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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.
- 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 Rescuegroups.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 shotting, label printing and email facilities based on filtered criteria
- Customisable online forms for adopter/foster/volunteer applications, etc.
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
• \( \text{W} \) Today + 1 week
• \( \text{D} \) Today + 1 day
• \( \text{SHIFT} + \) (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

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.
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
- `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
4.1 Shelter View

The shelter view screen (available from the default quicklinks or under ASM → 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 different groupings to be applied.

The “Location and Unit” grouping will show a box for every cage/pen with the animals occupying them. If they are unoccupied, they’ll be displayed with a green highlight. You can drag and drop animals between units in this view.

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 animal details tab contains all the basic information about the animal, including it’s 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.

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

The Entry panel 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 bonded with fields allow you to specify up to two animals that this animal can be bonded to. Bonding checks that when the animal is adopted, it is adopted with its bonded partner(s).

Most importantly, 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.

4.3. Edit Animal
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. More information on them can be found here: http://www.asilomaraccords.org/

### 4.3.3 Health and Identification

The health and identification tab 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.

### 4.3.4 Death

The death tab 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.
4.3.5 Diet

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.

4.3.6 Costs

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.
### 4.3.7 Vaccination

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.

### 4.3.8 Test

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.

### 4.3.9 Medical

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 click 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).
4.3.10 Media

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 web publisher will use the notes attached to the default image as the animal’s description when building a site or sending data to PetFinder or other third parties.

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

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.

Ticking the “Not for adoption” box on the details tab will ensure that the animal is not included in website publishing.

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

4.3.11 Diary

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. Edit Animal
4.3.12 Transport

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.

4.3.13 Movements

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.
4.3.14 Log

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 dropdowns 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

When copying from a template animal, ASM will copy the following items:

- The animal’s adoption fee amount
- Any additional fields the shelter has added to the system
- Vaccinations
• Tests
• Medical regimens
• Diets
• Costs

In addition, you can further define a template animal for baby animals (puppies and kittens). If the animal’s age is under the system defined “baby split” of 6 months by default, the system will first look for templates called TemplateTypeBaby and TemplateSpeciesBaby before falling back to TemplateType and TemplateSpecies.
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

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 an owner, along with payments they make, any useful multimedia, diary notes and animal movements, etc.

Facilities are also supplied to write documents to an owner, 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 owner for tracking gift aid claims to HMRC.
5.2.2 Warnings

When you create new owner records and adopt animals to owners, the system will perform some checks for you. Some of these require options to be set in Settings->Options under the Movement tab (they are all switched on by default).

- Name Check: The system will check to see if there is someone with a similar name on file to the one you just entered. If there is, you will be shown a list of matches, with the option to view them and prompted as to whether you want to continue.

- Address Check: The system will check to see if you have an owner on file at the same address as the one listed. This is useful for fraudulent owners who are banned from adopting animals getting family members to do it for them.

- Postcode Check: The system will warn the operator if they attempt to adopt an animal to a new owner who lives in the same postcode as the animal’s original owner.

- Previous Owner Check: System will warn the operator if they attempt to adopt an animal to a new owner with a name and address similar to someone who has brought an animal into the shelter.

- Non-Homechecked: The system will warn the operator if they attempt to adopt an animal to an owner who has not been homechecked.

- Banned: The system will warn the operator if they attempt to adopt an animal to an owner who has been banned from adopting animals.

5.2.3 Looking For

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 owner.

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 owners, 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.
5.2.4 Homechecker

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

5.2.5 License

The license tab holds details of animals licensed to this owner. 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 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**.

<table>
<thead>
<tr>
<th>Person</th>
<th>Investigation</th>
<th>Payments</th>
<th>Vouchers</th>
<th>Media</th>
<th>Diary</th>
<th>Movements</th>
<th>Links</th>
<th>Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Delete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By</td>
<td>Date</td>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>robin</td>
<td>04/02/2014</td>
<td>Next door neighbour phoned about dogs tied up outside all day</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The citations tab holds details of citations and fines given to this owner. 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 Citations

<table>
<thead>
<tr>
<th>Person</th>
<th>License ID</th>
<th>Investigation</th>
<th>Citations</th>
<th>Trap Loans</th>
<th>Payments</th>
<th>Vouchers</th>
<th>Media</th>
<th>Diary</th>
<th>Movements</th>
<th>Links</th>
<th>Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Delete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Incident</td>
<td>Date</td>
<td>Fine Amount</td>
<td>Due</td>
<td>Paid</td>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First offence</td>
<td>04/06/2014</td>
<td>$50.00</td>
<td>04/06/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The trap loan tab holds details of traps loaned to this owner. 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 Trap Loans

<table>
<thead>
<tr>
<th>Person</th>
<th>License ID</th>
<th>Investigation</th>
<th>Citations</th>
<th>Trap Loans</th>
<th>Payments</th>
<th>Vouchers</th>
<th>Media</th>
<th>Diary</th>
<th>Movements</th>
<th>Links</th>
<th>Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Delete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Date</td>
<td>Trap Number</td>
<td>Deposit</td>
<td>Due</td>
<td>Returned</td>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cat</td>
<td>04/06/2014</td>
<td>$50.00</td>
<td>04/06/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 5.2.9 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.

5.2.10 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.

5.2.11 Links

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

5.2.12 Merging People

The merge button on the owner 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 owner 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 owner 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.

**Note:** Person details are never copied during a merge, the merge just moves all the satellite data from the selected person to the open person before deleting the selected one.
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. i.e. 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.

### 6.1 Reservations

A singular exception to this is reservations - since they are not actually a movement (the animal hasn’t gone anywhere), 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.

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.

