donation) AS total
FROM adoption ad
INNER JOIN animal a ON ad.AnimalID = a.ID
INNER JOIN internallocation i ON i.ID = a.ShelterLocation
WHERE YEAR(ad.MovementDate) = $ASK STRING Which year to display for?$
AND ad.MovementType = 1
GROUP BY i.LocationName, MONTH(ad.MovementDate)
```

17.3 Maps

Maps are just like the reports. The difference is that instead of generating HTML, they will output map markers from a LatLong field.

ASM expects map queries to return a resultset containing at least two columns. The first is the LatLong marker for the map, and the second is the text to display in the popup when the marker is clicked.

For example, this SQL will produce a map that shows the location of every person on file, with their address when the marker is clicked:

```
SELECT LatLong, OwnerAddress FROM owner
```

If there are more than two columns in the query results, the report engine will concatenate together the values of each subsequent column.

This SQL will produce a map with every person on file, but includes a clickable link to the person record when the marker is clicked:

```
SELECT LatLong,
'<a target="blank" href="person?id=', ID, '>',
OwnerName,
```

(continues on next page)

(continued from previous page)

```
'</a>'  
FROM owner ORDER BY ownername
```

17.4 Automatic updating of repository reports

When you install a report from the repository, some reports have a revision number. This number will be shown in the list on the reports editing screen next to the report's title.

If we update the repository with a newer version of that report, it will get a new revision number. Each time you visit the home page, the system will automatically check for newer versions of reports. If it finds any, it will update the SQL and HTML of your copy of the report to the latest version. It will only change the SQL/HTML and update any subreports, it will not change the description if you updated it.

If you change the title or category on your copy of a report, this will prevent it being updated by the auto updater. You can use this to lock a report to a particular version.

ONLINE FORMS

ASM allows you to setup online forms that you can use to take information from members of the public through your website (if your ASM is publically accessible, or you are using sheltermanager.com).

This is very useful for handling adoption and waiting list application forms, questionnaires, taking lost or found animal information from people, complaints, behavioural assessments, etc. They can be used for any situation where you'd like to take information from web site visitors.

Forms need a name and a description. The description will be shown to the user while they are filling out the form. You can also specify a page you'd like to redirect the user to after they've completed the form.

If you use certain key fields (which the system will autocomplete for you), the system can create person, lost animal, found animal, animal control incident, transport or waiting list records directly from the submitted form data. You can also choose to attach form submissions to animal and people records.

If you set some person flags on your form, any person record created from the form data will automatically have those flags. In addition to that, the "checkbox" field type allows you to enter some additional person flags to set if that checkbox is checked during submission.

Online Forms						
Online forms can be linked to from your website and used to take information from visitors for applications, etc.						
<input type="button" value="New online form"/> <input type="button" value="Clone"/> <input type="button" value="Delete"/> <input type="button" value="Edit Header/Footer"/> <input type="button" value="Import"/>						
Name	Form URL	Redirect to URL after POST	Email submissions to	Person Flags	Number of fields	Description
<input type="checkbox"/> Adoption Application	View Form				88	
<input type="checkbox"/> Customer Satisfaction Survey	View Form				40	
<input type="checkbox"/> Found Animal Questionnaire	View Form				25	
<input type="checkbox"/> Interactive Cat Behaviour Assessment	View Form				29	
<input type="checkbox"/> Lost Animal Questionnaire	View Form				24	

Each form has a direct link that is accessed via the service API. Click "View Form" to follow that link and view the form. This is the web link you can use on your website to link people to the form or put in an iframe.

The first button to the right of "View Form" will copy the link to the clipboard for you, the second button will view the form in "development" mode. This is a special mode that bypasses any server side caching so that changes you make to the form are visible when you reload the page. When editing forms, it is useful to keep the development link open on another tab so you can quickly view and test your changes. The development mode link only works when you are logged in to SM, do not use it on your website.

You may add extra parameters to the form URL if you'd like to set default values for some of your form fields, by using the format `fieldname=value`.

The option "Email adoption coordinator" will send a copy of the submission to the person specified as the adoption coordinator for an animal the form is about. The form must have an `animalname` or `reserveanimalname` field for this to work.

If you set one of the "Send confirmation email to form submitter" options, the system will look for a field called "emailaddress" during submission. If that field exists and is populated with an email address, a confirmation email will be sent to that address. The confirmation message field will form the first part of the body of the email. HTML can be used, but it must be a complete HTML document that contains an `<html>` tag.

Warning: sheltermanager.com uses a 30 minute cache on forms, so if you make changes to a form you've recently viewed, you may have to wait 30 minutes for any changes you make to appear. Use the development mode button to see your changes immediately.

If you declare a javascript function in your form's header or footer named `asm3_onlineform_submit`, it will be called when form validation is successful and just before the form is submitted. You can use this if you want to grab the form values and send them somewhere else or transform the values before it is submitted to ASM:

```
function asm3_onlineform_submit() {
    alert("form is about to be submitted");
}
```

18.1 Editing Form Fields

Clicking on the form's name will allow you to edit the individual fields of information the report will take.

Online Form: Adoption Application					
<input type="button" value="New form field"/> <input type="button" value="Re-Index"/> <input type="button" value="Delete"/>					
<input type="checkbox"/>	Name	Display Index	Type	Label	Show If
<input type="checkbox"/>	reserveanimalname	10	Adoptable Animal	Animal you are interested in adopting	
<input type="checkbox"/>	firstname	30	Text	Applicant's First Name	
<input type="checkbox"/>	lastname	40	Text	Applicant's Last Name	
<input type="checkbox"/>	address	50	Text	Street Address	
<input type="checkbox"/>	city	60	Text	City	
<input type="checkbox"/>	state	70	Text	State	
<input type="checkbox"/>	Apartment#	80	Text	Apartment Number (if applicable)	
<input type="checkbox"/>	zipcode	90	Text	Zip Code	

The dialog will autocomplete the known fields that ASM can look for when creating records from form submissions. For details, see [Appendix: Online Form import fields](#)

To create any record, you will need at least a lastname or surname field. Lost animal records need an arealost and description, found animal records need an areafound and description, waiting list records need a description.

The “lookup”, “radio” or “multi-lookup” field types require a list of values. You should separate these with the pipe character. Eg: Option 1|Option 2|Option 3

The “signature” field type allows the person completing the form to sign electronically with a touchscreen.

A “raw markup” field type allows you to insert your own HTML sections within the form. This is useful for adding contract clauses, headings, or any sort of extra formatting.

The “GDPR contact” field type allows for a multiple lookup of GDPR communication choices to be made for resulting person records.

When forms are submitted through the website they come through to the “View Incoming Forms” screen, where the values can be inspected by clicking the name of the form submission. The screen shows a preview of the incoming data and the IP address that submitted it.

If a field called “emailaddress” is supplied as part of the form submission, the complete submission will be emailed automatically to the person who completed it for their records.

Similarly, if a field called “emailsubmissionto” is supplied, containing one or more comma separated email addresses, the submission will also be emailed to these extra addresses. This can be useful to have form values trigger hidden values to send submissions to other addresses.

If you have a field where the name prefix is “additionalX”, the system will look for an additional field called X and store the submission value in it when creating a person record. It will only work for new person records created from the form submission and not if the form updates an existing person record to prevent overwriting data.

18.1.1 Show If syntax

It is possible to have the system only display some of your form fields based on a condition being met. There are many situations where you may want to do this to remove unnecessary fields based on previous answers (for example, remove questions about the landlord if the person is not renting, or questions about dogs if they are surrendering a cat, etc).

Edit the form field that you want to show or hide based on a condition, and enter the condition in the “Show If” box.

The syntax for show if is:

```
fieldname=X
```

to only show if the form field with fieldname currently has the value X.

You can also use ! instead of = to only show if the field does NOT have the value:

```
fieldname!notthis
```

You can use < or > to use lesser than or greater than comparisons with a fixed value. Eg:

```
fieldname>0  
fieldname<20
```

Also, you can use * to test for partial matches, where the value given is present somewhere in the value of the field. This is very useful when dealing with multi-select type fields that can hold multiple values:

```
fieldname*email
```

If a value is not supplied, the system will compare against an empty string, so you can test that a field is or isn't empty:

```
fieldname=  
fieldname!
```

If fieldname is a checkbox, you can test for the special keyword “on” to indicate you want the box checked (or “off” for unchecked):

```
mycheck=on
```

If you want to reference a checkbox that is part of a checkbox group, you can reference it by the name of the group and item number, starting with 0 for the first item:

```
checkboxgroup0=on  
checkboxgroup1=off
```

Multiple conditions can be specified. They can be either ANDed together or ORed together, but NOT both at the same time.

In an AND expression, all conditions have to be true in order for the field to be displayed. Separate your AND conditions with an ampersand &

```
mycheck=on & fieldname=X
```

In an OR expression, only one of the conditions has to be true in order for the field to be displayed. Separate your OR conditions with a pipe |

```
hascats=Yes | hasdogs=Yes
```


Note: Only check boxes, radio buttons, text and lookup fields can be used with Show If

18.2 Incoming Forms

Name	Re	From	Preview	Link
<input checked="" type="checkbox"/> Rob Test	07/07/2021 05:58:42	127.0.0.1	First: Test, Last: Test, Mandatory YesNo:	
<input type="checkbox"/> Rob Test	07/07/2021 05:58:42	127.0.0.1	First: Test, Last: Test, Mandatory YesNo:	
<input type="checkbox"/> Rob Test	06/11/2021 06:00:00	127.0.0.1	A Lookup: Green, A checkbox group: Item 3	
<input type="checkbox"/> Rob Test	06/11/2021 06:00:00	127.0.0.1	A Lookup: Red, A checkbox: on, A checkbox group: Item 2	
<input type="checkbox"/> Rob Test	06/10/2021 05:58:42	127.0.0.1	: on, A Lookup: Green, A checkbox group: Item 1	
<input type="checkbox"/> Adoption Application	06/10/2021 05:57:51	127.0.0.1	Name: Jesse::C16Y002, : on, : on	
<input type="checkbox"/> Rob Test	06/08/2021 11:42:16	127.0.0.1	A Lookup: Red, A checkbox: on, A checkbox group: Item 3	
<input type="checkbox"/> Rob Test	03/28/2021 05:12:59	127.0.0.1	: 03/28/2021 05:12:59, A checkbox group: Item 3	
<input type="checkbox"/> Rob Test	03/19/2021 09:59:00	127.0.0.1	: 03/19/2021 09:59:00, A checkbox group: Item 2	

Selecting a form allows you to intelligently create or attach records from the data, or explicitly attach the form to existing records.

- Attach Person: Prompts for a single person record and attaches a copy of the form to them as media.
- Attach Animal: Prompts for a single animal record and attaches a copy of the form to them as media. If the animal is bonded, attaches to the bonded animals too.
- Attach Animal (via animalname): Attaches the form to a single animal record based on the animalname field in the form itself. If the animal is bonded, attaches to the bonded animals too.
- Attach Animal (via animalname, no media): Works the same as the option above, but if form contains images or documents that the submitter has uploaded, they will not be added to the media tab of the animal.
- Create Animal: Searches for an animal record matching the code field on the form if present, or the animalname if a dropdown of Shelter or Adoptable Animal was used (which has the code present in the name). If a match is found, the form is attached to that animal, otherwise a new animal record is created. While you can use the Species and Breed field types with the breed1/breed2/color fields, you can also use your own lookup lists containing subsets of these items for users to choose from. When creating animals, the animalname and one of dateofbirth or age are mandatory.
- Create Animal (non-shelter with owner): Performs a create animal as described above. This version assumes that the fields are present to create a person as well, and links that person to the animal as its owner, setting the non-shelter flag on the new animal.
- Create Animal (with brought in person): Performs a create animal as described above. This version assumes that the fields are present to create a person as well, and links that person to the new animal in the “Brought In By” field.
- Create Person: Searches for a person record matching either the email address if present, or the firstname, lastname and address fields on the form. If a match is found, the form is attached to that person. If no match is found, a new person record is created. If a “reserveanimalname” field was found on the form as well, a reservation to the matching animal is created to the person (these can be all viewed under *Move* → *Reservation Book*). If the animal was bonded, reservations will be created for the bonded animals too.
- Create Person (no merge existing): Similar to create person above, but does no checks to see if the person already exists and always creates a new person. This is useful if the icon is showing to indicate that a matching person has been found, but the matching person indicated is incorrect. This can happen when children apply on behalf of their parents or other scenarios where the contact info may point to the wrong person.
- Create Lost Animal: Runs through the same steps as Person so needs enough information to create/find a person as well. “description” and “arealost” fields are the minimum required to create the lost animal record.

- Create Found Animal: Runs through the same steps as Person so needs enough information to create/find a person as well. “description” and “areafound” fields are the minimum required to create the found animal record.
- Create Incident: Runs through the same steps as Person so needs enough information to create/find a person as well. That person becomes the “caller”. “callnotes” and “dispatchaddress” fields are the minimum required to create the incident record.
- Create Transport: Runs through the same steps as Animal, so needs an “animalname” field to figure out who to attach the transport to.
- Create Waiting List: Runs through the same steps as Person so needs enough information to create/find a person as well. A “description” field is the minimum required to create the waiting list record.

When you create a new record or attach the form, the whole form will be included in the media tab of any created records (animal, incident, person AND lost/found animal or waiting list). The screen will put a link in the Link column to give you a clickable link to the newly created record as well so you can view it. The system will also show a little warning icon at the side of this link if that record already existed and was updated instead of newly created.

Incoming forms that have been attached to a record will be automatically deleted when you leave the screen. The system will also remove incoming forms older than 4 weeks by default. Both of these options are configurable under the Online Forms tab of *Settings* → *Options*

18.3 Application Forms

ASM calls an application a “reservation”. If your form has a field named “reserveanimalname” of type “Adoptable Animal”, then using “Create Person” on an incoming form submission will create a reservation for the new person to that animal.

If you want to allow a person to apply for more than one animal, then you can add fields called reserveanimalname2, reserveanimalname3, etc.

The reservation will link the new person and the animal record. That link can be viewed under the movement tab of the person or animal, and you can view all current applications under *Move* → *Reservation Book*.

Reservations can have a status (eg: New, Pending home visit, Denied, etc).

You can configure your own statuses under *Settings* → *Lookup Data* → *Reservation Statuses*

Since the system default is to make animals who have a reservation not available for adoption, you may want to change this by setting *Publishing* → *Set Publishing Options* → *Animal Selection* → *Include Reserved* to YES.

18.4 Importing

ASM also allows importing of online forms from files.

Form files can be in a structured JSON format that ASM recognises, eg:

```
{
  "name": "Adoption Application",
  "description": "",
  "header": "",
  "footer": ""
  "fields": [
    { "index": 1, "lookups": "", "mandatory": "true", "name": "reserveanimalname",
      "tooltip": "", "label": "Animal you are interested in", "type":
↪ "ADOPTABLEANIMAL" },
    { "index": 2, "lookups": "", "mandatory": true, "name": "firstname",
      "tooltip": "", "label": "Applicant's First Name", "type": "TEXT" },
```

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```
    { "index": 3, "lookups": "", "mandatory": true, "name": "lastname",  
      "tooltip": "", "label": "Applicant's Last Name", "type": "TEXT" }  
  ]  
}
```

Files can also be HTML, where the import mechanism will extract all of the input, select and textarea elements. It will use the name attribute to set the field name and label. The HTML page title will be used as the form title.

HTML import is only basic, but can be used to grab the existing fields of a form you already have ready for editing, eg:

```
<!DOCTYPE html>  
<html>  
<head>  
<title>My Adoption Form</title>  
</head>  
<body>  
<form action="handler" method="post">  
  <p><input type="text" name="firstname"> First Name</p>  
  <p><input type="text" name="lastname"> Last Name</p>  
</form>  
</body>  
</html>
```

PAYMENT PROCESSORS

ASM can request due payments from customers via a payment processor. Currently, support is available for PayPal, Stripe, Square and Cardcom (Israel only).

For details on configuring payment processors from the options screen at *Settings* → *Options* → *Payment Processors*, see *Payment Processors*

19.1 Requesting a payment

To request a payment from a customer, first create that payment in either the payment tab for a person or animal, or *Financial* → *Payment Book*

Your payment should have a due date, but no received date.

The screenshot shows the software interface for a payment entry. At the top, there is a navigation bar with options like 'ASM', 'Move', 'Medical', 'Financial', 'Publishing', 'Mail', 'Reports', 'Settings', and a search box. Below this is a 'Quick Links' section with buttons for 'Shelter view', 'Foster book', 'Recently deceased', 'Up for adoption', 'Not for adoption', 'Foster an animal', and 'Adopt an animal'. The main content area shows the profile of 'Mr Dave Jones - J0000195' with address '123 Fake Street, Faketon CA 90210'. Below the profile is a tabbed interface with 'Payments' selected. A table of payments is displayed with columns: Type, Method, Frequency, Due, Received, Receipt No, Amount, Fee, VAT, Animal, and Comments. The first row is 'Adoption Donation' with a due date of 23/04/2020 and an amount of £120.00. A 'Request Payment' button is visible above the table. At the bottom, a summary bar shows 'Total payments: £0.00 / £120.00 VAT: £0.00'.

Next, request payment from the customer by selecting your payment from the list and clicking “Request Payment” followed by the processor you would like to use to receive the payment.

This screenshot is a close-up of the 'Request Payment' dropdown menu. The menu is open, showing a list of payment processors: 'PayPal', 'Stripe', 'Square', and 'Cardcom'. 'PayPal' is currently selected and highlighted. The background shows the same payment table as the previous screenshot, with the 'Request Payment' button now open.

The screen will pop up an email dialog, allowing you to complete details of the message to be sent requesting the payment. Use document templates to store commonly used emails and populate the text by choosing them from the Template dropdown at the bottom of the dialog.

The payment request link will be appended to the bottom of your message after you hit Send.

Warning: The subject line of your request email will be used as the description of the item presented to the customer when they pay.

Email request for payment
✕

From:

To:

CC:

BCC:

Subject:

Add to log

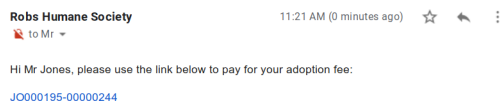
Hi Mr Jones, please use the link below to pay for your adoption fee:

Template:

The resulting email will end up in the customer’s inbox with a clickable link to pay with the payment processor.

Note the payment references that ASM uses are in the form of PERSON-RECEIPTNUMBER to prevent one person receiving a payment request from changing or guessing another receipt number to try and access another customer’s payment.

The subject line of your email will be used as the payment description at the checkout. ASM will default the comments from the selected payment and if they are not present, will suggest the payment type.



Once payment has been completed, the system will automatically update the received date on the payment record. If you have the option on to create matching accounting transactions for received payments, a transaction will be written at this point. If you have configured an expense account for transaction fees, a transaction will be written to deduct the fee and send it to the expense account.

Type	Method	Frequency	Due	Received	Receipt No	Amount	Fee	VAT	Animal	Comments
<input type="checkbox"/> Adoption Donation	Cash	One-Off	23/04/2020	23/04/2020	00000244	£118.73	£1.27	£0.00	Snappy - D2014005	

Total payments: £118.73 / £0.00 VAT: £0.00

19.2 Requesting fulfilment of multiple payments

Payment requests are linked to receipt numbers rather than individual payments.

While most payments will have their own receipt numbers, it is also possible to create multiple due payments on the same receipt number by using the *Financial* → *Receive a payment* or *Move* → *Adopt an animal* screens.

For these screens to allow you to set the due date, you need to have set the option *Settings* → *Options* → *Accounts* → *When receiving multiple payments, allow the due and received dates to be set*

When choosing a due payment from the Payment Book or a payment tab, the other payments with the same receipt number will also be included and added to the payment total requested.

19.3 Adoption checkout

The adoption checkout feature allows an adopter to complete the adoption process on their mobile device. It allows them to view and sign their adoption paperwork, make an optional donation and then sends them off to your chosen payment processor to pay the adoption fee and donation.

To enable the feature, it must first be configured under *Settings* → *Options* → *Checkout*

System Options

Save

Shelter Details
Accounts
Add Animal
Age Groups
Animal Codes
Animal Emblems
Checkout
Costs

Data Protection
Defaults
Diary and Messages
Display
Documents
Email
Find Animal/Person
Home page

Insurance
Lost and Found
Medical
Movements
Online Forms
Payment Processors
Quicklinks
Remove
Reports

Search
Shelter view
Waiting List

Adoption Checkout

Payment processor

Adoption paperwork template

Adoption fee payment type

Donation payment type

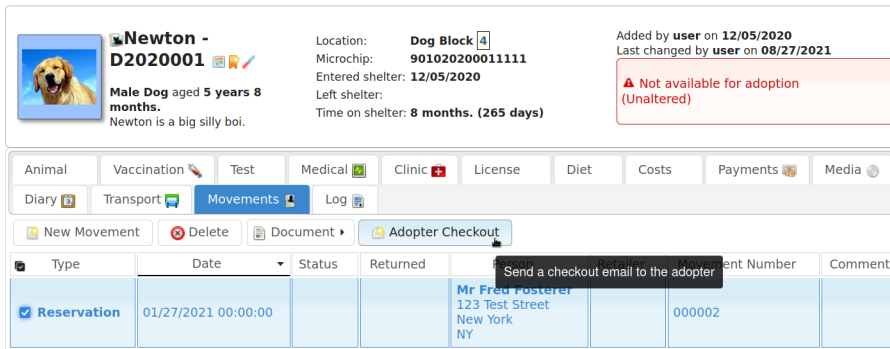
Payment method

Donation message

Donation tiers

The configuration options allow you to choose the payment processor you want to handle the payments, the document template you want to use to create the adoption paperwork, the payment method to use when creating payments and the payment types to use when recording the adoption fee and donation.

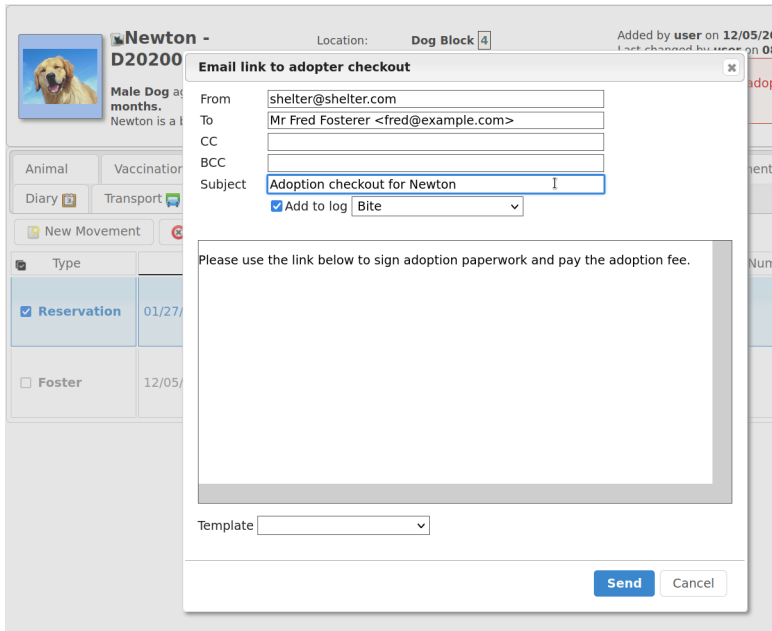
19.3.1 Initiating



Checkout is initiated from the movement tab of the person or animal (or the reservation or “recently adopted” books). It can be done from either a reservation or adoption movement, although if you do use a reservation you will need to manually convert it to an adoption afterwards.

Select the movement and click the “Adopter checkout” button on the toolbar.

If you have not configured the feature, this button will not appear.



The button will prompt you to send an email to the adopter. Relevant information will be pre-filled and as with other email dialogs, you can use a document template or write ad-hoc content.

A link will be added below your email message that links to the checkout system.

19.3.2 Checkout Link

The adopter follows the link in the email on their mobile device (tablets and desktops can also be used, it is not limited in any way to just mobiles).

At this point the system creates the adoption paperwork on the animal and person record ready for the adopter to view and sign on their device.

Review (1/3)



Newton

Male Dog 5 years 8 months.

Adoption Fee: **\$250.00**

Next →

The checkout will remind the adopter which animal they are adopting and the adoption fee. This value is taken from the adoption fee field on the animal's record.

Sign adoption paperwork (2/3)

View ∨



Once signed, this document cannot be edited or tampered with.

Email me a signed copy of the document at `test@example.com`

× Clear ✍ Sign

They will then be prompted to view and sign their adoption paperwork.

The adopter can also choose at this point to have a PDF of their signed adoption paperwork emailed to them.

Donate (3/3)

Our organization depends on the kind donations of individuals to provide animals with medical care, food and shelter.

We need your help!

\$0

No thanks

\$10

Microchip one pet

\$25

One week of milk for a litter of kittens

\$50

Vaccinate a litter of puppies

\$100

Spay/neuter and vaccinate one pet

\$200



Contribute to surgery for pets in need

The adopter will be asked if they would like to make a donation. The message can be configured, as can all the suggested tiers of donation.

Warning: If you remove the \$0 donation tier from the list, the adopter will only be able to continue if they make a donation as they must choose one option.

When you are configuring the donation tiers, the system will show everything to the left of the = sign in bold at the top of the button. This means that you should include your currency symbol for readability as shown in the example configuration above. You can also optionally include the decimal portion if you feel it looks better - eg: \$25 vs \$25.00

Once the user has chosen their donation tier, the system will create due payment records for the adoption fee and donation against the animal and person. It will add their signature to the paperwork at this point and send an email containing a PDF of the paperwork to the adopter if they requested it.

  \$275.00 USD

Log in to PayPal

With a PayPal account, you're eligible for Return Shipping on Us, Buyer Protection and more.

[Forgotten your password?](#)

Log In

or

Pay by Debit or Credit Card

Finally, the adopter will be redirected to the payment processor you have configured to take their payment online.

Depending on what apps are available on their device (eg: Google or Apple Pay) and which payment processor you are using, this can be an extremely trivial process that does not necessarily involve hand entering card numbers.

When payment is complete, the received date will be set on the two payment records for the fee and donation and any accounting transactions created. The adopter will be redirected to the success URL you configured under the payment processor options.

19.3.3 Incomplete payments

If the adopter does not complete their payment at this point, the payment records are left outstanding in the system.

If the adopter returns to the checkout by following the link again, or navigating back from the payment processor, the paperwork will not be created and signed again. The adopter can choose a new donation tier if they wish and the system will update the due donation payment record to reflect the new value that they've chosen. If they choose the 0 tier, the donation payment record will be deleted.

No matter how many times the adopter returns to the checkout, once payment has been made, the records will be updated.

The system will maintain the checkout state for 48 hours before removing it. After this period, the adopter will receive an error and will not be able to use their checkout link until a member of staff initiates the adoption checkout process again from the movement tab/book.

19.4 License checkout

The license checkout feature allows members of the public to renew and pay for their license online in a similar manner to the adoption checkout. Note that the first license for any animal/person combination must be created manually (or via an online form).

This is a much simpler workflow than the adoption checkout in that they are shown a thumbnail (if available) for the animal they are renewing the license for, along with some info on the animal and the renewal cost that they are about to pay.

They can then confirm that they wish to renew and will be taken off to the configured checkout payment processor to take the payment.

Once the payment is complete and received the system will do the following:

- Flag the existing license as renewed
- Create a new license of the same type as the renewed license.
- The issue date of the new license will be set to expiry date of the old license.
- The expiry date will be set to the issue date + the reschedule period for the license type.
- The fee will be set to the amount the person just paid (cost from the licence type)

License reminder emails can be configured to be sent out a set number of days prior to the expiry of a license under *Settings* → *Options* → *Reminder Emails*.

You can use the token/wordkey <<LicenceRenewLink>> or <<LicenceRenewSrc>> in your email template to include a clickable link to take the person to the checkout to pay and renew.

ROTA

ASM allows you to create and schedule staff rotas. A rota combines shifts and time off details for all staff and volunteers. You can find the rota screen at *ASM → Person → Staff rota*.

	Mon. Aug 14	Tue. Aug 15	Wed. Aug 16	Thu. Aug 17	Fri. Aug 18	Sat. Aug 19	Sun. Aug 20
Mrs Susan Dodds	Rostered day off	09:00 - 17:00 Reception	09:00 - 17:00 Reception	Sick leave	09:00 - 17:00 Reception	09:00 - 17:00 Reception	Rostered day off
Mrs Alison Peach	Rostered day off	08:00 - 16:00 Cattery	09:00 - 17:00 Kennel	09:00 - 17:00 Reception	09:00 - 17:00 Kennel	09:00 - 17:00 Cattery	Rostered day off
Mr Thomas Butler	08:00 - 12:00 Kennel 15:00 - 20:00 Cattery	Vacation	Vacation	Vacation	09:00 - 17:00 General	Rostered day off	12:00 - 20:00 Kennel
Mrs Jenny Fisher	10:00 - 18:30 Cattery	10:00 - 15:30 Cattery	Rostered day off	Rostered day off	09:00 - 17:00 Cattery	09:00 - 17:00 General	09:00 - 17:00 Cattery

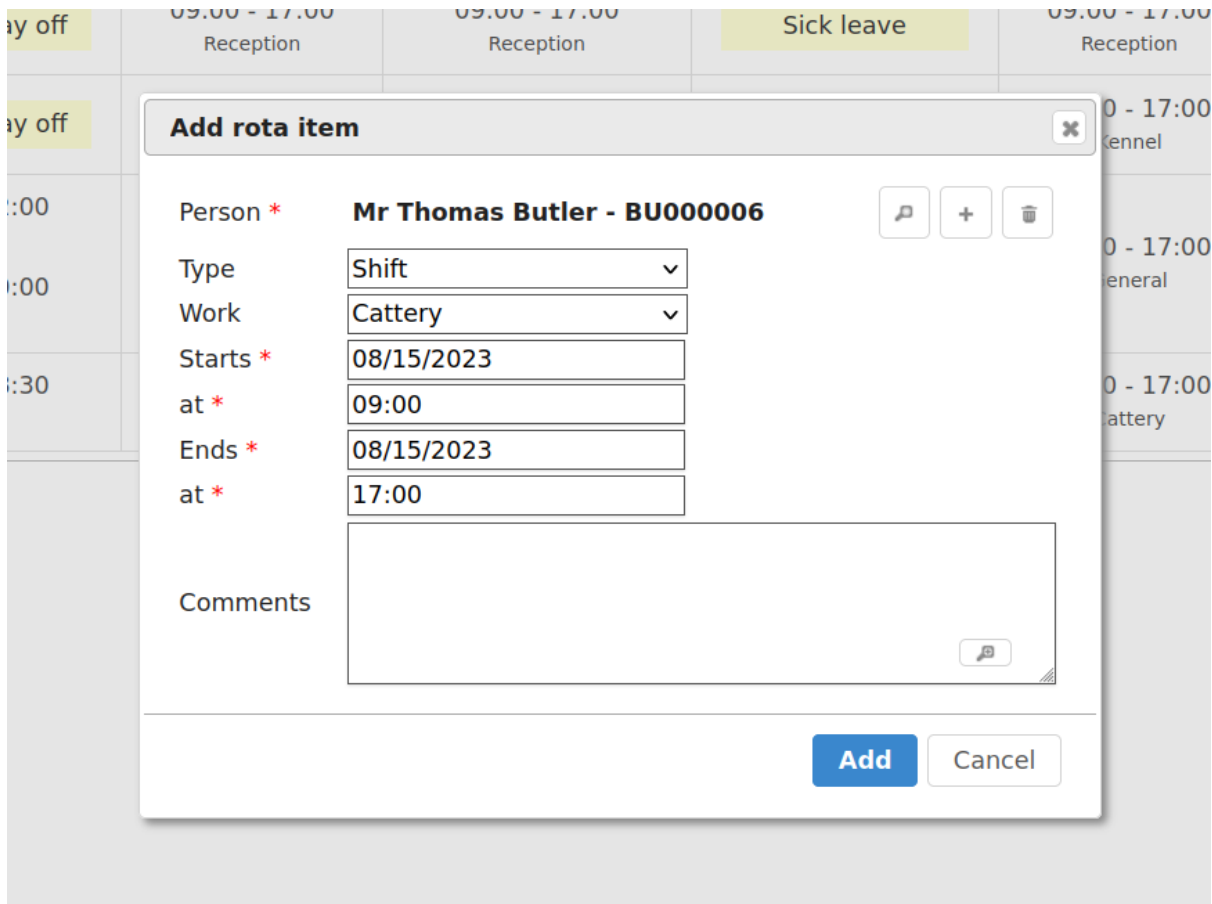
The rota screen shows all staff members down the left side, followed by all volunteers. Hovering over a person’s name will indicate their status as a staff member or volunteer, with staff members shown in blue and volunteers in green.

Across the top, the rota shows each day of the week with today highlighted if the rota is showing the current week. A flag filter allows you to select additional person flags - choosing these will filter the list to only people with any of those additional flags.

New rota entries can be created by clicking in the empty cells for a given day and person:

	Mon. Aug 14	Tue. Aug 15	Wed. Aug 16	Thu. Aug 17	Fri. Aug 18	Sat. Aug 19	Sun. Aug 20
Mrs Susan Dodds	Rostered day off	09:00 - 17:00 Reception	09:00 - 17:00 Reception	Sick leave	09:00 - 17:00 Reception	09:00 - 17:00 Reception	Rostered day off
Mrs Alison Peach	Rostered day off	08:00 - 16:00 Cattery	09:00 - 17:00 Kennel	09:00 - 17:00 Reception	09:00 - 17:00 Kennel	09:00 - 17:00 Cattery	Rostered day off
Mr Thomas Butler	08:00 - 12:00 Kennel 15:00 - 20:00 Cattery		Vacation	Vacation	09:00 - 17:00 General	Rostered day off	12:00 - 20:00 Kennel
Mrs Jenny Fisher	10:00 - 18:30 Cattery	10:00 - 15:30 Cattery	Rostered day off	Rostered day off	09:00 - 17:00 Cattery	09:00 - 17:00 General	09:00 - 17:00 Cattery

The defaults will be filled in for you and new records default to “shift”. You can set the default shift times under *Settings → Options → Defaults*.



If you click on an item in the rota, you can edit it directly as well as deleting it from that dialog.

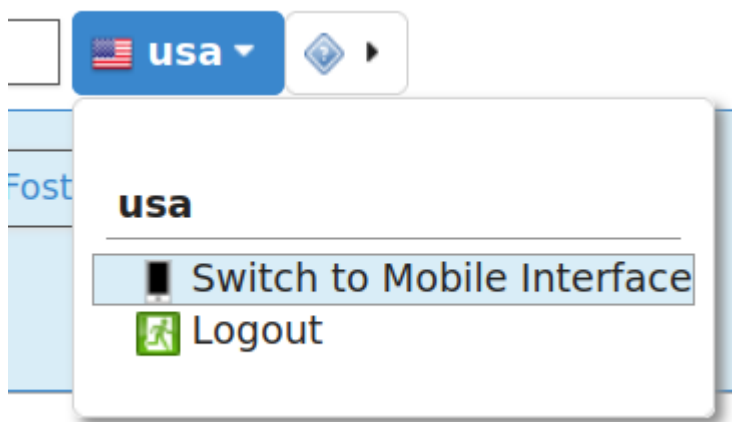
Items that span multiple days will appear on each day they apply to. Generally, it is time off variants rather than shifts that span multiple days.

The staff rota screen also gives you the facility to clone the current week's rota to a future week. This is the expected mechanism for propogating the rota each week. If a person flag filter has been selected, then only the matching rows in the rota will be cloned.

MOBILE INTERFACE

In addition to the web interface, ASM has a special user interface for mobile devices, such as your iPhone or Android handset.

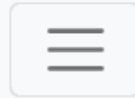
To access this interface, follow the “Mobile Interface” link under the user menu.



The Mobile interface is task focused and allows you to perform the following tasks:

- Read system messages.
- Quickly find and view the records of animals in care.
- Use your camera to upload photos and scan documents as PDFs for animals in care.
- Mark vaccinations given.
- Mark tests performed and record the result.
- Mark medical treatments administered.
- Add logs to animals, incidents and people.
- View open incidents and those assigned to you.
- Dispatch, respond to and complete incidents that have been assigned to you.
- Mark diary notes complete that have been assigned to you.
- Find and view people records.
- Find and check animal licenses
- Perform stock takes on stock locations.

usa: ASM



Messages **1**

Generate Report

Signing Pad

Animals ▾

- Photo Uploader
- Shelter Animals **27**
- Vaccinate Animal **2**
- Medicate Animal **1**

Animal Control ▾

Diary ▾


Financial ▾

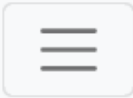
Person ▾

Desktop/Tablet UI

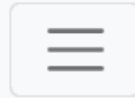
Old Smartphone UI

Logout

Auditing 

usa: ASM 	
Auditing	▼
Diary	▼
Figures	▲
<ul style="list-style-type: none"> Annual Figures (by species) Annual Figures (by type) Asilomar Figures (Live) Brought In Figures Long Term Animals Monthly Figures (by species) Monthly Figures (by type) 	
Financial	▼
Financial Charts	▼
Inventories	▼
Maps	▼
Medical	▼

usa: ASM



Shelter Animals

Search

Barry - D2023011

(Male Boxer Dog)

123456789 Dog Block::2



Bella - U2023012

(Female Domestic Short Hair Cat)

Cattery::8



Bisto - U2023006

(Male Domestic Short Hair Cat)

Cattery::6



Buster - D2023005

(Male Jack Russell Terrier Dog)

927856172 Dog Block::7



Charlie - D2023007

(Male Staffordshire Bull Terrier Dog)

Dog Block::9



Doyal - U2023011

(Male Domestic Long Hair Cat)

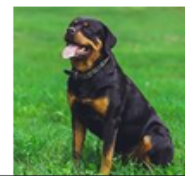
987625367283765 Cattery::11



Freddie - D2023008

(Male Rottweiler Dog)

986172886 Dog Block::10



SERVICE API

ASM includes a service API that you can call from other software via HTTP. To call the API you construct a URL to the service controller. The service controller is /service, so if you are accessing a local ASM from your local machine, the URL will start <http://localhost:5000/service>. If you are using [sheltermanager.com](https://service.sheltermanager.com), the URL will start <https://service.sheltermanager.com/asmservice>.

If you are using [sheltermanager.com](https://service.sheltermanager.com), or have enabled the option `CACHE_SERVICE_RESPONSES` in your `sitedefs.py`, please be aware that some service call responses are cached for performance. The cache time is indicated with the call below, along with whether credentials are needed and any permissions.

While the examples here show passing the parameters with HTTP GET requests, you can POST the parameters too if you prefer.

The service requires at least the following parameters:

- **account:** If this is a [sheltermanager.com](https://service.sheltermanager.com) service call, the user's account number. Can be omitted for other installations.
- **method:** A service method to call.
- **username:** A valid ASM user. Not all methods need a username and password.
- **password:** A valid ASM password.

From a security standpoint, it's better to create at least one ASM user dedicated to calling the service to assist with audit trails and to lock it down so an attacker with the URL cannot change your data or view anything you don't want them to. You can also set "Can Login" to NO in the user account to prevent it logging in to the UI, but still use it to access the service.

