



## **Animal Shelter Management System**



COPYRIGHT © 2002

**ISLAND BUSINESS GROUP, INC.**

All Rights Reserved. This software and associated documentation  
may be used only under license from Island Business Group, Inc.



ADOPT A FRIEND 7.0

ISLAND BUSINESS GROUP, INC.



ADOPT A FRIEND™ Version 7.0 was developed with input from shelters and animal control facilities of all sizes and types around the country. The intent of the software is to provide a shelter with a powerful tool to help the day to day functions of the shelter. When properly used, Adopt-A-Friend Version 7.0™ can help increase shelter awareness, adoptions, and revenue.

ADOPT A FRIEND™ Version 7.0 was designed to integrate with the Microsoft Office Suite for additional powerful tools such as mail merges, graphs, labels and other database functions. While ADOPT A FRIEND™ Version 7.0 is a powerful stand-alone application, the purchase of Microsoft Office 2000 (or greater) will provide additional functions and capabilities. Our unique add-on Datamine™ database (Microsoft Access 2000 required) will let you perform queries and analysis on your database safely, without change of accidentally damaging vital data.

Any software package is only as good as the people that use it, the data that is entered and the amount of effort spent setting up the software. ADOPT A FRIEND™ Version 7.0 was designed to run in it's entirety , but many users choose to use only the sections that apply to their shelters. A careful understanding of the capabilities of ADOPT A FRIEND™ Version 7.0 is essential when setting up your shelter.

The following documentation assumes sufficient knowledge in Windows applications and some familiarity with Microsoft Office. We also assume a working knowledge of networking if your application will be installed on your network. We strongly advise a class in Microsoft Office and/or Microsoft Access to learn additional system capabilities.

Our consultants are always available to assist and help with the installation and/or use of this product. Email any questions to [info@islandbusinessgroup.com](mailto:info@islandbusinessgroup.com) or call us at 631-288-6031.



ADOPT A FRIEND 7.0

ISLAND BUSINESS GROUP, INC.



# TABLE OF CONTENTS

<b>ADOPT-A-FRIEND™ VERSION 7.0 RELEASE NOTES .....</b>	<b>1</b>
<b>INSTALLATION INSTRUCTIONS .....</b>	<b>1</b>
Access Server Installation.....	2
SQL Server Installation.....	2
Client Installation .....	2
Once You Have Completed The Client And Server Installations .....	3
<b>SECURITY INFORMATION .....</b>	<b>5</b>
<b>QUICK START GUIDE .....</b>	<b>6</b>
<b>GENERAL DATA ENTRY INFORMATION.....</b>	<b>7</b>
Form View of Master List Form .....	7
Datasheet View of Master List Form .....	8
Searching The Database .....	8
The Search Form .....	9
Working With Forms .....	9
<b>IMAGES.....</b>	<b>9</b>
<b>MAJOR SYSTEM FORMS.....</b>	<b>10</b>
The Main Menu .....	10
The People Menu .....	11
<i>The Master List Form.....</i>	<i>12</i>
<i>Pledges/Appeals Detail Form.....</i>	<i>14</i>
<i>Mailing List Form .....</i>	<i>15</i>
Creating mailing labels or an export file .....	15
<i>Sponsor Types/Programs .....</i>	<i>17</i>
<i>Documents.....</i>	<i>17</i>
Pet Menu .....	18
<i>Animal Records .....</i>	<i>19</i>
<i>Adoption Records .....</i>	<i>20</i>
<i>Lost And Found.....</i>	<i>20</i>
<i>Waiting List.....</i>	<i>21</i>
<i>Animals For Disposition Report .....</i>	<i>21</i>
<i>Animal Support Menu .....</i>	<i>22</i>
Municipal Menu.....	23
<i>Animal Bites .....</i>	<i>23</i>
Licenses .....	25
<i>Animal Activity Report .....</i>	<i>26</i>
<i>Municipal Reports .....</i>	<i>27</i>
Health Menu .....	28
<i>Euthanasia Records.....</i>	<i>29</i>
<i>Spay Records .....</i>	<i>30</i>
<i>Health Reports.....</i>	<i>30</i>



<b>Point Of Sale .....</b>	<b>31</b>
<i>Processing A Transaction.....</i>	<i>31</i>
<b>Financial Menu .....</b>	<b>32</b>
<i>Batch Check Entry .....</i>	<i>32</i>
<i>Register History.....</i>	<i>33</i>
<i>Analysis Reports.....</i>	<i>33</i>
<i>Point Of Sale Reports .....</i>	<i>34</i>
<i>Financial Mailing List.....</i>	<i>34</i>
Creating mailing labels or an export file .....	35
<i>Financial Support Menu .....</i>	<i>35</i>
Appeal Types .....	36
Fund Codes .....	36
Memorials/Honors .....	36
Reason Codes .....	36
Source Codes.....	36
Payment Types.....	37
Profit Centers.....	37
<b>System Administration Menu.....</b>	<b>38</b>
<i>Supporting Tables .....</i>	<i>38</i>
Zip Codes .....	39
Document Wording.....	39
Security Menu.....	41
Users.....	41
Tasks .....	42
Logon Time-out.....	42
Export to Virtual Adoption .....	43
Export to Petfinder.org©.....	43
Database Backup .....	43
Required Field Control.....	44
<b>How To .....</b>	<b>44</b>
Process An Adoption.....	44
Process An Intake .....	44
Process A Spay, Vaccination or Medical Procedure.....	45
Sell Any Item.....	45
Take A Donation.....	46
Tips For Making Getting The Most Out Of Adopt-A-Friend .....	46



## ADOPT-A-FRIEND™ VERSION 7.0 RELEASE NOTES

Adopt-A-Friend™7.0 is a major new release. It is the result of working with existing users at shelters and animal control facilities around the country. The additions to this version include:

1. Adopt-A-Friend© Version 7 is a consolidated release for users of both the Access and SQL versions.
2. THE MASTER LIST now has numerous additional fields for identification and mailing purposes.
3. THE APPEALS/ PLEDGES screen has many additional fields and has been reformatted for easier viewing.
4. LICENSE REPORT is now sorted by license tag number.
5. ANIMAL COMPLAINT module has been expanded to better handle pets not in the pet database. There are also additional fields to track additional information.
6. WAITING LIST now includes date field.
7. ADOPTION CONTRACT – signature line has been removed. You should add a signature line to your contract wording.
8. ADOPTION DATABASE now includes a photo in the database and on the contract as well.
9. FINANCIAL ANALYSIS –Additional reports and functions.
10. LICENSE DATABASE – Additional fields added.
11. ANIMAL RECORD – Added ACO (AnimalControl Officer), additional wildlife information for Federal and Local reporting. Click button added to assign next tag number by species. Also DECLAWTYPE has been added
12. NEW APPEALS BATCH ENTRY SCREEN – To quickly add records to Appeals (bypassing POS).
13. TOOLBAR CHANGES – some additional toolbar items to help data entry.
14. NEW PET ARCHIVE FORM - Allows browsing of Pet Archives records.
15. MORE FLEXIBLE AUTOMATION – Automation such as adoptions can be set from the Service Code level, so that an item can be automated regardless of what G/L or Service Category it is in (\*Youwill need to set your automation back up). LICENSING HAS BEEN AUTOMATED
16. COLOR TABLE has been added and the COLOR field on the pet record now requires a preentered color. This will force color standards.
17. WANTED POSTER now has bigger, bolder fonts for poster use.
18. DOCUMENT TABLE to manage all of the word processing documents used for mail merges and other purposes.
19. REGISTER HISTORY is now available from the Financial menu, and has built in filtering on the form for history lookups.
20. UPC code has been added to the service code and logic has been added to the POS screen. This will allow UPC code scanning while keeping the primary item number small.

Additional Version7 upgrades are planned for 2004, some building upon these updates.

## INSTALLATION INSTRUCTIONS

The installation process is relatively simple if you follow these directions. The software is designed to run on a single computer or on a network with many computers sharing information. There is a SERVER installation(where the data goes) as well as a CLIENT installation (the actual program that you run). Even If you are using one computer without a server, both applications must be installed on the computer. In a network installation, the SERVER installation is installed on the machine that will hold the data and the CLIENT installation is installed on the machines that you will run the application on. Always run the server installation first.

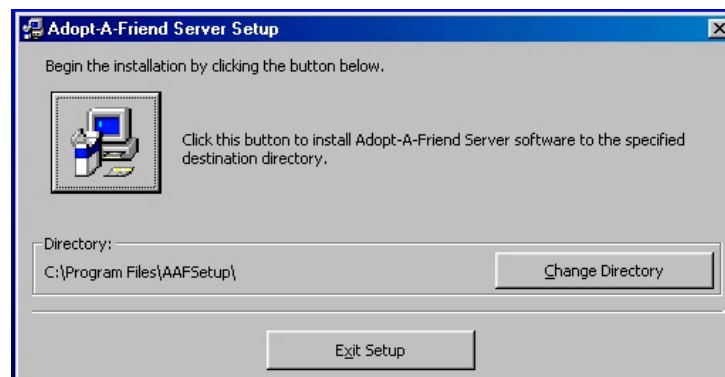
## Access Server Installation

The purpose of the SERVER installation is to put the associated databases into an area on your hard drive, or a hard drive on your network, that the CLIENT program will access.

When you put the CD into your CD drive, the Adopt-A-Friend Installation form will launch. You may be asked to reboot a few times during the installation so you should exit all of your programs before starting the installation. You may also receive various messages during the installation (such as installation of Access 2000 run time) and you should follow the instructions during the installation.



Click the SERVERSETUP. Please read and accept the License Agreement. Install the Server Application to the default directory, or change the directory (we advise the default installation). Follow the instructions during the installation.



## SQL Server Installation

Set up your SQL server as described in the additional information that came with your SQL CD. Proceed with the installation as described for the Access Server Installation. Choose SQL connection.

## Client Installation

The purpose of the CLIENT installation is to put the program to access the databases onto a machine that you will be using to run Adopt-A-Friend.





When you put the CD into your CD drive, the Adopt-A-Friend Installation form will launch. You may be asked to reboot a few times during the installation so you should exit all of your programs before starting the installation. You may also receive various messages during the installation and you should follow the instructions during the installation.



### ***Once You Have Completed The Client And Server Installations***

You are now a few steps from running Adopt-A-Friend! Proceed as follows:

1. Click on START, PROGRAMS, ADOPT-A-FRIENDSERVER. This will launch the following form:

Organization Information	
Organization	ADOPT-A-FRIEND
Street Address	111 MAIN STREET
Address line 2	RTE. 272
City	ANYTOWN
State	USA
Zip	00302-3022
Phone #	(888) 232-8232
Fax #	(888) 228-2323
Email address	info@yourshelter.com
Web Address	www.yourshelter.com
Logo file	C:\Program Files\AAFSetup\images\shelter.bmp
Image library	C:\Program Files\AAFSetup\images\
Animal Control Logo	C:\Program Files\Microsoft Visual Studio\Common\Graphics\Bitmaps\Assc
Image Type	BMP
Sales Tax %	6.00%

1. Choose the SQL or NATIVE versions.
2. Complete the company information on the form presented.
4. LOGO FILE You may add your own logo to the forms and reports (logo must be as small as possible) by using the find button on the Logo File field to find your logo.
5. IMAGE LIBRARY Pictures of pets may be stored in a directory for display and printing.  
(If you installed CLIENT and SERVER to the default directory, you may not need to change items 3 and 4)
6. ANIMAL CONTROL LOGO – You may add a special logo for your animal control section reports.
7. IMAGE TYPE – Most computers support BMP image formats, but if yours supports JPG images, you may want to choose JPG format for your pictures. Refer to our section on image support for additional details.
8. Sales Tax % - Enter the Sales Tax for your area.