### 6.2 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**: 11/02/2013  
**Trial adoption**  
**Trial ends on**: 13/02/2013

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

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.
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).
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.

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.
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.

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:

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

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

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

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):

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

To set the orientation to landscape. Portrait is the default but can be explicitly set too.

Use the margins directive to set the PDF margins:
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:

7.1 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:

- insert an image where you’d like the signature to appear
- When the insert image dialog requests the image source, instead of a URL, enter “signature:placeholder” without the quotes.
- Choose a size to constrain the image to - eg: 150 x 75
- The document signing module will insert the signature inside your image when the document is signed.

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

<table>
<thead>
<tr>
<th>Vaccination Name</th>
<th>Date Required</th>
<th>Date Given</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In addition, an icon will appear next to the document on the media tab to indicate that the document has now been signed.
7.2 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.
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**

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

### 7.3 User Signatures

It is quite common for documents to require a member of staff signature as well as the main signatory (e.g.: 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).
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 full size into the document as an image.

If you’d like to control the size and placement of the user’s signature in a similar manner to normal signatures, you can insert an image and when prompted for the image source use “signature:user” without the quotes.
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**

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 up to 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 (18)

- 1 test needs to be performed today
- 1 urgent entry on the waiting list
- 7 people have overdue payments
- 1 trial adoption has ended
- 1 unpaid fine
- 3 undispached animal control calls
- 3 incomplete animal control calls
- 1 trap is overdue for return

The animal control module will raise alerts for unpaid fines, calls that have not yet resulted in dispatch (remove the call date and time to remove the alert), 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.

![Map of active incidents](image)

## 8.7 Trap 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 a trap loan tab will appear on each person record.
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.

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

9.1 Waiting Room

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.
9.2 Consulting Room

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.

9.3 Clinic Calendar

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.
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.

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.

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).

10.1 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 up to 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.

10.2 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
- 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.
CHAPTER ELEVEN

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.

Entries are colour coded according to how urgent they are.

Additionally, you can use the highlight buttons to mark interesting entries in up to 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 button. You will be presented with a waiting list entry form to complete. As with other screens, press the Save button at the top to save your new record.
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.
CHAPTER TWELVE

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.

12.1 Add a new diary note

To add a new diary note to the system, navigate to ASM → 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).

### 12.2 Viewing my diary notes

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

You will be given a list of all your diary notes. You may edit them to mark diary notes for you completed, or even amend diary notes you have created for other people. Diary notes in the future (after today), will be highlighted to show they are not yet current. If you choose to show completed notes, they will be greyed out to illustrate this.

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.

### 12.3 Diary calendar

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

### 12.4 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*
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).

12.4.1 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.

12.5 Create a new diary task

Diary tasks can be edited under ASM → Edit Diary Tasks and attached to both animals and owners from the toolbar buttons on their detail tabs.

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 owners.
CHAPTER THIRTEEN

ACCOUNTS

Animal Shelter Manager includes a full, double-entry bookkeeping 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.

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.
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.

13.1 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.

13.2 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.

13.3 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 specified). The default destination account for payments is the first bank account listed if you do not change it.
13.4 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.
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

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.
14.1 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:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Quantity</th>
<th>Location</th>
<th>Units</th>
<th>Total</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metacam 1mg</td>
<td>Box of 10 1mg chewable meloxicam tablets</td>
<td>5</td>
<td>Stores</td>
<td>1mg tablet</td>
<td>50</td>
<td>10</td>
</tr>
</tbody>
</table>

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.

14.2 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.
14.3 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.

14.4 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 (27)

- 2 vaccinations need to be administered today
- 1 test needs to be performed today
- 2 medical treatments need to be administered today
- 1 urgent entry on the waiting list
- 8 people have overdue payments
- 1 trial adoption has ended
- 2 unpaid fines
- 3 undispached animal control calls
- 3 incomplete animal control calls
- 2 traps are overdue for return
- 1 item of stock has expired
- 1 item of stock expires in the next month
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.

Total Animals Returned From Adoption: 27

<table>
<thead>
<tr>
<th>Date</th>
<th>Reason</th>
<th>Code</th>
<th>Microchip</th>
<th>Name</th>
<th>Type</th>
<th>Species</th>
<th>Age</th>
<th>Sex</th>
<th>Location</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/01/2007</td>
<td>Stray</td>
<td>C2000196</td>
<td>Casey</td>
<td>Long</td>
<td>Dog</td>
<td>5 years and 6 months</td>
<td>Female (Location: Ms. Joan Lincoln)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/01/2007</td>
<td>Stray</td>
<td>C2000200</td>
<td>Milla</td>
<td>Cat</td>
<td>5 years and 6 months</td>
<td>Female (Location: Ms. Deborah Osbourne)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/01/2007</td>
<td>Stray</td>
<td>C2000241</td>
<td>Olivia</td>
<td>Cat</td>
<td>4 years and 6 months</td>
<td>Female (Location: Ms. Vivian Hoppenberger)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/01/2007</td>
<td>Stray</td>
<td>C2000241</td>
<td>Lucy</td>
<td>Cat</td>
<td>3 years and 6 months</td>
<td>Female (Location: Ms. Carol McRae)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/01/2008</td>
<td>Stray</td>
<td>C2000241</td>
<td>Mia</td>
<td>Cat</td>
<td>4 years and 6 months</td>
<td>Female (Location: Ms. Carol McRae)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27/01/2008</td>
<td>Owner unable to keep</td>
<td>C2000241</td>
<td>Terry</td>
<td>Cat</td>
<td>5 years and 6 months</td>
<td>Female (Location: Janie Doe)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/02/2012</td>
<td>Returned to foster</td>
<td>C2012317</td>
<td>Anou</td>
<td>Cat</td>
<td>4 years and 9 months</td>
<td>Male (Location: Anou Whiter)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Animals Transferred In: 8

Total Animals In: 1870

Animals Adopted

<table>
<thead>
<tr>
<th>Date</th>
<th>Reason</th>
<th>Code</th>
<th>Microchip</th>
<th>Name</th>
<th>Type</th>
<th>Species</th>
<th>Age</th>
<th>Sex</th>
<th>Location</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/10/2007</td>
<td>Selected</td>
<td>C2000296</td>
<td>Snowball</td>
<td>Cat</td>
<td>5 years and 6 months</td>
<td>Female (Location: Karen Evettsa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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.