22.1 Animal Datasets

Many of the json and xml service calls return a dataset of animals, a sample animal JSON result looks like this:

```
[
  {
    "ACCEPTANCENUMBER": "",
    "ACTIVEMOUMENTADOPTIONNUMBER": null,
    "ACTIVEMOUMENTCOMMENTS": null,
    "ACTIVEMOUMENTCREATEDBY": null,
    "ACTIVEMOUMENTCREATEDBYNAME": null,
    "ACTIVEMOUMENTCREATEDDATE": null,
    "ACTIVEMOUMENTDATE": null,
    "ACTIVEMOUMENTDONATION": null,
    "ACTIVEMOUMENTID": 0,
    "ACTIVEMOUMENTINSURANCENUMBER": null,
    "ACTIVEMOUMENTLASTCHANGEDBY": null,
    "ACTIVEMOUMENTLASTCHANGEDDATE": null,
    "ACTIVEMOUMENTREASONFORRETURN": null,
```

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```

"ACTIVEMOVEMENTRESERVATIONDATE": null,
"ACTIVEMOVEMENTRETURN": null,
"ACTIVEMOVEMENTRETURNDATE": null,
"ACTIVEMOVEMENTTRIALENDDATE": null,
"ACTIVEMOVEMENTTYPE": null,
"ACTIVEMOVEMENTTYPENAME": null,
"ACTIVERESERVATIONS": 3,
"ADDITIONALFLAGS": "|",
"ADOPTAPETCOLOUR": "Black",
"ADOPTIONCOORDINATOREMAILADDRESS": null,
"ADOPTIONCOORDINATORHOMETELEPHONE": null,
"ADOPTIONCOORDINATORID": 0,
"ADOPTIONCOORDINATORMOBILETELEPHONE": null,
"ADOPTIONCOORDINATORNAME": null,
"ADOPTIONCOORDINATORWORKTELEPHONE": null,
"AGEGROUP": "Senior",
"AGEGROUACTIVEMOVEMENT": "Senior",
"ANIMALAGE": "12 years 7 months.",
"ANIMALCOMMENTS": "Cat that needs a longer bio than 20 chars.",
"ANIMALCONTROLINCIDENTDATE": null,
"ANIMALCONTROLINCIDENTID": null,
"ANIMALCONTROLINCIDENTNAME": null,
"ANIMALNAME": "Sarah",
"ANIMALTYPEID": 2,
"ANIMALTYPENAME": "U (Unwanted Cat)",
"ARCHIVED": 0,
"ASILOMARINTAKECATEGORY": 0,
"ASILOMARISTRANSFEREXTERNAL": 0,
"ASILOMAROWNERREQUESTEDEUTHANASIA": 0,
"BASECOLOURID": 1,
"BASECOLOURNAME": "Black",
"BONDEDANIMAL1ARCHIVED": null,
"BONDEDANIMAL1CODE": null,
"BONDEDANIMAL1NAME": null,
"BONDEDANIMAL2ARCHIVED": null,
"BONDEDANIMAL2CODE": null,
"BONDEDANIMAL2ID": 0,
"BONDEDANIMAL2NAME": null,
"BONDEDANIMALID": 0,
"BREED2ID": 231,
"BREEDID": 231,
"BREEDNAME": "British Shorthair",
"BREEDNAME1": "British Shorthair",
"BREEDNAME2": "British Shorthair",
"BROUGHTINBYEMAILADDRESS": "",
"BROUGHTINBYHOMETELEPHONE": "",
"BROUGHTINBYJURISDICTION": "",
"BROUGHTINBYMOBILETELEPHONE": "",
"BROUGHTINBYOWNERADDRESS": "",
"BROUGHTINBYOWNERCOUNTY": "",
"BROUGHTINBYOWNERID": "",
"BROUGHTINBYOWNERNAME": "",
"BROUGHTINBYOWNERPOSTCODE": "",
"BROUGHTINBYOWNERTOWN": "",
"BROUGHTINBYWORKTELEPHONE": "",
"COATTYPE": 4,

```

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```

"COATTYPENAME": "Corded",
"CODE": "1D",
"COMBITESTDATE": null,
"COMBITESTED": 0,
"COMBITESTEDNAME": "No",
"COMBITESTRESULT": 0,
"COMBITESTRESULTNAME": "Unknown",
"CREATEDBY": "robin",
"CREATEDDATE": "2010-01-18T10:20:50",
"CROSSBREED": 0,
"CROSSBREEDNAME": "No",
"CRUELTYCASE": 0,
"CRUELTYCASENAME": "No",
"CURRENTOWNERADDRESS": "",
"CURRENTOWNERCOUNTRY": "",
"CURRENTOWNERCOUNTY": "",
"CURRENTOWNEREMAILADDRESS": "",
"CURRENTOWNEREXCLUDEEMAIL": "",
"CURRENTOWNERFORENAMES": "",
"CURRENTOWNERHOMETELEPHONE": "",
"CURRENTOWNERID": "",
"CURRENTOWNERINITIALS": "",
"CURRENTOWNERJURISDICTION": "",
"CURRENTOWNERMOBILETELEPHONE": "",
"CURRENTOWNERNAME": "",
"CURRENTOWNERPOSTCODE": "",
"CURRENTOWNERSURNAME": "",
"CURRENTOWNERTITLE": "",
"CURRENTOWNERTOWN": "",
"CURRENTOWNERWORKTELEPHONE": "",
"CURRENTVETADDRESS": null,
"CURRENTVETCOUNTY": null,
"CURRENTVETEMAILADDRESS": null,
"CURRENTVETID": 0,
"CURRENTVETLICENCENUMBER": null,
"CURRENTVETNAME": null,
"CURRENTVETPOSTCODE": null,
"CURRENTVETTOWN": null,
"CURRENTVETWORKTELEPHONE": null,
"DAILYBOARDINGCOST": 0,
"DATEBROUGHTIN": "2010-01-18T00:00:00",
"DATEOFBIRTH": "2008-01-18T00:00:00",
"DAYSONSHELTER": 3886,
"DECEASEDDATE": null,
"DECLAWED": 0,
"DECLAWEDNAME": "No",
"DIEDOFFSHELTER": 0,
"DIEDOFFSHELTERNAME": "No",
"DISPLAYLOCATION": "Dog Block::3",
"DISPLAYLOCATIONNAME": "Dog Block",
"DOCMIADIADATE": "2015-05-11T00:00:00",
"DOCMIADIANAME": "198.jpg",
"ENTRYREASONID": 7,
"ENTRYREASONNAME": "Stray",
"ESTIMATEDDOB": 0,
"ESTIMATEDDOBNAME": "No",

```

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```

"EXTRAIDS": "",
"FEE": 0,
"FLVRESULT": 0,
"FLVRESULTNAME": "Unknown",
"HASACTIVERESERVE": 0,
"HASACTIVERESERVENAME": "No",
"HASFUTUREADOPTION": 0,
"HASPERMANENTFOSTER": 0,
"HASSPECIALNEEDS": 0,
"HASSPECIALNEEDSNAME": "No",
"HASTRIALADOPTION": 0,
"HASTRIALADOPTIONNAME": "No",
"HEALTHPROBLEMS": "",
"HEARTWORMTESTDATE": null,
"HEARTWORMTESTED": 0,
"HEARTWORMTESTEDNAME": "No",
"HEARTWORMTESTRESULT": 0,
"HEARTWORMTESTRESULTNAME": "Unknown",
"HIDDENANIMALDETAILS": "",
"HOLDUNTILDATE": null,
"ID": 174,
"IDENTICHIP2DATE": null,
"IDENTICHIP2NUMBER": "",
"IDENTICHIPDATE": null,
"IDENTICHIPNUMBER": "",
"IDENTICHIPPED": 0,
"IDENTICHIPPEDNAME": "No",
"ISCOURTESY": 0,
"ISDOA": 0,
"ISDOANAME": "No",
"ISGOODWITHCATS": 0,
"ISGOODWITHCATSNAME": "Yes",
"ISGOODWITHCHILDREN": 2,
"ISGOODWITHCHILDRENNAME": "Unknown",
"ISGOODWITHDOGS": 2,
"ISGOODWITHDOGSNAME": "Unknown",
"ISHOLD": 0,
"ISHOUSEDTRAINED": 2,
"ISHOUSEDTRAINEDNAME": "Unknown",
"ISNOTAVAILABLEFORADOPTION": 0,
"ISNOTAVAILABLEFORADOPTIONNAME": "No",
"ISNOTFORREGISTRATION": 0,
"ISNOTFORREGISTRATIONNAME": "No",
"ISPICKUP": 0,
"ISPICKUPNAME": "No",
"ISQUARANTINE": 0,
"ISTRANSFER": 0,
"ISTRANSFERNAME": "No",
"JURISDICTIONID": 0,
"JURISDICTIONNAME": null,
"LASTCHANGEDBY": "robin",
"LASTCHANGEDDATE": "2018-08-27T10:25:07.534155",
"LOOKUPDEFAULT": "Item 3",
"MARKINGS": "",
"MOSTRECENTENTRYDATE": "2010-01-18T00:00:00",
"NEUTERED": 1,

```

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```

"NEUTEREDBYVETID": 0,
"NEUTEREDDATE": "2009-01-18T00:00:00",
"NEUTEREDNAME": "Yes",
"NEUTERINGVETADDRESS": null,
"NEUTERINGVETCOUNTY": null,
"NEUTERINGVETEMAILADDRESS": null,
"NEUTERINGVETLICENCENUMBER": null,
"NEUTERINGVETNAME": null,
"NEUTERINGVETPOSTCODE": null,
"NEUTERINGVETTOWN": null,
"NEUTERINGVETWORKTELEPHONE": null,
"NONSHELTERANIMAL": 0,
"NONSHELTERANIMALNAME": "No",
"ORIGINALOWNERADDRESS": "",
"ORIGINALOWNERCOUNTRY": "",
"ORIGINALOWNERCOUNTY": "",
"ORIGINALOWNEREMAILADDRESS": "",
"ORIGINALOWNERFORENAMES": "",
"ORIGINALOWNERHOMETELEPHONE": "",
"ORIGINALOWNERID": "",
"ORIGINALOWNERINITIALS": "",
"ORIGINALOWNERJURISDICTION": "",
"ORIGINALOWNERMOBILETELEPHONE": "",
"ORIGINALOWNERNAME": "",
"ORIGINALOWNERPOSTCODE": "",
"ORIGINALOWNERSURNAME": "",
"ORIGINALOWNERTITLE": "",
"ORIGINALOWNERTOWN": "",
"ORIGINALOWNERWORKTELEPHONE": "",
"OWNERID": 0,
"OWNERNAME": null,
"OWNERSVETADDRESS": null,
"OWNERSVETCOUNTY": null,
"OWNERSVETEMAILADDRESS": null,
"OWNERSVETID": 0,
"OWNERSVETLICENCENUMBER": null,
"OWNERSVETNAME": null,
"OWNERSVETPOSTCODE": null,
"OWNERSVETTOWN": null,
"OWNERSVETWORKTELEPHONE": null,
"PETFINDERBREED": "British Shorthair",
"PETFINDERBREED2": "British Shorthair",
"PETFINDERSPECIES": "Cat",
"PICKUPADDRESS": "",
"PICKUPLLOCATIONID": 0,
"PICKUPLLOCATIONNAME": null,
"PTSREASON": "",
"PTSREASONID": 8,
"PTSREASONNAME": "Biting",
"PUTTOSLEEP": 0,
"PUTTOSLEEPNAME": "No",
"RABIESTAG": "",
"REASONFORENTRY": "",
"REASONNO": "",
"RECENTLYCHANGEDIMAGES": 0,
"RECORDVERSION": 102507,

```

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```

"RESERVATIONDATE": null,
"RESERVATIONSTATUSNAME": null,
"RESERVEDOWNERADDRESS": "",
"RESERVEDOWNERCOUNTY": "",
"RESERVEDOWNEREMAILADDRESS": "",
"RESERVEDOWNERHOMETELEPHONE": "",
"RESERVEDOWNERID": "",
"RESERVEDOWNERJURISDICTION": "",
"RESERVEDOWNERMOBILETELEPHONE": "",
"RESERVEDOWNERNAME": "",
"RESERVEDOWNERPOSTCODE": "",
"RESERVEDOWNERTOWN": "",
"RESERVEDOWNERWORKTELEPHONE": "",
"SEX": 0,
"SEXNAME": "Female",
"SHELTERCODE": "D2010001",
"SHELTERLOCATION": 1,
"SHELTERLOCATIONDESCRIPTION": "",
"SHELTERLOCATIONNAME": "Dog Block",
"SHELTERLOCATIONUNIT": "3",
"SHORTCODE": "1D",
"SITEID": 1,
"SITENAME": "main",
"SIZE": 1,
"SIZENAME": "Large",
"SMARTTAG": 0,
"SMARTTAGDATE": null,
"SMARTTAGNUMBER": "",
"SMARTTAGSENTDATE": null,
"SMARTTAGTYPE": 0,
"SPECIESID": 2,
"SPECIESNAME": "Cat",
"TATTOO": 0,
"TATTOODATE": null,
"TATTOONAME": "No",
"TATTOONUMBER": "",
"TIMEONSHELTER": "10 years 7 months.",
"TOTALDAYSONSHELTER": 3162,
"TOTALTIMEONSHELTER": "8 years 7 months.",
"UNIQUECODEID": 0,
"UNITSPONSOR": "Mr and Mrs Smith",
"VACCGIVENCOUNT": 0,
"VACCOUTSTANDINGCOUNT": 0,
"WEBSITEIMAGECOUNT": 2,
"WEBSITEMEDIADATE": "2013-05-12T09:13:21",
"WEBSITEMEDIAID": 118,
"WEBSITEMEDIANAME": "118.jpg",
"WEBSITEMEDIANOTES": "Cat that needs a longer bio than 20 chars.",
"WEBSITEVIDEONOTES": "",
"WEBSITEVIDEOURL": "https://www.youtube.com/watch?v=dQw4w9WgXcQ",
"WEIGHT": 10.0,
"YEARCODEID": 1

```

}

]

22.2 Sensitive/Personal Info

Some methods, such as `json_adopted_animals`, `json_lost_animals`, etc. will include sensitive or personal information in some object properties in the returned data. By default, all sensitive/personal information will be stripped from these properties in the resultsets returned.

If you do want personal/sensitive data included, you need to pass an extra parameter “sensitive=1” to your calls. If the user account being used to access this data does not have the `VIEW_PERSON` permission, sensitive=1 will be overridden and personal data removed anyway.

The following properties contain personal data that will be stripped:

- OWNER*
- CURRENTOWNER*
- ORIGINALOWNER*
- BROUGHTINBY*
- RESERVEDOWNER*

22.3 animal_image

Cache time: 1 hour

Permissions required: None

Requires username/password: NO

Returns an animal’s preferred image. Send the id of the animal:

```
http://localhost:5000/service?method=animal_image&animalid=520&seq=1
```

An optional “seq” parameter can be included to return the animal’s other available images. seq=1 returns the preferred image (and will be assumed if that parameter is omitted), seq=2 returns the second available image, etc. seq is a 1-based count and can be used with the “WebsiteImageCount” property included in animal records (which contains the number of images an animal has) to programatically grab all the images for a particular animal.

22.4 animal_thumbnail

Cache time: 1 day

Permissions required: None

Requires username/password: NO

Returns an animal’s preferred image as a thumbnail. Send the id of the animal:

```
http://localhost:5000/service?method=animal_thumbnail&animalid=520
```

The thumbnail will be sized to whatever the main application is using (default is 150 pixels along the longest side). You can choose the thumbnail size under *Publishing -> Set Publishing Options -> All Publishers*

22.5 animal_view

Cache time: 10 minutes

Permissions required: None

Requires username/password: NO

Returns a webpage with information for one adoptable animal, constructed from the animalview HTML publishing template (editable at *Publishing -> Edit HTML publishing templates*). Pass the id of the animal:

```
http://localhost:5000/service?method=animal_view&animalid=520
```

When you use *Share -> Link to this animal* on an animal's record, it is this service call that the system redirects you to.

If the animal is no longer adoptable, an error page will be displayed. If you prefer, you can create an HTML publishing template called "animalviewnotadoptable" that will display instead for animals that can no longer be adopted.

You can also optionally specify a style parameter to choose a template to use other than animalview:

```
http://localhost:5000/service?method=animal_view&animalid=520&style=animalviewcarousel
```

It is also possible to specify a ustyle parameter to choose a template to use if the animal is not available for adoption. If you don't specify one, the default of "animalviewnotforadoption" is used. If that template does not exist, a simple error message is returned instead:

```
http://localhost:5000/service?method=animal_view&animalid=520&
↪style=animalviewcarousel&ustyle=animalviewnotforadoption
```

22.6 animal_view_adoptable_js

Cache time: 10 minutes

Permissions required: None

Requires username/password: NO

Returns a javascript file that when executed injects thumbnails of all adoptable animals into the page with links to the animal_view service call. It is most useful as the src attribute for a <script> tag.

The page must contain a div with an id attribute of "asm3-adoptables", where the adoptable animal thumbnails are to appear. If div#asm3-adoptables cannot be found, a popup error message will appear.

Here's an example page showing how to inject your adoptable animal list:

```
<!DOCTYPE html>
<html>
<head>
<title>Adoptable Animals</title>
<style>
.asm3-adoptable-thumbnail { border-radius: 8px; }
</style>
<body>

<div id="asm3-adoptables" />
```

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```
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
</body>
</html>
```

Warning: You cannot import the script file more than once, or have more than one asm3-adoptables div inside a single web page.

22.6.1 CSS and Styles

The adoptable_js output is unstyled - just a thumbnail with a name/link below and two lines of brief text containing some basic information about the animal. You can style this information by adding CSS to your stylesheets for the following classes:

- asm3-filters : The div surrounding the SELECT dropdown filters
- asm3-adoptable-list: The div surrounding all the animal thumbnails
- asm3-adoptable-item : The div surrounding each animal thumbnail
- asm3-adoptable-link : The a tag enclosing the thumbnail and animal name
- asm3-adoptable-thumbnail : The thumbnail img tag
- asm3-adoptable-name : The animal's name
- asm3-adoptable-reserved : The div surrounding the image if the animal is reserved
- asm3-adoptable-tagline : The brief animal information

and the following elements by their id attribute:

- asm3-adoptable-iframe-overlay: The div surrounding the popup iframe (if used)
- asm3-adoptable-iframe-close: The close link at the top right of the popup
- asm3-adoptable-iframe: The popup iframe itself

Eg: To add rounded corners to the thumbnails and show the animal's name in bold, add this to your CSS:

```
.asm3-adoptable-name { font-weight: bold; }
.asm3-adoptable-thumbnail { border-radius: 8px; }
```

To increase the size of the close link, add this:

```
#asm3-adoptable-iframe-close { font-size: 200%; }
```

Much more advanced and sophisticated styling can be done from these classes and selectors. For example, to float a reserved banner over the top right corner of animals with reservations, try this:

```
.asm3-adoptable-reserved {
  position: relative;
  color: #fff;
  display: inline-block;
  padding: 5px;
  overflow: hidden;
  font-family: Arial, sans-serif;
  font-size: 8pt;
  font-weight: bold;
}
```

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```
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

22.6.4 Filters

You can also add a filter callback, which allows you to implement your own filter based on other elements in the page. The callback receives the complete animal record and must return true if the record is to be included in the list of thumbnails.

For example, to only output animals with a species of dog, you could use this callback:

```
<script>
function asm3_adoptable_filter(a, index, arr) {
    return a.SPECIESNAME == "Dog";
}
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

Additional arguments are also passed to `asm3_adoptable_filter` containing the index of the current element and complete list. Definition: `asm3_adoptable_filter(item, index, arr)`

Which dropdowns appear depends on the `asm3_adoptable_filters` string. To use them all, include the following `asm3_adoptable_filters` line. The order in which they appear in the filters line is also used to output that piece of information below the animal's name in the list:

```
<script>
asm3_adoptable_filters = "sex breed agegroup size species goodwith where site";
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

The “goodwith”, “where” and “site” filters are special in that they do not augment the description of the animal. The “goodwith” filter allows the user to filter for animals who are good with dogs, cats or children. The where filter allows them to filter for animals who are either in the shelter, fostered or listed as a courtesy for someone else.

22.6.5 Sort

You can choose the sort order by setting an `asm3_adoptable_sort` variable. The default is `ANIMALNAME`, but another useful value is `-DAYSONSHELTER` to output animals based on how long they've been on shelter with the longest first. Preceding the sort field with a minus symbol `-` will sort in descending order. You can also use precede the sort field with an at symbol `@` to do a numeric sort rather than a string/alphanumeric sort:

```
<script>
asm3_adoptable_sort = "-@DAYSONSHELTER";
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

A special sort keyword of `SHUFFLE` can also be used, if instead of sorting you'd like the adoptable animals to be output in a random order:

```
<script>
asm3_adoptable_sort = "SHUFFLE";
</script>
```

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```
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

22.6.6 Style

You can choose the template that will be passed to the `animal_view` call when an animal's adoptable profile is viewed. By default, this value is "animalview" to use the template with that name, but it can be overridden:

```
<script>
asm3_adoptable_style = "animalviewcarousel";
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

22.6.7 Extra Content

It's also possible to add an extra content callback, which `adoptable_js` calls for every animal it outputs. For example, to add the animal's bio below the thumbnail and basic info:

```
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
asm3_adoptable_extra = function(a) {
    return a.WEBSITEMEDIANOTES;
}
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

You could set `.asm3-adoptable-tagline` to display: none and then use an extra content callback to output and format any data from the animal's record in the way you want and override the default behaviour.

22.6.8 Limit

You can limit the number of animals rendered by the `adoptable_js` output. This is useful if you want to only show a limited number of animals - eg: If this call is on the home page of your website and you'd like to show some featured animals.

For example, this will limit output to the first 3 animals in the set. Combined with the `-DAYSONSHELTER` sort, it will show the 3 animals who have been on shelter the longest:

```
<script>
asm3_adoptable_sort = "-DAYSONSHELTER";
asm3_adoptable_limit = 3;
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

22.6.9 Popup iFrame

By default, clicking on an animal thumbnail or link will load the target animalview page in a new browser tab. However, the system can also load the page in a floating iframe so that viewing adoptable animals does not leave your site. You can enable this behaviour by setting `asm3_adoptable_iframe = true` in your script. Eg:

```
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
asm3_adoptable_iframe = true;
asm3_adoptable_iframe_fixed = true;
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

Some positioning styles for the iframe have to be supplied programatically and cannot be set by CSS (everything else can be), but there are a couple of javascript variables you can set for them instead.

Eg: To fix the iframe height at 2000 pixels and use a gray background instead of the default of white:

```
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
asm3_adoptable_iframe = true;
asm3_adoptable_iframe_height = "2000px";
asm3_adoptable_iframe_bgcolor = "#888";
</script>
<div id="asm3-adoptables" />
<script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
```

By default, the iframe will use absolute positioning. If your page has multiple screens of vertical height, this will cause it to scroll back to the top when viewing an animal. Setting `asm3_adoptable_iframe_fixed` will use fixed positioning instead, which keeps the position of the parent page when viewing animals, but this has been found to be less compatible with some browsers and iframes.

22.7 animal_view_adoptable_html

Cache time: 10 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document that references `animal_view_adoptable_js` to show a list of adoptable animals. It looks for an HTML template called "animalviewadoptable" and falls back to a basic internal template if it does not exist:


```
http://localhost:5000/service?method=animal_view_adoptable_html
```

22.8 csv_import

Permissions required: IMPORT_CSV_FILE

Requires username/password: YES

The CSV import endpoint can be used to send CSV data to the system. GET or POST can be used and it accepts the following parameters:

- data: The base64 encoded CSV data.
- encoding: The text encoding used for the CSV data (defaults to utf-8 if not supplied)

As this is a synchronous method call, you should not use this method to import large amounts of data - that should be done with the asynchronous screen at *Settings* → *Import a CSV File*. This method call is intended for small amounts of data and individual records being sent by other systems for integration purposes.

Unlike the Import a CSV File screen, you cannot set any of the CSV import options. When importing via this method.

The return value is a JSON document containing the success count, the number of rows in the CSV data and details of errors from any rows that failed to be imported:

```
{ rows: 52,
  success: 51,
  errors: [
    [ 5, "Jeff,2,Dog,928310983219283", "This microchip number has already been used" ]
  ]
}
```

22.9 csv_mail and csv_report

Cache time: 10 minutes

Permissions required: VIEW_REPORT

Requires username/password: YES

Returns a CSV file containing a mail merge or report. Pass the name of the mail merge/report in the title attribute and if the merge requires any parameters, you can pass those too just like with html_report:

```
http://localhost:5000/service?method=csv_report&username=user&password=letmein&
↪title=Detailed+Shelter+Inventory
```

22.10 json_mail and json_report

Cache time: 10 minutes

Permissions required: VIEW_REPORT

Requires username/password: YES

Returns a dataset containing a mail merge or report. Pass the name of the mail merge/report in the title attribute and if the merge requires any parameters, you can pass those too just like with html_report:

```
http://localhost:5000/service?method=json_report&username=user&password=letmein&
↪title=Detailed+Shelter+Inventory
```

22.11 extra_image

Cache time: 1 day

Permissions required: None

Requires username/password: NO

Returns an extra image (see *Settings* → *Reports* → *Extra Images*). Pass the name of the image in the title parameter:

```
http://localhost:5000/service?method=extra_image&title=splash.jpg
```

22.12 html_adoptable_animals

Cache time: 10 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of adoptable animals.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible extra parameters:

- speciesid=X - only output animals of that species. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.
- animaltypeid=X - only output animals of that type. Run this query at the SQL interface to find out the ID numbers: `SELECT * FROM animaltype`
- locationid=X - only output animals in this location. Run this query at the SQL interface to find out the ID numbers: `SELECT * FROM internallocation`
- underweeks=X - only output animals aged under X weeks.
- overweeks=X - only output animals aged over X weeks

The rules governing which animals are adoptable are those set under *Publishing* → *Set Publishing Options* → *Animal Selection*. You can view the set at *Publishing* → *View Animals Matching Publishing Options*:

```
http://localhost:5000/service?method=html_adoptable_animals&template=littlebox&
↪speciesid=1
http://localhost:5000/service?method=html_adoptable_animals
```

22.13 html_adopted_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of recently adopted animals.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.

An “order” parameter can be passed to indicate what order you would like the results to be in. The default is adoption date descending. Options are:

- adopted_asc / adopted_desc - adoption date in ascending or descending order
- code_asc / code_desc - shelter code of the animals
- created_asc / created_desc - creation date of the animal records
- dateofbirth_asc / dateofbirth_desc - the date of birth of the animals
- deceased_asc / deceased_desc - the date the animals died
- entered_asc / entered_desc - the most recent date the animals entered care
- holduntil_asc / holduntil_desc - the date the animal holds end
- lastchanged_asc / lastchanged_desc - the last changed date of the animal records
- litterid_asc / litterid_desc - animal litter ID
- name_asc / name_desc - animal name

You can also pass a “days” parameter to indicate how far you would like to go back. If you do not set it, the default is anihttps://service.sheltermanager.com/asmservice?account=robin&method=html_found_animals&order=code_asc

22.14 html_deceased_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of recently deceased animals.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.

An “order” parameter can be passed to indicate the sort order (see html_adopted_animals). The default is deceased date descending.

You can also pass a “days” parameter to indicate how far you would like to go back. If you do not set it, the default is animals deceased in the last 30 days:

```
http://localhost:5000/service?method=html_deceased_animals&template=littlebox&
↪speciesid=1&days=60
http://localhost:5000/service?method=html_deceased_animals&order=deceased_desc
```

22.15 html_events

Cache time: 1 hour

Permissions required: None

Requires username/password: NO

Returns a complete HTML document of shelter fundraising/adoption events from *ASM* → *Events* → *Edit Events*

Looks for an HTML template called “events” to use. A basic template will be used if the template does not exist. The template can include the following tokens:

\$\$NAME\$\$

The name of the event.

\$\$DESCRIPTION\$\$

The event description. Note that this value is editable HTML from the screen.

\$\$STARTDATE\$\$

The start date/time.

\$\$ENDDATE\$\$

The end date/time.

\$\$ADDRESS\$\$

The event address.

\$\$CITY\$\$ / \$\$TOWN\$\$

The event city (town for non-US).

\$\$STATE\$\$ / \$\$COUNTY\$\$

The event state (county/region for non-US).

\$\$ZIPCODE\$\$ / \$\$POSTCODE\$\$

The event zip/postal code.

\$\$COUNTRY

The event country.

A “count” parameter can be passed to return the most recent X events (default 10) and a “template” parameter can set the name of the template to use.

This is useful for including a page of events on your website:

```
http://localhost:5000/service?method=html_events&template=events&count=20
```

22.16 html_flagged_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of shelter animals that have a particular flag.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.

An “order” parameter can be passed to indicate the sort order (see html_adopted_animals). The default is entered date descending.

A “flag” parameter must be passed to specify the flag you want the returned animals to have. If no flag is set, an error is returned. An “all=1” parameter can optionally be passed if you’d like all animals to be included, not just shelter animals:

```
http://localhost:5000/service?method=html_flagged_animals&template=littlebox&
↪speciesid=1&all=1&flag=Needs+Foster
http://localhost:5000/service?method=html_flagged_animals&flag=At+Risk&order=entered_
↪asc
```

22.17 html_found_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of animals added to the found animals section of the system.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause foundanimalview to be used). It is also possible to pass a speciesid=X parameter to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.

You can also pass a “days” parameter to indicate how far you would like to go back. If you do not set it, the default is animals found in the last 30 days:

```
http://localhost:5000/service?method=html_found_animals&template=littlebox&
↪speciesid=1&days=60
http://localhost:5000/service?method=html_found_animals
```

22.18 html_held_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of current held animals.

An “order” parameter can be passed to indicate the sort order (see html_adopted_animals). The default is entered date descending.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats:

```
http://localhost:5000/service?method=html_held_animals&template=littlebox&speciesid=1&
↳order=holduntildate_desc
http://localhost:5000/service?method=html_held_animals
```

22.19 html_lost_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of animals added to the lost animals section of the system.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause lostanimalview to be used). It is also possible to pass a speciesid=X parameter to only output animals of that species and and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats.

You can also pass a “days” parameter to indicate how far you would like to go back. If you do not set it, the default is animals lost in the last 30 days:

```
http://localhost:5000/service?method=html_lost_animals&template=littlebox&speciesid=1&
↳days=60
http://localhost:5000/service?method=html_lost_animals
```

22.20 html_permfoster_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of animals in permanent foster care.

An “order” parameter can be passed to indicate the sort order (see html_adopted_animals). The default is entered date descending.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats:

```
http://localhost:5000/service?method=html_permfoster_animals&template=littlebox&
↳speciesid=1&order=name_asc
http://localhost:5000/service?method=html_permfoster_animals
```

22.21 html_report

Cache time: 10 minutes

Permissions required: VIEW_REPORT

Requires username/password: YES

Returns an HTML document containing a report. Pass the name of the report in the title attribute. If the report requires any parameters, you can pass those too. VAR parameters are just their name, ASK parameters are ASKn where n is the order within the SQL. If you run the report within the ASM frontend you will see the parameters it requires in the address bar:

```
http://localhost:5000/service?method=html_report&username=user&password=letmein&
↳title=Detailed+Shelter+Inventory
```

22.22 html_stray_animals

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Returns a complete HTML document containing an HTML page of current stray animals.

An “order” parameter can be passed to indicate the sort order (see html_adopted_animals). The default is entered date descending.

You can pass an HTML template name in an optional “template” parameter (leaving it off will cause animalview to be used). It is also possible to pass speciesid=X or animaltypeid=X parameters to only output animals of that species and type. In the default dataset, speciesid=1 is Dogs and speciesid=2 is cats:

```
http://localhost:5000/service?method=html_stray_animals&template=littlebox&
↳speciesid=1&order=holduntildate_desc
http://localhost:5000/service?method=html_stray_animals
```

22.23 json_adoptable_animal, xml_adoptable_animal and csv_adoptable_animal

Cache time: 1 hour

Permissions required: VIEW_ANIMAL

Requires username/password: YES

Returns a dataset containing a single animal record from the list of animals available for adoption. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_adoptable_animal&animalid=123&username=user&
↳password=letmein
```

Note: If the animal with animalid is not adoptable, an empty result set will be returned.

22.24 json_adoptable_animals, xml_adoptable_animals and csv_adoptable_animals

Cache time: 10 minutes

Permissions required: VIEW_ANIMAL

Requires username/password: YES

Returns a dataset containing all animals available for adoption. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_adoptable_animals&username=user&
↳password=letmein
```

22.25 json_adopted_animals, xml_adopted_animals and csv_adopted_animals

Cache time: 30 minutes

Permissions required: VIEW_ANIMAL, VIEW_MOVEMENT

Requires username/password: YES

Returns a dataset containing animals adopted between two dates as passed in the “fromdate” and “todate” parameters. The dates themselves should be formatted for the current database locale (eg: M/D/Y for US locales, D/M/Y for European, Y/M/D for some Asian locales, etc).

Note that the “View Movement” permission is required to call this method.

The method name determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=json_adopted_animals&username=user&
↳password=letmein&fromdate=01/01/2020&todate=12/31/2021
```


22.26 `json_lost_animals`, `xml_lost_animals`, `csv_lost_animals`, `json_found_animals`, `xml_found_animals`, `csv_found_animals`

Cache time: 1 hour

Permissions required: `VIEW_LOST_ANIMAL`, `VIEW_FOUND_ANIMAL`

Requires username/password: YES

Returns a dataset containing all lost or found animals reported in the last 90 days that are still active. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_found_animals&username=user&password=letmein
```

22.27 `json_held_animals`, `xml_held_animals`, `csv_held_animals`

Cache time: 1 hour

Permissions required: `VIEW_ANIMAL`

Requires username/password: YES

Returns a dataset containing all animals currently held. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=json_held_animals&username=user&password=letmein
```

22.28 `json_recent_adoptions`, `xml_recent_adoptions`, `csv_recent_adoptions`

Cache time: 1 hour

Permissions required: `VIEW_ANIMAL`, `VIEW_MOVEMENT`

Requires username/password: YES

Returns a dataset containing all recently adopted animals with their new owner information. The method name determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_recent_adoptions&username=user&  
->password=letmein
```

22.29 `json_recent_changes`, `xml_recent_changes` and `csv_recent_changes`

Cache time: 1 hour

Permissions required: `VIEW_ANIMAL`

Requires username/password: YES

Returns a dataset containing all animals who have been modified in the last month. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_recent_changes&username=user&password=letmein
```

22.30 `json_shelter_animals`, `xml_shelter_animals` and `csv_shelter_animals`

Cache time: 1 hour

Permissions required: `VIEW_ANIMAL`

Requires username/password: YES

Returns a dataset containing all animals currently in the care of the shelter. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=xml_shelter_animals&username=user&
↳password=letmein
```

By default, any personal or sensitive data (such as names and contact information of fosterers and surrenders) will be stripped from the results. If you wish them to be included, pass an extra `sensitive=1` parameter:

```
http://localhost:5000/service?method=xml_shelter_animals&username=user&
↳password=letmein&sensitive=1
```

22.31 `json_stray_animals`, `xml_stray_animals` and `csv_stray_animals`

Cache time: 1 hour

Permissions required: `VIEW_ANIMAL`

Requires username/password: YES

Returns a dataset containing all stray animals in the care of the shelter. The method determines whether the format returned is JSON, CSV or XML:

```
http://localhost:5000/service?method=json_stray_animals&username=user&password=letmein
```

22.32 media_file and media_image

Cache time: 1 day

Permissions required: None

Requires username/password: NO

Responds with media file data for the mediaid given. The content type is set to the correct MIME type for the data:

```
http://localhost:5000/service?method=media_file&mediaid=52
http://localhost:5000/service?method=media_image&mediaid=28
```

22.33 online_form_html and online_form_json

Cache time: 30 minutes

Permissions required: None

Requires username/password: NO

Responds with the online form HTML or JSON for the id given.