9. WORDINGFIELDS – Substitute your own contract wording, or use the precanned wording for your contracts and forms. Please review the document wording and replace occurrences of “[your company name]” with the appropriate information.
10. Edit User Defined Fields – Define additional fields for the databases.
11. Exit the server application when you have completed entering your information.
12. Click on START, PROGRAMS, ADOPT-A-FRIEND\CLIENT. The program will attempt to find the data on your local system or your network. The Authorization Code defaults to DEMO and the data location is set to the default

The Setup Information dialog box has a blue title bar. It contains four input fields: 'Authorization code:' with 'DEMO', 'License code:' with '51874288', 'Path to Data:' with 'C:\Program Files\AAFSetup\' (highlighted), and 'Cash Register COM Port' with a dropdown menu showing '0'. To the right of these fields are three buttons: 'Continue', 'Find', and 'Exit'.

installation path. If the data is located elsewhere, you will have to tell it where the data is (using the FIND button) and the first screen you see will be:

13. AUTHORIZATIONCODE: If you are installing a DEMO version, enter DEMO for your authorization code which will provide you with a limited number of entries. If you have purchased ADOPT-A-FRIEND you will need to call us for your authorization code.
14. DATA LOCATION: Find the location that you installed the SERVER application to. If you used the default locations during installation, the data will be found in C:\Program Files\AAFSetup\.
15. If you are using an electronic cash drawer connected to your computer, then select the COM port the drawer is connected to, or leave it set to 0.
16. When you click continue, you will now be at the following log on form:

The Logon Security dialog box has a blue title bar. It features the IBG logo and the text 'Adopt-A-Friend'. Below this, it says 'Please Enter Name and Password:'. There are two input fields: 'User ID:' with 'administrator' and 'Password:'. At the bottom are two buttons: 'OK' and 'Exit'.

16. Log on to the system using administrator as the User ID and administrator as the Password. (You may want to change the password on this account. Read more on security in the security section). If you need to get back into the system setup, enter setup as the User ID to launch the setup menu.
17. Congratulations, you should be at the main menu!



## SECURITY INFORMATION

You can control access to the databases via our special security module. The concept is to User ID's, Passwords and tasks to your users. This is done in the Supporting Tables mode. First, define the tasks and the security assignments, then add in the users and assign them tasks. Adopt-A-Friend 7.0™ comes preinstalled with an ADMINISTRATOR and a KENNEL person. We recommend that you try to log in as the KENNEL person, so that you can see how the ADMINISTRATOR can limit the functions available to users.

The security functions in Adopt-A-Friend 7.0™ are fairly extensive. We recommend not changing the ADMINISTRATOR tasks so as to assure that you are never permanently locked out of the software.



## QUICK START GUIDE

Proper planning will ensure a smooth transition onto Adopt-A-Friend 7.0™. Read and understand the following steps, then Follow these steps to get your system running as fast as possible.

- 1) If you have not already done so during installation, run the Adopt-A-Friend 7.0™ SERVER program from your START MENU and fill in your Shelter information. If you have a logo, place it in the image directory and use the SERVER program to choose your logo.
- 2) Modify the DEFAULT wording for all of your forms and contracts.
- 3) Change the Administrative password. WRITE THIS DOWN AND DO NOT LOSE IT!
- 4) From the Main Menu, click FINANCIAL and then PROFIT CENTERS. Enter your profit centers (profit centers are areas in the shelter that bring in revenue, such as Clinic, Thrift Shop, etc. You are required to use a profit center, but you may simply use the ALL profit center that comes with the software.
- 5) On that same menu, choose USERS and TASKS to enter users and their associated TASKS into the SECURITY MODULE. Decide what privileges you will allow for each task. Assign each user a profit center. (To see how this can work, log back onto the software using the KENNEL/KENNEL user ID and password).
- 6) From the Main Menu, click PEOPLE and then SPONSOR TYPE to set the sponsor types you wish to use.
- 7) From the Main Menu, click PETS and then ANIMAL SUPPORT TABLES and enter ANIMAL ORIGINS, STATUS TYPES and SURRENDER REASONS that your shelter will use. Add any additional SPECIES and BREEDS that you may need.
- 8) From the Main Menu, press SYSTEM ADMINISTRATION SUPPORTING TABLES and set up your Appeal Types, Veterinarian database with all of your local veterinarians and ZIP CODE database with all of the towns in your area.
- 9) From the same menu, enter your SERVICE CATEGORIES. Pay special attention to the AUTOMATION. These automation categories trigger actions from the Cash Register. The eight special categories you choose will do the following:
  - a) ADOPTIONS- Any items under this category will update the ANIMAL and MASTERLIST records and add/display an ADOPTION record and allow printing of adoption contracts.
  - b) RECLAIM- Any items under this category will update and display the ANIMAL record of the surrendered or stay animal.
  - c) SURRENDER- Any items under this category will update and display the ANIMAL record and allow printing of the Surrender Agreement.
  - d) DONATIONS- Any items under this category will update the APPEALS database.
  - e) MEDICAL- Any item in this category will add/display a HEALTH and allow printing of the health reports.
  - f) SPAY/NEUTER- Any item in this category will add/display HEALTH and SPAY records and allow printing of the SPAY/NEUTER certificate.
  - g) SURGERY – Any item in this category will add/display a HEALTH record and allow printing of the SURGICAL release form.
  - h) VACCINATIONS Any items under this category will update the REMINDER and HEALTH databases and allow printing of health reports.
- 10) Enter your ITEM/SERVICE CODES – assign them to the proper category. They will automatically default to the automation selected in the corresponding category, but you may automate any item

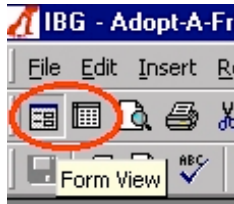
NOTE: PROPER ATTENTION TO THE ABOVE STEPS WILL INSURE THAT YOU ARE OFF TO A GOOD START!

You're ready to go!

## GENERAL DATA ENTRY INFORMATION

MS Access is a powerful database and if you spend some time familiarizing yourself with some of the basic functions, you will be able to move around Adopt-A-Friend and find information quickly.

On each form, you can toggle between FORM VIEW and DATASHEET VIEW by clicking the form view , datasheet view buttons on the Adopt-A-Friend toolbar



### Form View of Master List Form

Adopt-A-Friend Master List

ID # [AutoNumber] FIRST ENTERED 03/28/04 TYPE [ ]

[Mailing List](#) [Show Animals](#)

**PRIMARY CONTACT/ PRIMARY MAIL ADDRESS**

TITLE [ ] COMPANY [ ] EMAIL [ ]

FIRST NAME [ ] HOME [ ] EXT: [ ]

LAST NAME [ ] WORK [ ] MEMO [ ]

ADDRESS [ ] FAX [ ]

[ ] CELL [ ]

ZIP [ ] DRV. LIC# [ ]

CITY [ ] DOB: [ ]

STATE [ ] HGT [ ] EyeClr [ ]

MUNCPLTY [ ] WGHT [ ] SPONSOR TYPE [ ]

**SECONDARY CONTACT**

TITLE: [ ] FIRST NAME [ ] LAST NAME: [ ]

HOME [ ] WORK [ ] FAX [ ] CELL [ ]

EXT: [ ]

**MAILING INFO/SECONDARY MAIL ADDRESS** **MAILING CONTROL**

\*Double click to set default salutation

SALUTATION: [ ] PRIMARY ADD. ALTERNATE ADD.