15.1 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

15.1.1 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.
- $SITES$ - 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.
- $PARENTKEY$ - 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).

15.1.2 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.
- $ASK ANIMALs$ - requests a shelter animal. The value substituted is the animal ID.
- $ASK FSANIMALs$ - requests a foster animal. The value substituted is the animal ID.
- $ASK ALLANIMALs$ - requests any animal. The value substituted is the animal ID.
- $ASK ANIMALSS$ - 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 ($ASK ANIMALSS$))
• \$ASK ANIMALFLAG\$ - requests an animal flag.
• \$ASK PERSON\$ - requests an person. The value substituted is the person ID.
• \$ASK PERSONFLAG\$ - requests a person flag.
• \$ASK LITTERS\$ - 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 SPECIES\$ - requests a species from the user. A popup is displayed containing a dropdown of all species on the system.
• \$ASK LOCATION\$ - requests an internal location from the user in the same manner as \$ASK SPECIES\$
• \$ASK VOUCHER\$ - requests a voucher from the user in the same manner as \$ASK SPECIES\$
• \$ASK DIET\$ - requests a diet from the user in the same manner as \$ASK SPECIES\$
• \$ASK DONATIONTYPE\$ - requests a payment/donation type from the user in the same manner as \$ASK SPECIES\$
• \$ASK LOGTYPES\$ - requests a log type from the user in the same manner as \$ASK SPECIES\$
• \$ASK TYPES\$ - requests an animal type from the user in the same manner as \$ASK SPECIES\$
• \$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.

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

15.1.3 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 broughtinafter 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 >= '$@broughtinafter$'

15.1.4 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:
15.1.5 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:

``` asymptote
$GROUP_OwnerName
$$HEAD
<h2>$OwnerName</h2>
$$FOOT
<p>Number of owners with name '$OwnerName': {COUNT.OwnernName}</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) Returns a URL to the google charting api to generate 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}`
• {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.

• {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>
$$FOOT
</table>
<p>Total at $LocationName: {COUNT.AnimalName}</p>
GROUP$$

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

$$FOOTER
FOOTER$$
```
15.2 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.

15.2.1 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:

<table>
<thead>
<tr>
<th>Year</th>
<th>TotalAmount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>59840</td>
</tr>
<tr>
<td>2005</td>
<td>61893</td>
</tr>
<tr>
<td>2006</td>
<td>51039</td>
</tr>
<tr>
<td>2007</td>
<td>55984</td>
</tr>
</tbody>
</table>

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.

15.2.2 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)
```

15.3 Maps

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

15.3. Maps
ASM expects map queries to return a resultset containing 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:

```sql
SELECT LatLong, OwnerAddress FROM owner
```
Animal Shelter Manager allows you to track litters as they are born (or come into) the shelter. These facilities are used particularly for generating animal figures.

### 16.1 Mechanism

The main screen is accessible from ASM → Edit Litters. It shows you a list of all currently active litters on the shelter. A litter is deemed active whilst any of the animals who were part of it are still on the shelter or if it has 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.

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.
16.2 Litter Completion

The system will check all the animals in the litter daily and the moment the last one has left the shelter through any means other than fostering (if the “Foster animals are shelter inventory” option is on), the litter will be cancelled. It will also be treated as cancelled if the expiry date is set and passed.

From the Edit Litters screen, you can highlight a litter and call up all the animals in that litter. The screen will also show you how many of the litter animals are currently left on the shelter.
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.

If you set the “Send confirmation email to form submitter” checkbox for an online form, 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. If the confirmation message field is set, that will form the body of the email. HTML can be used, but it must be a complete HTML document that contains an <html> tag. If the confirmation message field is left blank, a copy of the form submission itself will be sent.

As you can see in the screenshot, each form has a “Form URL”. This is the web link you can use on your website to link people to the form. You can also click it directly there in the UI to test your form.

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

**Warning:** sheltermanager.com uses a short term 2 minute cache on forms, so if you make changes to a form you’ve recently viewed, you may have to wait 2 minutes for any changes you make to appear.

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

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.
- Attach Animal (via animalname): Attaches the form to a single animal record based on the animalname field in the form itself.
- 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).
• 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.

You can safely delete incoming forms once they have been attached to a record. The system will also remove incoming forms older than 2 weeks by default.

### 17.1 Importing

ASM also allows importing of online forms from files.

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

```json
{
    "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" },
        { "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:

```html
<!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>
</form>
</body>
</html>
```

(continues on next page)
17.1. Importing
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.*

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:

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 propagating the rota each week. If a person flag filter has been selected, then only the matching rows in the rota will be cloned.
In addition to the web interface, ASM has a special interface for mobile devices, such as your iPhone, Blackberry, WebOS or Android handset.
To access the mobile interface, follow the mobile link at the top right of the login screen.