```
http://localhost:5000/service?method=online_form_html&id=1
```

22.34 rss_timeline

Cache time: 1 hour

Permissions required: VIEW_ANIMAL

Requires username/password: YES

Returns an RSS feed of the timeline for use with feed aggregators:

```
http://localhost:5000/service?method=rss_timeline&username=user&password=letmein
```

PUBLISHING

ASM can update many third party adoption sites and microchip registries as well as generating websites of your adoptable and recently adopted animals. The sites produced are based on simple editable templates and can be completely customised and branded to suit you.

All of this functionality is accessed via the top level Publishing menu.

There are many options you can set to choose what appears on the output, and how the output is generated. Set these options under *Publishing* → *Set Publishing Options*

23.1 Animal Selection

The Animal Selection tab allows you to control which animals are considered adoptable by ASM's internet publishers.

- Include [category] animals: Select "yes" to include animals fitting the category.
- Merge bonded animals into a single record: When outputting bonded animals, merge them into a single entry. The names will be joined together with commas, but other than that all the details will be of the first animal in the sort so make sure the bio/notes include information on the bonded animals for all of them.
- Exclude animals aged under: This box is to prevent puppies and kittens who are too young being included in the list of available adoptions. You may choose an age limit on animals that appear. By default, the system excludes animals less than 1 year old (52 weeks).
- Exclude animals with more than X active reservations: This allows you to automatically stop an animal being published after it has received a set number of applications/reservations.
- Include animals in the following locations: Select the locations to include adoptable animals from. If none are selected, all locations will be used.

Note: In addition to items you select here, any animal which has the “Courtesy Listing” flag will be automatically included.

23.2 All Publishers

The All Publishers tab allows you to set options common to all internet publishers.

- **Register microchips after:** If you are registering microchips, ASM will update the owner information with the registry after these types of movements. Non-shelter animals will always be registered with their original owner information if present, using the microchip date as a trigger. A special “Intake” option allows registering of microchips to the shelter’s contact info for animals currently in the care of the shelter. This includes animals brought to the shelter as well as those returned from a previous movement. Animals who are marked as held awaiting reclaim will *not* be registered until after the hold is removed.
- **Register microchips from:** When registering microchips, only consider animals where the event triggering registration (intake, adoption, reclaim, etc) occurred after this date. This is useful when enabling registration for the first time on a database full of a historic data where you do not want to re-register old chips to potentially out of date adopters.
- **Update adoption websites every:** Some adoption websites will accept updates more frequently than the 24 hour default. Setting this option to a value smaller than 24 will update those services at the chosen interval. Services affected by this value are PetFinder, AdoptAPet, PetRescue, SaviourLife and Maddie’s Pet Assistant
- **Reupload animal images every time:** Ticking this box will tell the publisher to reupload images for all the animals published. Normally, ASM will not upload an image it has previously uploaded to save bandwidth. ASM will detect the preferred image changing and force a reupload for that animal without the need for this option. This option will be ignored by some publishers (notably RescueGroups.org and AdoptAPet.com) as reuploading all images constantly is considered abusive behaviour.
- **Upload all available images for animals:** Ticking this box will have the publisher upload all the images for each animal where available. They will be named sheltercode-X.jpg (X increments for each image). The first image will be the image flagged as web preferred.
- **Order published animals by:** Sorts the list of animals before they are published.
- **Thumbnail size:** Controls the size of thumbnails the system generates for adoptable animal publishers (in particular the ones used by the javascript include method of website integration). The size is for the thumbnail’s longest side.
- **Animal descriptions:** This determines the source of the main description for animals when being published. For the HTML/FTP publisher, this is the source of the \$\$WebMediaNotes\$\$ token. Set to “Use animal comments” to use the comments field from the notes section of the animal’s record. “Use notes from preferred photo” will use the notes field on the animal’s web preferred photo.

- Add this text to all animal descriptions: Allows you to set a footer on every animal description before it is published. Note that this does not apply to courtesy listings, allowing you to add additional contact info.

23.3 HTML/FTP Publishing

ASM can create websites for you using a simple templating system and optionally upload them to an FTP server. The pages themselves can be split down by species and age, or arranged numerically with a fixed number of animals per page. In addition, a recently adopted page can be generated along with an rss.xml for feed readers.

Warning: Static HTML publishing is deprecated for sheltermanager.com and is no longer available.

- Generate javascript database: The site search facilities require a Javascript database, indexing the available animal records. If you wish to include search facilities, make sure this box is ticked.
- Generate thumbnail images: The publisher will create thumbnails of all the animal images. Thumbnail images have the same name as the animal image, but are prefixed with tn and an underscore. You can use `tn_$$WebMediaFilename$$` in a template to get the thumbnail image for the current animal.
- Thumbnail size: The desired length in pixels of the longest side of the generated thumbnail.
- Output a separate page for each animal type: Output extra pages of the form ANIMALTYPE.EXTENSION, eg: Miscellaneous.html. This means you can reference the page of miscellaneous animals only from your website. If you have used any punctuation or spaces in the animal type, then they will be turned into underscores. For example, a type of “D (Dog)” will create a page called D__Dog_.html
- Output a separate page for each species: Output extra pages of the form SPECIES.EXTENSION, eg: Dog.html. This means you can reference the page of adoptable dogs only from your website.
- Split species pages with a baby/adult prefix: If this option is selected, ASM will output species pages in the form baby/adultSPECIES.EXTENSION. Eg: babyCat.html and adultCat.html for cats/kittens. This option only works in conjunction with the “Output a separate page for each species” option.
- Split baby/adult age at: The split point to determine juvenile animals.
- Output an adopted animals page: If set to yes, a file named adopted.EXTENSION will be output that you can use to reference recently adopted animals.
- Output a deceased animals page: If set to yes, a file named deceased.EXTENSION will be output that you can use to reference recently deceased animals as a tribute page.
- Output a page with links to available online forms: If set to yes, a file named forms.EXTENSION will be output that contains a link to all the online forms in the database.
- Output an rss.xml page: If set to yes, a file named rss.xml will be output for feed readers. It will use the rss template if it is available in your database, if it’s not then it will be constructed from a default template built into the program.
- Show animals adopted: If outputting an adopted animals page is on, how far back the adoptions should be included.
- Page extension: The file EXTENSION to give a page. Eg: html
- Publishing template: The template ASM should use to construct the header/footer/body elements of the pages. ASM comes with a set of included templates, outlined in the next section.
- Animals per page: ASM will always output numbered pages of the form 1.EXTENSION, 2.EXTENSION, etc. Specify here how many animals you’d like before moving on to the next page. By default, the system shows 10 animals per page, however the more animals you put on a page, the longer the page will take to load.
- Scale published images to: This box allows you to reduce the size of your animal images to a particular resolution. ASM scales down pictures when you attach them under the media tab, so unless you want to make them smaller still, it’s best to leave this at No Scaling.

- Publish to folder: Choose the folder where output is to be generated.

Warning: This folder is on the machine that ASM is installed on, not your local client PC. If this is left blank, a temporary folder will be used.

23.3.1 Included templates

ASM comes with a number of website templates out of the box. As well as working with static HTML building, they can also be used with the template parameter to various html service methods (eg: `html_adoptable_animals`)

- plain: produces very simple HTML output - just the animal's picture and a few details in a list.
- rss: produces XML output for interpreting by an RSS feed reader.
- sm.com: uses CSS hover elements and javascript to do image substitution for icons and other tricks.
- littlebox: a more advanced template that shows a screen of thumbnails with a clickable popup for each animal, using CSS overlays.
- responsive: uses relative sizings to work equally well on mobile devices. It is not dissimilar to plain, but also features the ability to click an animal's photo for more information.
- slideshow: loads the images of all animals into a rotating carousel, producing a slideshow of all adoptable animals. This template is very useful if you want to display it full screen on a TV in reception, etc.
- animalview: Used for displaying one animal generally. This is the default target of the `animal_view` service method and is the target for thumbnails injected by the javascript include code snippet (which loads the javascript from the `animal_view_adoptable_js` service method).
- animalviewcarousel: Just like animalview, but has a rotating carousel/slideshow of images for that animal.
- animalviewadoptable: This is the template used by the `animal_view_adoptable_html` service method, which injects the `animal_view_adoptable_js` service call into a page. It is useful for creating a page of thumbnails to link to for users who cannot edit their websites to include the javascript code snippet.

You can edit these templates under *Publishing* → *Edit HTML Publishing Templates* and add your own new ones if desired. Templates are made up of three sections.

- The header block - this is output for each page before any animal records.
- The footer block - this is output for each page after all the animal records.
- The body block - this is output for each animal record and has keys to pull data from the database and the animal's image(s). The keys available are those available for animal documents (see wordkeys in the appendix at the end of this document) and are enclosed in \$\$ - eg: `$$ShelterCode$$` will output the animal's shelter code.

A number of special keys are allowed in the header and footer blocks that pull information from other areas of the system. These are:

- `$$ORGNAME$$` - Becomes your organisation's name
- `$$ORGADDRESS$$` - Your organisation's address
- `$$ORGTEL$$` - Your organisation's telephone number (all of these org fields can be found under *System* → *Options*)
- `$$ORGEMAIL$$` - Your email address (this is taken from *Settings* → *Options* → *Email*)
- `$$USER$$` - Substitutes the current system user, including their real name
- `$$DATE$$` - The current date
- `$$TIME$$` - The current time
- `$$DATETIME$$` - The current date and time

- `$$VERSION$$` - The ASM version
- `$$NAV$$` - If you are using numbered pages, outputs navigation with the current page disabled and links to the other available pages. Returns a blank for recently adopted animal pages.
- `$$TITLE$$` - An appropriate title based on the page being published. If it is a recently adopted page, the title will be “Recently adopted” in your language. Otherwise, it will be “Available for adoption”.
- `$$TOTAL$$` - The number of animals output by the publisher

23.4 adoptapet.com

ASM can send data to 1-800-Save-A-Pet.com (now known as AdoptAPet.com) and upload your animals for adoption directly to your account with them.

You will need to go to the publishing options first and enter the user name given to you by AdoptAPet.com and your password. All you need to do then is choose Publish to AdoptAPet.com. The options for filtering animals are the same (see previous section for reference).

If you have mapped the colours and wish to include them, you will need to tick the “Include colors in column 9” checkbox on the AdoptAPet panel of the publishing options.

You can also have ASM stop sending the import.cfg file after the first export. This means you can then grab it from their FTP server and edit it yourself if you wish to change any mappings, then put it back again. This is generally only necessary for users who want to send colour information.

23.5 maddiesfund.org / Maddie’s Pet Assistant

ASM can send data to Maddie’s Fund/MPA - an application to provide information and interactive help to fosterers, adopters and other caregivers. Basic data on the animal and contact information for the adopter/fosterer is sent.

23.6 petfbi.org

ASM can send data to www.petfbi.org, a map-based website that publishes stray and found animals. Your ASM stray/hold animal data will also be published as well as found reports. You will need an organisation ID, FTP username and password and to enter the postal/zipcode of your shelter.

petfbi.org works with shelters in the US and Canada.

23.7 petfinder.com

In addition to creating standalone websites with animals up for adoption, ASM can also integrate with PetFinder.com and upload your animals for adoption directly to your account with them. You will need to go to *Publishing* → *Set Publishing Options* first and view the PetFinder panel. Here, you should enter the shelter ID given to you by PetFinder.com and the FTP password they have assigned to you.

You can also opt to have your shelter animals with the “Hold” flag sent with the PetFinder H status, and shelter animals who have “Stray” selected as their entry type sent with an F status. This will put those animals into PetFinder’s lost and found database to help with reuniting stray pets with their owners. Animals who have the “Cruelty Case” flag will be omitted from these uploads.

Finally, you can choose to send previously adopted animals with status X. This helps PetFinder keep track of your adopted animals and can be useful for grants. If you have many thousands of previously adopted animals, this can have an effect on performance.

Note: If you have created new Species or Breeds within ASM, you will need to map them to the available publisher options under the Breed and Species sections of *Settings* → *Lookup Data*

If you have some that are not mapped, the publisher will fail with an error message.

PetFinder has some quirks in that they indicate an unknown crossbreed by having a blank secondary breed with the crossbreed flag set. Since ASM doesn't allow you to set an empty second breed field, there's a workaround - If you make the second breed the same as the first breed with the crossbreed flag set, ASM will send that second breed as a blank to PetFinder. This behaviour can also be triggered by setting your second breed to "Crossbreed", "Unknown" or "Mix".

Warning: You have to let PetFinder know that you are using ASM to upload your data. Do this by logging into the PetFinder members area, go to the Admin System Help Center, then Contact Us and send PetFinder Tech Support a message that you are using ASM to publish animal data via their FTP server. They should give you the FTP login information and make sure permissions and quotas are correct.

23.7.1 Extra fields

PetFinder have a number of extra fields that you can set by creating additional animal fields with certain names in your database. The system responds to the field names, you can label them anything you want, they must be linked to animal records.

- pfprimarycolor, pfsecondarycolor, pftertiarycolor (Text): ASM only uses a single value for animal color, so our color field cannot be mapped to PetFinder. Instead, you can add the three color fields that PetFinder used and supply appropriate values. The values they will accept for color depend on the species of your animal and can be found here: <https://github.com/bobintetley/asm3/files/3487421/import.breeds.coats.colors.updated.Aug.2019.xlsx>
- pfcoatlength (Text): PetFinder can accept a coat length value, which is one of Short, Long, Medium, Wire, Hairless, Curly
- pfadoptionfeewaived (Bool): a 1 or 0 to indicate that there is no adoption fee for this animal.
- pfspecialneedsnotes (Text): If the animal has special needs, you can add a note about those needs to be output on their PetFinder listing.

23.8 petrescue.com.au

In addition to creating standalone websites with animals up for adoption, ASM can also integrate with Petrescue.com.au and upload your animals for adoption directly to your account with them.

You will need to go to *Publishing* → *Set Publishing Options* first and view the PetRescue panel. Here, you should enter the access token given to you by PetRescue.com.au. All you need to do then is choose Publish to PetRescue.com.au in place of the normal internet publisher. The options for filtering animals are the same (see previous section for reference).

23.8.1 Determining whether an animal is vaccinated

ASM will determine if your animals are vaccinated, wormed or heartworm treated and indicate this to PetRescue via the following rules:

- If the animal has at least 1 previously given vaccination on file and there are no vaccinations outstanding, the vaccination flag is set.
- If the animal has a medical treatment containing the word “worm” and not the word “heart” in the last 6 months, the wormed flag is set.
- If the animal has a medical treatment containing the words “heart” and “worm” in the last 6 months, the heartworm treated flag is set.

23.8.2 Contact Info

By default, the contact info for the shelter from the options page will be used. You can optionally override the email address and set a contact phone number if you wish.

If you enable the option to use the adoption coordinator’s contact information, this overrides the contact email and contact phone number options and will supply the phone number and email address of the adoption coordinator for each pet.

23.8.3 Extra fields

PetRescue have a number of extra fields that you can set by creating additional animal fields with certain names in your database. The system responds to the field names, you can label them anything you want, they must be linked to animal records.

- `bestfeature` (Text): PetRescue show a tagline at the top of listings. By default, this value is set to “Looking for love” on all listings. You are allowed 25 letters and can override the tagline on a per-animal basis.
- `needsconstantcare` (Yes/No): This can be used to indicate that an adoptable cannot be left by itself.
- `breedincareofgroup` (Yes/No): Indicates the animal was bred whilst in the care of the group. Setting this to true makes `breederid` mandatory for all listings in South Australia after July 2018.
- `needsfoster` (Yes/No): Indicates that foster care is required for the animal.

Note: PetRescue integration relies on you naming your breeds and species with the same values that they do. If a breed does not match one of the PetRescue breeds, ASM will send it as “Mixed Breed” instead.

23.9 rescuegroups.org

ASM can integrate with RescueGroups.org. They run a pet adoption portal service that allows updating of multiple online services (including Facebook and Petsmart). See their website for information on which services they update. For more information on setting up RescueGroups to receive data from ASM, see their userguide at <https://userguide.rescuegroups.org/> and search for ASM.

To configure ASM, you will need to go to *Publish* → *Set Publishing Options* and enter the FTP username and password given to you by RescueGroups (you can find this by going to *Services* → *FTP account* in the RescueGroups management interface).

Once you’ve done that, you can choose the Publish to RescueGroups.org menu item. The options for filtering animals are the same as for the other publishers.

Warning: If you are using the “Upload all images” option, ASM will only send the first 4 images (the first is always the preferred) as RescueGroups.org do not support more than 4 images per animal.

Warning: The RescueGroups.org publisher uses the publisher breeds and species mappings, so you should make sure that you have mappings for all your breeds and species before using the publisher (the publisher will give an error message if any species or breeds do not have mappings).

23.10 savour-life.com.au

ASM can integrate with savour-life.com.au and upload your animals for adoption directly to your account with them.

You will need to go to *Publishing* → *Set Publishing Options* first and view the SavourLife panel. Here, you should enter the username and password given to you by SavourLife. The options for filtering animals are the same as for other publishers, although ASM will only send dogs (Species 1) as SavourLife will not accept listings for other species of animals.

Note that regardless of whether you have set the publishing option to “Include animals who don’t have a picture”, SavourLife will not accept listings without a photo, so we will not send animals who do not have a photo.

23.10.1 Determining whether an animal is vaccinated

ASM will determine if your dogs are vaccinated, wormed or heartworm treated and indicate this to SavourLife via the following rules:

- If the animal has at least 1 previously given vaccination on file and there are no vaccinations outstanding, the vaccination flag is set.
- If the animal has a medical treatment containing the word “worm” and not the word “heart” in the last 6 months, the wormed flag is set.
- If the animal has a medical treatment containing the words “heart” and “worm” in the last 6 months, the heartworm treated flag is set.

23.10.2 Extra fields

SavourLife have extra fields that you can set by creating additional fields with certain names in your database. The system responds to the field names, you can label them anything you want, they must be linked to animal records.

- enquirynumber (Text): SavourLife will give potential adopters an enquiry number that can be given to the shelter. This enquiry number is used to link adopters with the adopted animal and qualify them for free food from SavourLife.
- medicalissues (Text): Any information you want to pass to SavourLife about medical issues the animal has.
- needsfoster (Yes/No): Indicates that foster care is required for the animal.
- interstateadoptable (Yes/No): Overrides the global interstate adoptable value on the config screen and allows you to apply it on a per-animal basis instead.

Note: SavourLife integration relies on you naming your breeds and species with the same values that they do. If a breed does not match one of the SavourLife breeds, ASM will send it as “Mixed Breed” instead.

23.11 shelteranimalscount.org

ASM can automatically update your statistics with shelteranimalscount.org, the US service for aggregating statistics on animal intakes and outcomes (this publisher is sheltermanager.com only).

First, you will need to contact shelteranimalscount and let them know your sheltermanager.com account number. This is so they can tie your organisation to the incoming data.

Next, go to *Publish* → *Set Publishing Options* → *ShelterAnimalsCount* and check the “Enabled” box.

Like the other publishers, shelteranimalscount will run automatically overnight to send updates and does not require any interaction.

When the publisher runs, the first phase is to determine which months of data it will send.

- If today is the 1st of the month, last month’s data will be sent.
- If an animal or movement record with an event date in a previous month has been added or changed in the last 24 hours, that month’s data will be sent. An event date is one of intake, return, death or movement.

Warning: Like the SAC reports, this publisher relies on the default species from the default database. If you have deleted the original species and recreated them, you will need to contact sheltermanager.com support for assistance.

23.12 petslocated.com

ASM can integrate with petslocated.com, a lost/found matching database for shelters in the UK.

To configure ASM, you will need to go to *Publish* → *Set Publishing Options* and enter your petslocated.com customer number. Once the petslocated.com publisher is enabled, ASM will automatically send all active found animal records to them with the overnight batch.

The petslocated.com publisher also has a pair of additional options you can set for “Include shelter animals” and “Only shelter animals with this flag”.

If you set “Include shelter animals” to “Yes”, you will need to specify a flag. You should create an animal flag (*Settings* → *Lookup Data*) to tag shelter animals that you would like to be sent to petslocated - typically strays and animals that have come via dog wardens, etc.

23.13 AVID/PETtrac UK

ASM can register animals with the AVID PETtrac database for shelters in the United Kingdom.

When you publish to PETtrac, ASM finds all animals with a PETtrac microchip (they are 15 digits and start with 977) that have been adopted and sends their information and new owner info to PETtrac to update their records. ASM tracks the date PETtrac was last updated, so if the animal is returned and adopted again, another update will be done automatically.

In order to handle re-registrations, you will need to nominate one of your system users as the “authorised user”. This user account needs to have a real name and an electronic signature on file. When re-registrations are generated, ASM will create a signed PDF disclaimer document to transmit to AVID, explaining that the shelter has done all it can to find the previous owner of the animal.

Warning: If you have the “Intake” option set of “Register microchips after”, the AVID publisher will ignore it. Instead, AVID have a “selfreg” parameter, which ASM will always set so the shelter is always logged as the secondary contact on a chip.

23.14 idENTICHIP/Anibase UK

ASM can register animals with the Anibase database for shelters in the United Kingdom.

When you publish to Anibase, ASM finds all animals with an idENTICHIP microchip (they are 15 digits and start with 9851 or 9861) that have been adopted and sends their information and new owner info to Anibase to update their records. ASM tracks the date Anibase was last updated, so if the animal is returned and adopted again, another update will be done automatically.

23.15 AKC Reunite

ASM can register microchips with AKC Reunite, part of the American Kennel Club, who supply microchips to US organisations and pet owners. AKC microchips are either 15-digits, starting with 956 or 10-digits, starting with 0006 or 0007.

They will optionally accept registration of any microchip, although this has to be agreed with them first.

23.16 BuddyID

ASM can register microchips with BuddyID, who supply microchips to US organisations and pet owners. Their registry is free to use and will accept registration of microchips from any manufacturer. To signup, you will need to get in touch with them and have them issue you with a “provider code” to configure in ASM.

ASM will attempt to register all microchips with BuddyID and as with the other chip registration publishers, will track when it last updated a chip with them in case of subsequent adoption or reclaim.

23.17 FindPet

ASM can register found animals and microchips with FindPet. Their registry is free to use and will accept registration of microchips from any manufacturer. To signup, you will need to complete a form to have them issue an ID for your organisation. A link to the form can be found in the FindPet tab in the publishing section.

ASM will attempt to register all microchips with FindPet and as with the other chip registration publishers, will track when it last updated a chip with them in case of subsequent adoption or reclaim.

23.18 FoundAnimals/24Pet

ASM can register microchips with foundanimals.org (now named FoundAnimals/24Pet after being acquired by PetHealth), a non-profit organisation that supplies microchips to US shelters.

Their microchip registry is completely free and accepts microchips from any provider. To signup, just get in touch and request a folder name from them to configure in ASM.

ASM will attempt to register all microchips with foundanimals.org and as with the other chip registration publishers, will track when it last updated a chip with them in case of subsequent adoption or reclaim.

23.19 HomeAgain

ASM can register microchips with HomeAgain, a company that supplies microchips to US shelters and pet owners. HomeAgain microchips are 15-digits, starting with 985.

23.20 PetLink

ASM can register microchips with PetLink, a company that supply microchips to US shelters.

When you register animals with PetLink, ASM finds all animals with a PetLink microchip (their microchips are 15 digits and start with 98102) that have been adopted and sends their information and new owner info to PetLink to update their records. If an animal is returned and adopted out again later, ASM will automatically update PetLink again.

There is an option in the configuration to send 15 digit microchips from all US manufacturers (anything starting with a 9) to PetLink if you have enabled this in your account with them.

23.21 SmartTag

ASM can register animals with SmartTag PETID, a company that supply collar tags to shelters for free in the US. Each tag has a unique number on it and if your locale is set to US and you have SmartTag PETID Settings in your database, you can enter the tag information in fields on the animal health and identification section.

When you register animals with SmartTag, ASM finds all animals with a SmartTag that have been adopted and sends their information (along with owner info and a picture) to SmartTag so they can be identified in the event they are lost. If an animal is returned and adopted out again later, ASM will register the tag again to the new owner.

SmartTag also supply ISO microchips. ASM will also register SmartTag microchips (15 digits starting with 90007400) in a similar manner to ASM's other chip registration publishers.

23.22 Exclude animals from specific publishers

It is possible to exclude an animal from a specific publisher. To do this, create a new animal flag called "Exclude from PUBLISHER", where PUBLISHER is the name of the service you wish to exclude. Eg: "Exclude from PetFinder".

Assigning this animal flag to your animal will then prevent it being sent by that publisher. You can create flags for all the 3rd party publishers you use and assign them in combination where necessary.

The flag names are not case sensitive. The names should not include any domains, eg: petfinder, adoptapet, rescuegroups, maddiesfund, petrescue, savourlife

This is useful in situations where you get inundated with applications for very popular animals and only want to put them on your own website.

MAIL MERGE SOURCES

You can create mail merge data sources quickly and easily for integration directly into word processors and spreadsheet applications. From these applications you can then print off bulk letters or save individual document files. Mail merge sources generate CSV files to perform this integration. They can also generate PDF files for sheets of printable labels and send bulk emails.

24.1 Running a Mail Merge

To run a mail merge, navigate to the Mail top level menu.

Initially, ASM does not come preloaded with any, however you can install mail merge sources from *Settings* → *Reports* → *Browse sheltermanager.com* (they appear in the list with the type “Mail Merge”).

The screenshot shows a web interface for a mail merge operation. At the top, a blue header bar reads "Mail Merge - All People". Below this, a light blue bar indicates "35 record(s) match the mail merge." The main content area is a white box with a blue header "Produce a CSV File". Inside this box, there is a checkbox labeled "Include CSV header line" which is currently unchecked, and a "Download" button. Below the "Produce a CSV File" section, there are several other options, each with a right-pointing arrow: "Produce a PDF of printable labels", "Send emails (11)", "Generate documents", "View matching records", and "View email recipient list (11)".

When executing a mail merge, you will be prompted to create a CSV file, print some labels, generate documents or send bulk emails. You will want to create a CSV file if you intend to use a wordprocessor to create printed letters or view the output with a spreadsheet program.

The files are always named <source>.csv (CSV is a text-based file of comma separated values). The mail merge tool will prompt you for a location to save the file to.

24.2 Printing Labels

ASM can generate sheets of labels for your printer. It has a list of some popular label manufacturers and sizes, or you can enter the paper size and measurements from the back of the box of labels that you have. Hitting Download will send a PDF to your computer with all the addresses laid out for the labels and ready to print. Most modern web browsers can render and print PDF files directly.

24.3 Generating Documents

ASM can generate documents (such as form letters) for every result in the mail merge. Select a template from the list under the “Generate documents” slider and that template will be run for each row in the mail merge results and output into a continuous document with page breaks between each one.

Unlike the documents generated by the document button on the animal or person toolbars, document templates that you use with mail merges can *only* see the columns in the mail merge data.

Each column can be accessed from your template with <<ColumnName>>. The only other wordkeys available are the organisation keys listed under [Appendix: Wordkeys](#)

For example, if your mail merge returns the fields OwnerName, OwnerAddress, OwnerTown, OwnerCounty, OwnerPostcode, then your template should contain <<OwnerName>>, <<OwnerAddress>>, <<OwnerTown>>, <<OwnerCounty>> and <<OwnerPostcode>> to access them.

24.4 Bulk Email

Mail Merge - All People

35 record(s) match the mail merge.

- Produce a CSV File
- Produce a PDF of printable labels
- Send emails (11)

From:

Subject:

Template:

Valid tokens for the subject and text:

- <<EMAILADDRESS>>
- <<EMAILADDRESS2>>
- <<HOMETELEPHONE>>
- <<MEMBERSHIPEXPIRYDATE>>
- <<MOBILETELEPHONE>>
- <<OWNERADDRESS>>
- <<OWNERCOUNTY>>
- <<OWNERFORNAMES>>
- <<OWNERNAME>>
- <<OWNERPOSTCODE>>
- <<OWNERSURNAME>>
- <<OWNERTITLE>>
- <<OWNERTOWN>>
- <<WORKTELEPHONE>>

In addition, Animal Shelter Manager allows you to bulk email any mail merge source directly.

ASM needs outbound email configured to use this option, which can be configured under *Settings* → *Options* → *Email*.

All of the mail merge sources you can install from sheltermanager.com will honour the “Exclude From Bulk Email” and “Deceased” person flags to prevent you emailing people who do not want mass emails or are no longer with us.

In the merge screen, you can expand the email panel to send emails. It contains ASM’s own internal email client with a list of tokens available so you can customise the email for each individual user.

Mail Merge - All People

■ 35 record(s) match the mail merge.

▶ Produce a CSV File

▼ Produce a PDF of printable labels

Type	<input type="text" value="Avery 5160"/>				
Paper Size	<input type="text" value="Letter"/>	Units	<input type="text" value="inches"/>	Left Margin	<input type="text" value="0.19"/>
Horizontal Pitch	<input type="text" value="2.75"/>	Vertical Pitch	<input type="text" value="1.0"/>	Top Margin	<input type="text" value="0.5"/>
Columns	<input type="text" value="3"/>	Rows	<input type="text" value="10"/>		
Font Size (pt)	<input type="text" value="8"/>	<input type="button" value="Download"/>			

▶ Send emails (11)
▶ Generate documents
▶ View matching records
▶ View email recipient list (11)

24.5 Integrating with OpenOffice

These instructions apply to versions 1.x and upwards of OpenOffice. To integrate your CSV merge source with OpenOffice, you will need to register it as a data source. Open a new, empty document in OpenOffice and click on the Tools menu. Now click on “Data Sources” to bring up the list of known data sources.

Enter the name first - you may call it anything you like, however for ease, use the name of the source in Animal Shelter Manager. For the type, select “Spreadsheet” from the drop down box. Click the browse button below to pop up an open dialog. You should then find the csv file you downloaded and select it.

Now, click on the tables tab. You will be prompted with the OpenOffice text convert screen. OpenOffice is intelligent enough to understand csv files and you can safely click the Ok button in the top right corner.

You will be returned to the data source manager screen. Simply click Ok now as you have successfully set up your mail data source.

24.5.1 Create the OpenOffice Document

Now that your source is set up, you can create as many different documents as you like within OpenOffice to utilise them.

Create a new document, or open an existing one you would like to adapt. Pull down the “Insert” menu and select “Fields”, followed by “Other”.

Select the “Database” tab and highlight “Form Letter Field” on the left. You should now see all your data sources on the right in tree form. Expand the one you would like to use, and simply double click on fields to embed the placeholders in your document (these placeholders will be replaced with real data when you run the merge).

TIP: While this screen is open, double-click ALL the fields you intend to use and then move them around in your document later. This is much easier than coming back to this screen repeatedly for each field.

24.5.2 Run the Merge

Once you have a document that you are happy with, make sure it is saved. To run the merge, bring up the data sources window by pressing F4 on the keyboard. Your datasources will be listed down the left hand side. Expand the one you want to use (you may be prompted for the text import again - simply click Ok). Expand the Tables section and highlight “Sheet1”. Your data will be displayed on the right hand side.

To initiate a merge, click on the “Form Letter” button. It appears on the data toolbar second from the right and looks like three envelopes stuck together.

You may now choose how to merge. You can write emails (by selecting “Electronic” and selecting “Email” as the field). Generate printed documents by using the printer, or generate individual copies of this document for each entry by selecting “File”.

24.6 Integrating with Microsoft Word

These instructions apply to versions 6.0, 95, 97, 2000 and XP of Microsoft Word. To integrate your mail merge source with Microsoft Word, simply open Word with an empty new document. Pull down the Tools menu and select “Mail Merge”. Word allocates data sources per document (as opposed to OpenOffice, which allocates data sources applicable to all documents).

Word will now prompt you through a three-step process, where you must either open an existing document or turn the current document into a mail merge document (you may choose from Form Letters, Address Labels etc.)

Step two prompts you to get the data source - simply find the csv file you download and select it.

Note: Note that by default Word will not show the csv files in its dialog - make sure you drop down the file type list and select “All Files (.)”

If you used an empty document, Word will prompt you to select mail merge fields to use. You can insert these placeholders into your document by dropping down the “Insert Merge Field” button that has appeared on the merge toolbar.

When you are happy, make sure you save your document. To run the merge, go back to *Tools* → *Mail Merge* and select “Merge” under step 3.

Word will generate a new document containing a new copy of your original document for each entry in the data for you to print and save.

The Word document you have created will always rely on your data source, so should you change it (generate a new one from Animal Shelter Manager), you can simply open the document again and rerun the merge.

CONFIGURATION

To configure all areas of the system, you need to look under the top-level Settings menu.

25.1 Additional Fields

Additional Fields							
<input type="button" value="New Field"/> <input type="button" value="Delete"/>							
<input type="checkbox"/>	Name	Label	Type	Link	Index	Options	
<input type="checkbox"/>	Clinicref	ClinicID	Text	Animal - Health and Identification	0	Hidden	
<input type="checkbox"/>	DriversID	Drivers Licence	Text	Person - Type	0	Hidden	
<input type="checkbox"/>	finder	Finder	Person	Animal - Entry	0	New Record	
<input type="checkbox"/>	FoundTest	Found Test	Text	Found Animal - Details	0	Mandatory	
<input type="checkbox"/>	IncidentTest	Incident Test	Text	Incident - Details	0	New Record	
<input type="checkbox"/>	LinkedPerson	Linked Person	Person	Person - Additional	0	New Record	
<input type="checkbox"/>	lookupdefault	Lookup with default	Lookup	Animal - Additional	0	Searchable	
<input type="checkbox"/>	LostTest	Lost Test	Text	Lost Animal - Details	0		
<input type="checkbox"/>	WaitingTest	Waiting List Test	Text	Waiting List - Details	0		

This screen allows you to declare additional fields that will appear on the animal, person, lost animal, found animal and waiting list screens.

Fields have a name, a label, a tooltip, a location, a display index and a default value.

The name cannot contain spaces and is used for referencing the data in document generation - you can use a <<FIELDNAME>> tag to add these additional values to your documents. The label is what will appear on the screen at the side of the field, the tooltip text will appear when you hover your mouse over the control on screen. The display index determines the order your fields are output to the tab and which field the cursor moves to when you press the TAB key on the screen. The default value will populate the field automatically until it is updated.

If you selected a field type of “lookup” or “multi-lookup”, then the use the “Lookup Items” field to supply some values for the dropdown list. These should be pipe-separated, eg: Item 1 | Item 2 | Item 3

If you selected a field type of “Yes/No” then “Lookup Items” can optionally hold a pair of values that ASM will use. You can use this to supply your own text for Yes/No fields in the web publisher and document templates. The default if you don’t supply a Lookup Items for a Yes/No field is 0=Yes|1=No

The “show on new record screens” checkbox makes the field available on the new record entry screen the field is linked to. For example a field created which is linked to Animal-Entry will appear in the entry section when adding a new animal if the checkbox is enabled.

The mandatory checkbox allows you to mark a field as mandatory (ie. Will not let a user save until they have supplied a value). Mandatory additional fields will appear on the new screen for a record where non-mandatory ones do not.

The searchable checkbox allows you to include the additional field in global searches using the search box at the top right of every screen. Pay careful attention to your use of this as unnecessarily marking fields searchable can slow things down. It’s best generally to only make an additional field searchable if that field contains a unique string to identify the record (for example, Driving Licence ID).

The hidden checkbox will hide the field from users so it can no longer be used. This is useful when you no longer want a field to be used but don't wish to delete the field from the system, as deleting an additional field from the system also deletes all the data it held.

Here's a worked example: To add a new field to the animal screen to say whether the animal has been tested for kennel cough, create a new additional field and enter the following values:

```
Name: KennelCough
Label: Kennel Cough Tested?
Tooltip: Tick this box if the animal has been tested for kennel cough
Show on new records screen: No
Mandatory: No
Searchable: No
Hidden: No
Type: Yes/No
Link: Animal - Additional
DisplayIndex: 0
```

The new field will appear under the Additional tab on the animal screen.

You will be able to reference it in generated animal documentation with the <<KennelCough>> key.

Data for these fields is stored in the "additional" table in the database, the LinkID field holds the animal or person ID (with LinkType being the location, 0 is animal additional tab, 1 is person additional tab).

You can access additional fields in reports by using a subquery. For example, to output a list of all our animal names with the new KennelCough field we defined:

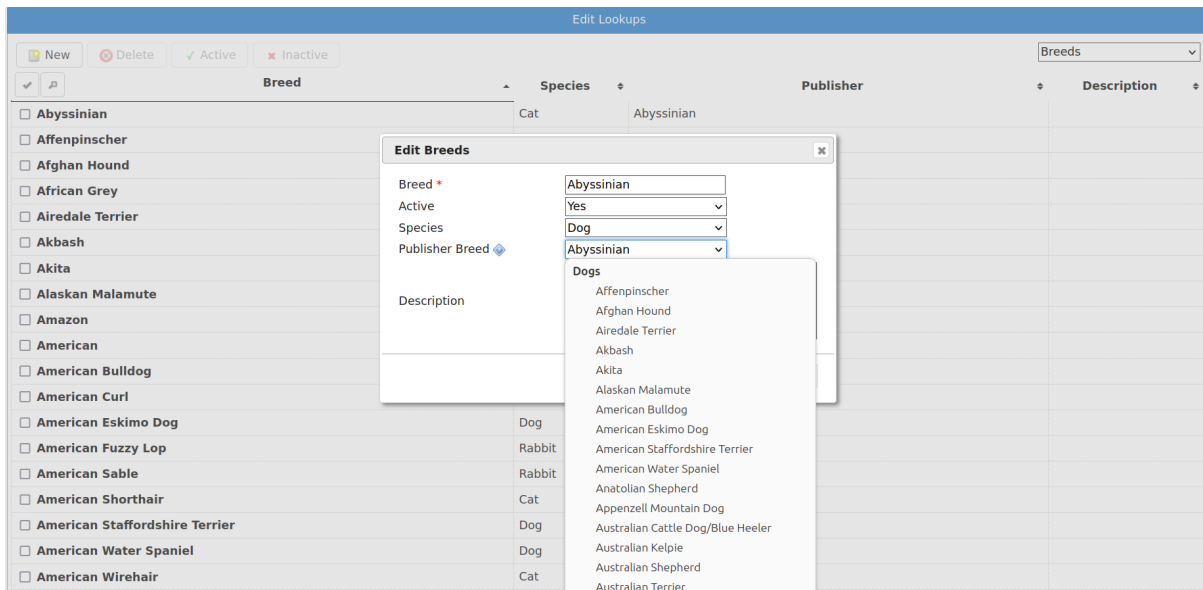
```
SELECT a.AnimalName,
       (SELECT ad.VALUE FROM additional ad
        INNER JOIN additionalfield af ON af.ID = ad.AdditionalFieldID
        WHERE ad.LinkID = a.ID AND af.FieldName = 'KennelCough') AS KennelCough
FROM animal a
```

25.2 Lookup Data

Type	Description	Reschedule for	Default Cost
<input type="checkbox"/> Bordetella		8 weeks	\$15.00
<input type="checkbox"/> Chlamydia		4 weeks	\$10.00
<input type="checkbox"/> DHLPP		3 weeks	\$20.00
<input type="checkbox"/> Distemper		1 year	\$5.00
<input type="checkbox"/> FECV/FeCoV		1 year	\$15.00
<input type="checkbox"/> FeLV		6 weeks	\$0.00
<input type="checkbox"/> FIPV		null	\$0.00

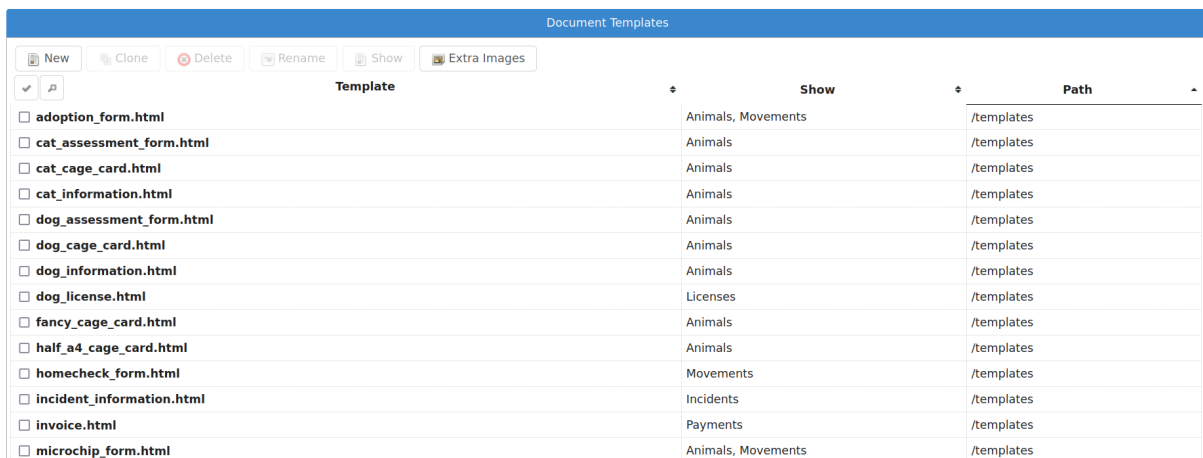
The lookup data screen allows editing of lookups. These are small, standard tables of information used throughout the system for values such as breeds, species, colours, flags, sizes, vaccination types, etc.

As well as creating and deleting them here, lookup data items can be marked inactive so that they cannot be chosen for new records, but are retained for compatibility with existing records.



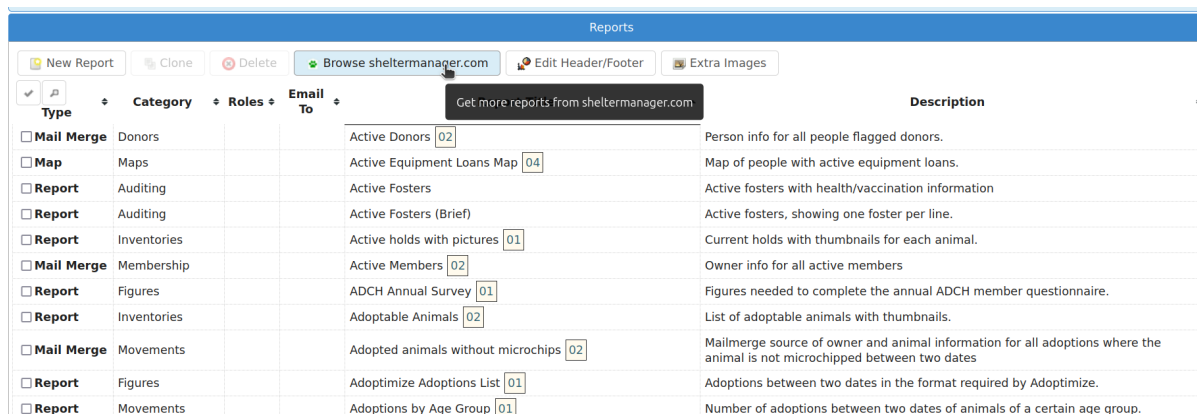
Some lookups, such as breed, species and color allow you to choose a matching “Publisher” item. These are the items that will be sent to AdoptAPet, PetFinder and other third party adoption sites when transmitting adoptable animal data.

25.3 Document templates



Here, you can edit the available document templates on the system. For a comprehensive list of tokens for use in templates, see the appendix on wordkeys.

25.4 Reports



Here, you can create and edit all the available reports on the system. The “Browse sheltermanager.com” button allows you to browse reports from the online repository and choose reports, graphs and mail merges to install.

The “Edit Header/Footer” button allows you to modify the HTML header that is prepended and footer that is appended to reports when they’re run.

25.4.1 Extra Images

The “Extra Images” button allows you to upload additional images for use in reports and document templates. The screen will give you a URL for each image so you can reference them in reports and document templates.

There are certain special names for images that the system will use to override some of its standard pictures:

- `nopic.jpg` – this is the image the system will display when an animal does not have any image media. You cannot delete this image, however you can upload a new image called `nopic.jpg` to replace it.
- `logo.jpg` – this is the image the system will use for the home logo at the top left corner. By default, it’s the ASM logo but it can be changed for your shelter. Ideally, your logo should not be more than 32 pixels high, but the system will scale down larger images.
- `splash.jpg` – this is the image the system will show on the login screen instead of the default ASM splash screens. Your splash image should be 400x200 pixels.
- `watermark.png` – this should be a version of your logo with a transparent background. If you supply a watermark image, then the watermark toolbar button will appear on animal media tabs. This button will add the watermark image to the bottom right of the chosen picture and the animal’s name in the lower left. Note that the original image will be changed, so you should upload images multiple times if you want to retain a copy without the watermark.

25.5 System user accounts

You may create, edit and delete system users from here. It is recommended that every person who uses Animal Shelter Manager have their own login and user name (when a user is finished, they should navigate to *User* → *Logout* to prepare the system for the next user) - simply to make sure that people do not get other people’s work attributed to them on the audit trails.

Whilst editing a user, you can choose absolutely everything that user may do within the system by assigning one or more appropriate roles. If you set the user type to “superuser”, the user has full administrative privileges to the system. If you choose “normal user”, you will need to set permissions for the user by assigning roles.

If you set an email address for the user and configure email, you can have the system send diary notes and messages via email to users.

If you set a staff person record for the user, they will be forbidden from opening that person record. The idea is to prevent them from viewing their own person record. You can also set the role permission to forbid them opening any other person record with the “Staff” flag if you wish to lock a user from opening any staff person records.

Setting an IP restriction will only allow that user account to login from IP addresses that match the set. IP restrictions should be separated with spaces and can be either complete IPv4 or IPv6 addresses, IPv4 blocks in CIDR notation or IPv6 prefixes. Eg:

```
192.168.1.0/24 172.16.31.34 2001:db8:abcd:0012
```

25.5.1 Site and Location Filters

Setting a location filter (a group of internal locations) for a user account will prevent that account from seeing or opening animals who are not in those locations when:

- Directly viewing an animal record.
- Displaying animal links on the home page.
- Displaying shelter view, search results or find animal results (basic or advanced).
- When adding or editing animals, the internal location dropdown will only show those locations.
- When choosing report criteria, they will only be able to select one of the filter locations for any \$ASK LOCATION\$ tags.

If ASM has been configured with multi-site mode, a site dropdown will also appear on the user record, allowing a site to be assigned to the user. Each internal location belongs to a site and selecting a site is effectively a shorthand for setting a location filter for all the locations that belong to that site. It is an easy way of preventing a user from seeing animals who are not at that site without having to configure individual location filters.

There are a number of “special” location filters, which correspond to animals outside the shelter that you may wish to let your users see.

They all appear at the bottom of the list and allow you to choose from animals who have a particular exit movement type, those who are marked non-shelter, those who the active user is fostering or coordinating adoptions for right now and deceased animals.

25.5.2 Two-Factor Authentication (2FA)

ASM supports two-factor authentication for user accounts with the Google Authenticator app (or any time-based one time password generator) for mobile devices.

Change User Settings

Username	user			
Real name	<input type="text" value="Default system user"/>			
Email Address	<input type="text" value="test@example.com"/>			
Visual Theme	<input type="text" value="Medium"/>			
Locale	<input type="text" value="(use system)"/>			
	<input type="text" value="Select"/>			
Quicklinks	<input type="button" value="Shelter view x"/> <input type="button" value="Calendar view x"/> <input type="button" value="Foster book x"/> <input type="button" value="Up for adoption x"/> <input type="button" value="Not for adoption x"/>			
Signature	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>			

Enable two-factor authentication (2FA)

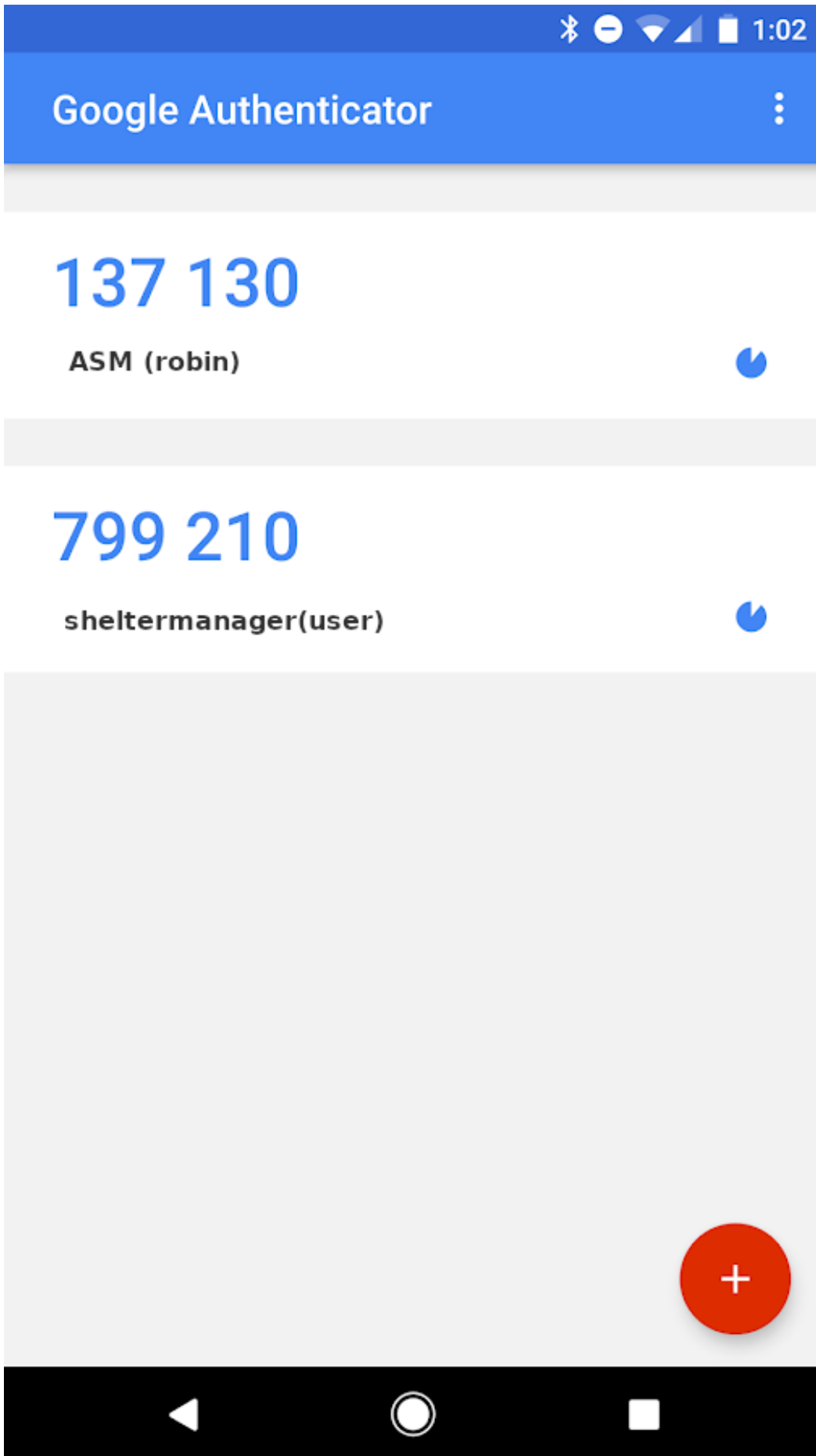
i Scan the QR code below with the Google Authenticator app for your mobile device.



To enable it, log in with your user account, then choose “Change User Settings” from the user menu at the top right of the screen (the button with your username on it).

Install the Google Authenticator (or other TOTP) app on your mobile device from the Play or iTunes store. Tick the box to enable 2FA and the screen will show you a QR code. In the Google Authenticator app, click the add button and choose “QR Code”, then scan the on screen code with your camera.

An entry will appear in Google Authenticator for ASM (if you are self hosted) or sheltermanager (for sheltermanager.com customers) with your username and a time-based one time passcode that will update every 30 seconds. When you login in future, you will be challenged for this 2FA code from your mobile device.



If you are ever locked out of your account because your mobile device is no longer available, you can disable 2FA by resetting your password from either the login screen, or via *Settings* → *System user accounts*

25.6 User roles

Edit role
✕

Name *

Animals	People	Animal Control
<input type="checkbox"/> Add Animals <input type="checkbox"/> Change Animals <input type="checkbox"/> View Animals <input type="checkbox"/> Delete Animals <input type="checkbox"/> Clone Animals <input type="checkbox"/> Merge Animals <input type="checkbox"/> Generate Documents	<input type="checkbox"/> Add Person <input type="checkbox"/> View Person <input type="checkbox"/> View Staff Person Records <input type="checkbox"/> View Volunteer Person Records <input type="checkbox"/> View Person Links <input type="checkbox"/> Change Person <input checked="" type="checkbox"/> Email Person <input type="checkbox"/> Merge Person <input type="checkbox"/> Delete Person	<input checked="" type="checkbox"/> Add Incidents <input checked="" type="checkbox"/> View Incidents <input checked="" type="checkbox"/> Change Incidents <input type="checkbox"/> Delete Incidents <input type="checkbox"/> Dispatch Incident <input type="checkbox"/> Respond to Incident
Litters	Citations	Trap Loans
<input type="checkbox"/> Add Litter <input type="checkbox"/> View Litter <input type="checkbox"/> Change Litter <input type="checkbox"/> Delete Litter	<input checked="" type="checkbox"/> Add Citations <input checked="" type="checkbox"/> View Citations <input checked="" type="checkbox"/> Change Citations <input checked="" type="checkbox"/> Delete Citations	<input type="checkbox"/> Add Trap Loans <input type="checkbox"/> View Trap Loans <input type="checkbox"/> Change Trap Loans <input type="checkbox"/> Delete Trap Loans
Tests		Accounts
		<input type="checkbox"/> Add Accounts <input type="checkbox"/> View Accounts <input type="checkbox"/> Change Accounts <input type="checkbox"/> Delete Accounts

Roles can be assigned to individual users and represent sets of permissions. When you edit a role, ASM will show you a huge number of tickboxes to determine what any user with that role is allowed to do within the system.

25.7 Export Animals as CSV

ASM can export your animal data to a CSV file. This format of CSV file is the one used by the “Import a CSV file” screen. You can use this function to export data to a file that you can give to other ASM users to import into their database.

A number of pre-set filters are available. You can choose to export all animals in your database, those who are currently on the shelter, a selection of the current on shelter animals or use custom SQL.

25.8 Export People as CSV

ASM can export your person data to a CSV file. This format of CSV file is the one used by the “Import a CSV file” screen. You can use this function to export data to a file that you can give to other ASM users to import into their database.

A number of pre-set filters are available. You can choose to export all people in your database, those with a particular flag or use custom SQL.

25.9 Import a CSV file

ASM can import data from a CSV file.

Microsoft Excel, OpenOffice Calc, Gnumeric, Google Docs and many other spreadsheet products can all export individual sheets in CSV format.

Note: The screen *Settings* → *Export Animals as CSV* produces CSV files in a format that ASM can import. This can be used to export and import animals from one ASM database to another.

The CSV file should have a header row that contains column names that ASM recognises (see *Appendix: CSV file import fields*)

	A	B	C	D	E	F	G
1	ANIMALNAME	ANIMALAGE	ANIMALSEX	ANIMALSPECIES	ANIMALENTRYDATE	ANIMALCOMMENTS	ANIMALBREED1
2	Gnasher	3	Male	Dog	5/4/2013	This is Gnasher, a lovely dog	German Shepherd
3							

Each row of data can contain animal, person, movement and donation information. If movement data is present, then an adoption (or other movement if MOVEMENTTYPE is set) record will be created to link the animal and person in the row together. If donation data is present in the row, a donation will be created and linked to the person (and movement if one was available).

If a column is not supplied, then ASM will use the default as set under the default tab in Settings-Options. For example, not setting ANIMALTYPE will cause ASM to use the default animal type.

ASM prefers the ANIMALDOB field to set the date of birth, but if you don't have it, it will calculate the date of birth from the ANIMLAGE field (which it assumes to be an integer number of years). If neither are set, it will use today's date as a last resort.

If ANIMALBREED2 is not set, the animal is assumed to be a purebreed of ANIMALBREED1. If ANIMALBREED2 is set and is different from ANIMALBREED1, then the crossbreed flag will be set on the resulting animal.

When importing animals and people, ASM will check the database for animals with the same ANIMALCODE and people with the same name/address or email/cell phone to find duplicates. Certain fields (see *Appendix: CSV file import fields*) will be updated if an existing record is found and a new record will not be created.

If the "Create missing lookup values" option is on, and the file contains a value that is not present in the database (for example, if you have "Goldfish" in the ANIMALSPECIES column, but it isn't a species in your database),

then it will be created during the import and the animal linked to it.

If the “Clear tables before importing” option is on, ASM will remove all data from the animal, person, movement and donation tables before doing the import. This delete cannot be undone, so exercise caution when using this option as you can wipe out your entire database!

25.10 Import a PayPal CSV file

ASM can import data from CSV files produced by PayPal’s activity reporting.

The import process allows you to choose a payment type and method for the imported transactions and any flags you’d like to assign to people records created or updated as a result of the import. The import will use the person’s email or name and address to try and automatically attach payments to existing person records where possible. If an existing record cannot be found, a new person will be created.

The net amount will be used as the payment amount and the PayPal transaction fee will be recorded with the payment.

It is possible to override the payment type on a per transaction basis by editing the PayPal CSV file and adding a column named “ASM Payment Type”. You can then assign values from your payment types lookup in this column. Note that they must match exactly (same case) the payment type name from your lookup. If the column does not exist, contains a blank or the system could not find a match then the payment type from the import screen will be used.

25.11 Import a Stripe CSV file

Similar to PayPal, ASM can import data from CSV files exported with the Export button on Stripe’s payments screen.

The Stripe fee will be recorded with the payment and the payment amount will have the fee deducted.

25.12 Trigger Batch Processes

ASM runs various tasks overnight to keep animal records upto date and generate cached versions of complex reports and figures.

Ordinarily, users should have no need to trigger these batch processes manually, however after importing CSV data or making bulk data changes with queries, animal locations, person flags and historic figures data can get out of sync and need to be recalculated/regenerated.

Some of these processes can take many minutes to run and may block use of the database for other users. They should be used sparingly.

OPTIONS

The main *Settings* → *Options* page allows configuring of the general preferences within Animal Shelter Manager.

26.1 Shelter Details

The shelter details tab allows you to enter contact information for your shelter. This is used with reporting and internet publishing.

The “Server Adjustment” box allows you to set a time offset in hours from the server clock. This is only necessary if your client is in a different timezone from the server. For example, the main sheltermanager.com servers are in the UK. East coast Americans will want to adjust the time by -5 hours to make sure alerts appear at the correct time and reports are shown correctly.

26.2 Accounts

ASM contains a full double entry accounting package. The options here are:

- **Enable Accounts Functionality:** Unticking this box will cause ASM to remove all accounts related menu entries/buttons so that users do not see it, and you will not be using ASM to manage your accounts.
- **Creating payments and payments types creates matching accounts and transactions:** When you create a new payment type, or log a new payment against an owner/animal, ASM will automatically create a matching account in the accounts system if one does not exist, and a matching transaction.
- **Creating costs and cost types creates matching accounts and transactions:** When you create a new cost type, or log a new cost against an animal, ASM will automatically create a matching account in the accounts system if one does not exist, and a matching transaction.
- **When receiving payments, allow the deposit account to be overridden:** When adding payments to the system, if you have the create matching transactions option on as well as this one, a destination account dropdown will be shown on payment screens allowing you to override the deposit account that the donation will be applied to (the withdrawal account is always the donation type’s matching income account).
- **When receiving payments, allow a quantity and unit price to be set:** When adding payments to the system, allow a quantity and unit price to be included for multiple item purchases/payments.
- **When receiving payments, allow a transaction fee to be set:** Allows a transaction fee to be recorded with the payment (eg: The cut taken by services like PayPal, Amazon Payments, Google Wallet, Stripe, etc).
- **When receiving payments, allow recording of sales tax with a default rate of %:** ASM can calculate and store sales tax/VAT/GST amounts on payments you receive for taxable goods. Enabling this option will add a tickbox to all payment screens allowing you to calculate the taxable value (assumes your amount is gross and inclusive of tax/VAT/GST).
- **When calculating sales tax, assume the payment amount is net and add it:** Not everyone charges for items that are inclusive of tax and don’t have the full amount to hand. With this option on, when the system calculates the sales tax/VAT/GST on your payment amount, it will calculate it as if the amount was exclusive of tax and

then add it to the amount so that it becomes a gross amount, inclusive of tax. Eg: \$50 at 20% will produce \$10 tax and the amount will become \$60 with this option on. With it off, tax will be calculated as \$8.33 for \$50.

- When receiving multiple payments, allow the due and received dates to be set: If this option is on, due and received date columns will be shown when taking payments from the Move screens and Receive a Payment screen.
- Only show account totals for the current period, which starts on: If you wish to use accounting periods, put the start date in here. By enabling the show account totals for current period option, the totals shown on the account screen will only include transactions from this date or later.
- Default transaction view: When viewing transactions for an account, ASM will show transactions matching this time period. The default is the current month.
- Default source account for costs: When ASM creates a matching cost transaction, it will use the cost type to find the expense account to use. The source account here denotes where the money will be moved from. If you do not set one, ASM will use the first bank account on file.
- Default destination account for payments: When ASM creates a matching payment transaction, it will use the payment type to find the income account to use. The destination account here denotes where the money will be moved to. If you do not set one, ASM will use the first bank account on file.
- Income account for sales tax: If you are creating matching transactions from payment records and there is a tax/VAT/GST value present, the system will write a transaction to deposit the tax into the target bank account from the income account you nominate here, giving you an easy way to track your tax burden while keeping your bank balances correct.
- Expense account for transaction fees: If you are creating matching transactions from payment records and there is a fee present, the system will write a transaction to deduct the fee from the target bank account and send it to the expense account you nominate here.
- Donations of type ... are sent to ...: In addition to the default payment destination account, you can specify optional mappings, so that when ASM receives a payment of a particular type, it uses the specified destination account for it when creating the matching accounting transaction.

26.3 Add Animal

ASM allows you to bulk add more than one animal at a time by just hitting the “Create” button on the new animal screen instead of “Create and Edit” - this is useful if booking in a litter of kittens and puppies for example. Here, you can choose some extra fields for the new animal screen.

- Show breed field(s): Allow entry of a breed
- Use a single breed field for animals: Setting this option will make ASM only display a single breed field on the animal details screen. This is the norm for UK shelters, where animals are either pedigree or a crossbreed (a “Crossbreed” breed can be added to the lookup). Without this option set, ASM allows for two breed fields and a crossbreed indicator so that mixed breed type animals can be recorded (this is typical for US shelters).
- OR only show the second breed field for these species of animals: If the “use a single breed field for animals” option is not enabled, restrict display of the second breed field to only these species of animals.
- Show the color field: Allow entry of a specific colour
- Show the adoption fee field: Allow entry of an adoption fee
- Show the internal location field: Allow entry of an internal location
- Show the location unit field: Allow a cage/pen/kennel/hutch number to be set
- Allow a fosterer to be selected: Allow new animals to be fostered straight away
- Allow an adoption coordinator to be selected: Allow assignment of an adoption coordinator
- Show the litter ID field: Allow a litter ID

- Show the size field: Allow entry of the size
- Show the weight field: Allow entry of the weight
- Show the altered fields: Allow an altered date to be set
- Show the microchip fields: Allow a microchip date/number to be set
- Show the entry category field: Allow an entry category to be set
- Show the original owner field: Allow original owner to be set
- Show the pickup fields: Allow pickup location/address to be set
- Show the brought in by field: Allow brought in by to be set
- Show the transfer in field: Allow incoming transfers to be set
- Show the hold fields: Allow hold and hold until date to be set
- Warn if the animal is similar to one entered recently: Pop up a warning dialog if the animal's name is the same as one entered recently to help prevent possible duplicates.

26.4 Age Groups

It is possible to categorise your animals by their age in ASM. This is useful when generating adoption paperwork and you don't have an exact date of birth for the animal. Instead, ASM can specify one of its groups, using the AgeGroup wordkey (or animal.AgeGroup field in custom reports).

This tab allows you to choose the threshold for each grouping, as well as the grouping name. By default, anything under 6 months (0.5 years) is classed as a Baby, anything under 2 years is Young Adult, under 7 years is Adult and over that is Senior.

26.5 Animal Codes

ASM allows you to choose the format that animal codes will be automatically generated in. ASM internally stores two codes for each animal, the "normal" code, unique among all animals and the "short" code. The short code does not have to be unique and is used by staff wanting to quickly identify animals in conversation.

The defaults are TYYYYNNN (the first letter of the animal type, followed by the year it was brought to the shelter, followed by a number unique within that year for that type of animal) for the normal code and NNT for the shortcode (a unique number within the year for the animal's type, followed by the type).

You can build and use any format string you like, using the following tokens:

- YYYY - The year the animal was brought into the shelter (4 digits)
- YY - The year the animal was brought into the shelter (2 digits)
- MM - The month the animal was brought into the shelter
- DD - The day the animal was brought into the shelter
- E - The first letter of the animal's entry category
- EE - The first and second letters of the animal's entry category
- S - The first letter of the animal's species
- SS - The first and second letters of the animal's species
- T - The first letter of the animal's type
- TT - The first and second letters of the animal's type
- UUUUUUUUUU - (10 digits) a unique number representing the animal (this number will never be used for another animal), padded to 10 digits. If the number overflows, more digits will be used.

- UUUU - (4 digits) a unique number representing the animal (this number will never be used for another animal), padded to 4 digits. If the number overflows, more digits will be used.
- XXX - (3 digits) a number which is unique for all animals within the year
- XX - A number which is unique for all animals within the year, no padding is done.
- NNN - (3 digits) a number representing the animal, which is unique within the year brought in for the animal's type and padded to 3 digits. If the number overflows, more digits will be used.
- NN - A number representing the animal, which is unique within the year brought in for the animal's type. No padding is done.

Here are some examples:

- YYYYMMDD-NNN-T (an ISO date, followed by a unique number/type within the year). Eg: 20080520-001-D
- TUUUUUUUUUU (the animal's type, followed by a unique number for the animal) - Eg: U0000003412

If you change the coding formats when you already have animals on file using a different format, those animals will be ignored when creating new codes and multiple codes can co-exist.

Any values you put in your codes other than these tokens (such as punctuation or other letters) will not be substituted and will be retained in generated codes. For example, the format NNN:21:T will produce 001:21:D for the first dog of the year.

There is also an option on this screen to set codes for animal control incidents, with a limited subset of these values (YYYY, MM, DD, XXX, OOO, UUUU).

- Manually enter codes (do not generate): This option tells ASM that you don't want it to generate any codes. A code field will appear on the add animal screen and apart from enforcing that codes are unique, ASM will do nothing with the values entered by the user. Shortcodes can also be manually entered unless the option to remove the box below is ticked.
- Show short shelter codes on screens: This option tells ASM to display the short code throughout the application instead of the main shelter code.
- Remove short shelter code box from the animal details screen: Setting this option will make ASM hide the short shelter code field at the top left of the animal details screen. It does not stop ASM generating short codes behind the scenes, it just stops them being visible on the screen.
- Show codes on the shelter view screen: This option tells ASM to display the code with the animal's name on the shelter view screen and animal links on the home page.
- Once assigned, codes cannot be changed: Setting this option will make ASM lock the shelter code fields, as well as the type and brought in date once an animal record has been saved for the first time. This is to guarantee that once an animal code has been handed out, it cannot be changed.
- Allow duplicate microchip numbers: By default, the system will prevent you entering or saving animals with a microchip number that has already been allocated. In some situations this is desirable (for example, for figures purposes some shelters prefer to create new animal records every time they see an animal regardless of whether it has been through the shelter before).
- Allow duplicate license numbers: By default, the system will prevent you entering or saving licenses with a number that has already been used. Some licensing regions use a tag number that stays with the animal for life and need to allow duplicate licenses as a result.

26.6 Boarding

The boarding tab allows configuration of the boarding tab that appears on person records, and animals who are not in care.

- Boarding payment type: The payment type to use when creating due payments from a boarding record with the “Create Payment” toolbar button.

26.7 Checkout

The checkout tab allows you to configure automated checkouts that take payment from members of the public (eg: for adoptions and license renewals).

- Payment Processor: The payment processor to use for taking checkout payments.
- Adoption paperwork template: A document template to use for generating adoption paperwork.
- Adoption fee payment type: The payment type to use when creating a payment record for the adoption fee.
- Donation payment type: The payment type to use when creating a payment record for a donation during adoption checkout.
- Payment method: The payment method to assign to the fee/donation payment records.
- Donation message: The message shown at the top of the adoption checkout donate screen. Limited HTML formatting tags can be used here, such as , <u>, <i> and

- Donation tiers: The available options adopters have for making a donation. They are in the form amount=description. Currency symbols should be included in the amount. You should include a zero/0 donation tier unless you want to force your adopters to leave a donation.

26.8 Costs

The costs tab allows you to specify a default daily boarding cost for new animals (this value can be modified on the animal’s cost tab).

- Create boarding cost record when animal is adopted: If set, then during adoption the total daily boarding cost for the animal will be converted to a cost a record and given the boarding cost type.
- Show a cost field on medical/test/vaccination screens: If set, a cost amount box will be shown on medical, test and vaccination screens to store the cost of treatments the animal received (this can then be reported on).
- Show a separate paid date field with costs: If you would like to track the date a cost was paid separately from the date a cost was incurred, tick this box.

26.9 Daily Observations

This tab allows you to configure the values that are requested on the *Daily Observations* screen, along with the log type used for the records written.

The left column contains the name of the value, and the right the available values. If the right column is empty, the user will be given a free text box to enter a value. Otherwise, the right column should contain a pipe-separated list of the values available to show in a dropdown.

26.10 Data Protection

This tab allows configuration of how long ASM should keep certain types of data before removing them. These settings can be used to enforce data retention policies instigated as part of data protection compliance.

- **Anonymize personal data after this many years:** If this option is on, the system will automatically anonymize person records this many years after their creation. Anonymizing will blank the name, email, address and telephone fields. The city, state and zipcode (town, county and postcode for other locales) will be retained along with the rest of the person data for statistics and reporting. This option helps organisations in the EU to comply with data retention policies and the GDPR by removing identifiable personal data.

To be anonymized, a record needs to be older than the retention period, and all payments, clinic appointments, boarding records, vouchers, licenses, movements or log entries attached to the person must be older than the retention period. The person record cannot have any flag that indicates an ongoing relationship with the shelter. These flags are:

aco, adoptioncoordinator, driver, retailer, homechecker, member, shelter, foster, staff, vet, volunteer

Warning: Once anonymized, personal data is gone forever and cannot be recovered.

- **Never anonymize people who adopted an animal:** If this option is set, people with the adopter flag are included in the list of people who will never be anonymized.
- **Remove HTML and PDF document media after this many years:** If this option is on, the system will automatically delete HTML and PDF document media this many years after its creation.

Warning: Once deleted, documents are gone forever and cannot be recovered.

- **Remove animal media this many years after the animal dies or leaves the shelter:** If this option is on, the system will automatically remove animal media a set number years after the animal dies or leaves the shelter.

Warning: Once deleted, media is gone forever and cannot be recovered.

- **Remove people with a cancelled reservation who have not had any other contact after this many years:** Shelters receive many applications to adopt animals, many of which can be unsuccessful. This option will completely delete (not anonymise) people records where their only contact with the shelter is a cancelled reservation that is X years old. The same rules as above for anonymization apply in that anyone with an ongoing relationship with the shelter or a previous adoption will be excluded.
- **Show GDPR Contact Opt-In field on person screens:** If this option is on, the system will show a contact opt-in field on person records. You can use it to specify which forms of communication a person prefers. When saving the record, if “Email” is not in the list of preferred communication methods, the “Exclude from bulk email” flag will automatically be set on the person’s record.
- **When I set a new GDPR Opt-In contact option, make a note of it in the log with this type:** This option will automatically log any changes to the contact opt-in field so that the person who changed it along with the date and time are recorded in the log.

26.11 Defaults

This screen allows configuration of the system defaults. These defaults are used to select starting values when finding and creating animals and other records.

- **Mark new animals as not for adoption:** Setting this option will cause ASM to automatically tick the “not for adoption” box when creating new animals. This is an extra precaution - by forcing users to untick the box when necessary, no animal can be accidentally published.
- **Exclude new animal photos from publishing:** Setting this option will make any photos uploaded to the media tab not sent by the publishers or included in any websites. If an animal does not have any other photos, they will continue to have the “No photo available” picture until the picture is made available for publishing (by ticking the red cross to the lower right of it on the media tab). This allows new photos to be vetted before being sent to adoption sites or used anywhere.
- **Prefill new media notes for animal images with animal comments if left blank:** If no notes are given when adding images as media, ASM will default the animal’s comments field.
- **Prefill new media notes with the filename if left blank:** If the media being added is not an image and the notes are blank, use the original filename as the notes.

26.12 Diary and Messages

- **Show the full diary (instead of just my notes) on the home page:** If this option is on, all users will see the full list of outstanding diary notes on their home page.
- **Auto complete diary notes linked to animals when they are marked deceased:** If this option is enabled, diary notes linked to animals are completed when the animal is given a deceased date.
- **Email users their outstanding diary notes once per day:** This option will cause the system to send users an email containing their outstanding diary notes. The system will send it as part of the overnight batch, which depending on your recommended locale/cron times will be between midnight and 4am. For this option to work, you must have configured the system email in the Email tab of this screen and your users must have email addresses set.
- **Email users immediately when a diary note assigned to them is created or updated:** This option will cause an email be sent to any users a diary note is assigned to as soon as you create or make a change to it.
- **Email diary note creators when a diary note is marked complete:** This option will have an email sent to the person who created a diary note the moment that it is marked complete by a user.
- **When a message is created, email it to each matching user:** In addition to showing messages on the home page for a user, send it via email. The message is sent immediately as soon as the message is created.

26.13 Display

- **Enable Visual Effects:** Enables visual sliding effects. Turn this off to speed up the UI.
- **Use Fancy Tooltips:** If your browser supports it (all but IE8), ASM can use modern callout style tooltips in the interface.
- **Use HTML5 client side image scaling:** If your browser supports it, media will be scaled on your PC before being uploaded to the server to save time.
- **Show animal thumbnails in clinic books:** Show animal pictures in the rows of the clinic waiting and consulting room screens. This option is off by default to save screen space and because clinics are normally person-focused.
- **Show animal thumbnails in movement and medical books:** Show animal pictures in the rows of the movement and medical books (foster book, reservation book, vaccination book, etc.)

- Show pink and blue borders around animal thumbnails to indicate sex: Makes the border around thumbnails pink for girls and blue for boy animals.
- Show a minimap of the address on person screens: Show an embedded map next to the person's address on the details screen. Also shows a minimap on the dispatch slider of incidents.
- When entering addresses, restrict states to valid US 2 letter state codes: When this option is on, the state field will switch to a dropdown that only allows valid US states to be selected. The default state for screens will be auto selected from the state chosen on the shelter details options tab.
- Allow editing of latitude/longitude with minimaps: Allow the latitude/longitude geocodes to be hand edited in fields near the minimap and address. Right clicking on the minimap will add a new pin and update the fields.
- Default to table mode when viewing media tabs: When accessing the media tab of records, show the media records in a sortable table with metadata information. You can toggle the view mode of media tabs with the button on the right side of the toolbar.
- Show weights as lb and oz: Enter and show weights with separate pounds and ounces. eg: 5 lbs and 6 oz
- Show weights as decimal lb: Enter and show weights in lbs, allowing decimal fractions, eg: 5.50 lbs If neither this or the previous show weights option is set, weights are shown in kg, eg: 20.1 kg
- Show complete comments in table views: When viewing comments or log notes in tables, show the complete text instead of truncating it to 80 characters and fitting the text onto one line.
- Show record views in the audit trail: When viewing the audit trail slider of a record, include audit records that show when users viewed this record.
- Show ID numbers when editing lookup data: When browsing lookup data under *Settings* → *Lookup Data*, show the internal system ID numbers. This is handy for looking up IDs when writing reports.
- Keep table headers visible when scrolling: If selected, when scrolling down long tables their headers will float at the top of the screen to remind you of the column headings.
- Tables stack vertically on portrait smartphones: If selected, tables will stack all of their columns vertically for each row and devices with a viewport < 480px (portrait smartphones). This allows tables to be viewed without them overflowing off to the right.
- Open records in a new browser tab: Open all records in their own browser tabs.
- Open reports in a new browser tab: Open all reports in their own browser tabs.
- Auto log users out after this many minutes of activity: If a user leaves their browser open and idle for this many minutes, the system will automatically log them out.
- Enable location filters: Location filters allow a user account to be restricted to only viewing animals in set internal locations. With this option enabled, a location filter field will appear on the system users screen allowing you to set the locations a user account is restricted to viewing.
- Enable multiple sites: Once enabled, sites can be created in the lookup data section. Sites can be assigned to locations, user accounts, incidents and people records. User accounts with a particular site assigned can only see animals in locations belonging to their site, along with people and incidents at their site. Leaving a person, location or incident with no site allows anyone to see it. Leaving a user account without a site allows it to see all sites. This allows you to handle multiple sites with one ASM database. A number of site-specific reports are available in the repository.
- Format telephone numbers according to my locale: When leaving fields containing phone numbers, if the numeric portion is the correct length, format them according to your locale. Eg: US numbers become (XXX) XXX-XXXX
- When displaying person names in lists, use the format: In movement books, donation books, the waiting list, etc. when showing person names, ASM can use different formats if you want surname first for sorting, etc.
- When displaying calendars, the first day of the week is: For date choosers and calendar view, select which day the week should start on. For the US and some Jewish cultures, it's generally Sunday, for the rest of the world, Monday.

26.14 Documents

The documents tab allows you to change various settings related to generating documents from templates.

- Allow use of OpenOffice document templates: Browser based applications cannot support native applications like OpenOffice as well as the browser-based word processor built into ASM, however with this option on you can continue to use OpenOffice templates. With this option enabled, the document template screen will also allow you to upload OpenOffice documents as templates. When generating a document from an OpenOffice template, ASM will substitute the correct tags in the OpenOffice template and send the constructed document to the web browser as a binary file with the correct mime type for display in OpenOffice or download.
- Printing word processor documents uses hidden iframe and window.print:By default when printing documents in the built-in wordprocessor, an iframe is used to display and print only the document. This works fine for desktop web browsers, but if you use mobile devices where the print command sends the URL to a separate printing service, this will not work and you should untick this option. Unticking this option will cause the print button to redirect to a separate copy of the document by itself for use by mobile printing services.
- Send PDF files inline instead of as attachments: If this option is on, ASM will tell the browser to show PDF documents in the main page. Otherwise, it will send them as attachments for you to download.
- Include incomplete medical records when generating document templates: If set, vaccinations, tests and medical regimens will be included that are incomplete when accessing them via LastX, Due and Recent wordkeys.
- Notify adoption coordinator when documents are signed: If this option is on, adoption coordinators will receive an email notifying them when a signing request connected to one of their adoptions has been completed.
- When I generate a document, make a note of it in the log: If this option is on, a log record is created every time you generate a document.
- Default zoom level when converting documents to PDF: This setting controls how the text is scaled when converting a document to PDF. Older versions of the PDF converter used by SM would to scale to the widest element on the page, however newer versions do not do this. To get back the behaviour that older versions of SM had with wkhtmltopdf <= 0.12.3, set this value to 130.

26.15 Email

Configure the email address used as the FROM address when sending from ASM. You can also configure auto-complete items for the from, to and cc address boxes as well as default BCC address if you want to copy all emails somewhere else.

(sheltermanager.com only) You can override the use of smtp.sheltermanager.com and use your own SMTP server to send email if you wish. This is an advanced option for experienced users, if you do not understand what you are doing, do not enable the option to use your own SMTP server as you will likely break the email sending functionality for your database.

ASM normally uses the email address configured in this tab in the FROM header, with whatever the user puts in the From field as the Reply-To header. There is an option available here (sheltermanager.com only) to use the reply address as the FROM address. Just be aware that this can cause relay failures or messages to be classified as spam if the user attempts to send from an address that you do not own the domain for.

26.16 Find Screens

This tab allows you to configure which columns are present on all the find screens and in which order they are displayed.

- Default to advanced find animal screen: If ticked, the find animal screen will appear in advanced mode by default.
- Advanced find animal screen defaults to on shelter: If ticked, the advanced find animal screen will automatically select “On Shelter” as the logical location when the screen is opened.
- Default to advanced find person screen: If ticked, the find person screen will appear in advanced mode by default.
- Find an incident screen defaults to incomplete incidents: If ticked, the find incident screen will automatically select the “Incomplete incidents” filter when the screen is opened.
- Open animal find screens in a new tab: If ticked, search results in the find animal screen will be opened in their own tab.
- Open person find screens in a new tab: If ticked, search results in the find person screen will be opened in their own tab.

26.17 Home page

The home page tab allows configuration of the home page. If selected, some shelter stats can be displayed for the current period on the home page as well as links to a chosen set of animals (eg: Recently changed or Up for adoption).

- Show tips on the home page: Shows tips at the top of the home page.
- Show alerts on the home page: Shows alerts about outstanding vaccinations, medical treatments, donations, etc.
- Show overview counts on the home page: Shows totals for animals in care.
- Show timeline on the home page: Shows the last 10 things that happened at the shelter on the home page (intake, adoptions, euthanasia, etc)
- Hide deceased animals from the home page: If this option is on, any deceased animals on the animal links or timeline sections of the home page will be hidden. This option does not apply to the full timeline view, accessed by clicking the Timeline heading on the home page or from the *ASM* → *Timeline* menu option.
- Hide financial stats from the home page: If this option is on, the stats lines showing how much money has been received in payments or spent in costs will be hidden from the home page.
- Show an alert when these species of animals are not microchipped: The microchip alerts on the home page and emblems will only be shown for these species of animals (by default, dogs and cats)
- Show an alert when these species of animals are not altered: The recently adopted/unneutered animal alerts on the home page and emblems will only be shown for these species of animals (by default, dogs and cats)
- Show an alert when these species of animals do not have a rabies vaccination: The alert for animals without a rabies vaccination will only be shown for these species (by default dogs)
- Show an alert when these species of animals do not have a vaccination of any type: The alert for animals that have never been vaccinated will only be shown for these species (by default dogs and cats)

26.18 Insurance

If you have an agreement with a pet insurer, Animal Shelter Manager can accept a range of numbers under this tab and allow you to assign them to adoptions as they are made.

Simply fill in the start/end/next values and tick the box to ensure you are using automatic numbers. When you next adopt an animal, a button will appear at the side of the insurance number on the movement screen, allowing you to assign an insurance number to that adoption.

26.19 Logs

- When I change the flags on an animal/person, make a note of it in the log with this type: If this option is on a log record is created when you add or remove a person or animal flag.
- When I mark an animal held, make a note of it in the log: If this option is on, a log record is created when you mark an animal held along with the hold until date.
- When I change the location of an animal, make a note of it in the log: If this option is on, a log record is created every time you change an animal's internal location with the new location so you can track the history of where the animal has moved within your shelter.
- When I change the weight of an animal, make a note of it in the log: If this option is on, a log record is created every time you change an animal's weight so you can track the history of an animal's weight with reports and graphs.
- When I change the address of a person, make a note of it in the log: If this option is on, a log record detailing what was changed is created every time you change a person's address.
- When I send an email, record it in the log: If this option is on, when sending an email the option to record that email in the log will be on by default.

26.20 Lost and Found

The lost and found tab allows you to assign your own point weightings to the different kinds of matches used when generating the lost and found match report, as well as determine how many points are need for a match to be included.

26.21 Medical

- Include off-shelter animals in medical calendar and books: If ticked, animals with outstanding medical/vacc/tests that have left the shelter will be shown in medical books and the medical calendar.
- Pre-create all treatments when creating fixed-length medical regimens: Enabling this option will have creation of a new medical regimen create all of its treatments up-front. If the new regimen has a "Completed" status, all the treatments will be marked as given. This can be useful when entering historic records. The default behaviour without this option is to create treatments incrementally as each previous treatment is given. This is done to prevent staff accidentally overdosing animals or having to "catch up" when a treatment is missed.
- Reload the medical book/tab automatically after adding new medical items: If selected, reloads the screen automatically after adding a new medical regimen. If this option is not enabled, a placeholder row will be shown for the new medical item instead and the status column will show a link to reload the screen. This option is useful if you have a full medical book or animals with a lot of medical items who are frequently treated and reload times are long.

- When entering vaccinations, default the last batch number and manufacturer for that type: If ticked, when entering a given vaccination, the batch number and manufacturer will be copied from the last vaccination on record of the vaccination type.
- Send a weekly email to fosterers with medical information about their animals: If set, an email will be sent to all active fosterers containing info of overdue medications and medications/clinic appointments that fall due in the coming week. The email is sent as part of the overnight batch, early on Monday mornings by default. A day other than Monday can be chosen from the dropdown below if needed.
- Do not send an email if there are no medical items due for animals in the care of this fosterer: If set, fosterers will be skipped if there are no medical items due for animals in their care.

An example of the email fosterers will receive looks like this:

From: You <you@youraddress.com>
 To: Alan Fosterer <fosterer@email.com>
 Date: Wed 16th Jan 2019

Subject: Fosterer Medical Report

Rover - D2019001
 Male Pit Bull Terrier Dog aged 1 year and 2 months
 Fostered to Alan Fosterer since 04/02/2018

WARNING: This animal is over 6 months old and has not been neutered/spayed
 WARNING: This animal has not been microchipped

Overdue medical items

01/07/2019: Wormer 1 tablet 1/1
 01/08/2019: Rabies 1/1

Upcoming medical items

01/20/2019: DHLPP 1/1

26.22 Movements

- Cancel unadopted reservations after: If an animal is reserved for this period of time and it does not result in an adoption (or any kind of movement), ASM will automatically cancel the reservation for you after this time.
- Highlight unadopted reservations on screen after: If an animal is reserved for this period of time, the system will highlight the reservation on screen (typically in red italics).
- Remove holds after: This value is used to set a default in the “Hold until date” field of new animals. When the date is reached, the hold flag is automatically removed.
- Trial adoptions last for: This value is used to set the default “trial end date” field when marking adoptions as a trial.
- Animals are long term after: This value controls the long term alert, search and emblem. The default is 182 days (6 months).
- Treat animals with a future intake date as part of the shelter inventory: This option will treat animals who have not arrived yet (Date Brought In > Today) as on shelter so that they are visible in shelter view etc.
- Treat foster animals as part of the shelter inventory: Setting this option will make ASM treat fostered animals as if they are on the shelter (with appropriate visual output to show they are fostered).

Note: You should use *Settings* → *Trigger Batch Processes* and recalculate animal locations after changing this option.

- Treat animals at retailers as part of the shelter inventory: Setting this option will make ASM treat animals at a retailer as if they are on the shelter (with indications that they are at a retailer).
- Our shelter does trial adoptions, allow us to mark these on movement screens: When creating an adoption from *Move* → *Adopt an animal*, or in any of the movement tabs/screens, show a “trial” tickbox and trial end date. This allows for trial adoptions (some shelters call this “Foster to Adopt”), which can then be reported on by installing the “Active Trial Adoptions” and “Expired Trial Adoptions” reports.
- Treat Trial Adoptions as shelter inventory: As with the Foster as inventory option, trial adoptions are still shown in the Shelter View and on shelter searches/reports.
- Our shelter does soft releases, allow us to mark these on movement screens: When creating a released to wild movement, this allows for a soft release to be made. A soft release is one where the animal is monitored for some time after release.
- Treat Soft Releases as shelter inventory: Animals on soft release will be kept in the shelter’s inventory.
- Allow reservations to be created that are not linked to an animal: This option lets you create a reservation without specifying the animal. It also applies to using *Create* → *Person* on the incoming forms screen with a *reserveanimalname* field in the form to allow the person’s application to still be tracked through the reservation book even if the person is not interested in a specific animal yet.
- Automatically cancel any outstanding reservations on an animal when it is adopted: Self explanatory.
- Automatically return any outstanding foster movements on an animal when it is adopted: Applies to movement tabs/books. If an adoption record is created for an animal that still has an open foster movement, the foster movement will be returned with the adoption date so that the adoption can proceed.
- Automatically return any outstanding retailer movements on an animal when it is adopted: Applies to movement tabs/books. If an adoption record is created for an animal that still has an open retailer movement, the retailer movement will be returned with the adoption date so that the adoption can proceed. The adoption will be linked to the previous retailer and movement for reporting purposes.
- When creating payments from the Move menu screens, mark them due instead of received: Creating adoptions and reservations from *Move* → *Adopt an animal* lets you receive a payment at the same time. If this option is ticked, the payment will be marked as due to be paid, but not actually received.
- Allow creation of payments on the Move-Reserve screen: Allow payments to be taken on the *Move* → *Reserve an animal* screen.
- Allow editing of payments after creating an adoption on the Move-Adopt an animal screen: After the adopt button is clicked, take the user to a screen that allows editing of the payments that were just created. This allows the user to generate an invoice/receipt or request payment by email, etc.
- Allow requesting of signed paperwork when creating an adoption on the Move-Adopt an animal screen: If this option is enabled, a section will appear on the adopt an animal screen (after choosing a person) to allow a document template to be chosen and an email address. After the adopt button is clicked, the document will be generated and sent to that email for signature.
- Allow overriding of the movement number on the Move menu screens: If turned on, the movement number field will be visible on all Move menu screens for the user to override.
- Warn when adopting an unaltered animal: If the animal has not been neutered/spayed, show a warning when trying to adopt it.
- Warn when adopting an animal who has not been microchipped: If the animal has not been microchipped, show a warning when trying to adopt it.
- Warn when adopting an animal who has outstanding medical treatments: If the animal has ungiven medical treatments, show a warning when trying to adopt it.

- Warn when adopting to a person who has not been homechecked: If the person record does not have them down as homechecked, the system can warn you if you try to adopt an animal to them.
- Warn when adopting to a person who lives at the same address as a banned person: If the adopter has the same address as someone previously banned, show a warning.
- Warn when adopting to a person who has been banned from adopting animals: The system can warn you if you try to adopt an animal to a person who has been marked as banned.
- Warn when adopting to an owner in the same postcode as the original owner: Self explanatory.
- Warn when adopting an animal with reservations and this person is not one of them: Self explanatory.
- Warn when creating multiple reservations on the same animal: If set, the system will warn you if you attempt to reserve the same animal to different people.
- Warn when adopting to a person who has previously brought an animal to the shelter: The system can check and warn you if you attempt to adopt an animal to an owner who looks like an owner who brought an animal in. This is a loose check based on name and address.

26.23 Online Forms

- Remove incoming forms after: Automatically remove forms from the incoming queue after this many days.
- Remove forms immediately when I process them: When creating or attaching forms to records in the incoming forms list, delete the form as soon as it is successfully processed.
- Remove processed forms when I leave the incoming forms screen: When navigating away from the incoming forms screen, any forms that have been processed (have a link shown in the rightmost column) will be deleted automatically.
- When storing processed forms as media, apply tamper proofing and make them read only: If this option is on, form submissions will be hashed and read only (in the same way as signed documents) and the user who processed the form recorded. This prevents anyone from editing form submissions after they have been stored.

There are a number of options for protection of online forms from spambots. If any of these options are enabled and triggered by a form submission, the form will be marked as spam in your incoming form queue. If auto-process is enabled for the form it would go into the queue to be reviewed and deleted instead of being processed. If an email address has been selected to send submissions to, the email would not be sent.

In the queue, forms flagged as spam can be easily identified by the spam icon in the preview column and deleted in one click using the “Delete Spam” button.

- Spambot protection: Invisible textbox: Sometimes called a honey trap, forms will add an extra invisible text field that only bots can see. If the box contains a value, we know the submission has been filled in by a bot and will be marked as spam.
- Spambot protection: Useragent check: Web browsers all have comment elements to the useragent string they use to identify themselves. This option will mark the form as spam if we don't recognise the submission as coming from a browser.
- Spambot protection: Person name mixed case: Looks for unusual combinations of mixed and lower case letters in the applicants name fields and marks these as spam.
- Spambot protection: Zipcode / Postcode contains numbers: Checks that the Zipcode / Postcode field contains numbers, marks forms as spam where no number is present.

26.24 Payment Processors

ASM can be configured to request due payments from your customers via payment processors.

- Request payments in: A currency code to request payments in. This should match the currency that you are using in your database as ASM does not perform any kind of currency exchange calculations.
- Redirect to this URL after successful payment: When a customer successfully completes a payment, this is the page they will be redirected to. If you do not set a page, the payment processor will show their own payment successful page.

26.24.1 PayPal

- PayPal Business Email: The address for your PayPal account where payments will be sent to.

It should not be necessary, but some users have reported problems receiving IPN notifications from PayPal. As a “just in case” measure, click on the Settings/Gear icon at the top right of your PayPal account, choose “Account Settings”, then “Notifications” and the “Update” link next to “Instant Payment Notifications”. You can now choose a URL and to enable IPN messages. Use the URL shown on screen.

26.24.2 Stripe

- Stripe Key: Your stripe key. This is usually prefixed with pk
- Stripe Secret Key: Your stripe secret key, usually prefixed with sk

In order for ASM to receive notification that payments have been received, a Webhook needs to be created in the Stripe dashboard to receive “checkout.session.completed” events under *Developers* → *Webhooks*

The Payment Processors option tab in ASM will display the URL you need to configure for your webhook below the key fields.

26.24.3 Square

- Square Access Token: Your Square access token, obtained from the developer console in Square
- Square Location ID: Your Square location ID, found in the locations tab of your developer dashboard in Square

In order for ASM to receive notification that payments have been received, a Webhook needs to be created in the Square dashboard to receive “payment.updated” events under *Developers Console* → *Webhook Subscriptions*

The Payment Processors option tab in ASM will display the URL you need to configure for your webhook below the key fields.

26.25 Quicklinks

Quicklinks can be configured here and shown on the home page and optionally all screens (at the cost of some vertical space). Quicklinks allow you to quickly get to some of ASM’s screens without having to open the menus.

26.26 Reminder Emails

Reminder emails can be configured to be sent to people before or after certain events and interactions with the shelter. In all cases, a number of days and an email template can be chosen.

- Send a followup email to new adopters after days: This option will automatically send a followup email to people who recently adopted an animal. The system will make sure the animal is not dead or returned before sending the email. The template must be suitable for movement data.
- Send a reminder email to people with clinic appointments in days: This option will automatically send a reminder email to everyone who has a clinic appointment in the number of days chosen. The template chosen must be suitable for clinic data.
- Send a reminder email to people with due payments in days: This option will automatically send a reminder email to everyone who has a non-received payment with a due date in the number of days chosen. The template chosen must be suitable to receive payment data.
- Send a reminder email to people with licenses expiring in days: This option will automatically send a reminder email to everyone with an expiring license in the number of days entered. The template chosen must be suitable for license data. A forthcoming expansion to this area will allow inclusion of a renewal link to allow the license holder to renew and pay online.

26.27 Remove

26.27.1 System

- Remove boarding functionality from screens and menus: If your shelter does not board animals for the public, this option will disable the system's boarding functionality from the financial menu and animal/person screens.
- Remove clinic functionality from screens and menus: If your shelter does not run a clinic, this option will disable the system's clinic appointment and invoicing functionality from the medical menu and animal/person screens.
- Remove move menu and the movements tab from animal and person screens: If your shelter does not do adoptions and animals never leave, this option will disable the system's movement functionality.
- Remove retailer functionality from the movement screens and menus: Setting this option removes the retailer fields from the movement screens and retailer specific options from the menu.
- Remove the document repository functionality from menus: Setting this option removes the central document repository from the menu.
- Remove the online form functionality from menus: Setting this option removes the online form screens from the menu.
- Remove the animal control functionality from menus: Setting this option removes the animal control screens from the menu.
- Remove the event management functionality from menus and screens: If your shelter does not hold events, setting this option will remove the systems event screens from the menu and adoption movement screen.
- Remove the rota functionality from menus: Setting this option removes the staff rota from the menu and person screens.
- Remove the stock control functionality from menus: Setting this option removes the stock control screens from the financial menu and medical/vaccination dialogs.
- Remove the transport functionality from menus: Setting this option removes the transport book from the menu and the tab from animal records.
- Remove the trap loan functionality from menus: Setting this option removes the trap loan link from the menu and the trap loan tab on the person screen.

26.27.2 People

- Remove the city/state fields from person details: Setting this option will prevent ASM from presenting the user with additional fields to store the city and state information. These are handy for group owner searches, but not all shelters want or need them and prefer to keep the complete address in the address box.
- Remove the country field from person details: Setting this option will hide the country field from person addresses. This option is on by default since most shelters only deal with one country.
- Remove the home and work telephone fields from person details: Setting this option will hide the home and work telephone fields from person records.
- Remove the homechecked/by fields from person type according to the homechecked flag: This option is on by default and will hide the homechecked by and date fields from the person type slider if they don't have the homechecked flag. This option exists because some users prefer to assign the person doing the homecheck before the flag to confirm the person is homechecked.
- Remove the insurance number field from the movement screens: Setting this option hides the insurance number field and button from *Move* → *Adopt an animal* and all movement tabs/books.

26.27.3 Animals

- Remove the asilomar fields from the entry/deceased section: (US locales only) This option hides the asilomar intake and death category fields from the Entry and Deceased sliders.
- Remove the coat type field from the animal screen: If ticked, ASM won't display the coat type dropdown on the animal editing screen. For some shelters, keeping coat types is unnecessary (particularly for those that keep reptiles and birds!), so you can disable it here.
- Remove the microchip fields from the animal screen: If ticked, ASM won't display the microchip indicator, number and date fields. For shelters that don't keep microchipped animals (eg: Reptiles and birds).
- Remove the tattoo fields from the animal screen: If ticked, ASM won't display the tattoo indicator, number and date fields. Useful for shelters that don't keep animals with ear tattoos.
- Remove the spay/neutered fields from the animal screen: If ticked, ASM won't display the neutered/spayed flag and date. Useful for shelters that keep animals that do not require neutering (small mammals, birds, reptiles, horses, etc).
- Remove the declawed field from the animal screen: If ticked, ASM won't display the declawed flag. Useful for shelters that don't keep cats, or for countries where declawing is illegal (such as the UK).
- Remove the heartworm test fields from the animal screen: If ticked, ASM won't display the heartworm test fields. Useful for shelters with animals that do not require heartworm tests.
- Remove the FIV/L test fields from the animal screen: If ticked, ASM won't display the Combi test or FIV/FLV test fields (depending on your locale).
- Remove the "Good With..." and trained/energy level fields from the animal screen: If ticked, ASM won't display the good with cats/dogs/children/elderly, and the good on lead/good traveller/crate trained/housetrained and energy level fields. Useful for shelters that don't keep cats and dogs.
- Remove the adoption fee field from the animal screen: If ticked, ASM won't show the adoption fee field on the animal details. If this option is not on and an animal has a fee set, it will override the donation amount in the *Move* → *Adopt an animal* and *Move* → *Reserve an animal* screens.
- Remove the adoption coordinator field from the animal entry screen: If ticked, ASM won't show the adoption coordinator field on the entry slider. Adoption coordinators are generally used by smaller, distributed rescues.
- Remove the Litter ID/Acceptance Number field from the animal screen: If ticked, ASM won't display the Litter ID or Acceptance Number field at the top of the details screen. If your shelter does not track litters, or is not a UK RSPCA shelter, you can turn this off and save some space on the screen.

- Remove the location unit field from animal details: If ticked, ASM won't display the location unit field (this is the cage or pen number if your shelter uses those).
- Remove the Bonded With fields from the entry details screen: If ticked, ASM won't display the fields that allow an animal to be marked as bonded with other animals (bonding is particularly common with rescues that deal with rabbits and is the recommendation that pairs of animals are adopted together).
- Remove the picked up fields from the entry details screen: If ticked, ASM won't display the fields that allow an animal to be marked as picked up in a particular location or by an ACO (useful for shelters who do not have staff picking up animals).

26.28 Reports

- Email scheduled reports with no data: If you have set reports to be automatically emailed at a time of day, empty reports with "No data to show" will be emailed if this box is ticked.
- Show report menu items in collapsed categories: If you have a lot of reports installed, this option allows you to just show the categories in the reports menu. Clicking a category expands it.

26.29 Security

- Force users to enable 2 factor authentication: If set, users will be forced to enable 2fa next time they login.
- Force users to set strong passwords (8+ characters of mixed case and numbers): If set, users will be forced to set stronger passwords when they next change their password under the Change Password screen. You can't force the user to change their password, but you can reset it to something stronger on the user administration screen and notify them of their new password.
- Enable access permissions for incident records: Enabling this option adds a "View Roles" control to the new incident and edit incident screens. The "View Roles" control allows a user to specify exactly which users can see the incident.
- Enable access permissions for person records: Enabling this option adds a "View Roles" control to the add person and person record screens. The "View Roles" control allows a user to specify exactly which users can see the person record.

26.30 Shelter View

The shelter view tab allows the default grouping to be set.

- Allow drag and drop to move animals between locations: If set, you can drag animal thumbnails between locations in shelter view to move them.
- Allow units to be reserved and sponsored: If set, and the user has the appropriate "Reserve/Sponsor Unit" permission, an edit icon will appear to the right of units in "Location and Unit" mode. This edit icon allows a reservation to be placed on a unit so that it appears with a red background and shows as occupied when adding/editing animals. Any sponsor text will be included with the animal occupying that unit when it is published to your website so that the sponsor of the unit can be shown publicly.
- Show empty locations: If set, headings for all internal locations will be shown, even if there are no animals in them.

26.31 Waiting List

The waiting list tab allows an update period to be configured here. Simply specify in days the interval between updates (how often a waiting list entry is bumped up the urgency ratings until it reaches “High”). Another option is available to select the default waiting list urgency - this is the default start value given to new waiting list entries. You can also choose hold separate rankings for species on the waiting list. This makes sense if your shelter takes dogs and cats for example and whether you can take a cat is independent of how many dogs are on the shelter.

26.32 Watermark

Watermarking is a feature available under the media tab of animal records. It allows you to embed a logo and the animal’s name within a photo.

By default, the watermark image is added to the bottom right corner of the photo and the name in the bottom left.

Note that the original image will be changed, so you will need to upload the same image twice if you want to retain a copy without the watermark.

The options on this tab allow you to control the placement of the watermark image and animal name, along with the colours used for the text of the name.

For this feature to be available, you need to upload your watermark image, named “watermark.png” to *Settings* → *Reports* → *Extra Images* - note that the image must be a PNG file, so that an alpha channel for transparency can be included.

APPENDIX: FREQUENTLY ASKED QUESTIONS

27.1 How do I add new vaccination types, breeds or internal locations?

Go to *Settings* → *Lookup Data*, and then choose them from the dropdown list at the upper right side of the screen.

27.2 How do I bring an animal back to the shelter after adoption, transfer or fostering?

Open the animal's record and go the *Movements* tab. Find the current adoption, transfer or foster movement, edit it and set a return date.

27.3 Where do I get some reports?

Go to *Settings* → *Reports*, then click the "Browse sheltermanager.com" button. You can choose reports from the list and use the "Install" button to add them to your database.

27.4 Why am I seeing "animal not in location filter/site" when I open a record?

You've applied a "location filter" to your account. A location filter is a list of locations attached to a user account that prohibits the user from seeing animals who are not in one of those locations. To remove it, go to *Settings* → *System user accounts* and remove the location filter items from your account.

27.5 Why is my animal marked not available for adoption?

ASM assumes that any on shelter animal is adoptable, unless it has the "Not for adoption" flag explicitly set on it.

There are then a set of rules applied to decide whether or not an animal is excluded from being adoptable. You can edit those rules under *Publishing* → *Set Publishing Options* → *Animal Selection*. The rules can exclude animals that don't have a photo, are in a foster home or part of a cruelty case, are under a certain age, etc.

If an animal is not adoptable due to any of those rules, when you view its record, you will see the words "Not for adoption" in the banner at the top of the record and directly underneath that in brackets the rule that has excluded the animal from being adoptable.

27.6 Why are my non-shelter and adopted animals appearing on the vaccination book?

The option *Settings* → *Options* → *Defaults* → *Include off-shelter animals in medical books and calendars* controls whether or not off-shelter animals appear in the vaccination book, medical book, test book and are highlighted in alerts on the home page. By default, this option is off.

27.7 Why are my non-shelter and adopted animals being shown on my website?

You've likely set the "Courtesy Listing" flag for that animal.

The purpose of that flag is to force animals that wouldn't normally be adoptable to appear on websites and be sent to third parties for publicity. Common scenarios for this are non-shelter owned animals or previously adopted animals where the owner is handling the adoption, but the shelter is helping to publicise the animal.

27.8 Why can't I edit the date brought in field?

The option *Settings* → *Options* → *Animal Codes* → *Once assigned, codes cannot be changed* will cause the edit animal screen to lock any fields that make up part of the shelter code. For example, if your coding format contains T for the type, the type field will be locked for editing when this option is on. If your coding format has any of YYYY, MM or DD for a portion of the date brought in, that field will be locked too.

27.9 When I create a payment I get "No source account found for donation type, can't create trx"?

You've turned on the option to have payments create matching accounting transactions under *Settings* → *Options* → *Accounts*

The error is occurring because your payment type is not linked to an income account under *Financial* → *Accounts*. To fix this, either disable the option to create matching accounting transactions if you are not using the accounts. Or, you can create a new income account in the accounts screen and link it to your payment type with the dropdown.

The message itself is only a warning to tell you an accounting transaction could not be created, it is not stopping your payment from being created.

27.10 Why can't I view my person record?

You've linked a person record to your user account. This should only be done when you want to forbid a user account from viewing a person record and is there to prevent staff members from editing their own person records.

You can unlink the person record by going to *Settings* → *Edit System Users*, editing your user account and using the trash can icon to the right of "Staff Record" to break the link. Breaking the link will not delete the person record or user account.

27.11 How do I integrate my adoptable animals with my website?

See *Appendix: Integrating with Your Website*.

27.12 I uploaded the wrong picture for an animal, but it's "stuck"?

Your browser caches the thumbnail images for each animal. If you upload the wrong picture, then delete it and upload the correct picture your browser will continue to show the old picture.

To fix this, invalidate your browser's cache when looking at the animal's record by pressing CTRL+R or F5 to reload all images from the server. This does not work as well in some versions of Internet Explorer and if you are using that, you can try *Tools* → *Internet Options* and delete temporary internet files.

27.13 Why do I get "page 1 of 1" in the header when I print documents?

Your web browser is adding these header and footers. Where you turn them off depends on your web browser:

- Internet Explorer: Open Page Setup from the printer icon on the toolbar or File menu. Delete the header and footer strings in the "Headers and Footers" section
- Firefox: Choose Page Setup from the File menu (press ALT if it is not visible). Click on the Margins & Header/Footer tab and choose –blank– from all the dropdowns in the Headers and Footers section.
- Chrome: Untick the "Print headers and footers" box in the print preview screen.

27.14 My scanned confidential documents are being published on my website / PetFinder!

You've attached scanned documents as JPEG images to animal records. You should NEVER do this!

- They can be published outside the shelter, which you do not want.
- They aren't relevant to someone browsing an animal bio online.
- ASM scales down incoming pictures for the web, assuming any pictures you upload are always going to be photos rather than text. This means smaller text on documents you scan as JPEG could become unreadable.

Instead, you should always attach your scanned documents as PDF files. ASM scales PDFs in a different way so that they don't lose clarity and legibility, it will never publish a PDF to any website.

ASM does have a handy function to help if you do upload an image containing text, you can select an image on the media tab and choose *Image* → *Create a PDF file* to create a new PDF file that contains your image. Once you're happy with the PDF you can safely delete the image to prevent it going anywhere.

27.15 Why can't I send certain fields to PetFinder?

PetFinder's import spec only allows for the following items of information to be sent by ASM (or any third party system):

Code, Name, Breed, Mix, Sex, Size, Color 1-3, Age, Bio/Description, Type, Shots, Altered, NoDogs, NoCats, NoKids, Housetrained, Declawed, SpecialNeeds, 6 x Photos, Arrival Date, Birth Date, Special Needs Notes, Adoption Fee, Display Adoption Fee Y/N

Note that the spec only allows ASM to state whether an animal is bad with other animals, but not if it is good with them. It also will not accept video URLs or any other field that PetFinder have on their site that is not listed here.

While color is accepted by PetFinder, we do not support sending it. The reason is that our color field is a single user customisable dropdown. PetFinder split the color into 3 dropdowns of separate colors and have very strict validation rules on which combinations are allowed for different species of animals. It is therefore impossible to map our color scheme to theirs in a way that won't cause many of your animal listings to be rejected.

27.16 Why are ASM emails being sent from account@bounce.sheltermanager.com?

In the early days of email, address spoofing was used by everyone. It was an easy way ensuring an email came back to you no matter what servers your message passed through.

Unfortunately, this also made it easy for spammers to fake where their emails were coming from and to send a lot of backscatter (failure notices) to innocent victims.

Most large email services today, such as gmail, hotmail and yahoo use technologies called SPF and DKIM. These allow a domain to state which mail servers are allowed to relay email on its behalf. For example, the hotmail.com domain states that nothing but the hotmail servers are allowed to send any messages that come from a hotmail.com address.

When a message arrives at an email server using these technologies, it checks the domain the email is from and then checks to see whether the server it received that message from is allowed to send email for that domain. If it isn't, the message is put straight into the spam folder of the recipient or in some cases, rejected outright.

This is very helpful in filtering spam, but it means that ASM cannot send emails that appear to come from your address (particularly if you have a hotmail or gmail address) - otherwise most mail services will either refuse delivery of your message or put it straight in the spam folder for the recipient.

Instead, ASM sends emails from the fixed address you configured in sitedefs and trusts you know what you're doing. sheltermanager.com sends emails from a account@bounce.sheltermanager.com address. Your real email address is set in the Reply-To email header, which email clients will honour when someone replies to your message. So while they'll see the message as appearing to come from account@bounce.sheltermanager.com, when they hit the reply button in their email client, the email they create will have a to address of you@youremail.com instead.

In the case of sheltermanager.com, if someone does accidentally reply to a account@bounce.sheltermanager.com address, the sheltermanager email server will find your account and send the email through to you, or find a Reply-To header in the quoted message if one exists and send it to that.

27.17 Why has my colour scheme reset?

Originally, ASM allowed you to set a system-wide theme for all users. It no longer does this. We decided to remove that behaviour for a number of reasons:

- A single system theme means users all have the same, consistent starting point
- What users see on screen when they start using ASM matches the screenshots in the documentation and help videos.
- The system now follows the law-of-least-surprise as users will only ever see the theme they've chosen themselves and others can no longer change it for them.

All users can choose their theme/colour scheme by clicking on their username at the top right, and then the “Change User Settings” menu option.

27.18 If I delete a user, will it delete everything they created?

No. You can safely delete user accounts and it will not delete any data.

27.19 Can I undo a CSV import?

Yes. All CSV imports are tagged with the user “import/USER” where USER is the user account that ran the import.

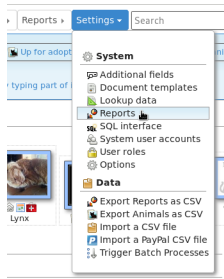
You can run the following script at *Settings* → *SQL Interface* to remove everything imported by anyone after the 1st January, 2017:

```
DELETE FROM animal WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM animalcost WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM animalvaccination WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-
↳01-01';
DELETE FROM animalmedical WHERE CreatedBy = 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM animalmedicaltreatment WHERE CreatedBy LIKE 'import%' AND CreatedDate >
↳'2017-01-01';
DELETE FROM animaltest WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM owner WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM animalcontrol WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01
↳';
DELETE FROM adoption WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01';
DELETE FROM ownerdonation WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01
↳';
DELETE FROM ownerlicence WHERE CreatedBy LIKE 'import%' AND CreatedDate > '2017-01-01
↳';
```

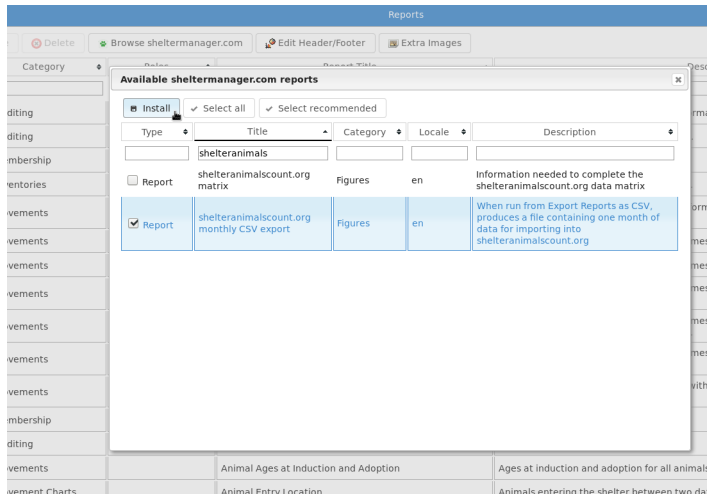
27.20 How do I export my data to shelteranimalscount.org?

There's a special report that will export your monthly figures to shelteranimalscount.org for upload via their CSV import tool.

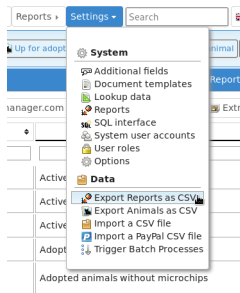
To install it, open the reports menu:



Use the “Browse sheltermanager.com” button to install new reports. Enter part of the name in the search box at the top of the title column, select the report you wish to install by ticking the box to the left of it and clicking the “Install” button.



Once installed, use the Export Reports as CSV option to run the report:



Click its name in the list:

Quickbooks Export (Accounts)	Accounts	Financial accounts, exportable to CSV for Quickbooks
Quickbooks Export (Payments)	Accounts	Incoming financial payments between two dates
Reserved Animal Report	Movements	Displays all animals with reservations and their status
Reserves without Homechecks	Auditing	All owners with active reservations on animals
Reserves without Homechecks Map	Maps	Map of owners with active reservations on animals
Rota between Two Dates by Person and Type	Rota	All rota items between two dates by person and type
shelteranimalscount.org monthly CSV export	Figures	When run from Export Reports as CSV, produces a file containing one month of data for importing into shelteranimalscount.org
Stock Usage by Location and Date	Stock Control	Stock usage between two dates broken down by location
Stock Usage by Name and Date	Stock Control	Stock usage between two dates broken down by name
Stock Usage by Type and Date	Stock Control	Stock usage between two dates broken down by type

Finally, enter the start and end dates of the calendar month that you’d like to generate the figures for.

shelteranimalscount.org monthly CSV export

Month starting on

ending on

Note: The report will only work correctly for one calendar month. Run the report multiple times for multiple months.

months.

Note: While this process can still be done manually, it has been superseded by the shelteranimalscount.org publisher, which will automatically update your figures every month without user intervention via their API.

27.21 How do I export my data from the system for import somewhere else?

The “Export” button under *Settings* → *SQL Interface* allows you to export your data in various formats. You can export a number of CSV files containing data from different areas of the system for reading via spreadsheet software. You can also export a database dump for use with either self-hosted ASM3 or our older ASM2 desktop software.

The files/options include:

- `dump.sql`: A database independent SQL script that contains DELETE and INSERT statements to recreate all of the database tables. By itself, this file can only be used to restore your data in a database that already contains the existing ASM tables. If you want to install your data in a new database, you will have to run one of the DDL files first for your database platform.
- `ddl_mysql.sql`: The database schema for MySQL database backends.
- `ddl_postgresql.sql`: The database schema for PostgreSQL database backends.
- `ddl_db2.sql`: The database schema for IBM DB2 database backends.
- `asm2.sql`: A complete HSQLDB database script for use with the ASM2 desktop software.
- `animal.csv`: All animal and adopter/movement information for viewing with spreadsheet software.
- `incident.csv`: All call/incident information for viewing with spreadsheet software.
- `licence.csv`: All animal licence information for viewing with spreadsheet software.
- `media.csv`: Information about all media files for viewing with spreadsheet software.
- `medical.csv`: All animal medical histories for viewing with spreadsheet software.
- `person.csv`: All person information for viewing with spreadsheet software.
- `payment.csv`: All payment information for viewing with spreadsheet software.

APPENDIX: CSV FILE IMPORT FIELDS

ASM will recognise columns with the following names when importing CSV files. Where you wish to supply multiple rows for the same animal (such as for vaccinations or regimens), make sure you have a populated ANIMALCODE column, similarly for multiple rows to people (such as movements, licenses, etc) make sure you have populated person data.

When processing animal records that already exist, there are certain key fields that will be overwritten on the existing animal from the CSV data if those columns exist in the CSV data and have a value for that row.

These fields are:

- ANIMALCOMMENTS / ANIMALDESCRIPTION / ANIMALWARNING
- ANIMALDECEASEDDATE
- ANIMALDECEASEDNOTES
- ANIMALDECEASEDREASON
- ANIMALDOB
- ANIMALEUTHANIZED
- ANIMALFLAGS
- ANIMALHEALTHPROBLEMS.
- ANIMALLOCATION / ANIMALUNIT
- ANIMALMICROCHIP / ANIMALMICROCHIPDATE
- ANIMALNEUTERED / ANIMALNEUTEREDDATE
- ANIMALPICKUPADDRESS
- ANIMALPICKUPLOCATION

This allows you to use a spreadsheet of data to update many animals on chipping/neutering days (for example), or update many animal bios in one go.

When importing incident data from CSV files, the person fields supplied will be used as the caller.

ANIMALCODE

A code for the animal. If supplied, it will set the sheltercode and short sheltercode fields. If not supplied, the system will generate a code for the animal to the appropriate scheme. If you have manual codes turned on and no animal code is supplied, an error message will be displayed and the import abandoned.

ANIMALLITTER

A litter reference for the animal. Animals with the same reference can be viewed together with the “litter-mates” button on animal records.

ANIMALNAME

The animal’s name.

ANIMALIMAGE

A photo for the animal, it can either be an absolute HTTP URL to a JPG image OR a base64 encoded JPG expressed as a data URI.

ANIMALPDFDATA

A PDF file to attach to the animal. Like image, it can be an absolute URL or a base64 encoded PDF as a data URI.

ANIMALPDFNAME

The filename associated with the PDF data.

ANIMALNONSHELTER

Y/N to indicate whether this animal is owned by a member of the public and not a shelter animal.

ANIMALNOTFORADOPTION

Y/N to indicate whether this animal is not available for adoption (Y is not available).

ANIMALTRANSFER

Y/N to indicate whether this animal was transferred in. If set to Y, the ORIGINALOWNER fields will be used in the "Transferred From" field.

ANIMALFLAGS

A comma separated list of animal flags, including builtins courtesy, crueltycase, notforadoption, notforregistration, nonshelter, quarantine.

ANIMALSEX

The animal's gender. ASM looks for the initial letter "M" in the string to indicate male, "F" for Female or "U" for Unknown.

ANIMALTYPE

The animal's type. This should correspond to one of ASM's animal types from your database.

ANIMALCOLOR

The animal's color. This should correspond to a color in your database.

ANIMALCOATTYPE

The animal's coat type. This should correspond to a coat type in your database.

ANIMALBREED1

The animal's primary breed. It should match a breed in your database.

ANIMALBREED2

The animal's secondary breed. If different from ANIMALBREED1, ASM will mark the animal as a cross-breed.

ANIMALDOB

The animal's date of birth. This field, or ANIMALAGE must be supplied or the record will not be imported.

ANIMALSIZE

The animal's size. This should correspond to a size in your database.

ANIMALWEIGHT

The animal's weight as a floating point number of pounds or kilos (eg: 2.5 = 2 lb and 8 oz).

ANIMALAGE

The animal's current age in years. ASM will calculate a date of birth from this during import if ANIMALDOB is not supplied or blank.

ANIMALLOCATION

The animal's location within your shelter. This should correspond to a location in your database.

ANIMALUNIT

The unit within the animal's location within the shelter, eg: pen/cage number.

ANIMALJURISDICTION

The jurisdiction to allocate the animal to based on entry circumstances (usually pickup).

ANIMALPICKUPLOCATION

The location where the animal was picked up. This should match a value in the pickup location lookup.

ANIMALPICKUPADDRESS

The address where the animal was picked up.

ANIMALSPECIES

The animal's species. This should match a species in your database.

ANIMALCRATETRAINED

Y/N/U to indicate yes/no/unknown.

ANIMALHOUSETRAINED

Y/N/U to indicate yes/no/unknown.

ANIMALENERGYLEVEL

Y/N/U to indicate yes/no/unknown.

ANIMALGOODWITHCATS

Y/N/U to indicate yes/no/unknown.

ANIMALGOODWITHDOGS

Y/N/U to indicate yes/no/unknown.

ANIMALGOODWITHELDERLY

Y/N/U to indicate yes/no/unknown.

ANIMALGOODWITHKIDS

Y/N/U to indicate yes/no/unknown.

ANIMALGOODONLEAD

Y/N/U to indicate yes/no/unknown.

ANIMALDESCRIPTION

Some comments to put in the animal's description field.

ANIMALHIDDENDETAILS

Some comments for the animal's hidden details field.

ANIMALMARKINGS

Some comments for the animal's markings field.

ANIMALHEALTHPROBLEMS

Some comments for the animal's health problems field.

ANIMALWARNING

A popup warning to display when viewing the animal record.

ANIMALNEUTERED

Y/N to indicate yes/no.

ANIMALNEUTEREDDATE

The date the animal was neutered. If supplied and not blank, ANIMALNEUTERED = Y is also assumed.

ANIMALMICROCHIP

If not blank, ASM will mark the animal microchipped with this as the microchip number.

ANIMALMICROCHIPDATE

The date the microchip was implanted.

ANIMALTATTOO

If not blank, ASM will mark the animal tattooed with this as the tattoo number.

ANIMALTATTOODATE

The date the tattoo was implanted.

ANIMALDECLAWED

Y/N to indicate yes/no.

ANIMALHASSPECIALNEEDS

Y/N to indicate yes/no.

ANIMALENTRYDATE

The date the animal entered the shelter (date brought in). Today's date will be used if this column is not present or the value is blank.

ANIMALENTRYTIME

The time the animal entered the shelter. These should be in 24 hour clock format with either 4 or 6 digits if seconds are included, seperated by colons.

ANIMALENTRYCATEGORY

The animal's entry category, which should correspond to an entry category in your database.

ANIMALENTRYTYPE

The animal's entry type, which should be one of the fixed entry types, Surrender, Stray, Transfer In, etc.

ANIMALREASONFORENTRY

Free text, notes on the reason the animal entered the shelter.

ANIMALDECEASEDDATE

If the animal is deceased, the date it died.

ANIMALDECEASEDREASON

The death category for the animal, which should correspond to one in your database.

ANIMALDECEASEDNOTES

The notes about the animal's death.

ANIMALEUTHANIZED

Y/N to indicate whether the animal was euthanized.

ANIMALADDITIONAL<fieldname>

If you have animal additional fields defined, you can put the uppercased version of their name as a suffix to this. Eg, for an additional field called Weight, ANIMALADDITIONALWEIGHT.

COSTTYPE

The cost type to use (should correspond to a cost type in your database).

COSTDATE

The date of the cost on this line.

COSTAMOUNT

The amount of the cost on this line.

COSTDESCRIPTION

A description of the cost on this line.

CURRENTVETTITLE

If we have current vet info for the animal, the vet's title.

CURRENTVETINITIALS

Vet's initials.

CURRENTVETFIRSTNAME

The vet's first name(s).

CURRENTVETLASTNAME

The vet's last name. This column being present and having data in it determines whether or not the importer will consider the animal as having current vet info. If ANIMALNEUTEREDDATE is included in the file along with CURRENTVET info, then the neutering vet will be copied from the current vet info.

CURRENTVETADDRESS

Vet's address.

CURRENTVETCITY

The vet's city/town.

CURRENTVETSTATE

The vet's state/county.

CURRENTVETZIPCODE

The vet's zip or postcode.

CURRENTVETJURISDICTION

The vet's jurisdiction.

CURRENTVETHOMEPHONE

The vet's home phone.

CURRENTVETWORKPHONE

The vet's work phone.

CURRENTVETCELLPHONE

The vet's mobile phone.

CURRENTVETEMAIL

The vet's email.

CURRENTVETADDITIONAL<fieldname>

If you have person additional fields defined, you can put the uppercased version of their name as a suffix to this. Eg, for an additional field called DateOfBirth CURRENTVETADDITIONALDATEOFBIRTH.

DIARYDATE

The date of the diary entry.

DIARYFOR

The person the diary note is for.

DIARYSUBJECT

The subject of the diary note.

DIARYNOTE

The diary note section.

DONATIONDATE

The date the donation amount on this line was received. If movement columns are present, it will be attached to the movement as well as the person. If no person columns are present, having this column in the CSV file will cause an error.

DONATIONAMOUNT

The amount of the donation on this line (as a floating point number).

DONATIONFEE

The amount of any transaction fee in handling the donation.

DONATIONCHECKNUMBER

The cheque/check number for the donation.

DONATIONCOMMENTS

Any comments to go with the donation.

DONATIONPAYMENT

The payment method to use (should correspond to a payment method in your database, eg: Cash).

DONATIONTYPE

The payment type to use (should correspond to a payment type in your database).

DONATIONGIFTAID

Y / N if the payment should have the giftaid flag set.

INCIDENTDATE

The date of the incident and call.

INCIDENTTIME

The time of the incident. These should be in 24 hour clock format with either 4 or 6 digits if seconds are included, separated by colons.

INCIDENTCOMPLETEDDATE

The date the incident was completed.

INCIDENTCOMPLETEDTIME

The time the incident was completed should be in 24 hour clock format with either 4 or 6 digits if seconds are included, separated by colons.

INCIDENTCOMPLETEDTYPE

The incident completion disposition.

INCIDENTRESPONDEDDATE

The date the officer responded to the incident.

INCIDENTFOLLOWUPDATE

The date of follow for the incident.

INCIDENTTYPE

The type for the incident (should correspond to an incident type in your database).

INCIDENTNOTES

The call notes for the incident.

DISPATCHACO

The animal control officer dispatched to the incident .

DISPATCHDATE

The date the officer was dispatched to the incident.

DISPATCHTIME

The time the officer was dispatched to the incident. Should be in 24 hour clock format with either 4 or 6 digits if seconds are included, seperated by colons.

DISPATCHADDRESS

The dispatch address for the incident.

DISPATCHCITY

The dispatch city.

DISPATCHSTATE

The dispatch state.

DISPATCHZIPCODE

The dispatch zipcode.

INCIDENTANIMALSPECIES

The species of animal involved in the incident.

INCIDENTANIMALSEX

The sex of the animal involved in the incident.

INCIDENTANIMALDESCRIPTION

Description of the animal involved in the incident.

LICENSETYPE

The license type to use (licenses need at least person info).

LICENSENUMBER

The license number (mandatory).

LICENSEFEE

The fee paid for the license.

LICENSEISSUEDATE

The date the license was issued.

LICENSEEXPIRESDATE

The date the license expires.

LICENSECOMMENTS

Any comments on the license

LOGDATE

The date of any log entry (only animal logs can be imported).

LOGTIME

The time of any log entry. Should be in 24 hour clock format with either 4 or 6 digits if seconds are included, seperated by colons.

LOGTYPE

The type of log entry.

LOGCOMMENTS

The log entry itself.

MEDICALNAME

The name of the medical regimen for this line.

MEDICALDOSAGE

The dosage of the medical regimen.

MEDICALGIVENDATE

The date the medical regimen started (only one-off treatment regimens can be created via import).

MEDICALCOMMENTS

Any comments on the medical regimen.

MOVEMENTTYPE

The type of movement for this line (0 = Reservation, 1 = Adoption, 2 = Foster, 3 = Transfer, 4 = Escaped, 5 = Reclaimed, 6 = Stolen, 7 = Released to Wild, 8 = Moved to Retailer. If MOVEMENTTYPE is not specified, but a MOVEMENTDATE has been given, ASM will default the type to adoption. If MOVEMENTTYPE is 0, then MOVEMENTDATE and MOVEMENTRETURNDATE will be used to set the reservation date and reservation cancelled date fields.

MOVEMENTDATE

The date of the movement.

MOVEMENTRETURNDATE

The return date of the movement.

MOVEMENTCOMMENTS

Any comments for the movement.

ORIGINALOWNERTITLE

If we have original owner info for the animal, the person's title. If the animal has been marked as non-shelter, the ORIGINALOWNER will become the animal's owner.

ORIGINALOWNERINITIALS

Original owner's initials.

ORIGINALOWNERFIRSTNAME

The original owner's first name(s).

ORIGINALOWNERLASTNAME

The original owner's last name. This column being present and having data in it determines whether or not the importer will consider the animal as having original owner info.

ORIGINALOWNERADDRESS

Original owner's address.

ORIGINALOWNERCITY

The original owner's city/town.

ORIGINALOWNERSTATE

The original owner's state/county.

ORIGINALOWNERZIPCODE

The original owner's zip or postcode.

ORIGINALOWNERJURISDICTION

The original owner's jurisdiction.

ORIGINALOWNERHOMEPHONE

The original owner's home phone.

ORIGINALOWNERWORKPHONE

The original owner's work phone.

ORIGINALOWNERCELLPHONE

The original owner's mobile phone.

ORIGINALOWNEREMAIL

The original owner's email.

ORIGINALOWNERWARNING

A popup warning to display when viewing the original owner record.

ORIGINALOWNERFLAGS

This column can be used to set any other person flags on the original owner. Flags should be comma separated with no extra spaces. Built in flags are their lower case English names, eg: banned,aco,homechecked,homechecker,excludefrombulkemail Additional flags that you have added to the system should exactly match their flag names as they appear on the person screens, eg: banned,Fundraising Flag 1,Custom Flag.

ORIGINALOWNERADDITIONAL<fieldname>

If you have person additional fields defined, you can put the uppcased version of their name as a suffix to this. Eg, for an additional field called DateOfBirth ORIGINALOWNERADDITIONALDATEOFBIRTH.

PERSONCLASS

1 = Individual, 2 = Organisation.

PERSONTITLE

The person's title.

PERSONINITIALS

The person's initials.

PERSONFIRSTNAME

The person's first name (forenames).

PERSONLASTNAME

The person's last name (surname).

PERSONNAME

If this field is supplied, ASM will assume it contains first names and a last name, overriding any fields that set those. Everything up to the last space is considered first names and everything up to the last space the last name.

PERSONADDRESS

The person's address.

PERSONCITY

The person's town/city.

PERSONSTATE

The person's state/county.

PERSONZIPCODE

The person's zip or postcode.

PERSONJURISDICTION

The person's jurisdiction.

PERSONHOMEPHONE

The person's home phone number.

PERSONWORKPHONE

The person's work phone number.

PERSONCELLPHONE

The person's cell/mobile number.

PERSONEMAIL

The person's email address.

PERSONGDPRCONTACTOPTIN

The GDPR contact optin values, separated by a comma. These values are: didnotask, declined, email, post, sms, phone.

PERSONMEMBER

Y or 1 in this column to indicate the person should have the membership flag set.

PERSONMEMBERSHIPNUMBER

The person's membership number.

PERSONMEMBERSHIPEXPIRY

A date for when this person's membership expires.

PERSONFOSTERER

Y or 1 in this column to indicate the person should have the fosterer flag set.

PERSONFOSTERCAPACITY

The number of animals this person is willing to foster.

PERSONDONOR

Y or 1 in this column to indicate the person is a regular donor.

PERSONFLAGS

This column can be used to set any other person flags on the imported person. Flags should be comma separated with no extra spaces. Built in flags are their lower case English names, eg: banned,aco,homechecked,homechecker,excludefrombulkemail Additional flags that you have added to the system should exactly match their flag names as they appear on the person screens, eg: banned,Fundraising Flag 1,Custom Flag.

PERSONCOMMENTS

Any comments to go with the person record.

PERSONWARNING

A popup warning to display when viewing the person record.

PERSONMATCHACTIVE

Y or 1 in this column indicates the person is looking for an animal. If this field is not set to Y or 1, the other PERSONMATCH columns are ignored for this row.

PERSONMATCHADDED

The date the system should start looking for matches.

PERSONMATCHEXPIRES

The date the system should stop looking for matches.

PERSONMATCHSEX

The gender. ASM looks for the initial letter "M" in the string to indicate male, "F" for Female, "U" for Unknown or "A" for any.

PERSONMATCHSIZE

The size of the animal the person is looking for.

PERSONMATCHCOLOR

The color of the animal the person is looking for.

PERSONMATCHAGEFROM, PERSONMATCHAGETO

The age range of the animal the person is looking for in years.

PERSONMATCHTYPE

The animal type of the animal the person is looking for.

PERSONMATCHSPECIES

The species of animal the person is looking for.

PERSONMATCHBREED1, PERSONMATCHBREED2

The breed of the animal the person is looking for

**PERSONMATCHGOODWITHCATS, PERSONMATCHGOODWITHDOGS,
PERSONMATCHGOODWITHCHILDREN, PERSONMATCHHOUSETRAINED**

The good with/housetrained flags of the animal the person is looking for.

PERSONMATCHCOMMENTSCONTAIN

The animal this person is looking for will have this value in its comments.

PERSONADDITIONAL<fieldname>

If you have person additional fields defined, you can put the uppercased version of their name as a suffix to this. Eg, for an additional field called DateOfBirth PERSONADDITIONALDATEOFBIRTH.

PERSONIMAGE

A photo for the person, it can either be an absolute HTTP URL to a JPG image OR a base64 encoded JPG expressed as a data URI.

PERSONPDFDATA

A PDF file to attach to the person. Like image, it can be an absolute URL or a base64 encoded PDF as a data URI.

PERSONPDFNAME

The filename associated with the PDF data.

STOCKLEVELNAME

The name of the stock level on this line.

STOCKLEVELDESCRIPTION

A description of the stock level on this line.

STOCKLEVELBARCODE

The barcode number of this stock level item.

STOCKLEVELLOCATIONNAME

The stock location that this level is in.

STOCKLEVELUNITNAME

The name of the units used to count this stock level.

STOCKLEVELTOTAL

The total units in the container for this stock level.

STOCKLEVELBALANCE

The balance of units in this stock level.

STOCKLEVELLOW

The low balance value for this stock level (shows an alert on the home page).

STOCKLEVELEXPIRY

The expiry date for this stock level if it is a perishable good.

STOCKLEVELBATCHNUMBER

The batch number for this stock level if it is medication.

STOCKLEVELCOST

The total cost of the container for this stock level.

STOCKLEVELUNITPRICE

The individual unit price of an item in this stock level.

TESTTYPE

The type of test on this line.

TESTRESULT

The test result.

TESTDUEDATE

The due date for the test.

TESTPERFORMEDDATE

The date the test was performed.

TESTCOMMENTS

Any comments for the test.

VACCINATIONTYPE

The type of vaccination on this line.

VACCINATIONDUEDATE

The due date for the vaccination.

VACCINATIONGIVENDATE

The date the vaccination was given.

VACCINATIONEXPIRESDATE

The date the vaccine wears off and needs to be re-administered.

VACCINATIONMANUFACTURER

The manufacturer of the vaccine.

VACCINATIONBATCHNUMBER

The serial/batch number of the vaccine.

VACCINATIONRABIESTAG

The rabies tag accompanying the vaccine.

VACCINATIONCOMMENTS

Comments on the vaccine.

APPENDIX: DATABASE TABLES/COLUMNS

29.1 adoption

The adoption table holds a row for each movement attached to an animal or person.

ID

INTEGER A unique, incrementing number that identifies this record

AdoptionNumber

VARCHAR A unique string identifying this movement (defaults to adoption.ID)

AnimalID

INTEGER Link to the animal table

OwnerID

INTEGER Link to the owner table

RetailerID

INTEGER Link to the owner table for a retailer (0 for no retailer)

OriginalRetailerMovementID

INTEGER Link to another movement in this table for an original movement to retailer that started this adoption

EventID

INTEGER Link to the event table for the adoption event this movement came from

MovementDate

TIMESTAMP The date the animal moved

MovementType

INTEGER Link to the lksmovementtype table for the type of animal movement (none = reservation, adoption, foster, transfer, escaped, stolen, reclaimed, etc)

InsuranceNumber

VARCHAR If your shelter does short term insurance when adopting, the policy number

ReturnDate

TIMESTAMP The date the animal came back to the shelter from this movement (or null for not returned)

ReturnedReasonID

INTEGER Link to the entryreason table for reason for return

ReturnedByOwnerID

INTEGER Link to the owner table for the person who returned the animal

ReasonForReturn

VARCHAR Free text, the reason the animal was returned

ReservationDate

TIMESTAMP For reservation movements, the reservation date

Donation

FLOAT A total of all donations attached to this movement

ReservationCancelledDate

TIMESTAMP If this is a reservation and it has been cancelled, the date it was cancelled

IsPermanentFoster

INTEGER 1 if this foster movement is permanent

IsTrial

INTEGER 1 if this is a trial adoption movement

TrialEndDate

TIMESTAMP The date this trial ends if it is a trial adoption movement

Comments

VARCHAR Movement comments

RecordVersion

INTEGER Optimistic lock flag

CreatedBy

VARCHAR User who created this record

CreatedDate

TIMESTAMP Date this record was created

LastChangedBy

VARCHAR User who last changed this record

LastChangedDate

TIMESTAMP Date this record was last changed

29.2 animal

The animal table holds a row for each animal on the system. Various denormalised fields at the end are used to track the current movement, whether the animal is on shelter, etc. These are useful for writing reports.

ID

INTEGER A unique, incrementing number that identifies this record

AnimalTypeID

INTEGER Link to the animaltype table

AnimalName

VARCHAR The animal's name

NonShelterAnimal

INTEGER 1 if the animal is a non-shelter animal (kept out of figures)

CrueltyCase

INTEGER 1 if the animal is a cruelty case (all 0/1 fields link to lksyesno table)

BondedAnimalID

INTEGER Animal ID of bonded animal 1 (or 0)

BondedAnimal2ID

INTEGER Animal ID of bonded animal 2 (or 0)

BaseColourID

INTEGER Link to the basecolour table

SpeciesID

INTEGER Link to the species table

BreedID

INTEGER Primary breed (link to the breed table)

Breed2ID

INTEGER Secondary breed (same as primary if not crossbreed)

BreedName

VARCHAR Name of breed in form breed1 / breed2 if crossbreed

CrossBreed

INTEGER 1 if animal is a crossbreed

CoatType

INTEGER Link to lkcoattype table

Markings

VARCHAR Distinguishing features field

ShelterCode

VARCHAR The animal's shelter code

ShortCode

VARCHAR The short version of the shelter code

UniqueCodeID

INTEGER The next UUU code can be generated by doing MAX(UniqueCodeID)

YearCodeID

INTEGER The next NNN code is MAX(YearCodeID) for matching brought in year and type

AcceptanceNumber

VARCHAR The acceptance number/Litter ID

DateOfBirth

TIMESTAMP The animal's date of birth

AgeGroup

VARCHAR The animal's age group based on date of birth at the most recent time it entered the shelter

AgeGroupActiveMovement

VARCHAR The animal's age group based on date of birth at the last time it left the shelter

DeceasedDate

TIMESTAMP Date the animal died, if null the animal is still alive

Sex

INTEGER Link to the lksex table

Identichipped

INTEGER 1 if the animal is microchipped

IdentichipNumber

VARCHAR The animal's microchip number

IdentichipDate

TIMESTAMP The date the animal was microchipped

Tattoo

INTEGER 1 if the animal has an ear tattoo

TattooNumber

VARCHAR The animal's tattoo number

TattooDate

TIMESTAMP The date the animal was tattooed

Neutered

INTEGER 1 if the animal has been neutered/spayed

NeuteredDate

TIMESTAMP The date the animal was neutered/spayed

Declawed

INTEGER 1 if the animal has been declawed

HiddenAnimalDetails

VARCHAR Hidden animal comments

AnimalComments

VARCHAR The animal's comments

OwnersVetID

INTEGER Link to the owner's vet (owner table, 0 for no value)

CurrentVetID

INTEGER Link to the current vet (owner table, 0 for no value)

OriginalOwnerID

INTEGER Link to the original owner (owner table)

BroughtInByOwnerID

INTEGER Link to the owner who brought the animal in (owner table)

ReasonForEntry

VARCHAR Freeform text, reason animal was brought to shelter

ReasonNO

VARCHAR Freeform text, reason original owner didn't bring the animal in

DateBroughtIn

TIMESTAMP The date the animal was brought into the shelter

EntryReasonID

INTEGER Reason for entry (link to entryreason table)

HealthProblems

VARCHAR Health problems box on Vet tab

PutToSleep

INTEGER 1 if the animal was euthanised

PTSReason

VARCHAR Freeform text, reason the animal died

PTSReasonID

INTEGER Euthanasia category - link to deathreason table

IsDOA

INTEGER 1 if the animal was dead on arrival to the shelter

IsTransfer

INTEGER 1 if the animal was a transfer from another animal shelter

IsGoodWithCats

INTEGER Link to the lksynun table for yes/no/unknown

IsGoodWithDogs

INTEGER Link to the lksynun table for yes/no/unknown

IsGoodWithChildren

INTEGER Link to the lksynun table for yes/no/unknown

IsHouseTrained

INTEGER Link to the lksynun table for yes/no/unknown

IsNotAvailableForAdoption

INTEGER 1 if the animal should not be included for publishing as adoptable

HasSpecialNeeds

INTEGER 1 if the animal has special needs

ShelterLocation

INTEGER Location on shelter (link to internallocation table)

DiedOffShelter

INTEGER 1 if the animal died off shelter (won't be included on figures reports)

Size

INTEGER animal's size (link to lksize table)

RabiesTag

VARCHAR The rabies tag field

Adoptable

INTEGER 1 if the animal is adoptable according to publishing rules

Archived

INTEGER 1 if the animal is off shelter now

ActiveMovementID

INTEGER Link to the adoption table for the latest movement for this animal

ActiveMovementType

INTEGER Link to lksmovementtype for the current movement type

ActiveMovementDate

TIMESTAMP The current movement date

ActiveMovementReturn

TIMESTAMP The current movement's return date

HasActiveReserve

INTEGER 1 if the animal has an open reservation

HasTrialAdoption

INTEGER 1 if the animal is on trial adoption

DisplayLocation

VARCHAR Shows a readable version of the animal's location. If on shelter, the internal location. If off shelter, the movementtype, accompanied by the person name.

MostRecentEntryDate

TIMESTAMP The most recent entry date - either DateBroughtIn or ActiveMovementDate

TimeOnShelter

VARCHAR Readable time spent on shelter (eg: 1 year, 3 months)

DaysOnShelter

INTEGER Number of days spent on shelter

DailyBoardingCost

INTEGER The cost of one days board on shelter for this animal

AnimalAge

VARCHAR Readable animal age (eg: 1 year, 3 months)

RecordVersion

INTEGER For optimistic locking, each save increments this lock value

CreatedBy

VARCHAR Name of user that created this record

CreatedDate

TIMESTAMP Date this record was created

LastChangedBy

VARCHAR Name of user that last changed this record

LastChangedDate

TIMESTAMP Date this record was last changed

29.3 animalcontrol

The animalcontrol table holds a row for every animal control incident on the system.

ID

INTEGER A unique, incrementing number that identifies this record

IncidentDateTime

TIMESTAMP The date and time of the incident

IncidentTypeID

INTEGER A link to the incidenttype table for the type of incident

CallDateTime

TIMESTAMP The date and time the incident was reported

CallNotes

VARCHAR The incident description

CallTaker

VARCHAR The username of the system user who took the call

CallerID

INTEGER A link to the owner table for the person who called to report the incident

VictimID

INTEGER A link to the owner table for the person who was the victim (if any)

DispatchAddress

VARCHAR The address the incident occurred at

DispatchTown

VARCHAR The incident town/city

DispatchCounty

VARCHAR The incident county/state

DispatchPostcode

VARCHAR The incident postcode/zipcode

DispatchLatLong

VARCHAR A geocode containing the latitude and longitude of the dispatch address

DispatchedACO

VARCHAR The username of the system user representing the ACO

PickupLocationID

INTEGER A link to the pickuplocation table

DispatchDateTime

TIMESTAMP The date and time the ACO was dispatched to the incident

RespondedDateTime

TIMESTAMP The date and time the ACO arrived at the incident

FollowupDateTime / FollowupDateTime2 / FollowupDateTime3

TIMESTAMP The date and time the ACO should return to the incident to follow up

FollowupComplete / FollowupComplete2 / FollowupComplete3

INTEGER 1 if the follow up has been done

CompletedDate

TIMESTAMP The date the incident was closed and completed

IncidentCompletedID

INTEGER A link to the incidentcompleted table

SiteID

INTEGER A link to the site table for multi-site setups

OwnerID / Owner2ID / Owner3ID

INTEGER A link to the owner table for the suspect

AnimalDescription

VARCHAR A description of the animal involved in the incident

SpeciesID

INTEGER A link to the species table for the animal involved in the incident

Sex

INTEGER A link to the lksex table for the animal involved in the incident

AgeGroup

VARCHAR The age group of the animal involved in the incident

29.4 dbfs

The dbfs table holds a row for each file stored in ASM's database. Name and Path can be concatenated to form a full path. Eg: path = /templates name = cage_card.html

ID

INTEGER A unique, incrementing number that identifies this record

Name

VARCHAR The name of the element

Path

VARCHAR The path to the element

URL

VARCHAR Either `file:[]filename` or `s3:[]filename` for binary data stored in the filesystem or remote object storage like Amazon S3, BackBlaze B2 or Cloudflare R2 etc. If the data is in the Content field, the URL will be contain the text base64:

Content

CLOB Base64 encoded content or null if the data is in a file storage (see URL)

29.5 media

The media table holds a row for each piece media attached to an animal, owner, etc.

ID

INTEGER A unique, incrementing number that identifies this record

MediaType

INTEGER 1 = File, 2 = Link

MediaName

VARCHAR The name of the file within the dbfs table - always `[media.ID].extension` unless `MediaType=2` in which case this will hold the link URL

MediaNotes

VARCHAR The notes accompanying the media file (can optionally be used as description when publishing)

DocPhoto

INTEGER 1 if this is the preferred photo of an animal for use with document templates

WebsitePhoto

INTEGER 1 if this is the preferred photo of an animal for use on the web

WebsiteVideo

INTEGER 1 if this is the preferred video link of the animal

DocPhoto

INTEGER 1 if this is the preferred photo of an animal for use with generated documents

ExcludeFromPublish

INTEGER 1 if this photo should be excluded from being used on websites or sent to third parties

SignatureHash

VARCHAR For media containing documents that have been signed, this field will contain a cryptographic hash of the document file data so that it can be checked for tampering

NewSinceLastPublish (deprecated)

INTEGER 1 if this media record was created after the last time a publish was done

UpdatedSinceLastPublish (deprecated)

INTEGER 1 if this media record was updated after the last time a publish was done

LastPublished (deprecated - see animalpublished table)

TIMESTAMP The date this record was last published to the web

LastPublishedPF (deprecated)

TIMESTAMP Date this record was last published to PetFinder.com

LastPublishedAP (deprecated)

TIMESTAMP Date this record was last published to AdoptAPet.com

LastPublishedP911 (deprecated)

TIMESTAMP Date this record was last published to Pets911.com

LastPublishedRG (deprecated)

TIMESTAMP Date this record was last published to RescueGroups PetAdoptionPortal.org

LinkID

INTEGER The ID of the record in the table this media is linked to

LinkTypeID

INTEGER Link to lksmedialink table to determine linked table

CreatedDate

TIMESTAMP The date this record was created

Date

TIMESTAMP Date this record was last updated

RetainUntil

TIMESTAMP The date to automatically delete this record (or NULL to never delete)

RecordVersion

INTEGER Optimistic lock flag

29.6 owner

The owner table holds a row for every person stored in ASM's database.

ID

INTEGER A unique, incrementing number that identifies this record

OwnerType

INTEGER 1 = Individual, 2 = Organization, 3 = Couple

OwnerCode

VARCHAR A unique code for this record, generated from first two letters of surname and padded ID

OwnerTitle / OwnerTitle2

VARCHAR The person's title, eg: Mr

OwnerInitials / OwnerInitials2

VARCHAR The person's initials

OwnerForeNames / OwnerForeNames2

VARCHAR The person's first name(s)

OwnerSurname / OwnerSurname2

VARCHAR The person's surname

OwnerName

VARCHAR Title, Forenames and Surname concatenated together for display

OwnerAddress

VARCHAR The address

OwnerTown

VARCHAR The town or city (depending on locale)

OwnerCounty

VARCHAR The county or state (depending on locale)

OwnerPostcode

VARCHAR

HomeTelephone

VARCHAR

WorkTelephone / WorkTelephone2

VARCHAR

MobileTelephone / MobileTelephone2

VARCHAR

EmailAddress / EmailAddress2

VARCHAR

DateOfBirth / DateOfBirth2

TIMESTAMP

IdentificationNumber / IdentificationNumber2

VARCHAR The government issued identification number (passport, driving license, etc)

Comments

VARCHAR

GDPRContactOptIn

VARCHAR didnotask,declined,email,post,sms,phone

ExcludeFromBulkEmail

INTEGER 1 if this person should not receive bulk emails

IDCheck

INTEGER 1 if the person has been homechecked

IsBanned

INTEGER 1 if this person has been banned from adopting animals

IsVolunteer

INTEGER 1 if this person is a shelter volunteer

IsHomeChecker

INTEGER 1 if this person homechecks people

IsMember

INTEGER 1 if this person is a shelter member

MembershipExpiryDate

TIMESTAMP The date this person's membership expires

MembershipNumber

VARCHAR The membership number

IsDonor

INTEGER 1 if this person is a regular donor

IsDriver

INTEGER 1 if this person is a driver for transport

IsShelter

INTEGER 1 if this person is another animal shelter

IsACO

INTEGER 1 if this person is an animal care officer

IsStaff

INTEGER 1 if this person is shelter staff (permissions exist to prevent users viewing staff records)

IsFosterer

INTEGER 1 if this person fosters animals

IsRetailer

INTEGER 1 if this person is a retailer for animals (eg: Pet shop)

IsVet

INTEGER 1 if this person is a vet

IsGiftAid

INTEGER (UK only) 1 if this person is eligible for gift aid on their donations

AdditionalFlags

VARCHAR Comma separated list of all person flags applying to this owner, includes additional person flags created under lookup data as well as the standard ones above.

HomeCheckAreas

VARCHAR If this person homechecks other people, the areas they are wiling to check

DateLastHomeChecked

TIMESTAMP The date this person was last homechecked

HomeCheckedBy

INTEGER ID of the person record who homechecked this person

MatchAdded

TIMESTAMP Date any looking for match was added to this person

MatchExpires

TIMESTAMP Date this looking for info expires

MatchActive

INTEGER 1 If we should consider this person's looking for info when building the looking for report

MatchSex

INTEGER

MatchSize

INTEGER

MatchAgeFrom

FLOAT

MatchAgeTo

FLOAT

MatchAnimalType
INTEGER

MatchSpecies
INTEGER

MatchBreed
INTEGER

MatchBreed2
INTEGER

MatchGoodWithCats
INTEGER

MatchGoodWithDogs
INTEGER

MatchGoodWithChildren
INTEGER

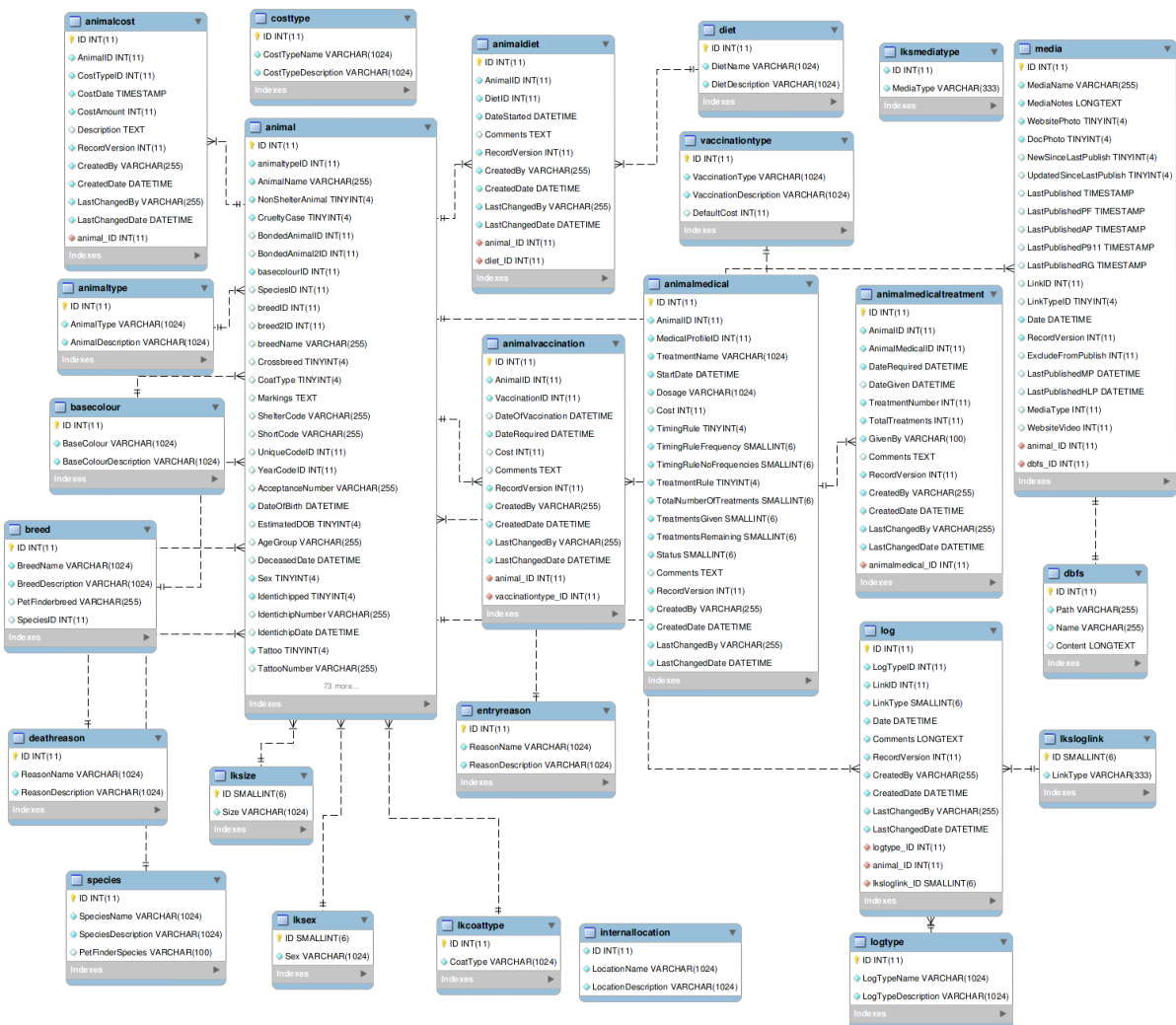
MatchHouseTrained
INTEGER

MatchCommentsContain
VARCHAR

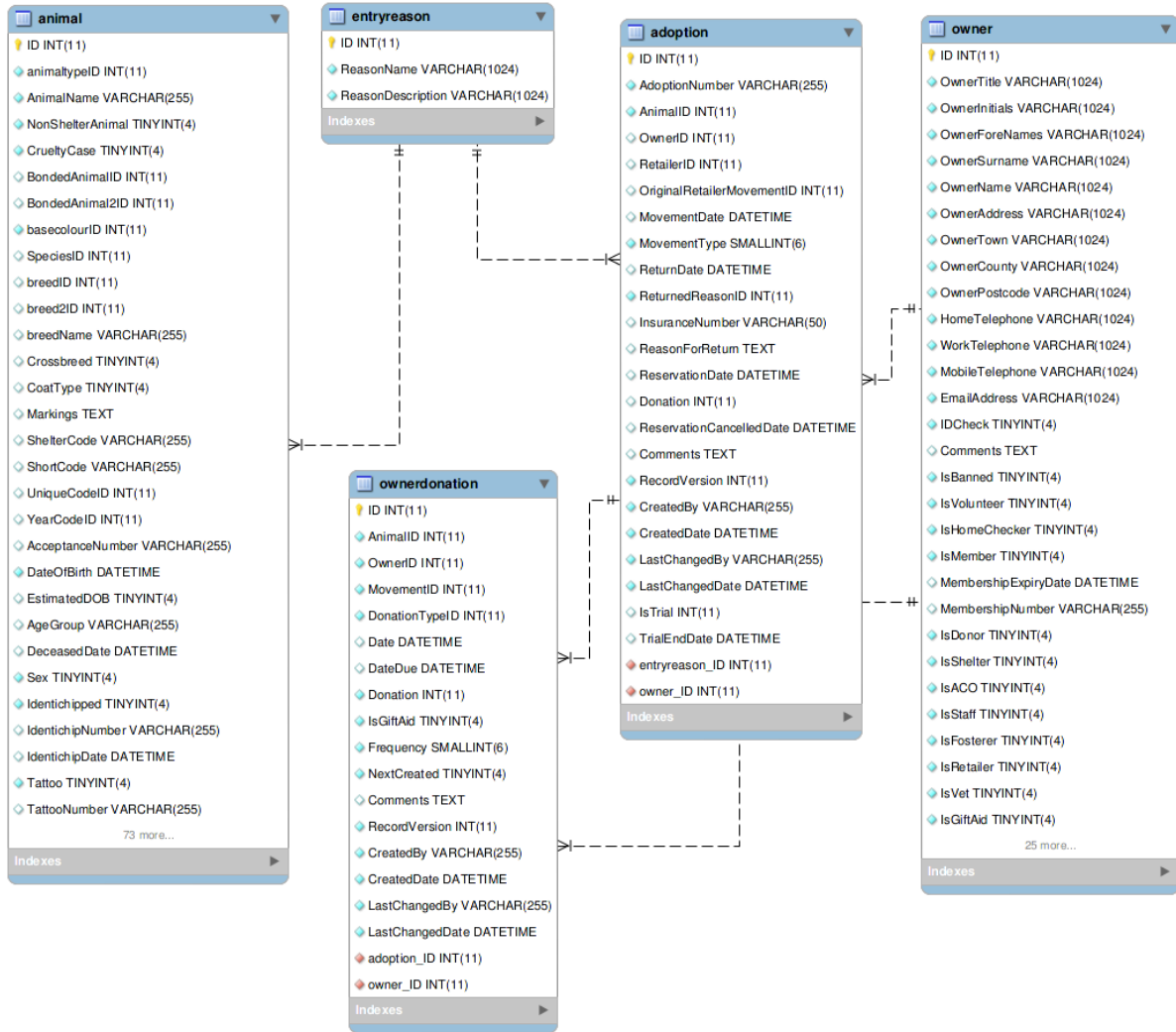
MatchFlags
VARCHAR

APPENDIX: ENTITY RELATIONSHIP DIAGRAMS

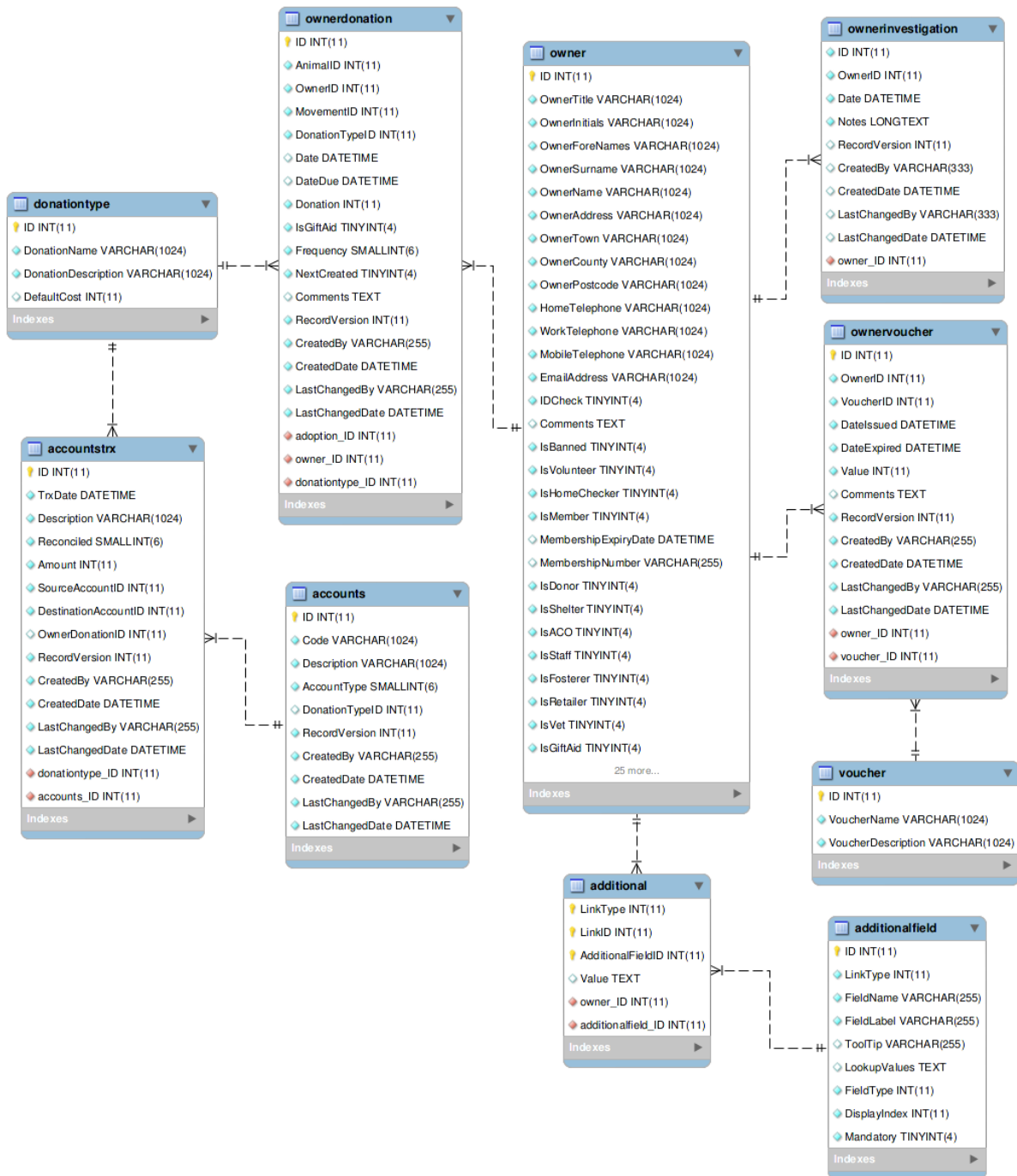
30.1 Animal with satellite tables, media and logs



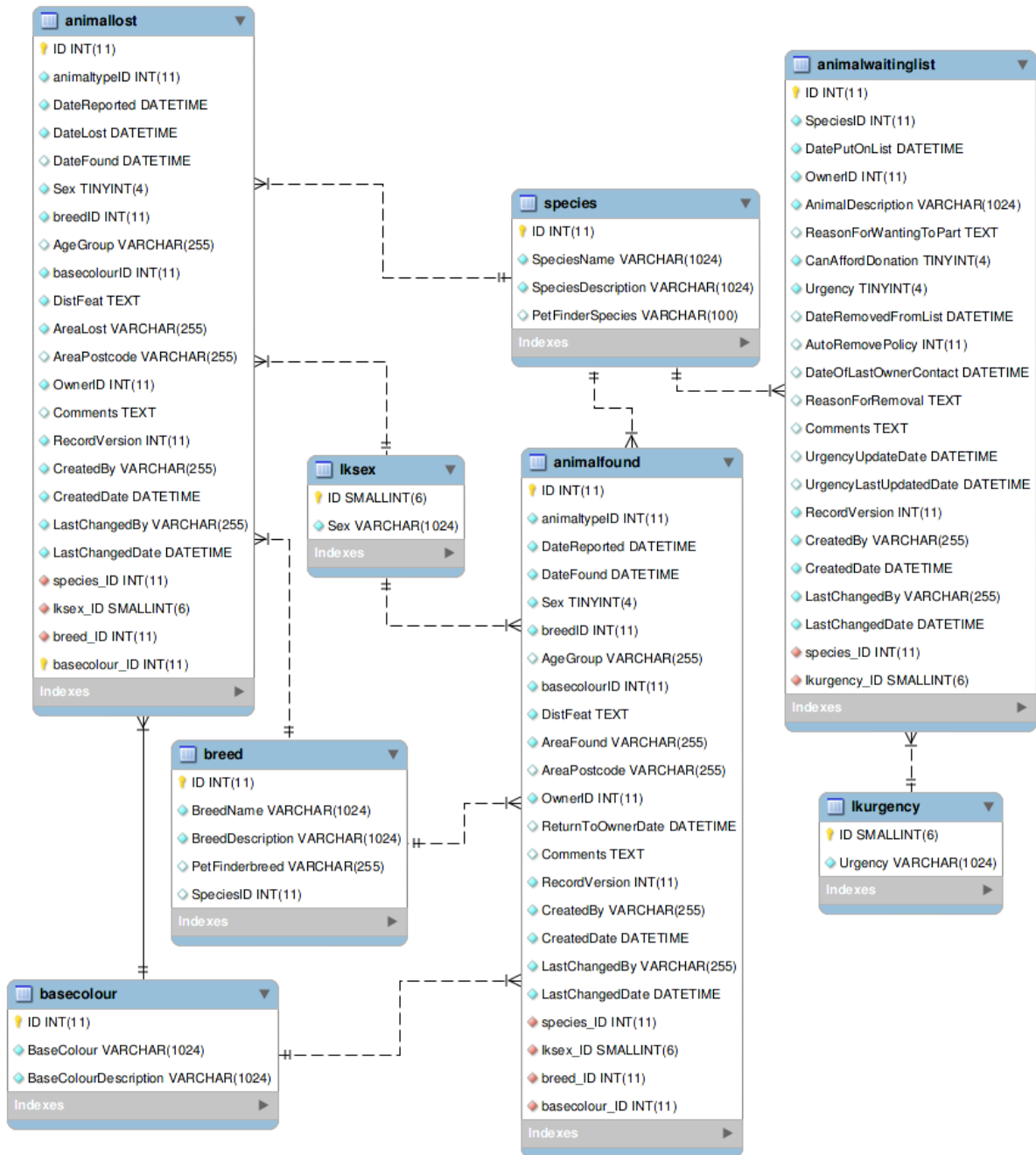
30.2 Adoption/Movement table with relationships



30.3 Person/payment/account relationships



30.4 Lost/found and waiting list



APPENDIX: INTEGRATING WITH YOUR WEBSITE

ASM offers a number of methods of integrating your adoptable animal data with your website.

31.1 Javascript Include

The `animal_view_adoptable_js` method of ASM's *Service API* can generate a list of adoptable animal thumbnails for embedding straight into a div container on a page of your website.

Clicking on the thumbnails will call the `animal_view` method of the Service API for the animal. You can edit the HTML of how that page looks and what information appears on it by editing the `animal_view` template under *Publishing* → *Edit HTML publishing templates*

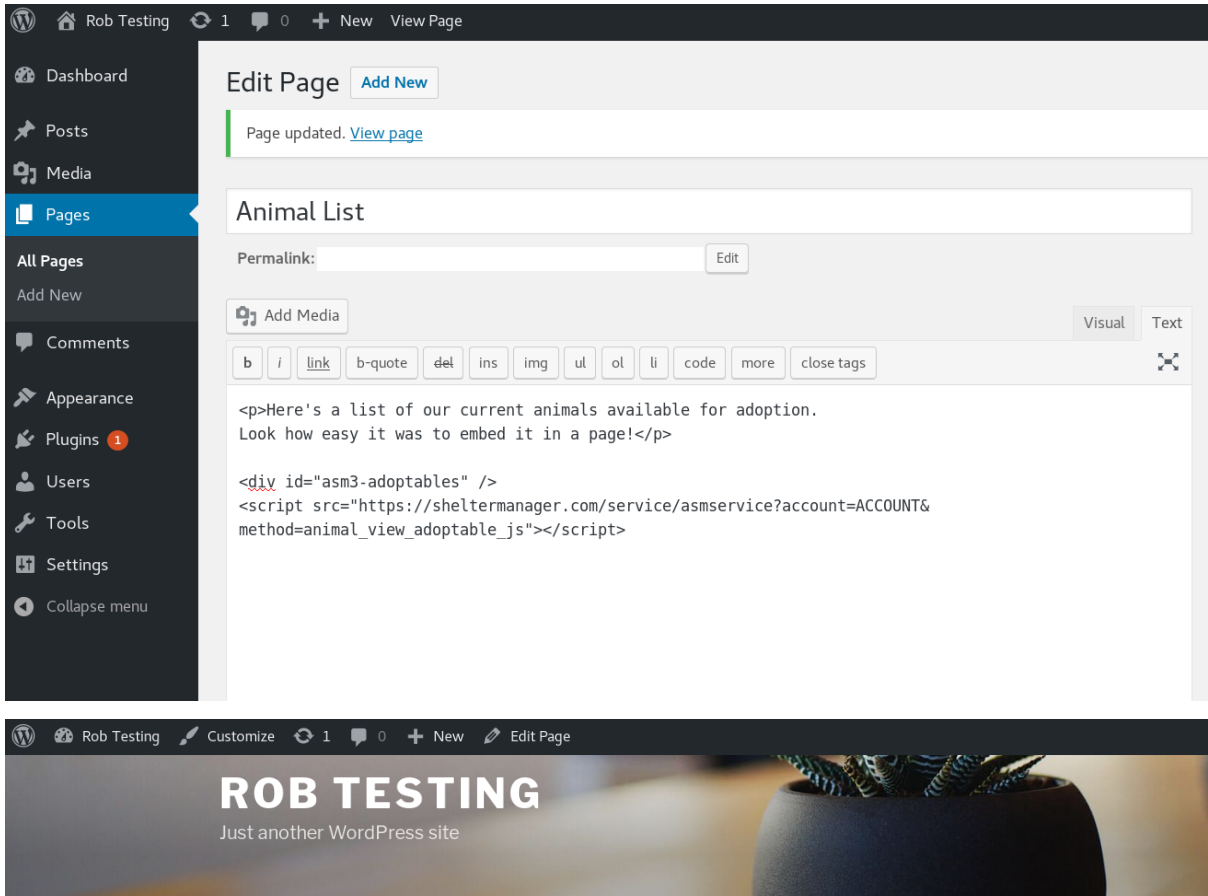
The code snippet required to embed the adoptable animal list in a page on your website looks like this:

```
<div id="asm3-adoptables" />
<script src="https://service.sheltermanager.com/asmService?method=animal_view_
↪adoptable_js&account=ACCOUNT"></script>
```

This example is for `sheltermanager.com`, substitute your own URL in the script src if you are hosting ASM yourself. Also, if you are using `sheltermanager.com`, change `ACCOUNT` in the src for your `sheltermanager.com` account.

31.1.1 Wordpress

To embed your adoptable animals in a Wordpress page, edit the page and add the javascript include snippet shown above where you'd like your adoptable animals to appear on the page:



ANIMAL LIST
Edit

Here's a list of our current animals available for adoption.
Look how easy it was to embed it in a page!



Foster Animal
Female British Shorthair Cat
9 years 1 month.



Snappy
Male Yorkshire Terrier Yorkie Dog
3 years 0 months.



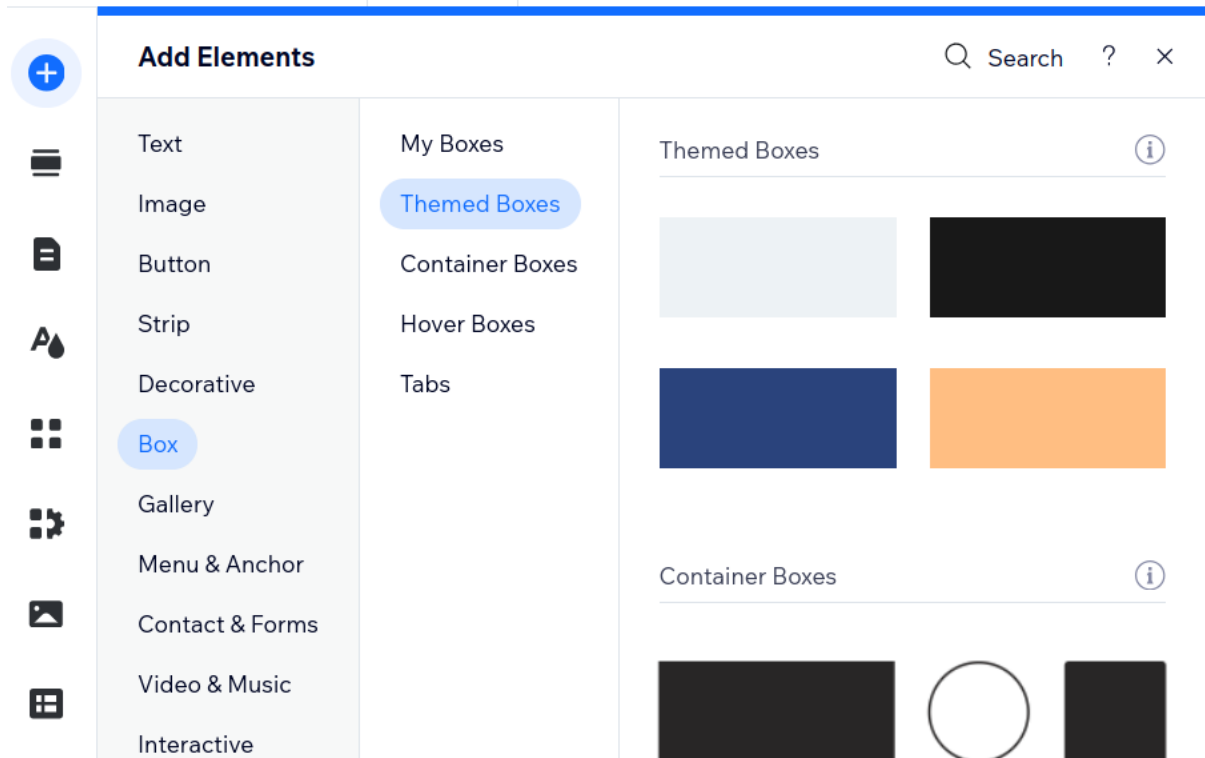
Gengis
Male German Shepherd Dog
10 years 0 months.



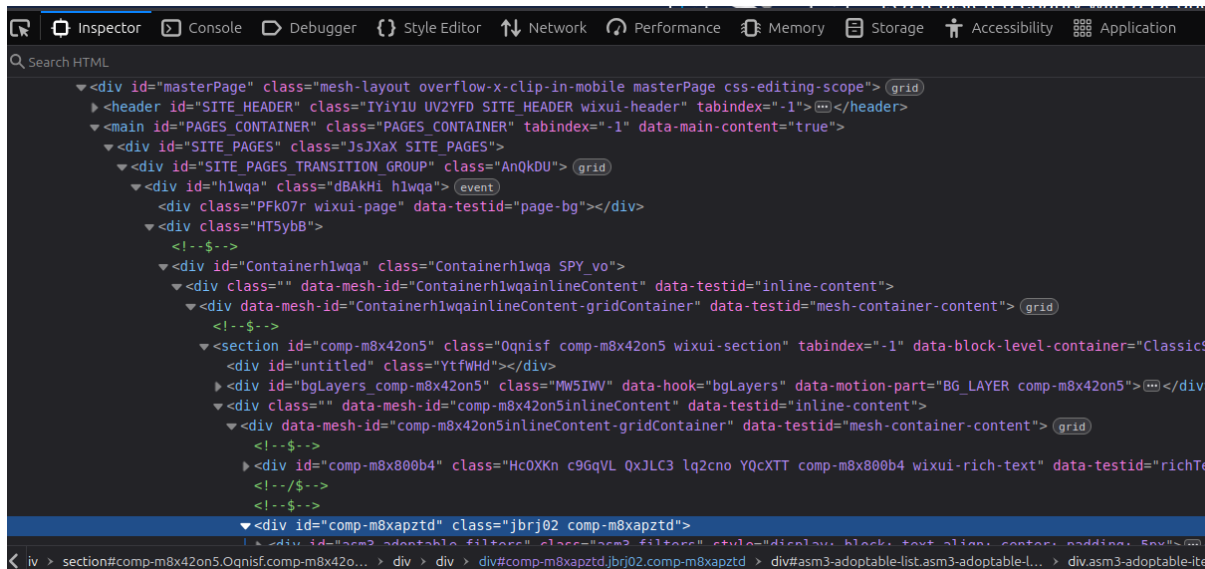
Константин Чаус
Female Affenpinscher Dog
4 years 2 months.

31.1.2 Wix

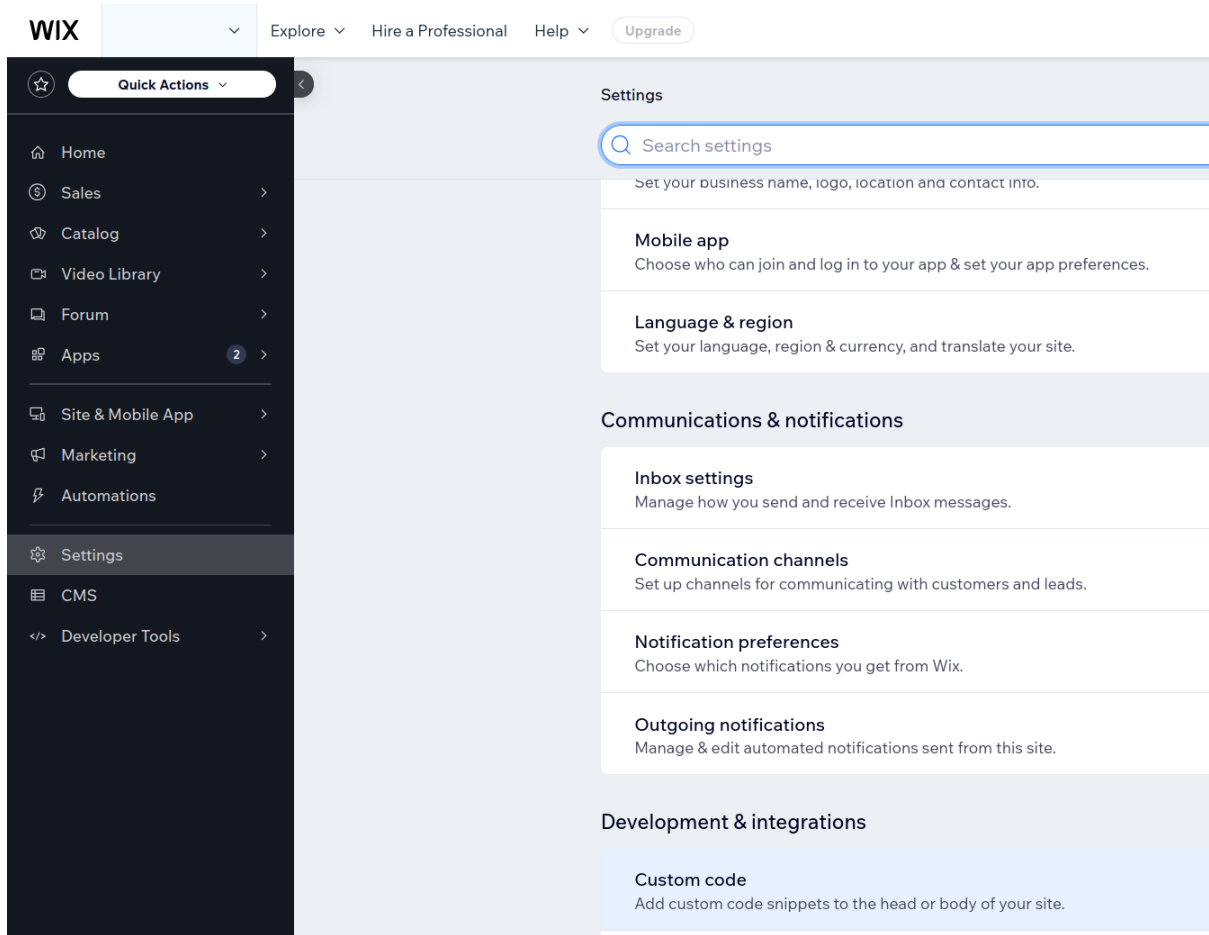
To embed your adoptable animals in a Wix page, add a content box within the page where you would like the animals to appear. Make the box as wide as it needs to be.



Next, publish your site so that the page is live. Visit the page and use the browser inspect tool on the content box to find its id attribute. In the example below, the id is “comp-m8xapztd”



Now, go to the main settings for your Wix site and pick “Custom Code” from the bottom of the list.

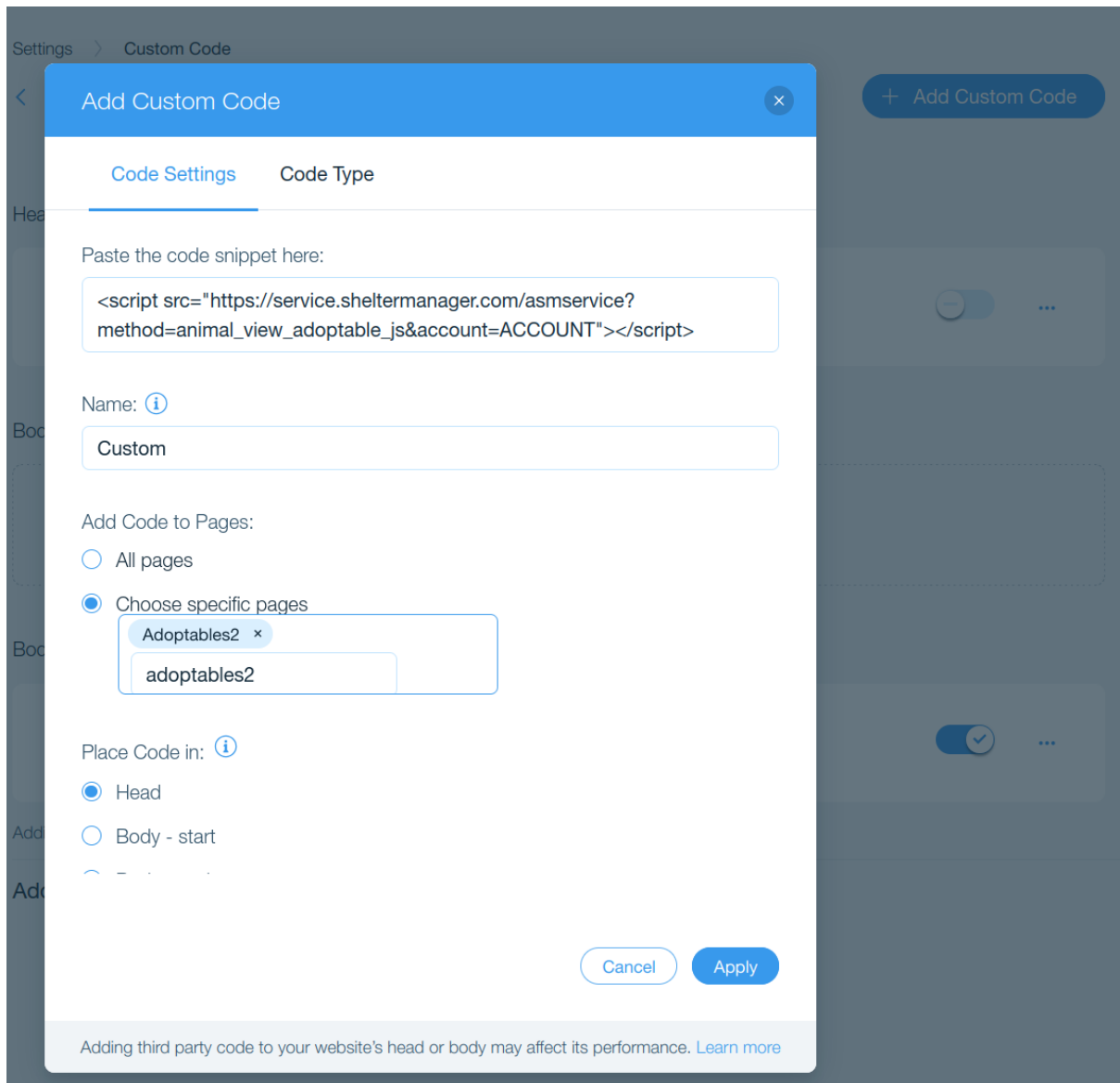


The screenshot shows the Wix Settings interface. On the left is a dark sidebar with navigation items: Home, Sales, Catalog, Video Library, Forum, Apps (with a '2' badge), Site & Mobile App, Marketing, Automations, Settings (highlighted), CMS, and Developer Tools. The main content area is titled 'Settings' and has a search bar. Below the search bar are sections for 'Mobile app', 'Language & region', 'Communications & notifications', and 'Development & integrations'. The 'Custom code' section is highlighted in light blue and contains the text: 'Add custom code snippets to the head or body of your site.'

Click the “Add Custom Code” button. Enter the code snippet below, changing ACCOUNT for your sheltermanager account number and filling in the id attribute of your container box:

```
<script>
asm3_adoptable_div_id = "comp-m8xapztd";
asm3_adoptable_delay = 2000;
</script>
<script src="https://service.sheltermanager.com/asmService?method=animal_view_
↪adoptable_js&account=ACCOUNT"></script>
```

Finally, choose the page you want to add the custom code to (this will be your adoptable animals page) and choose “Head” for the “Place code in” option.



Further options for `animal_view_adoptable.js` as documented in the *Service API* section of the manual can be specified in the custom code snippet if needed.

31.2 Dynamic HTML Page

ASM can generate dynamic pages of your adoptable animals on demand with the service API. The HTML templates are those used by the regular HTML publisher.

For example, to embed a dynamic page of adoptable animals in an iframe on your website for a sheltermanager.com account:

```
<iframe src="https://service.sheltermanager.com/asmservice?account=ACCOUNT&method=html_adoptable_animals" width="100%" height="600px"></iframe>
```

31.3 Static HTML Pages (Publisher)

ASM can generate a set of static pages from your data with its *HTML/FTP Publishing*. You can configure it under *Publishing* → *Set Publishing Options* → *HTML/FTP Publisher*.

The HTML/FTP publisher constructs the static pages using HTML templates, which you can create under *Publishing* → *Edit HTML publishing templates* and outputs the pages to a folder of your choice, sending them on to an FTP server of your choice.

Once the site has been created, you can either link directly to it, or embed it on your website with an `iframe` tag.

Warning: The HTML publisher is no longer available for sheltermanager.com users, use the dynamic HTML page service call outlined above instead.

31.4 Service API Data Calls

Finally, you can use ASM's Service API to retrieve the adoptable animal information and images programatically yourself and use that information to construct a site in any way you wish.

More information can be found in the section on the *Service API*

APPENDIX: ONLINE FORM IMPORT FIELDS

ASM will recognise fields with the following names when receiving incoming online form submissions. These can be used to create person, lost animal, found animal, incident and waiting list records as well as attach to existing animal records.

title / title2

The person's title, eg: Mr Person fields suffixed with 2 update the second person for couple records

initials / initials2

The person's initials

forenames / firstname / forenames2 / firstname2

The person's first name

surname / lastname / surname2 / lastname2

The person's last name

address

The person's address

town / city

The person's town or city

county / state

The person's county or state

postcode / zipcode

The person's postcode or zipcode

hometelephone

The person's home phone number

worktelephone / worktelephone2

The person's work phone number

mobiletelephone / celltelephone / mobiletelephone2 / celltelephone2

The person's mobile number

emailaddress / emailaddress2

The person's email address

dateofbirth / dateofbirth2

The person or animal's date of birth

dateofbirthanimal

The animal's date of birth

dateofbirthperson /dateofbirthperson2

The person's date of birth

idnumber / idnumber2

The person's ID number (passport, driving license, national ID card, etc)

excludefrombulkemail

If this field is supplied and not a blank or “No” in your language, the exclude from bulk email flag will be set for the created person

gdprcontactoptin

The person’s GDPR contact preference (Declined, Email, Post, SMS, Phone)

comments

The comments field for the animal (for historical reasons, comments populates the animal’s description field), person, lost, found or waiting list animal

commentsanimal / commentsperson

If you intend to use this form to populate both an animal or a person, set the comments for the animal or person (overrides comments field)

description

The description for the lost, found or waiting list animal

healthproblems

The health problems field for the animal

entryreason

The entry category for an animal. ASM will try and guess this from the entry reasons lookup values in the database.

entrytype

The entry type for an animal. ASM will try and guess this from the fixed list of entry types, Surrender, Stray, Transfer In, etc.

reason

The reason the person is putting their animal on the waiting list (or reason for entry notes if creating an animal)

type

The animal type for the animal. ASM will try and guess based on the text which one is meant. Use a lookup field to limit the choices to known items.

species

The species of the animal. ASM will try and guess based on the text which one is meant. Use a lookup field to limit the choices to known items (or use the Species field type)

breed1 / breed2

The breed of the animal. ASM will try and guess one of it’s lookup values (or use the Breed field type to limit to them). If this form has no species field and you are creating an animal from it, the form engine will use the species linked to breed1.

breed

For compatibility, breed can be used interchangeably with breed1

age

The age of the animal in years. Fractional years can be used, eg: 1.5

agegroup

The age group of the animal. Again, ASM will try and guess one if it’s internal values.

color / colour

The colour of the animal. ASM will try and guess a match (or use the Color field type to limit to them)

sex

The sex of the animal. ASM will look at the first letter of the value for an M or F

neutered

Whether the animal is neutered/spayed. Should be a checkbox or Yes/No field and should contain a value that translates to Yes or on.

weight

The weight of the animal in system units (lb or kg). Should not contain anything but numbers and optionally a decimal mark.

datelost

The date the animal was lost (lost animals only)

datefound

The date the animal was found (found animals only)

arealost

The area the animal was lost in (lost animals only)

areafound

The area the animal was found in (found animals only)

areapostcode / areazipcode

The postcode/zipcode area the animal was lost or found in

microchip

The animal's microchip number

animalname

The name of an existing shelter animal to attach this form to if specified (use the adoptable/shelter animal field types to get a valid animal name from your form)

reserveanimalname[x]

The name of a shelter/adoptable animal to reserve to the imported person record. This is useful when creating adoption application forms to automatically tie the person to the animal they are interested in adopting. Unlike the other keys, you can add a numeric suffix to have multiple animals reserved by the imported person (eg: reserveanimalname1, reserveanimalname2...)

callnotes

When creating an incident, the incident notes

dispatchaddress / dispatchcity / dispatchstate / dispatchzipcode

The dispatch address for an incident

APPENDIX: WORDKEYS

The following wordkeys are available in different areas of the system when generating documents from templates. Wordkeys should be placed in your templates, wrapped in double angle-brackets. Eg: <<AnimalName>>

33.1 Organisation Keys

These keys are available in all types of documents.

Organisation / Organization

The shelter's name

OrganisationAddress / OrganizationAddress

The shelter's address

OrganisationTown / OrganizationCity

The shelter's town / city

OrganisationCounty / OrganizationState

The shelter's county / province / state

OrganisationPostcode / OrganizationZipcode

The shelter's zip or postal code

OrganisationTelephone / OrganizationTelephone

The shelter's telephone number

OrganisationEmail / OrganizationEmail

The shelter's email address

Date

Today's date

Database

The name of the database (or account number if using sheltermanager.com)

Signature

A signature:placeholder image for inserting a signature later (default 150px wide)

Signature100 / Signature150 / Signature200 / Signature300

Controls the max width of the signature while retaining aspect ratio

Username

The current user generating the document

UserRealname

The real name of the user generating the document

UserEmailAddress

The email address of the user generating the document

UserSignature

An image tag containing the electronic signature of the user generating the document (default 150px wide)

UserSignature100 / UserSignature150 / UserSignature200 / UserSignature300

Controls the max width of the signature while retaining aspect ratio

UserSignatureSrc

Just the src attribute value so the signature can be applied to your own image tag (eg: to override size)

33.2 Animal Keys

Animal keys are available for documents generated from the animal details and movement screens.

DocumentImgLink

An tag containing a link to the animal's preferred document image. The image will be 200px high. You can also suffix a pixel height in increments of 100 upto 500px if you would like the image to be larger, eg: <<DocumentImgLink300>>, <<DocumentImgLink400>>, <<DocumentImgLink500>>

DocumentImgSrc

Just the src attribute value for an image link to the preferred document image.

DocumentImgThumbLink

An tag containing a link to a thumbnail of the animal's preferred document image.

DocumentImgThumbSrc

Just the src attribute value for a thumbnail link to the preferred document image.

DocumentQRLink

An tag containing a link to QR code that references a URL to the animal's record within ASM. Supports an optional pixel height suffix with the following values: 50, 100, 150, 200, eg: <<DocumentQR-Link100>>

DocumentQRShare

An tag containing a link to a QR code that references a URL to the "share a link to this animal" public page for the animal. Supports an optional pixel height suffix with the following values: 50, 100, 150, 200, eg: <<DocumentQRShare>>, <<DocumentQRShare200>>

ShelterCode

The animal's shelter code

ShortShelterCode

The shortened version of the shelter code

Age

The animal's age in readable form (eg: "6 weeks", "5 years")

AgeYM

The animal's age in years and months (eg: "5 years and 6 months")

Description / AnimalComments

The animal description box.

DescriptionAttr

The descriptionfield, but truncated to 100 characters with linebreaks suppressed and double quotes escaped to use in an HTML attribute

HealthProblems

The health problems field

LitterID / AcceptanceNumber

The litter reference / acceptance number

AddressOfPersonBroughtAnimalIn

The full address of the person who brought the animal in

AnimalName

The animal's name

AnimalTypeName

The animal's type

BaseColourName (BaseColorName for US users)

The animal's colour

BreedName

The animal's breed. If the "Use single breed field" option is not set and the animal is a crossbreed, ASM will output the this field as "Breed 1 / Breed 2" to indicate that the animal is a cross of two breeds.

InternalLocation / LocationName

The animal's location within the shelter

LocationDescription

The description field from the animal's internal location

LocationUnit

The location unit (eg, pen or cage number)

LocationSite

The site the location is at

DisplayLocation

Either the internal location if the animal is on shelter, a movement type/person for animals leaving the shelter or a deceased reason if the animal is no longer alive

UnitSponsor (only available in HTML website templates)

Returns the name of the sponsor of the unit the animal is currently in

CoatType

The animal's coat type

AnimalFlags

A list of the flags assigned to an animal, separated by commas.

AnimalFlagsEmblems

Like AnimalFlags, but if you have assigned a custom emblem to a flag, outputs that emblem before the flag name

AnimalFlagsEmblemsX

Like AnimalFlagsEmblems but excludes flags with no emblem

AnimalFlagsEmblemsOnly

Like AnimalFlagsEmblems, but only outputs the emblem and not the flag name

AnimalFlagsEmblemsOnlyX

Like AnimalFlagsEmblemsOnly but only excludes flags with no emblem

AnimalCreatedBy

The user who created the animal record (AnimalCreatedByName for full user name)

AnimalCreatedDate

The date the animal record was created

DateBroughtIn

The date the animal was first brought to the shelter

TimeBroughtIn

The time of day the animal was first brought to the shelter

MonthBroughtIn

The month the animal was first brought to the shelter

DateOfBirth

The animal's date of birth

EstimatedDOB

The word (estimated) if the estimated date of birth flag is ticked on the animal, or a blank string if not.

AgeGroup

The animal's age group (the defaults are Baby, Adult, Young Adult and Senior). These can be configured under the Settings->Options screen.

DisplayAge

If the EstimatedDOB flag is set, outputs the age group, if not, outputs a string representation of the animal's age.

DisplayDOB

If the EstimatedDOB flag is set, outputs the age group, if not, outputs the animal's date of birth.

HoldUntilDate

If the animal is held, the date it will be held until

DeceasedDate

The date the animal died (if applicable)

DeceasedNotes

The comments on the animal's death

DeceasedCategory

The deceased category for the animal

Declawed

"Yes" if the animal has been declawed

AnimalID

The animal's internal ID number

BondedAnimal1Name

The name of the first animal this animal is bonded to

BondedAnimal1Code

The code of the first animal this animal is bonded to

BondedAnimal2Name

The name of the second animal this animal is bonded to

BondedAnimal2Code

The code of the second animal this animal is bonded to

BondedAnimal1Microchip

The microchip number of the first animal this animal is bonded to

BondedAnimal2Microchip

The microchip number of the second animal this animal is bonded to

BondedNames

returns the name with bonds eg: AnimalName / BondedAnimal1Name / BondedAnimal2Name

BondedCodes

returns the codes with bonds eg: ShelterCode / BondedAnimal1Code / BondedAnimal2Code

BondedMicrochips

returns all microchip numbers eg: MicrochipNumber / BondedAnimal1Microchip / BondedAnimal2Microchip

Fee

The animal's adoption fee if you are using per-animal adoption fees

LicenceNumber / LicenseNumber

The latest licence number on file for this animal from the licence tab

Microchipped

"Yes" if the animal has been microchipped

MicrochipNumber

The animal's microchip number

MicrochipNumber2

The animal's second microchip number if it has one

MicrochipDate

The date the animal was microchipped

MicrochipDate2

The date the animal received a second microchip

MicrochipManufacturer

The manufacturer of the microchip

MicrochipManufacturer2

The manufacturer of the second microchip

Tattoo

"Yes" if the animal has an identifying tattoo

TattooNumber

The tattoo number

TattooDate

The date the tattoo was applied

CombiTested (FIVLTested for US users)

"Yes" if the animal has been combi-tested (or FIV/L testing for the US)

CombiTestDate (FIVLTestDate for US users)

The date of the test

CombiTestResult (FIVResult for US users)

The test result - Positive or Negative.

FLVResult

The result of the FLV test - Positive or Negative

HeartwormTested

"Yes" if the animal has been heartworm tested.

HeartwormTestDate

The date of the test

HeartwormTestResult

The result - positive or negative

HiddenComments / HiddenAnimalDetails

The hidden comments box

AnimalLastChangedBy

The user who last changed the animal record (AnimalLastChangedByName for full user name)

AnimalLastChangedDate

The date record was last changed

Markings

The markings box

Warning

The warning box

NameOfOwnersVet

The owner's vet box

HasSpecialNeeds

"Yes" if the animal has the box ticked for special needs on the vet tab

Neutered

"Yes" if the animal has been neutered/spayed (usually called "altered" or "fixed" in the US)

NeuteredDate

The date the animal was neutered

PickupAddress

The pickup address

PickupLocationName

The pickup location set on the animal

AnimalJurisdiction

The animal's jurisdiction

CoordinatorName

The name of the adoption coordinator

CoordinatorFirstname / CoordinatorForeNames

The first name(s) of the adoption coordinator

CoordinatorLastname / CoordinatorSurname

The last name of the adoption coordinator

CoordinatorHomePhone

The home phone number of the adoption coordinator

CoordinatorWorkPhone

The work phone number of the adoption coordinator

CoordinatorMobilePhone / CoordinatorCellPhone

The mobile phone number of the adoption coordinator

CoordinatorEmail

The email address of the adoption coordinator

BroughtInByAddress

The address of the person who brought the animal in

BroughtInByName

The name of the person who brought the animal in

BroughtInByTown

(BroughtInByCity for US users)

BroughtInByCounty

(BroughtInByState for US users)

BroughtInByPostcode

(BroughtInByZipcode for US users)

BroughtInByHomePhone

The home phone number of the person who brought the animal in

BroughtInByWorkPhone

The work phone number of the person who brought the animal in

BroughtInByMobilePhone

(BroughtInByCellPhone for US users)

BroughtInByEmail

The email address of the person who brought the animal in

BroughtInByJurisdiction

The jurisdiction of the person who brought the animal in

BroughtInByIDNumber

The identification number (driving licence, passport, etc) of the person who brought the animal in

BroughtInBy Additional Fields

Additional fields on the brought in by person can be accessed via BroughtInByFIELDNAME

OriginalOwnerAddress

The address of the animal's original owner

OriginalOwnerName

The name of the animal's original owner

OriginalOwnerTown (OriginalOwnerCity for US users)

The town of the animal's original owner

OriginalOwnerCounty (OriginalOwnerState for US users)

The county of the animal's original owner

OriginalOwnerPostcode (OriginalOwnerZipcode for US users)

The original owner's post/zipcode

OriginalOwnerHomePhone

The original owner's home phone number

OriginalOwnerWorkPhone

The original owner's work phone number

OriginalOwnerMobilePhone

The original owner's mobile phone number

OriginalOwnerEmail

The original owner's email address

OriginalOwnerIDNumber

The original owner's identification number (driving licence, passport, etc)

OriginalOwnerJurisdiction

The jurisdiction of the original owner

OriginalOwner Additional Fields

Additional fields on the original owner can be accessed via OriginalOwnerFIELDNAME

CurrentOwnerName

The name of the animal's current owner (fosterer or adopter)

CurrentOwnerTitle

The title of the current owner

CurrentOwnerFirstname / CurrentOwnerForenames

The first name(s) of the current owner

CurrentOwnerLastname / CurrentOwnerSurname

The last name of the current owner

CurrentOwnerAddress

Current owner's address

CurrentOwnerTown

(CurrentOwnerCity for US users)

CurrentOwnerCounty

(CurrentOwnerState for US users)

CurrentOwnerPostcode

(CurrentOwnerZipcode for US users)

CurrentOwnerHomePhone

Current owner's home phone number

CurrentOwnerWorkPhone

Current owner's work phone number

CurrentOwnerMobilePhone

Current owner's cell/mobile phone number

CurrentOwnerEmail

Current owner's email address

CurrentOwnerIDNumber

The current owner's identification number (driving licence, passport, etc)

CurrentOwnerJurisdiction

The jurisdiction of the current owner

CurrentOwner Additional Fields

Additional fields on the current owner can be accessed via CurrentOwnerFIELDNAME

ReservedOwnerName

The name of the person with an active reserve on the animal

ReservedOwnerTitle

The title of the reserving person

ReservedOwnerFirstname / ReservedOwnerForenames

The first name of the reserving person

ReservedOwnerLastname / ReservedOwnerSurname

The last name of the reserving person

ReservedOwnerAddress

Reserved owner's address

ReservedOwnerTown

(ReservedOwnerCity for US users)

ReservedOwnerCounty

(ReservedOwnerState for US users)

ReservedOwnerPostcode

(ReservedOwnerZipcode for US users)

ReservedOwnerHomePhone

Reserved owner's home phone number

ReservedOwnerWorkPhone

Reserved owner's work phone number

ReservedOwnerMobilePhone

Reserved owner's cell/mobile phone number

ReservedOwnerEmail

Reserved owner's email address

ReservedOwnerIDNumber

The reserving owner's identification number (driving licence, passport, etc)

ReservedOwnerJurisdiction

The jurisdiction of the reserving owner

ReservationStatus

The active reservation/application status

CurrentVetName

The name of the animal's current vet

CurrentVetAddress

The address of the animal's current vet

CurrentVetTown

(CurrentVetCity for US users)

CurrentVetCounty

(CurrentVetState for US users)

CurrentVetPostcode

The postal code of the animal's current vet

CurrentVetPhone

A phone number for the animal's current vet

CurrentVetEmail

The email address of the animal's current vet

CurrentVetLicence / CurrentVetLicense

The veterinary licence number

CurrentVet Additional Fields

Additional fields on the current vet person can be accessed via CurrentVetFIELDNAME

NeuteringVetName

The name of the vet that neutered/spayed the animal

NeuteringVetAddress

The address of the vet that neutered/spayed the animal

NeuteringVetTown

(NeuteringVetCity for US users)

NeuteringVetCounty

(NeuteringVetState for US users)

NeuteringVetPostcode

The postal code of the the vet that neutered/spayed the animal

NeuteringVetPhone

A phone number for the vet that neutered/spayed the animal

NeuteringVetEmail

The email address of the vet that neutered/spayed the animal

NeuteringVetLicence / NeuteringVetLicense

The veterinary licence number

OwnersVetName

The owner's vet

OwnersVetAddress

The address of the owner's vet

OwnersVetTown

(OwnersVetCity for US users)

OwnersVetCounty

(OwnersVetState for US users)

OwnersVetPostcode

The postal code of the owner's vet

OwnersVetPhone

A phone number for the owner's vet

OwnersVetEmail

The email address of the owner's vet

OwnersVetLicence / OwnersVetLicense

The veterinary licence number

RabiesTag

The animal's rabies tag

GoodWithCats

"Yes/No/Unknown/Selective"

GoodWithDogs

“Yes/No/Unknown/Selective”

GoodWithChildren

“Yes/No/Unknown/Selective”

GoodWithElderly

“Yes/No/Unknown/Selective”

GoodOnLead

“Yes/No/Unknown/Selective”

GoodTraveller

“Yes/No/Unknown/Selective”

HouseTrained

“Yes/No/Unknown/Selective”

CrateTrained

“Yes/No/Unknown/Selective”

EnergyLevel

“1-Very low/2-Low/3-Medium/4-High/5-Very high”

DisplayCatsIfGoodWith

Outputs “Cats” if this animal is good with cats

DisplayDogsIfGoodWith

Outputs “Dogs” if this animal is good with dogs

DisplayChildrenIfGoodWith

Outputs “Children” if this animal is good with children

DisplayCatsIfBadWith

Outputs “Cats” if this animal is bad with cats

DisplayDogsIfBadWith

Outputs “Dogs” if this animal is bad with dogs

DisplayChildrenIfBadWith

Outputs “Children” if this animal is bad with children

DisplayXIfCat / DisplayXIfDog / DisplayXIfRabbit / DisplayXIfMale / DisplayXIfFemale

Outputs an X if this animal is a cat, dog, rabbit, male or female (used for form boxes)

DisplayXIfPedigree / DisplayXIfCrossbreed

Outputs an X if this animal is a pure or crossbreed

DisplayXIfNeutered / DisplayXIfFixedMale / DisplayXIfFixedFemale

Outputs an X if this animal is neutered/spayed

DisplayXIfNotNeutered / DisplayXIfEntireMale / DisplayXIfEntireFemale

Outputs an X if this animal is not neutered/spayed

EntryCategory

The entry category of the animal

ReasonForEntry

The reason the animal was brought to the shelter

ReasonNotBroughtByOwner

The reason (if any) that the animal was not brought in by the owner

Sex

The animal’s sex

Size

The animal’s size

Weight

The animal's weight

DisplayWeight

The animal's weight, shown as either kg or lb/oz according to system display options

SpeciesName

The animal's species

MostRecentEntry / MostRecentEntryDate

The date the animal most recently entered the shelter (if it was returned from an adoption or fostering for example)

MostRecentMonthEntry

The month the animal most recently entered the shelter

MostRecentEntryCategory

The entry category or return category depending on which happened most recently

TimeOnShelter

A readable string showing the time the animal has spent on the shelter (from the last time it entered), eg: 4 weeks.

DaysOnShelter

The number of days the animal has spent on the shelter

NoTimesReturned

The number of times the animal has been returned to the shelter

AdoptionStatus

A readable string of the animal's status, eg: Hold, Reserved, Quarantine, Adoptable

HasValidMedia

"Yes" if the animal has a photo flagged for website generation

WebMediaFilename WebMediaNotes

The notes to accompany the picture

WebMediaNew

"Yes" if the animal has not been published via the web publishing tool

WebMediaUpdated

"Yes" if the notes on the media for the animal have been edited since the animal was last published via the web publishing tool

WebsiteVideoURL

The web address of the default video link for this animal

WebsiteVideoNotes

The notes accompanying the video link

AnimalAtRetailer

"Yes" if the animal is currently located at a retailer

AnimalIsAdoptable

"Yes" if the animal is available for adoption

DateAvailableForAdoption

The date animal was first made available for adoption in its current stay in care.

AnimalOnFoster

"Yes" if the animal is in a foster home

AnimalOnShelter

"Yes" if the animal is on the shelter

AnimalPermanentFoster

"Yes" if the animal is a permanent foster

AnimalIsReserved

“Yes” if the animal has been reserved

AnimalIsVaccinated

“Yes” if the animal has at least one vaccination given and no vaccinations due before today that have not been given

OutcomeDate

If the animal has left the care of the shelter, the date it left

OutcomeType

How the animal left the shelter (can be a movement type or deceased reason if the animal died)

33.3 Qualifiers

For situations where a record can be linked to many records, such as an animal with many vaccination or medical records, or a person with many payments, then you must qualify the tokens with a suffix to indicate which of those records you want to access.

33.3.1 n (index)

Suffix a token with a number to get the nth record when counting from oldest to newest. Eg:

```
<<VaccinationName1>> - name of oldest vaccination
<<TestGiven3>> - given date of 3rd test
```

33.3.2 Last(n)

Suffix a token with Last[number] to get the nth record counting from newest to oldest. Eg:

```
<<VaccinationGivenLast1>> - date given of newest vaccination
<<MedicalDateStartedLast2>> - start date of second newest medical regimen
```

33.3.3 (name)

Suffix a token with the name of a type to get the oldest given record with that type. Eg:

```
<<VaccinationGivenRabies>> - first date given of type "Rabies"
<<DietDateStartedStandard>> - date first diet on file was started of type "Standard"
```

33.3.4 Recent(name)

Suffix a token with Recent and the name of the type to get the most recently given record of that type. Eg:

```
<<VaccinationGivenRecentRabies>> - date of most recently given vaccination of type
↪ "Rabies"
<<LogCommentsRecentWeight>> - log message of the most recently recorded log of type
↪ "Weight"
```

Note: When constructing names, the tokens will suppress any spaces, so “Rabies 3 Yr” would become “Rabies3Yr”

33.3.5 Due(name)

Suffix a token with Due and the name of the type to get the newest ungiven record of that type. Eg:

```
<<VaccinationRequiredDueRabies>> - required date for the newest ungiven vaccination.
↳of type "Rabies"
<<PaymentAmountDueRegular>> - amount for the newest unreceived payment of type
↳"Regular"
```

Note that the “Due” keyword will not work for medical, vaccination or tests if you have turned off the option to include incomplete medical items from documents under *Settings* → *Options* → *Documents* → *Include incomplete medical records when generating document templates*

33.4 Vaccination Keys

You must use a qualifier suffix to access these records.

VaccinationName

The name of the vaccination (eg: Booster)

VaccinationRequired

The date the vaccination is required

VaccinationGiven

The date the vaccination was given

VaccinationExpires

The date the vaccination expires if known

VaccinationBatch

The batch number from the vaccination administered

VaccinationManufacturer

The manufacturer of the vaccine

VaccinationRabiesTag

The rabies tag number accompanying this vaccine

VaccinationCost

The cost of this vaccine

VaccinationComments

The vaccination comments

VaccinationDescription

The vaccination description from the lookup data.

VaccinationAdministeringVetName

The name of the vet who administered the vaccination

VaccinationAdministeringVetLicence / VaccinationAdministeringVetLicense

The licence number of the vet who administered the vaccination

VaccinationAdministeringVetAddress

The address of the vet who administered the vaccination

VaccinationAdministeringVetTown / VaccinationAdministeringVetCity

The town/city of the vet who administered the vaccination

VaccinationAdministeringVetCounty / VaccinationAdministeringVetState

The county/state of the vet who administered the vaccination

VaccinationAdministeringVetPostcode / VaccinationAdministeringVetZipcode

The postal/zip code of the vet who administered the vaccination

VaccinationAdministeringVetEmail

The email address of the vet who administered the vaccination

33.5 Test Keys

You must use a qualifier suffix to access these records.

TestName

The name of the test (eg: FIV)

TestResult

The test result (eg: Positive)

TestRequired

The date the test is required

TestGiven

The date the test was performed

TestCost

The cost of the test

TestComments

The test comments

TestDescription

The test description from the lookup data.

TestAdministeringVetName

The name of the vet who administered the test

TestAdministeringVetLicence / TestAdministeringVetLicense

The licence number of the vet who administered the test

TestAdministeringVetAddress

The address of the vet who administered the test

TestAdministeringVetTown / TestAdministeringVetCity

The town/city of the vet who administered the test

TestAdministeringVetCounty / TestAdministeringVetState

The county/state of the vet who administered the test

TestAdministeringVetPostcode / TestAdministeringVetZipcode

The postal/zip code of the vet who administered the test

TestAdministeringVetEmail

The email address of the vet who administered the test

33.6 Medical Keys

If you are creating a document from the animal record, then you must use a qualifier suffix to access these records.

Note: For medical regimens, the Recent keyword only looks for those with a status of Completed, while the Due keyword only looks for those with a status of Active.

However, if you create a document from the medical tab of an animal record (or medical book), you can select multiple medical regimens before creating the document and access the information by suffixing a number to the end of the keys listed below (eg: MedicalName1, MedicalStartDate2).

Optionally, you can omit the numeric suffix to access the first selected medical regimen.

MedicalName

The name of the medical treatment

MedicalFrequency

How often the treatment is given (eg: Monthly)

MedicalNumberOfTreatments

The total number of treatments

MedicalStatus

The treatment status (eg: Active)

MedicalDosage

The treatment dosage

MedicalStartDate

The date treatment started

MedicalTreatmentsGiven

How many treatments the animal has had

MedicalTreatmentsRemaining

How many treatments are remaining

MedicalNextTreatmentDue

The date of the next due treatment in the regimen

MedicalLastTreatmentGiven

The date the last treatment was given in the regimen

MedicalLastTreatmentComments

The comments attached to the last treatment given

MedicalCost

The cost of this medical regimen

MedicalComments

The medical comments

33.7 Boarding keys

Boarding keys are available for use with documents generated from within the boarding tab in animal records.

BoardingFromDate

The date the boarding period started

BoardingToDate

The date the boarding period ends

BoardingDays

The number of days in the boarding period

BoardingDailyFee

The amount of the daily boarding fee

TotalBoardingFee

The total cost of the boarding period

33.8 Payment Keys

If you are creating a document from the animal or person records, then you must use a qualifier suffix to access these records. The Recent keyword looks for payments that have been received and Due for non-received payments.

However, if you create an invoice/receipt document from the payment tab of a person or animal record (or the payment book), you can select multiple payments before creating the document and access the information by suffixing a number to the end of the keys listed below (eg: PaymentType1, PaymentComments2)

The fields are:

ReceiptNum

If you issue receipts for donations, the receipt number

CheckNum / ChequeNum

The cheque number for the payment

PaymentType

The payment type

PaymentMethod

The payment method

PaymentDate

The date the payment was received

PaymentDateDue

If this is a recurring payment, the date it is due

PaymentGross

The total gross amount of the payment, including any fees and taxes

PaymentFee

Any transaction fees incurred on the payment

PaymentAmount / PaymentNet

The net amount of the payment, excludes any fees and taxes

PaymentQuantity

(if quantities are enabled) The number of items the payment covers

PaymentUnitPrice

(if quantities are enabled) The price per item

PaymentGiftAid

Yes or No if this payment is eligible for UK giftaid

PaymentTax / PaymentVAT

Yes or No if this payment was taxable for sales tax/VAT/GST

PaymentTaxRate / PaymentVATRate

The taxable rate applied

PaymentTaxAmount / PaymentVATAmount

The taxable amount charged

PaymentComments

Any comments on the payment

The following fields are only available to payments generated via invoice/receipt document:

PaymentAnimalName

The name of the animal the payment is linked to

PaymentAnimalShelterCode

The full shelter code of the animal the payment is linked to

PaymentAnimalShortCode

The short shelter code of the animal the payment is linked to

PaymentPersonName

The name of the person the payment is linked to

PaymentPersonAddress

The address of the person the payment is linked to

PaymentPersonCity / PaymentPersonTown

The city of the person the payment is linked to

PaymentPersonState / PaymentPersonCounty

The state of the person the payment is linked to

PaymentPersonZipcode / PaymentPersonPostcode

The zipcode of the person the payment is linked to

PaymentTotalDue

The gross total of all selected payments that have a due date and no received date

PaymentTotalNet / PaymentTotalReceived

The net total of all selected payments that have a received date

PaymentTotalTaxRate / PaymentTotalVATRate

The highest rate of tax applied by any of the selected payments

PaymentTotalTax / PaymentTotalVAT

The total of all sales tax/VAT/GST on the selected payments

PaymentTotal / PaymentTotalGross

The gross total of all received payments

33.9 Transport Keys

If you are creating a document from the animal or person records, then the same rules apply as for vaccinations and medical records when accessing transports. The Recent keyword looks for transports with the most recent drop off date/time and the Due keyword uses the pickup date/time.

However, if you create a document from the transport tab of an animal record (or the transport book), you can select multiple transports before creating the document and access the information by suffixing a number to the end of the keys listed below (eg: TransportType1, TransportComments2)

The fields are:

TransportID

A unique ID number representing the transport

TransportType

The type of transport

TransportDriverName

The transport driver if known

TransportPickupDateTime / TransportPickupDate / TransportPickupTime

The date and time of the pickup

TransportPickupName

The person the transport is picking up from if known

TransportPickupAddress

The pickup address

TransportPickupCity / TransportPickupTown

The pickup city / town

TransportState / TransportCounty

The pickup state / county

TransportPickupZipcode / TransportPickupPostcode

The pickup zipcode/postcode

TransportPickupCountry

The pickup country

TransportPickupEmail

The email address of the pickup contact

TransportPickupHomePhone

The home phone number of the pickup contact

TransportPickupWorkPhone

The work phone number of the pickup contact

TransportPickupCellPhone / TransportPickupMobilePhone

The mobile phone number of the pickup contact

TransportDropoffName

The person the transport is taking the animal to if known

TransportDropoffDateTime / TransportDropoffDate / TransportDropoffTime

The date and time of the dropoff

TransportDropoffAddress

The dropoff address

TransportDropoffCity / TransportDropoffTown

The dropoff city / town

TransportDropoffState / TransportDropoffCounty

The dropoff state / county

TransportDropoffZipcode / TransportDropoffPostcode

The dropoff zipcode / postcode

TransportDropoffCountry

The dropoff country

TransportDropoffEmail

The email address of the dropoff contact

TransportDropoffHomePhone

The home phone number of the dropoff contact

TransportDropoffWorkPhone

The work phone number of the dropoff contact

TransportDropoffCellPhone / TransportDropoffMobilePhone

The mobile phone number of the dropoff contact

TransportMiles

The distance of the transport in miles (if known)

TransportCost

The cost of the transport

TransportComments

Any comments present for the transport

The following fields are only available to transports generated via the transport tab or book:

TransportAnimalName

The name of the animal being transported

TransportShelterCode / TransportShortCode

The code of the animal being transported

TransportSpecies

The species of animal being transported

TransportBreed

The breed of animal being transported

TransportSex

The sex of the animal being transported

33.10 Cost Keys

You must use a qualifier suffix to access these records.

CostType

The cost type

CostDate

The date the cost was incurred

CostDatePaid

If the “show cost paid field” option is on, the date the cost was actually paid for

CostAmount

The value of the cost

CostDescription

Any other information about the cost

In addition there are a number of total fields for costs:

TotalVaccinationCosts

The total of all vaccination costs for the animal

TotalTransportCosts

The total of all transport costs for the animal

TotalTestCosts

The total of all test costs for the animal

TotalMedicalCosts

The total of all medical costs for the animal

TotalLineCosts

The total of all cost lines from the cost tab for the animal

DailyBoardingCost

The animal’s daily boarding cost

CurrentBoardingCost

The daily boarding cost multiplied by days on shelter for the animal

TotalCosts

The total of CurrentBoardingCost and all the Total Cost fields.

33.11 Diary Keys

You must use a qualifier suffix to access the records (animal only).

DiaryDate

The date/time of the diary note

DiaryCompleted

The date the diary note was completed

DiaryFor

Who the diary note is for

DiarySubject

The diary subject

DiaryNote

The diary note text

DiaryComments

Any comments added to the diary note

33.12 Diet Keys

You must use a qualifier suffix to access these records (animal only).

DietName

The name of the diet

DietDescription

The diet description

DietDateStarted

The date the diet started

DietComments

Any comments on the diet

33.13 Log Keys

You must use a qualifier suffix to access these records.

LogName

The type of log

LogDate

The date of the log

LogTime

The time of the log

LogComments

The log entry

LogCreatedBy

The person who created the log entry

33.14 Movement Keys

Movement keys are available for documents generated either from the Move->Adopt screen, or from the animal details screen (in which case the animal's active movement is assumed if it has one) or movement tabs. Since movements tie together animals and owners, all of the animal and owner keys are also available for movements.

MovementDate

The date the animal was moved (whatever the type)

MovementType

The movement type (eg: Adoption, Foster, Transfer, etc)

MovementNumber

The movement number

MovementComments

The comments from the movement

InsuranceNumber

If your shelter insures animals as they are adopted, the insurance number

ReservationDate

The date the animal was reserved (if it's a reserve record)

ReservationCancelledDate

The date the reservation was cancelled

ReservationStatus

The status of the selected reservation

ReturnDate

The date the animal was returned from this movement

ReturnNotes

The reason for return notes

ReturnReason

The return category

ReturnedByName

The name of the person who returned the animal

ReturnedByFirstname / ReturnedByForenames

The first name(s) of the person who returned the animal

ReturnedByLastname / ReturnedBySurname

The last name of the person who returned the animal

ReturnedByAddress

The returner's address

ReturnedByTown

(ReturnedByCity for US users)

ReturnedByCounty

(ReturnedByState for US users)

ReturnedByPostcode

(ReturnedByZipcode for US users)

ReturnedByHomePhone

Returner's home phone number

ReturnedByWorkPhone

Returner's work phone number

ReturnedByMobilePhone

Returner's cell/mobile phone number

ReturnedByEmail

Returner's email address

ReturnedByIDNumber

The identification number (driving licence, passport, etc) of the person who returned the animal

ReturnedBy Additional Fields

Additional fields on the original owner can be accessed via ReturnedByFIELDNAME

AdoptionDate

The date of the adoption (if this is an adoption, alias for MovementDate)

FosteredDate

The date the animal was fostered (if this is a foster, alias for MovementDate))

TransferDate

The date the animal was transferred (if this is a transfer, alias for MovementDate)

TrialEndDate

The date the trial adoption ends

MovementIsTrial

Yes if this movement is a trial adoption

MovementIsPermanentFoster

Yes if this movement is a permanent foster

MovementPaymentTotal

The total of any payments for this movement

MovementCreatedBy

The user who created the movement record (AdoptionCreatedByName)

MovementCreatedDate

The date the movement was created

MovementLastChangedBy

The user who last changed the movement (AdoptionLastChangedByName)

MovementLastChangedDate

The date the movement was last changed

33.15 Person Keys

Person keys are available for documents generated from the person and movement screens, they are also available for documents generated from the payment and licence tabs as well as lost animal, found animal and waiting list. For documents generated from the animal screen, the person will be chosen in the following order: Latest movement on file, latest reservation on file, current owner (if the animal is non-shelter) Log keys are available for people, but prefixed with PersonLog instead of just Log.

Title / OwnerTitle / Title2 /

The person's title

Initials / OwnerInitials / Initials2

The person's initials

Forenames / OwnerForenames / Forenames2

(Firstnames / OwnerFirstNames / Firstnames2 for US users)

Surname / OwnerSurname / Surname2

(Lastname / OwnerLastName / Lastname2 for US users)

OwnerFlags

A list of the flags assigned to a person, separated by commas.

OwnerComments

Any comments on the person

OwnerWarning

The warning box on the person

OwnerCreatedBy

(OwnerCreatedByName)

OwnerCreatedDate

The date the person record was created

HomeTelephone

The person's home phone number

OwnerID

The ID of the person record

IDCheck

"Yes" if the owner has been homechecked

HomeCheckedDate

The date this person was homechecked

HomeCheckedByName

The name of the person who homechecked this person

HomeCheckedByEmail

The email address of the person who homechecked this person

HomeCheckedByHomeTelephone

A phone number for the person who homechecked this person

HomeCheckedByMobileTelephone

(HomeCheckedByCellTelephone for US users)

OwnerLastChangedDate

The date this person record was last changed

OwnerLastChangedBy

(OwnerLastChangedByName) - The person who last changed this person record

Address / OwnerAddress

The person's address

Name / OwnerName

The person's display name in the selected system display format

Town / OwnerTown

(City / OwnerCity for US users)

County / OwnerCounty

(State / OwnerState for US users)

Postcode / OwnerPostcode

(Zipcode / OwnerZipcode for US users)

Country / OwnerCountry

The country this person lives in

OwnerLookingFor

A summary of the "Looking for" slider on the person's record

OwnerJurisdiction

The person's jurisdiction

OwnerSite

The site this person is linked to

WorkTelephone / WorkTelephone2

The person's work telephone number

MobileTelephone / MobileTelephone2

(CellTelephone / CellTelephone2 for US users)

EmailAddress / EmailAddress2

The person's email address

OwnerDateOfBirth / OwnerDateOfBirth2

The person's date of birth

IDNumber / IDNumber2

The person's identification number (driving licence, passport, national ID card, etc)

MembershipNumber

The person's membership number

MembershipExpiryDate

The date this person's membership with the shelter expires

PersonDocumentImgLink

An tag containing a link to the person's preferred document image. The image will be 200px high. You can also suffix a pixel height in increments of 100 upto 500px if you would like the image to be larger, eg: <Person<DocumentImgLink300>>, <<PersonDocumentImgLink400>>, <<PersonDocumentImgLink500>>

PersonDocumentImgSrc

Just the src attribute value for an image link to the preferred document image.

33.16 Citation Keys

You must use a qualifier suffix to access these records.

Note: The Recent keyword returns citations where the fine is paid where Due returns unpaid.

CitationName

The type of citation being issued

CitationDate

The date of the citation

CitationComments

Any comments on the citation

FineAmount

The fine amount

FineDueDate

The date the fine is due to be paid

FinePaidDate

The date the fine was paid

33.17 Equipment Loan Keys

You must use a qualifier suffix to access these records.

Note: The Recent keyword returns returned trap loan records where Due is unreturned.

EquipmentTypeName

The type of equipment being loaned

EquipmentLoanDate

The date the equipment was loaned

EquipmentDepositAmount

The amount of deposit on the loan

EquipmentDepositReturnDate

The date the deposit was returned

EquipmentNumber

The equipment number of the trap being loaned

EquipmentReturnDueDate

The date the equipment is due for return

EquipmentReturnDate

The date the equipment was returned

EquipmentComments

Any comments on the equipment loan

33.18 Licence Keys

Licence keys are only available for documents generated for a single licence under the licence tab or licencing book (or for licence reminder emails as configured under *Settings* → *Options* → *Reminder Emails*).

Keys for the person purchasing the licence are also present and if the licence is linked to an animal, animal keys are also present.

Note: You can use “Licence” or “License” when accessing these keys - either will work.

LicenceTypeName

The type of licence purchased

LicenceNumber

The unique number of the licence

LicenceFee

The fee for the licence

LicenceIssued

The date the licence was issued

LicenceExpires

The date the licence expires

LicenceComments

Any comments from the licence record

LicenceRenewLink

A clickable link to “pay and renew this licence”. Links to the licence checkout.

LicenceRenewSrc

The link target only for renewing so that you can build your own link

33.19 Voucher Keys

Voucher keys are only available for documents generated for a single voucher under the voucher tab or the voucher book. Keys for the person the voucher has been issued to are also present and if the licence is linked to an animal, animal keys are also present.

VoucherTypeName

The type of voucher

VoucherCode

The voucher's unique code

VoucherVetName

The vet or other organisation the voucher can be redeemed with

VoucherVetAddress

The address of the vet or other organisation the voucher can be redeemed with

VoucherVetTown / VoucherVetCity

The city of the vet or other organisation the voucher can be redeemed with

VoucherVetCounty / VoucherVetState

The state of the vet or other organisation the voucher can be redeemed with

VoucherVetPostcode / VoucherVetZipcode

The zipcode of the vet or other organisation the voucher can be redeemed with

VoucherVetPhone

The phone number recorded in the work phone field of the vet or other organisation the voucher can be redeemed with

VoucherVetEmailAddress

The email address of the vet or other organisation the voucher can be redeemed with

VoucherValue

The amount the voucher can be redeemed for if appropriate

VoucherIssued

The date the voucher was issued

VoucherExpires

The date the voucher expires

VoucherRedeemed

The date the voucher was redeemed/used

VoucherComments

Any comments about the voucher

33.20 Incident Keys

Incident keys are only available for documents generated with the document button on a single incident. Log keys are available for incidents, but prefixed with IncidentLog instead of just Log.

IncidentNumber

The unique incident number

IncidentCode

The incident code

IncidentDate

The date of the incident

IncidentTime

The time of the incident

IncidentTypeName

The type of incident

CallDate

The date of the call

CallTime

The time of the call

CallerName

The name of the caller

CallerAddress

The address of the caller

CallerTown / CallerCity

The city of the caller

CallerCounty / CallerState

The state of the caller

CallerPostcode / CallerZipcode

The zipcode of the caller

CallerHomeTelephone

The caller's home number

CallerWorkTelephone

The caller's work number

CallerMobileTelephone / CallerCellTelephone

The caller's mobile number

CallNotes

Any notes about the call.

CallTaker

The username of the staff member that took the call

DispatchDate

The date an ACO was dispatched

DispatchTime

The dispatch time

DispatchAddress

The address an ACO was dispatched to

DispatchTown / DispatchCity

The city an ACO was dispatched to

DispatchCounty / DispatchState

The state an ACO was dispatched to

DispatchPostcode / DispatchZipcode

The zipcode an ACO was dispatched to

PickupLocationName

The pickup location set on the incident

IncidentJurisdiction

The incident jurisdiction

RespondedDate

The date the incident was attended by an ACO

RespondedTime

The time the incident was attended by an ACO

FollowupDate

The date the incident is due for followup

FollowupTime

The time the incident is due for followup

FollowupDate2

The date the incident is due for followup

FollowupTime2

The time the incident is due for followup

FollowupDate3

The date the incident is due for followup

FollowupTime3

The time the incident is due for followup

CompletedDate

The date the incident was completed

CompletedTypeName

The completion code/name

AnimalDescription

A description of any animals involved in the incident

SpeciesName

The species of animal(s) involved in the incident

Sex

The sex of the animal(s) involved in the incident

AgeGroup

The age group of the animal(s) involved in the incident

SuspectName

The name of the main suspect

SuspectAddress

The suspect's address

SuspectTown / SuspectCity

The suspect's city

SuspectCounty / SuspectState

The suspect's state

SuspectPostcode / SuspectZipcode

The suspect's postal/zip code

SuspectHomeTelephone

The suspect's home number

SuspectWorkTelephone

The suspect's work number

SuspectMobileTelephone / SuspectCellTelephone

The suspect's mobile number

Suspect1Name

The name of the first suspect

Suspect2Name

The name of the second suspect

Suspect3Name

The name of the third suspect

VictimName

The name of the victim

VictimAddress

The address of the victim

VictimTown / VictimCity

The victim's city

VictimCounty / VictimState

The victim's state

VictimPostcode / VictimZipcode

The victim's postal/zip code

VictimHomeTelephone

The victim's home number

VictimWorkTelephone

The victim's work number

VictimMobileTelephone / VictimCellTelephone

The victim's mobile number

DocumentImgLink

An `` tag containing a link to the incident's preferred document image. The image will be 200px high. You can also suffix a pixel height in increments of 100 upto 500px if you would like the image to be larger, eg: `<<DocumentImgLink300>>`, `<<DocumentImgLink400>>`, `<<DocumentImgLink500>>`

DocumentImgSrc

Just the src attribute value for an image link to the preferred document image.

33.21 Incident Animal Keys

Incident animal keys allow accessing of the animals linked to an incident. Each animal is indexed with a number for ascending (eg: `AnimalName1`) or LastX for descending (`AnimalNameLast1`).

AnimalName

The animal's name

ShelterCode

The animal's shelter code

ShortCode

The animal's short shelter code

MicrochipNumber

The animal's microchip number

AgeGroup

The animal's age group

AnimalTypeName

The type of animal

SpeciesName

The species of animal

Sex

The sex of the animal

Size

The size of the animal

BaseColorName / BaseColourName

The color of the animal

CoatType

The coat type of the animal

DateBroughtIn

The date the animal entered the shelter

DeceasedDate

The date the animal died

33.22 Lost Animal Keys

Lost animal keys are only available for documents generated with the document button on a single lost animal record. In addition to the tokens listed below, the person keys listed above are also valid for the primary contact along with log keys.

DateReported

The date the report was received

DateLost

The date the animal was first missing

DateFound

The date the animal was found

AgeGroup

An age group for the animal

Features

Any information about the animal's appearance

AreaLost

The area in which the animal was lost (street, etc)

AreaPostcode

The postcode in which the animal was lost

Comments

Any comments about the lost record

SpeciesName

The species of animal

BreedName

The breed of animal

BaseColorName / BaseColourName

The color of the animal

Sex

The sex of the animal

DocumentImgLink

A photo of the animal if one exists. 200/300/400/500 can also be suffixed as with animal images above to control the size of the output.

33.23 Found Animal Keys

Found animal keys are only available for documents generated with the document button on a single found animal record. In addition to the tokens listed below, the person keys listed above are also valid for the primary contact along with log keys.

DateReported

The date the report was received

DateFound

The date the animal was found

DateReturned

The date the animal was returned to its owner

AgeGroup

An age group for the animal

Features

Any information about the animal's appearance

AreaFound

The area in which the animal was found (street, etc)

AreaPostcode

The postcode in which the animal was found

Comments

Any comments about the found record

SpeciesName

The species of animal

BreedName

The breed of animal

BaseColorName / BaseColourName

The color of the animal

Sex

The sex of the animal

DocumentImgLink

A photo of the animal if one exists. 200/300/400/500 can also be suffixed as with animal images above to control the size of the output.

33.24 Waiting List Keys

Waiting list keys are only available for documents generated with the document button on a single waiting list record. In addition to the tokens listed below, the person keys listed above are also valid for the primary contact along with log keys.

DatePutOnList

The date the animal was put on the waiting list

DateRemovedFromList

The date the animal was removed from the waiting list

DateOfLastOwnerContact

The last time we heard from the owner

Size

The size of the animal

SpeciesName

The species of animal

Description

A description of the animal

ReasonForWantingToPart

The reason the owner is relinquishing the animal

ReasonForRemoval

The reason this waiting list entry was removed

CanAffordDonation

Yes/No - whether the person can afford to make a donation

Urgency

An urgency rating for this waiting list item

Comments

Any comments on this waiting list entry

DocumentImgLink

A photo of the animal if one exists. 200/300/400/500 can also be suffixed as with animal images above to control the size of the output.

33.25 Clinic Keys

Clinic keys are only available for documents generated with the document button on a single clinic appointment record (either via the Clinic tab of an animal or person, or the “Consulting Room” or “Waiting Room” screens). In addition to these keys, the person and animal keys listed above are valid for clinic appointments.

AppointmentFor

The name of the vet the appointment is with

AppointmentDate

The date of the appointment

AppointmentTime

The time of the appointment

Status

The appointment’s current status

ArrivedDate

The date the person arrived for the appointment

ArrivedTime

The time the person arrived for the appointment

WithVetDate

The date the person was with the vet for the appointment

WithVetTime

The time the person was with the vet for the appointment

CompletedDate

The date the appointment was complete

CompletedTime

The time the appointment was complete

ReasonForAppointment

The reason the appointment was made

AppointmentComments

Any comments on the appointment

InvoiceAmount

The total of all invoice items for the appointment

InvoiceVatAmount / InvoiceTaxAmount

The total VAT/Tax on the invoice

InvoiceVatRate / InvoiceTaxRate

The tax rate applied to the invoice

InvoiceTotal

The total of invoice amount and VAT/Tax

33.26 Table Keys

These are special keys that insert a table into your document that contains the complete data from a tab.

These keys do not allow the flexibility of formatting that the other keys offer, but they do offer a simple way of putting bulk data into a document without having to create a table containing many “just in case” placeholder keys.

They will also dynamically expand the document according to how many records there are. Records are output in ascending order of date.

AnimalVaccinations

Inserts a table containing all the animal’s vaccinations into the document

DueAnimalVaccinations

Inserts a table containing all due vaccinations for this animal into the document

GivenAnimalVaccinations

Inserts a table containing all given vaccinations for this animal into the document

AnimalTests

Inserts a table containing all of the animal’s tests into the document

AnimalMedicals

Inserts a table containing all of the animal’s medical regimens

ActiveAnimalMedicals

Inserts a table containing all of the animal’s medical regimens where the status is active

AnimalLogs

Inserts a table containing all of the animal’s log entries

AnimalLogsTYPE

Inserts a table containing all of the animal’s log entries of TYPE

IncidentLogs

Inserts a table containing all of the incident's log entries

LitterMates

Inserts a table containing a list of the animal's littermates

ActiveLitterMates

Inserts a table containing a list of the animal's littermates (only those still in care)

MovementPayments

Inserts a table containing all of the payments for the active movement for the person, animal or movement the document is being generated for.