ADDRESS: [ ] ☒ JAN ☒ JUL ☐ JAN ☐ JUL

ZIP [ ] ☒ FEB ☒ AUG ☐ FEB ☐ AUG

CITY: [ ] ☒ MAR ☒ SEP ☐ MAR ☐ SEP

STATE: [ ] ☒ APR ☒ OCT ☐ APR ☐ OCT

☒ MAY ☒ NOV ☐ MAY ☐ NOV

☒ JUN ☒ DEC ☐ JUN ☐ DEC

**PHYSICAL/LEGAL ADDRESS** ADD1 [ ]

[ ]

ZIP [ ]

CITY: [ ]

ST. [ ]

MUN. [ ]

ser Defined Field1 [ ]

ser Defined Field2 [ ]

ser Defined Field3 [ ]

ser Defined Field4 [ ]

**OTHER SPONSORSHIPS/PROGRAMS**

[ ]

LST ADPT DTE [ ]

PET ADPTED [ ]

Pledged \$ [ ]

Received \$ [ ]

Pledge Balance \$ [ ]

[Pledge/Appeal Details](#)

Secure Memo: [ ]

Record: 13 of 13

While in form view you can use the navigation buttons on the bottom to move between records, much as you would use a control on your VCR. The navigation button with the \* is used to ADD a new record.

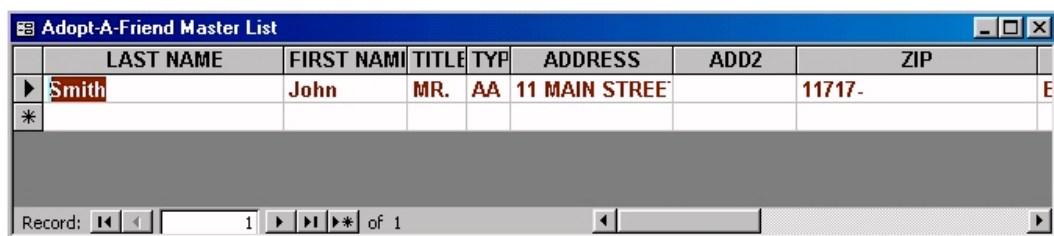
STATE


Record:       of 1






To DELETE a record, simply click on the left-hand border of the form (with the small arrow or pencil) and press your delete key.

Also while in form view you may use the search tools to find information in your database as well as use the form filters and queries.

### ***Datasheet View of Master List Form***



	LAST NAME	FIRST NAME	TITLE	TYPE	ADDRESS	ADD2	ZIP	
	Smith	John	MR.	AA	11 MAIN STREET		11717-	E
*								

Record:       of 1

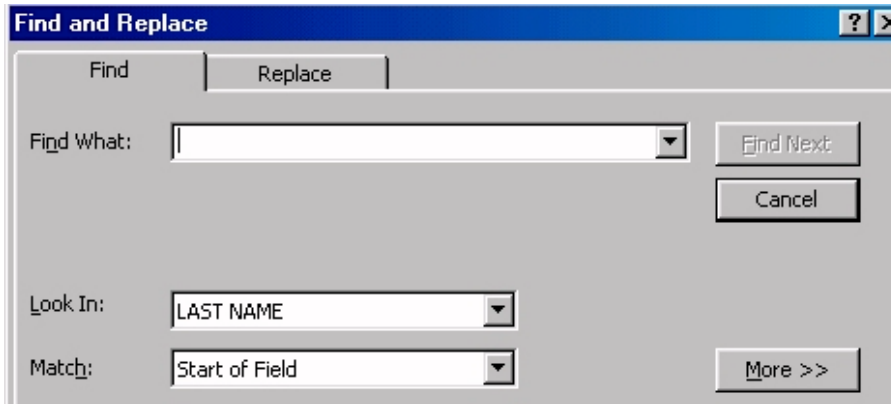
This is a form in Datasheet View. In Datasheet View, you can sort, drag and hide columns as well as perform advanced queries.

### ***Searching The Database***

Advanced Search tools are available in either form or datasheet view. To launch the search form, press the search button on the tool bar. This will launch the search form.



## The Search Form



To search the database for information, either put your cursor in the field you want to search, or choose the field name from the LOOK IN drop down menu. Enter the information you wish to search for into the FIND WHAT box. Lastly, choose your match from the MATCH drop down. Choose START OF FIELD to match exactly the first few characters in the field. Choose ANY PART OF FIELD to look for your match anywhere within the field. Choose WHOLE FIELD to match exactly all letters and characters in your search.

## Working With Forms

While in any entry form in Adopt-A-Friend 7.0™, you can use the advance features of Microsoft Access to apply filters and selection criteria to the form you are on. Refer to Access documentation for use of items on this tool bar.



## IMAGES

Adopt-A-Friend supports either BMP or JPG images that are either scanned or inputted from a digital camera. JPG images are favored, as they require less space and are read faster from the computer. If your computers do not support JPG, use BMP images. We assume that you have some experience in dealing with images and image formats. Resample your images to make them as small as possible, increasing loading, printing as well as printing and network speed.

Pet images are placed in a directory on your computer or server. The Adopt-A-Friend 7.0™ Server program will define where these pictures reside. Pictures will automatically appear on the Animal Records form, if they are named as xxxx.jpg or xxxx.bmp, depending upon the image type you have chosen for your shelter. Xxxx is the ANIMALID field in the pet record. For example, pet record 3 should have its picture called 3.JPG or 3.BMP.