You can generate any report that doesn’t require criteria and view the details of all the current shelter animals.
You can also mark vaccinations and medical treatments given, add logs to animals, dispatch and respond to animal control incidents, complete diary tasks and mark homechecks as performed. This last item is very useful for volunteers going out to homecheck owners prior to adoption.

19.1 Mobile App

An app is available in the Google Play, iTunes and Amazon app stores for mobile devices (search for “sheltermanager”).

The app encapsulates a number of interfaces, which you can choose from a dropdown when logging in.

- Smartphone Interface: The Mobile interface described above (default)
• Desktop/Tablet Interface: The “full” interface, on your mobile device
• Animal Photo Uploader: An area that links to the gallery or camera of your phone and allows you to take or upload existing photos to animal records.
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, the URL will start https://service.sheltermanager.com/asmservice.

If you are using 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.

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

The service requires the following parameters:

- **account**: If this is a sheltermanager.com service call, the user’s account number. Can be omitted for other installations.
- **username**: A valid ASM user.
- **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.
- **method**: A service method to call
- **animalid / title**: An animal ID or title depending on the service method called.

The following method values are supported:

### 20.1 animal_image

**Cache time: 1 hour**

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.

### 20.2 animal_thumbnail
20.3 animal_view

Cache time: 2 minutes

Returns a webpage with information for one animal, constructed from the animal_view 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.

20.4 animal_view_adoptable_js

Cache time: 10 minutes

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:

```html
<!DOCTYPE html>
<html>
<head>
<title>Adoptable Animals</title>
<style>
  .asm3-adoptable-thumbnail { border-radius: 8px; }
</style>
<body>
  <div id="asm3-adoptables" />
  <script src="http://localhost:5000/service?method=animal_view_adoptable_js"></script>
</body>
</html>
```

20.4.1 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-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:

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

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

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

### 20.4.2 Translations

It’s possible to translate any of the text output by the adoptable list on the fly. By default, it only uses text from your database values so they will match the language of your database.

You can add on-the-fly translation by adding a script tag with a dictionary called `asm3_adoptable_translations` above the script that makes the service call. Eg to translate some English species to French and to change the default (any species) to all as well as the CLOSE link text:

```html
<script>
asm3_adoptable_translations = {
    "Dog": "Chien",
    "Cat": "Chat",
    "Pig": "Cochon",
    "(any species)": "all",
    "CLOSE": "Return to my webpage"
}
</script>
```

### 20.4.3 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 an animal type of dog, you could use this callback:

```javascript
function asm3_adoptable_filter(a, index, arr) {
    return a.ANIMALTYPE_NAME == "D (Dog)";
}
</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:

```html
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
</script>
```

### 20.4.4 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/alphabetic sort:

```html
<script>
asm3_adoptable_sort = "-@DAYSONSHELTER";
</script>
```

### 20.4.5 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:

```html
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
asm3_adoptable_extra = function(a) {
    return a.WEBSITEMEDIANOTES;
}
</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.

### 20.4.6 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.

---

20.4. animal_view_adoptable_js
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:

```html
<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>
```

### 20.4.7 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:

```html
<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:

```html
<script>
asm3_adoptable_filters = "sex breed agegroup size species";
asm3_adoptable_iframe = true;
asm3_adoptable_iframe_height = "2000px";
asm3_adoptable_iframebgcolor = "#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.

### 20.5 animal_view_adoptable_html

**Cache time: 2 minutes**

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.

20.6 csv_mail and csv_report

Cache time: 10 minutes

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:

```
   title=Detailed+Shelter+Inventory
```

20.7 extra_image

Cache time: 1 day

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

```
```

20.8 html_adoptable_animals

Cache time: 30 minutes

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

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
```

20.9 html_adopted_animals

Cache time: 30 minutes

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.

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 adopted in the last 30 days.
20.10 html_deceased_animals

Cache time: 30 minutes

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.

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.

20.11 html_flagged_animals

Cache time: 30 minutes

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.

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 “allanimals=1” parameter can optionally be passed if you’d like all animals to be included, not just shelter animals.

20.12 html_held_animals

Cache time: 30 minutes

Returns a complete HTML document containing an HTML page of current held 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.

20.13 html_report
Cache time: 10 minutes

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:


20.14 json_adoptable_animal and xml_adoptable_animal

Cache time: 1 hour

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 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.

20.15 json_adoptable_animals and xml_adoptable_animals

Cache time: 1 hour

Returns a dataset containing all animals available for adoption. The method determines whether the format returned is JSON or XML:

http://localhost:5000/service?method=xml_adoptable_animals&username=user &password=letmein

20.16 json_lost_animals, xml_lost_animals, json_found_animals, xml_found_animals

Cache time: 1 hour

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 or XML:

http://localhost:5000/service?method=xml_found_animals&username=user &password=letmein

20.17 json_recent_adoptions and xml_recent_adoptions

Cache time: 1 hour

Returns a dataset containing all recently adopted animals with their new owner information. The method name determines whether the format returned is JSON or XML:
20.18 json_recent_changes and xml_recent_changes

Cache time: 1 hour

Returns a dataset containing all animals who have been modified in the last month. The method determines whether the format returned is JSON or XML:

http://localhost:5000/service?method=xml_recent_changes&username=user&password=letmein

20.19 json_shelter_animals and xml_shelter_animals

Cache time: 1 hour

Returns a dataset containing all animals currently in the care of the shelter. The method determines whether the format returned is JSON 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

20.20 rss_timeline

Cache time: 1 hour

Returns an RSS feed of the timeline for use with feed aggregators:

http://localhost:5000/service?method=rss_timeline&username=user&password=letmein
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

### 21.1 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).
- **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.
21.2 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.

- **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.

- **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.

21.3 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.

- **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 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: Modern digital cameras can take very high quality images - so much so that they could take a very long time for users to download (particularly for people with modems). Also, if your shelter’s connection to the internet is over a modem, it could take a long time for the site to upload. This box allows you to reduce the size of your images to scaled JPEGs with the resolutions specified. 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. |

### 21.3.1 Included templates

ASM comes with a number of site templates – plain, rss, littlebox and sm.com.

• 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 is also more advanced, using CSS overlays and popups.
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.

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:

- $$SORGNAMES$$ - Becomes your organisation’s name
- $$SORGADDRESS$$ - Your organisation’s address
- $$SORGTEL$$ - Your organisation’s telephone number (all of these org fields can be found under System → Options)
- $$SORGEMAIL$$ - 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

### 21.4 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.

### 21.5 helpinglostpets.com

ASM can send data to www.helpinglostpets.com, a map-based website that publishes adoptable and found animals. Your ASM found data will also be published as well as adoptable animals. You will need an organisation ID, FTP
username and password and to enter the postal/zipcode of your shelter.

Helpinglostpets.com is global and can accept data from shelters in any country.

21.6 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.

21.7 meetapet.com

ASM can send adoptable animal information to www.meetapet.com, an adoption website. After signing up with them, you will need to get a secret and shelter key from them in order to send them data.

21.8 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 your password. All you need to do then is choose Publish to PetFinder.com in place of the normal internet publisher. The options for filtering animals are the same (see previous section for reference).

**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.

The “Upload all available images” option will upload all animal photos to PetFinder instead of just the preferred. 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.

21.9 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).
Options are available to override the desex flag to send all your animals and mark whether you will fly animals between states for adoption.

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.
- breederid (Text): Dogs located in QLD with a date of birth after 26th May 2017 require a breeder number.
- bredincareofgroup (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.
- sourcenumber (Text): Required for all cat and dog listings in Victoria
- rehomingorganisationid (Text): For cats and dogs in NSW, this field OR a microchip number OR breederid must be supplied.

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.

21.10 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).

21.11 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.
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.

**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.

### 21.12 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.

### 21.13 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.

### 21.14 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.
21.15 FoundAnimals

ASM can register microchips with microchipregistry.foundanimals.org, 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.

21.16 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.

21.17 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.

21.18 VetEnvoy US (HomeAgain and AKC Reunite)

ASM can also use the VetEnvoy service in the US to register microchips with HomeAgain and AKC Reunite.

ASM will find all HomeAgain microchips (15 digits starting with 985) and AKC Reunite microchips (15 digits starting with 956) that have been adopted and will register the animal and new owner information. As with the other microchip providers, ASM will register the chip again if the animal is returned and adopted to a new owner.
CHAPTER TWENTYTWO

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.

22.1 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”).

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.

22.2 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.

22.3 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.

22.4 Bulk Email

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.
22.5 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.

22.5.1 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.

22.5.2 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”.

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**22.5. Integrating with OpenOffice**

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22.6 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.
To configure all areas of the system, you need to look under the top-level Settings menu.

### 23.1 Additional Fields

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 and a display index.

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.

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 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).

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:

<table>
<thead>
<tr>
<th>Name: KennelCough</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label: Kennel Cough Tested?</td>
</tr>
<tr>
<td>Tooltip: Tick this box if the animal has been tested for kennel cough</td>
</tr>
<tr>
<td>Mandatory: No</td>
</tr>
<tr>
<td>Searchable: No</td>
</tr>
<tr>
<td>Type: Yes/No</td>
</tr>
<tr>
<td>Link: Animal - Additional</td>
</tr>
<tr>
<td>DisplayIndex: 0</td>
</tr>
</tbody>
</table>

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:

```sql
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
```

### 23.2 Lookup Data

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.

### 23.3 Document 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
 homachack_form.html
 microchip_form.html
 reserved.html
```
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.

23.4 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.

23.4.1 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.

23.5 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 of IPv6 addresses, IPv4 blocks in CIDR notation or IPv6 prefixes. Eg:

192.168.1.0/24 172.16.31.34 2001:db8:abcd:0012

23.5.1 Location Filter

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 with particular movements that you may wish to let your users see:

- Adopted Animals: Allows the user to see previously adopted animals
- Fostered Animals: Allows the user to see animals currently on foster
- Retailer Animals: Allows the user to see animals currently with retailers
- My Fosters: Restricts the user to ONLY see animals they are currently fostering
23.6 User roles

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.

23.7 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.

When importing CSV files produced by this function, make sure you turn on the “Merge duplicates” option. It is necessary because files generated by this export use repeated lines of animal data to contain the medical, movement and financial history.

A number of pre-set filters are available. You can choose to export all animals in your database, just those who are currently on the shelter or a selection of the current on shelter animals.

23.8 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)

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ANIMALNAME</td>
<td>ANIMALAGE</td>
<td>ANIMALSEX</td>
<td>ANIMALSPECIES</td>
<td>ANIMALENTRYDATE</td>
<td>ANIMALCOMMENTS</td>
</tr>
<tr>
<td>2</td>
<td>Gnasher</td>
<td>Male</td>
<td>Dog</td>
<td>5/2/2013</td>
<td>This is Gnasher, a lovely dog</td>
<td>German Shepherd</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 ANIMALAGE 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.

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!

If the “Merge duplicate records” option is on, then before importing people records from the fields prefixed with PERSON or ORIGINALOWNER, ASM will check the person database for anyone with the same name and address. If the person already exists, it will not be created again. Similarly, if ANIMALCODE has been specified and an animal record with that code already exists in the database, it will not be created again.