## Working With Advanced Queries, Filters and Sorts

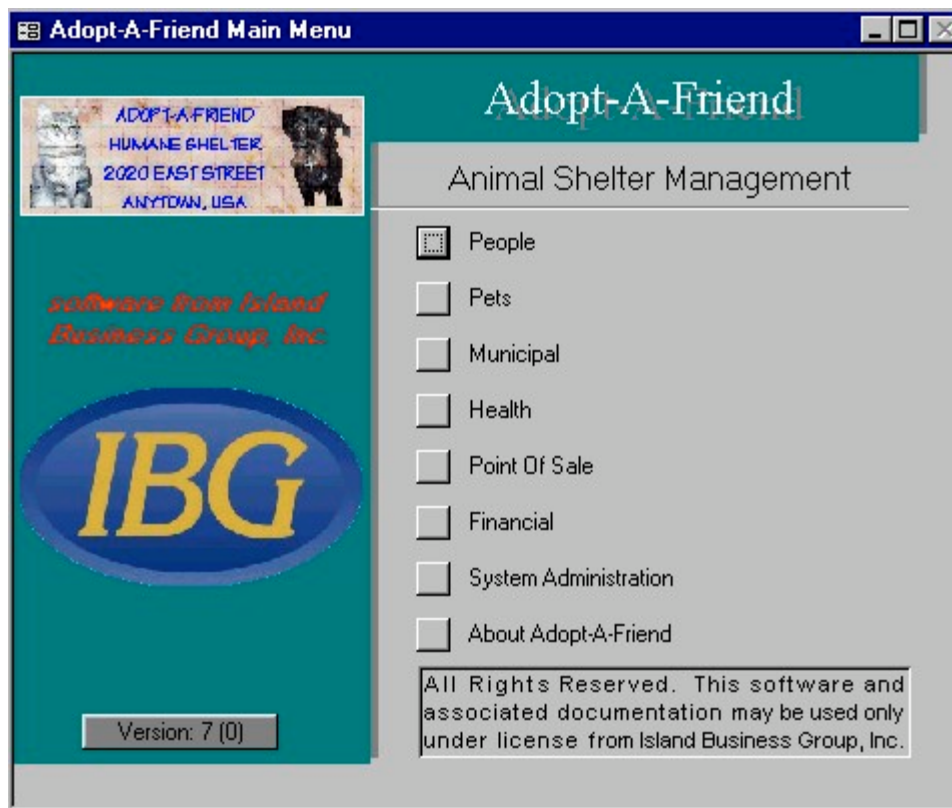
You can use advanced queries such as filter by form, and advanced filtering using the form filter controls.



## MAJOR SYSTEM FORMS

The following section shows the major system forms.

### *The Main Menu*



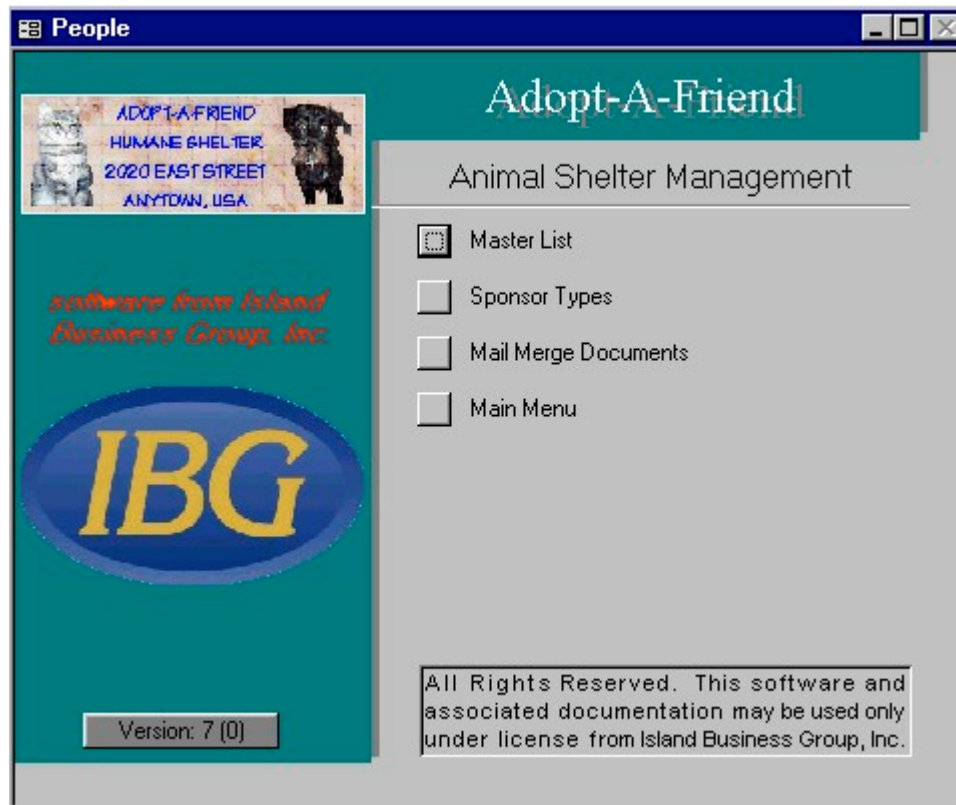
This form shows the options available in Adopt-A-Friend 7.0™. The major system functions are:

- People - All your friends, patrons, benefactors, government officials and the general public can be entered and tracked, as well as their donations and involvement with the shelter.
- Pets - Detailed record keeping on available as well as adopted pets with automatic Internet compatibility.
- Municipal – Maintain information on Pet Licensing, Bite Incidents and Complaints.
- Health – Track health related items such as vaccinations and neutering.
- Point Of Sale – Fully functional Point Of Sale module to sell items, received dollars and print receipts.
- Financial – Income reports as well as Analysis of revenue, and mailing lists by appeals/donations.
- System Administration – Various functions to maintain lists and procedures.

All of these functions coexist with the Microsoft OfficeSuite for endless possibilities!



## The People Menu



This form shows the options available in the People Menu. These functions are:

- Master List – Enter information about people, organizations, corporations or government officials. View, edit and enter donation/appeal information, and enter people on the list into various shelter programs or sponsorship. This option also allows you to print labels or export mailing list information.
- Sponsor Types – Set up any programs or sponsor ship information to involve your master List people with.
- Mail Merge Documents – Track documents to be used for mail merges with the Master List.