23.9 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.
23.10 Trigger Batch Processes

ASM runs various tasks overnight to keep animal records up to 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 and historic figures data can get out of sync and needs 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.
The main Settings → Options page allows configuring of the general preferences within Animal Shelter Manager.

### 24.1 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.

### 24.2 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 drop-down 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.

- **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.

• 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.

24.3 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).

• 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 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.
24.4 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.

24.5 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.

- 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.

### 24.6 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.

### 24.7 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, 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, retailer, homechecker, member, shelter, foster, staff, vet, volunteer

**Warning:** Once anonymized, personal data is gone forever and cannot be recovered.

- 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.

- 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.

### 24.8 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.

- 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.
24.9 Diary

The diary tab allows you to set whether you would like to see the complete diary on the home page, or just the diary notes for the current user. You can also set whether you would like diary notes emailed to each user every day – for this to work, you must have configured the system’s email in the email section of the screen and your users must have an email address set.

24.10 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 movement and medical books: Show animal pictures in the rows of the movement and medical books (foster book, reservation book, vaccination book, etc.)
- 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.
- Allow editing of latitude/longitude with minimaps: Allow the latitude/longitude geocodes to be hand edited in a field near the minimap and address.
- 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.
- 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.
- 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.
- 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.
- 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.
- 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.

24.11 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 word processor, 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.

• 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.

24.12 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.

24.13 Find Animal/Person

The find animal and person columns boxes allows you to specify which columns are used on the find animal screens and in what order they appear. The waiting list columns box operates similarly.

A comma separated list of field names should be given here. You can also use additional field names for your custom fields.

• 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.
24.14 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 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)

24.15 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.

24.16 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.
- 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 that fall due in the coming week. The email is sent as part of the overnight batch, early on Monday mornings.

An example of the email fosterers will receive looks like this:
24.17 Movements

The movement tab allows a number of days to be set to automatically cancel reservations. 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.

- 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.

- Automatically cancel any outstanding reservations on a 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.
- 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 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.
- 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.

• 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 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 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 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.

24.18 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.

24.19 Remove

• 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 fine-grained animal control incident permissions: Setting this option removes the “View Roles” control from the new incident and edit incident screens. The “View Roles” control allows a user to specify exactly which users can see the incident.

• 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.

• 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 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.

• 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 Housetrained fields from the animal screen: If ticked, ASM won’t display the good with cats/dogs/children and housetrained 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).
24.20 Shelter View

The shelter view 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.
- Show empty locations: If set, headings for all internal locations will be shown, even if there are no animals in them.

24.21 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.
APPENDIX: FREQUENTLY ASKED QUESTIONS

25.1 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.

25.2 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.

25.3 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.

25.4 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.

25.5 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.
25.6 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.

25.7 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.

25.8 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.

25.9 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.

25.10 How do I integrate my adoptable animals with my website?

See Appendix: Integrating with Your Website.

25.11 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.
25.12 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.

25.13 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 of animals. This means smaller text on documents you scan as JPEG will 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.

If you’re using phones rather than flatbed scanners to scan your documents, apps exist for all mobile platforms that allow you to take a photo of a document, clean it up and output it as a PDF. Apps such as “CamScanner” for Android, or “Scanner App” for iPhone.

25.14 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 message 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.

25.15 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.

25.16 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.

25.17 Can I undo a CSV import?

Yes. All CSV imports are tagged with the user “import”. You can run the following script at Settings → SQL Interface to remove everything imported after the 1st January, 2017:

```sql
DELETE FROM animal WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM animalvaccination WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM animalmedical WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM animalmedicaltreatment WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM animaltest WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM owner WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM animalcontrol WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM adoption WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM ownerdonation WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
DELETE FROM ownerlicence WHERE CreatedBy = 'import' AND CreatedDate > '2017-01-01';
```

25.18 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:

Finally, enter the start and end dates of the calendar month that you’d like to generate the figures for.

**Note:** The report will only work correctly for one calendar month. Run the report multiple times for multiple
25.18. How do I export my data to shelteranimalscount.org?
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.

**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.

**ANIMALNAME** The animal’s name

**ANIMALIMAGE** A photo for the animal, it can either be a fully qualified HTTP URL to a JPG image OR a base64 encoded JPG expressed as a data URI

**ANIMALNONSHELTER** Y/N to indicate whether this animal is a 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).

**ANIMALSEX** The animal’s gender. ASM looks for the initial letter “M” in the string to indicate male.

**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.

**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 crossbreed.

**ANIMALDOB** The animal’s date of birth. This field, or ANIMALAGE must be supplied or the record will not be imported.

**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.

**ANIMALSPECIES** The animal’s species. This should match a species in your database.

**ANIMALHOUSED Trained** 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

**ANIMALGOODWITHKIDS** Y/N/U to indicate yes/no/unknown

**ANIMALCOMMENTS** Some comments to put in the animal’s comment 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.

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

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.

ANIMALREASONFORENTRY  Free text, notes on the reason the animal entered the shelter.

ANIMALDECEASEDDATE  If the animal is deceased, the date it died.

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, ANIMALADDITIONAL-WEIGHT

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

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

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 (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.

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.

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.

ORIGINALOWNERADDITIONALfieldname> 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 ORIGINALOWNERADDITIONALDATEOFBIRTH

PERSONCLASS 1 = Individual/Couple, 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

PERSONMEMBERSHIPCATEGORY 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.

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.