## The Master List Form

**Adopt-A-Friend Master List**

ID #  FIRST ENTERED  TYPE

[Mailing List](#) [Show Animals](#)

---

**PRIMARY CONTACT/ PRIMARY MAIL ADDRESS**

TITLE  COMPANY  EMAIL

FIRST NAME  HOME  EXT:

LAST NAME  WORK  MEMO

ADDRESS  FAX

CELL

ZIP  DRV. LIC#

CITY  DOB:

STATE  HGT  EyeClr

MUNCPLTY  WGHT  SPONSOR TYPE

---

**SECONDARY CONTACT**

TITLE:  FIRST NAME  LAST NAME:

HOME  WORK  FAX  CELL

EXT:

---

**MAILING INFO/SECONDARY MAIL ADDRESS** **MAILING CONTROL**

\*Double click to set default salutation

SALUTATION:

ADDRESS:

ZIP

CITY:

STATE:

**PRIMARY ADD.**

☒ JAN ☒ JUL

☒ FEB ☒ AUG

☒ MAR ☒ SEP

☒ APR ☒ OCT

☒ MAY ☒ NOV

☒ JUN ☒ DEC

**ALTERNATE ADD.**

☐ JAN ☐ JUL

☐ FEB ☐ AUG

☐ MAR ☐ SEP

☐ APR ☐ OCT

☐ MAY ☐ NOV

☐ JUN ☐ DEC

---

**PHYSICAL/LEGAL ADDRESS**

ADD1

ZIP

CITY:

ST.

MUN.

---

ser Defined Field1

ser Defined Field2

ser Defined Field3

ser Defined Field4

---

**OTHER SPONSORSHIPS/PROGRAMS**

LST ADPT DTE

PET ADPTED

Pledged \$

Received \$

Pledge Balance \$

[Pledge/Appeal Details](#)

Secure Memo:

Record: 14 of 13

This form shows the Master List Form. You can see the details behind the appeal amount by viewing the Appeals Form, launched by pressing the [Pledge/Appeal Details](#) button next to the total Appeals dollars. EVERYONE THAT COMES TO YOUR SHELTER SHOULD BE ENTERED INTO THIS LIST.

The Master List functions include:



- List Maintenance – Maintain pertinent information on individuals and organizations for mailings, queries and analysis.
- User Defined Fields that can be set up from the Adopt-A-Friend 7.0™ Server program.
- Programs – Track and communicate with people and organizations by their involvement with the shelter as well as by their donations.
- Appeals/Pledges Entry – Enter and track donations and appeals and pledges by directly entering donation information (or enter from the Point Of Sale Module and view it here). Note: The ability to see this is controlled by the View Donations check box on the Users form found on the Security menu.
- Mailing List Functions – Print or export mailing information.
- Show Animals – Displays the filtered Animal Records form.
- Secure Memo – The ability to see this memo field is controlled by the View Donations check box on the Users form found on the Security menu(if you have access to the donations information, you will also have access to the Secure Memo).
- Search Lists by any criteria, sort by any field and perform your own queries. Use the advanced features of Microsoft Access to filter and select records by various criteria.
- Switch to Datasheet View – see all of your records on one form. Sort, rearrange and query every column.

*Pledges/Appeals Detail Form*

**Adopt-A-Friend Pledges/Appeals**

**Mirell, Eric**

**Appeals**

Appeal Date	Amount	Appeal Type	Description	Source	Fund Code	Pledge #	Mem/Hon	Mem Code
Reason	Pay Met	Tax Ded. \$						
03/18/2004	\$25.00	Ad Journal	Spring Fund Drive	M1	A	0	Memorial	JD
A	AMEX	\$0.00	BatchDate: 3/18/04	Batchcode: A				
03/01/2003	\$100.00	Building Fund		M1	A	6	Memorial	
A		\$0.00	BatchDate: 3/18/04	Batchcode: A				
* 04/01/2004	\$0.00							
			BatchDate: 4/1/04	Batchcode:				
<b>Total: \$125.00</b>								
<b>Total for selected Pledge: \$100.00</b>								
Record: 1 of 2								

**Pledges**

ID	Pledge Date	Amount	Pledge Type	Outstanding \$
6	04/01/2004	\$150.00	Building Fund	\$50.00
* (AutoN)	04/01/2004	\$0.00		\$0.00
<b>Total Amount: \$150.00</b>				
<b>Total Outstanding: \$50.00</b>				
Record: 1 of 1				

Outstanding Pledge Statement

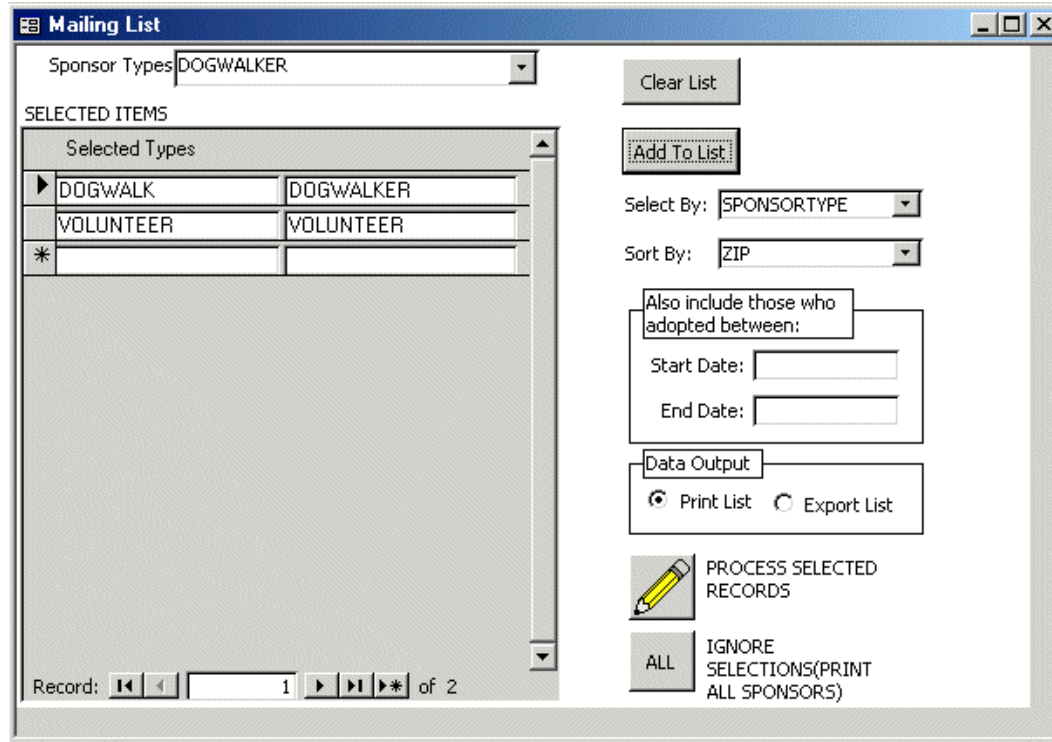
The PLEDGEfunction of Adopt-A-Friend™ will let you track paid and unpaid pledges. Each pledge is assigned a unique transaction ID when it is created. Upon receipt of payments for specific pledges, the payments are entered and applied to the pledge ID. The above screen shows that this donor has made four appeal payments. The first two (on the right side of the screen) are applied to pledge ID #1. If you look at the pledge ID on the left side of the screen, you can see that this was a pledge to donate \$300, of which \$275.00 has been received, leaving \$25 outstanding on this pledge. You can print a statement from this screen as well to remind the donor of his pledge and account balance.

Pledges and Appeals can be entered directly into the Pledges/Appeals form from this form, or they can be automatically entered from the Point Of Sale Cash Register form (see QUICK START section on how to set this up). The advantage of entering this through the Point Of Sale is that all of the money entered will appear on the POS reports.

The Pledges/Appeals functions include:

- Pledge List Maintenance – Maintain pledge information on individuals and organizations.
- Appeal List Maintenance – Maintain appeal information and apply to a specific pledge if applicable.

### Mailing List Form



The mailing list form is a powerful tool to help do selective mailings to anyone on your mailing list, based on a number of criteria. You can either print your own labels (on Avery 5160 label stock), or export the selected records to an ASCII text file to send to a mailing service or to another program. The mailing list knows not to create more than one label even if a list record has more than one selected sponsor type.

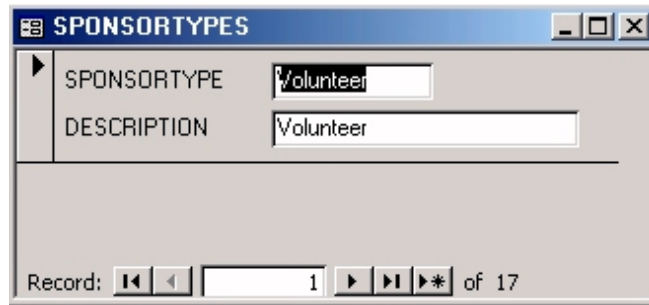
### Creating mailing labels or an export file

1. Clear list (to remove prior settings). The Selected Types window will clear.
2. Choose your SELECT BY option from the Drop Down Menu. You can select to target your mailing to specific sponsor/program types (from the PROGRAMS section of the MASTERLIST), or to specific zip codes in your area.
3. Choose your SORT option from the drop down list. You can sort by any criteria, ZIP code is the most common to take advantage of bulk mail rates.
4. Include ADOPTORS by entering starting and ending adoption dates. This will add ANYONE who has adopted in this time period to your mailing.
5. If you have chosen to select by SPONSOR TYPE, choose the type from the dropdown window, then press ADD TO LIST. Do the same if you have chosen to select by ZIP CODE
6. Repeat step 5 as needed to create your labels.
7. Choose to either PRINT LIST (labels) or EXPORT LIST to create the ASCII export file from your selections.



8. Press the PENCIL button to process the labels. If you have chosen PRINT LIST, the labels will preview on your form. Press the printer ICON to send them to the printer. If you have chosen EXPORT LIST, you will be prompted for an EXPORT FILE NAME.
9. Press the ALL button to print to ignore any selections and simply print (or export) all records on the master list that have at least one SPONSOR TYPE in the PROGRAM section of that screen.

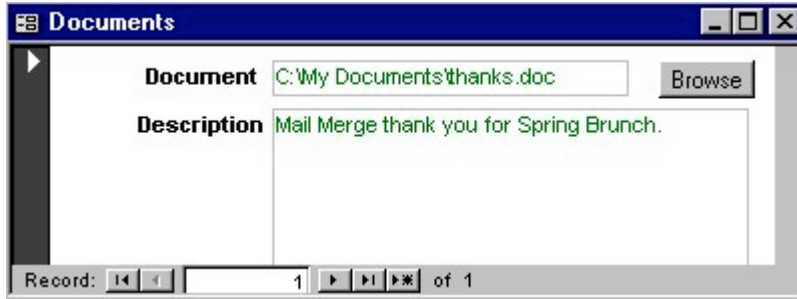
### *Sponsor Types/Programs*



The SPONSORTYPES form is a window with a title bar that says "SPONSORTYPES". It contains two input fields: "SPONSORTYPE" with the value "Volunteer" and "DESCRIPTION" with the value "Volunteer". At the bottom, there is a record navigation bar that says "Record: 1 of 17".

The Sponsor Types/Program form can be used to enter and maintain the various programs that Sponsors or Members can be a part of.