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 of the animal the person is looking for

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 The good with/housetrained flags of the animal the person is looking for

PERSONMATCHCOMMENTS 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

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

VACCINATIONCOMMENTS Comments on the vaccine
APPENDIX: DATABASE TABLES/COLUMNS

27.1 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

**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)

**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

**InsuranceNumber**  VARCHAR If your shelter does short term insurance when adopting, the policy number

**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

**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
27.2 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)

**BondedAnimal1ID** 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

**Breed1ID** 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

**UniqueId** INTEGER The next UUU code can be generated by doing MAX(UniqueId)

**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
PTSRreason  VARCHAR  Freeform text, reason the animal died
PTSRreasonID  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
 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

27.3 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
27.4 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
Content  CLOB Base64 encoded content

27.5 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
MediaName  VARCHAR The name of the file within the dbfs table - always [media.ID].extension
MediaNotes  VARCHAR The notes accompanying the media file (used as description when publishing)
WebsitePhoto  INTEGER 1 if this is the preferred photo of an animal for use on the web
DocPhoto  INTEGER 1 if this is the preferred photo of an animal for use with generated documents
NewSinceLastPublish  INTEGER 1 if this media record was created after the last time a publish was done
UpdatedSinceLastPublish  INTEGER 1 if this media record was updated after the last time a publish was done
LastPublished  TIMESTAMP The date this record was last published to the web
LastPublishedPF  TIMESTAMP Date this record was last published to PetFinder.com
LastPublishedAP  TIMESTAMP Date this record was last published to AdoptAPet.com
LastPublishedP911  TIMESTAMP Date this record was last published to Pets911.com
LastPublishedRG  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
Date  TIMESTAMP Date this record was created
RecordVersion  INTEGER Optimistic lock flag

27.6 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
OwnerTitle  VARCHAR The person’s title, eg: Mr
OwnerInitials  VARCHAR The person’s initials
OwnerForeNames  VARCHAR The person’s first name(s)
OwnerSurname  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  VARCHAR
MobileTelephone  VARCHAR
EmailAddress  VARCHAR
IDCheck  INTEGER 1 if the person has been homechecked
Comments  VARCHAR
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
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
28.1 Animal with satellite tables, media and logs
28.2 Adoption/Movement table with relationships
28.3 Person/payment/account relationships
28.4 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.

29.1 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:

```html
<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.

29.1.1 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:
29.1.2 Facebook

The “Share” button on animal records is great for highlighting an animal so that all your followers see it in their timeline, but you can also add your complete adoptable animal list as a tab to your Facebook page too.

Follow this guide: http://www.jotform.com/help/82-Adding-Form-to-Facebook-Custom-iFrame-App- to add a
new iframe tab to your page. You can use a service call to ASM as the iframe target to get a list of your adoptable animals.

If you’re using sheltermanager.com, it’s as easy as using this snippet of iframe markup (substitute YOURACCOUNT for your sheltermanager.com account number):

```html
<iframe src="https://service.sheltermanager.com/asmservice?method=animal_view_adoptable_html&account=YOURACCOUNT" width="100%" height="600px"></iframe>
```

### 29.2 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:

```html
<iframe src="https://service.sheltermanager.com/asmservice?account=ACCOUNT&method=html_adoptable_animals" width="100%" height="600px" />
```

### 29.3 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.

For example, to embed a static HTML website generated by sheltermanager.com (don’t forget to swap ACCOUNT for your sheltermanager.com account number):

```html
<iframe src="https://public.sheltermanager.com/animals/ACCOUNT" width="100%" height="600px" />
```

**Warning:** The HTML publisher is deprecated for sheltermanager.com users, use the dynamic HTML page service call outlined above instead.

### 29.4 Service API Data Calls

Finally, you can use ASM’s Service API to retrieve the adoptable animal information and images programmatically 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.
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** The person’s title, eg: Mr
- **initials** The person’s initials
- **forenames / firstname** The person’s first name
- **surname / lastname** 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** The person’s work phone number
- **mobiletelephone / celltelephone** The person’s mobile number
- **emailaddress** The person’s email address
- **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
- **description** The description for the lost, found or waiting list animal
- **reason** The reason the person is putting their animal on the waiting list
- **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)
- **breed** 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)
- **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)
- **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
- **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
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>>

### 31.1 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
- **Date** Today’s date
- **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
- **UserSignatureSrc** Just the src attribute value so the signature can be applied to your own image tag (eg: to override size)

### 31.2 Animal Keys

Animal keys are available for documents generated from the animal details and movement screens.

- **DocumentImgLink** An `<img>` 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 `<img>` 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 `<img>` tag containing a link to QR code that references a URL to the animal’s record within ASM.
- **ShelterCode** The animal’s shelter code
ShortShelterCode  The shortened version of the shelter code
Age  The animal’s age in readable form (eg: “5 years and 6 months”)
Description / AnimalComments  The animal description box
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)
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
CoatType  The animal’s coat type
AnimalFlags  A list of the flags assigned to an animal, separated by commas.
AnimalCreatedBy  The user who created the animal record (AnimalCreatedByByName 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
Fee  The animal’s adoption fee if you are using per-animal adoption fees
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 (FIVLResult 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
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
CoordinatorName  The 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

**BroughtInBy Additional Fields**  Additional fields on the brought in by person can be accessed via BroughtIn-ByFIELDNAME

**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

**OriginalOwnerJurisdiction**  The jurisdiction of the original owner

**OriginalOwner Additional Fields**  Additional fields on the original owner can be accessed via OriginalOwner-FIELDNAME

**CurrentOwnerName**  The name of the animal’s current owner (fosterer or adopter)

**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

**CurrentOwnerJurisdiction**  The jurisdiction of the current owner

**CurrentOwner Additional Fields**  Additional fields on the current owner can be accessed via CurrentOwner-FIELDNAME

**ReservedOwnerName**  The name of the person with an active reserve on the animal

**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
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
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 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”
 GoodWithDogs  “Yes/No/Unknown”
 GoodWithChildren  “Yes/No/Unknown”
 HouseTrained  “Yes/No/Unknown”
 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
 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.

**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

**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)

### 31.3 Vaccination Keys

Vaccination keys let you access the vaccination records for an animal. There are multiple ways of accessing the records. You construct a key that contains the field name and then an index for it. The field names are:

**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

**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

Just putting a number on the end of the fieldname returns that field for the records, counting from oldest to newest. For example, VaccinationName1 returns the name of the first vaccination on file for the animal.

You can use the suffix Lastn, where n is a number to count from the newest to the oldest instead. For example, VaccinationGivenLast1 returns the given date of the most recent vaccination record.

You can also use the vaccination type itself as an index, for example VaccinationRequiredDHCPP will return the latest vaccination record of type DHCPP. If your vaccination type has spaces in its name, then remove them when constructing the key. Eg: A type of “DHCPP Vacc” would become <<VaccinationRequiredDHCPPVacc>> when accessing it via a wordkey.

The “Recent” keyword operates with the vaccination type and allows you to select the most recent vaccination of that type that has a non-blank given date. Eg: VaccinationCommentsRecentDHCPP will return the comments of the last given DHCPP vaccination.

The “Due” keyword operates with the vaccination type and allows you to select the most recent vaccination of that type that has a blank given date. Eg: VaccinationRequiredDueDHCPP will return the date the most recent due DHCPP vaccination. Note that the “Due” keyword will not work 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**.

### 31.4 Test Keys

The same rules for vaccinations apply to reading test 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

31.5 Medical Keys

The same rules for vaccinations apply to reading medical records, except the MedicalName field can be used for looking up the most recent record of that treatment. In addition, the Recent keyword looks for medical regimens that have a status of complete, while the Due keyword looks for active medical regimens.

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

31.6 Payment 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 payments. 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  
PaymentAmount  The total amount of the payment  
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  
PaymentTotalDue  The total of all selected payments that have a due date and no received date  
PaymentTotalReceived  The 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  PaymentTotalReceived + PaymentTotalTax  

31.7  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  
TransportDriveName  The transport driver if known  
TransportPickupDateTime  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  

31.7.  Transport Keys
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 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

31.8 Cost Keys

The same rules apply as for vaccinations and medical records but for accessing costs. The fields are:
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.

### 31.9 Diet Keys

The same rules apply as for vaccinations, but for accessing diet records. The fields are:

- **DietName**  The name of the diet
- **DietDescription**  The diet description
- **DietDateStarted**  The date the diet started
- **DietComments**  Any comments on the diet

### 31.10 Log Keys

The same rules apply as for vaccinations, but for accessing log records. The fields are:

- **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

### 31.11 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
- **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
- **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

31.12 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. Log keys are available for people, but prefixed with PersonLog instead of just Log.

OwnerTitle  The person’s title
OwnerInitials  The person’s initials
OwnerForenames  (OwnerFirstNames for US users)
OwnerSurname  (OwnerLastName for US users)
OwnerFlags  A list of the flags assigned to a person, separated by commas.
OwnerComments  Any comments 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
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
OwnerAddress  The person’s address
OwnerName  The person’s display name in the selected system display format
OwnerTown  (OwnerCity for US users)
OwnerCounty  (OwnerState for US users)
OwnerPostcode  (OwnerZipcode for US users)
Jurisdiction  The person’s jurisdiction
WorkTelephone  The person’s work telephone number
MobileTelephone  (CellTelephone for US users)
EmailAddress  The person’s email address
**MembershipNumber**  The person’s membership number

**MembershipExpiryDate**  The date this person’s membership with the shelter expires

**DocumentImgLink**  An `<img>` 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: `<<DocumentImgLink300>>`, `<<DocumentImgLink400>>`, `<<DocumentImgLink500>>`

**DocumentImgSrc**  Just the `src` attribute value for an image link to the preferred document image.

### 31.13 Citation Keys

The same rules apply as for vaccinations, but for accessing citations. Each citation is indexed with a number for ascending (eg: `CitationName1`), LastX for descending (eg: `CitationNameLast1`) and with the type name for the most recent citation of that type for the person (eg: `FineAmountFirstOffence`). Citation keys can be accessed from a person document or an incident document.

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

### 31.14 Traploan Keys

The same rules apply as for vaccinations, but for accessing trap loans. Each loan is indexed with a number for ascending (eg: `TrapTypeName1`), LastX for descending (eg: `TrapTypeNameLast1`) and with the type name for the most recent loan of that type for the person (eg: `TrapLoanDateCat`).

The Recent keyword returns returned trap loan records where Due is unreturned.

The fields are:

- **TrapTypeName**  The type of trap being loaned
- **TrapLoanDate**  The date the trap was loaned
- **TrapDepositAmount**  The amount of deposit on the loan
- **TrapDepositReturnDate**  The date the deposit was returned
- **TrapNumber**  The trap number of the trap being loaned
- **TrapReturnDueDate**  The date the trap is due for return
- **TrapReturnDate**  The date the trap was returned
- **TrapComments**  Any comments on the traploana

### 31.15 Licence Keys

Licence keys are only available for documents generated for a single licence under the licence tab or licencing book. 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

31.16 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
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
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 <img> 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.

### 31.17 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  
**AgeGroup** The animal’s age group  
**AnimalTypeName** The type of animal  
**SpeciesName** The species of animal  
**DateBroughtIn** The date the animal entered the shelter  
**DeceasedDate** The date the animal died

### 31.18 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.

### 31.19 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.

31.20 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
WaitingListComments 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.

31.21 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