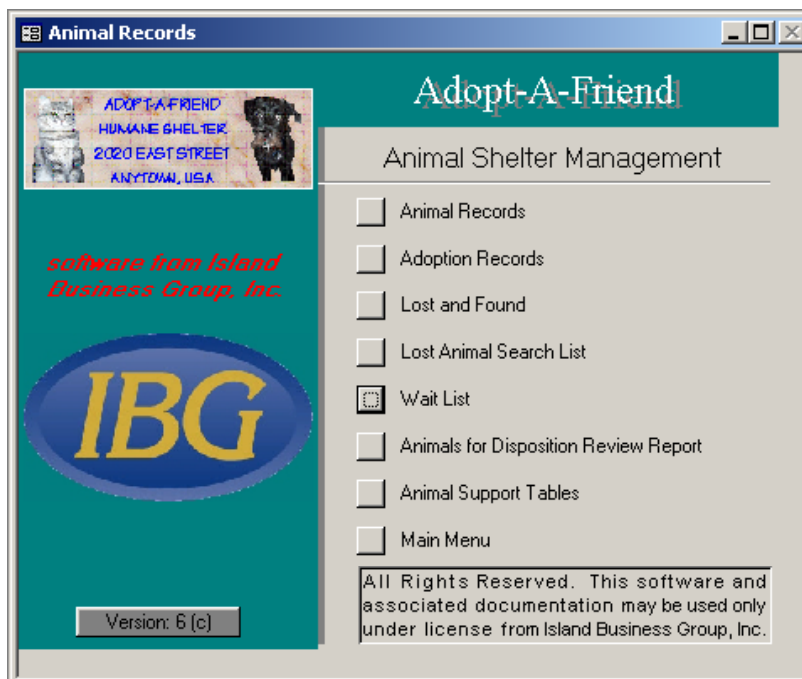
### *Documents*



The Documents form is a window with a title bar that says "Documents". It contains two input fields: "Document" with the value "C:\My Documents\thanks.doc" and "Description" with the value "Mail Merge thank you for Spring Brunch.". There is a "Browse" button next to the Document field. At the bottom, there is a record navigation bar that says "Record: 1 of 1".

The Document screen lets you track various documents for mail merge purposes.

## Pet Menu

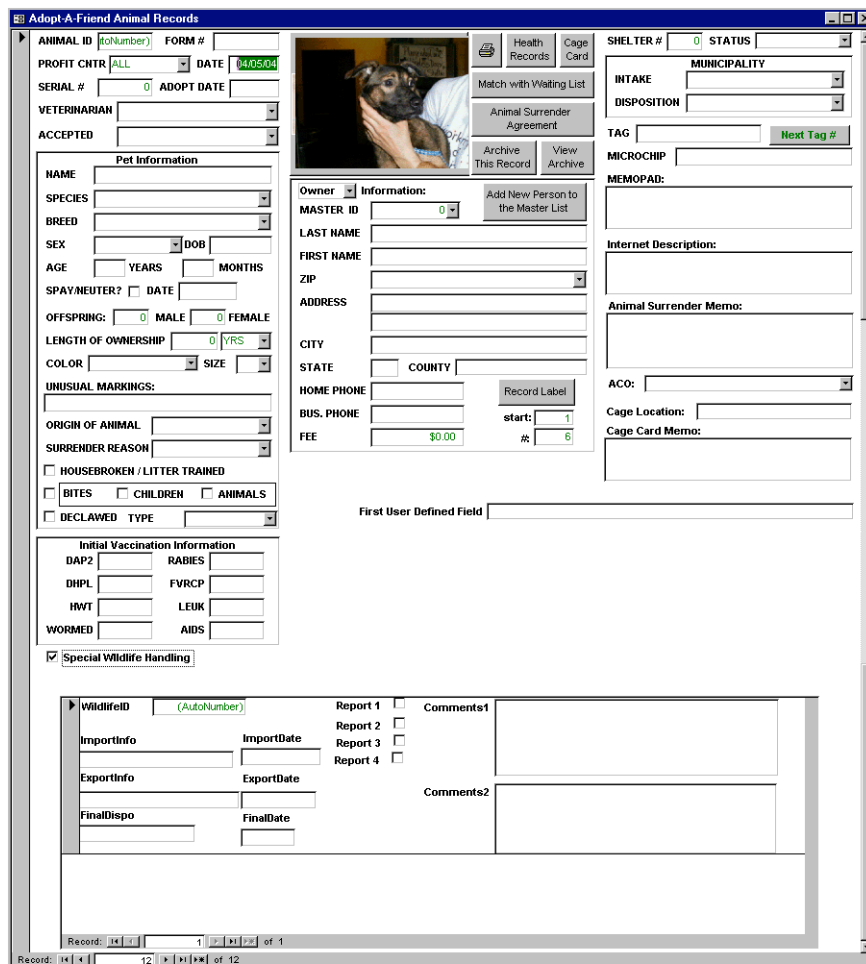


The PET MENU offers the following functions:

- Animal Records – Maintain information on any animals that have passed through the shelter for any reason. This form can also be launched from the Point Of Sale Menu.
- Adoption Records – Process adoption forms and maintain information on adopted animals and their new owners. This form will also be launched from the Point Of Sale menu during an adoption transaction.
- Lost and Found – Track pets that are lost and/or found.
- Lost Animal Search List – Quickly see an overview of lost animals that are at the shelter.
- Wait List – Maintain information and Pets waiting to be put up for adoption, or owners waiting to adopt a certain type of pet.
- Animals For Disposition Review Report – Quickly see animals by their status and when they arrived.
- Animal Support Tables – Set table information for your animal records.



## Animal Records



**Adopt-A-Friend Animal Records**

ANIMAL ID (AutoNumber) FORM #

PROFIT CNTR ALL DATE 04/05/04

SERIAL # 0 ADOPT DATE

VETERINARIAN

ACCEPTED

**Pet Information**

NAME

SPECIES

BREED

SEX DOB

AGE YEARS MONTHS

SPAY/NEUTER? DATE

OFFSPRING: 0 MALE 0 FEMALE

LENGTH OF OWNERSHIP 0 YRS

COLOR SIZE

UNUSUAL MARKINGS:

ORIGIN OF ANIMAL

SURRENDER REASON

☐ HOUSEBROKEN / LITTER TRAINED

☐ BITES ☐ CHILDREN ☐ ANIMALS

☐ DECLAWED TYPE

**Initial Vaccination Information**

DAP2 RABIES

DHPL FVRCP

HWT LEUK

WORMED AIDS

☒ Special Wildlife Handling

**Owner Information:**

MASTER ID 0 Add New Person to the Master List

LAST NAME

FIRST NAME

ZIP

ADDRESS

CITY

STATE COUNTY

HOME PHONE

BUS. PHONE

FEE \$0.00

Record Label

start: 1

# 6

**Health Records**

Health Records

Cage Card

Match with Waiting List

Animal Surrender Agreement

Archive This Record

View Archive

**SHELTER # 0 STATUS**

**MUNICIPALITY**

**INTAKE**

**DISPOSITION**

**TAG** Next Tag #

**MICROCHIP**

**MEMOPAD:**

**Internet Description:**

**Animal Surrender Memo:**

**ACO:**

**Cage Location:**

**Cage Card Memo:**

**Wildlife**

WildlifeID (AutoNumber)

ImportInfo ImportDate

ExportInfo ExportDate

FinalDispo FinalDate

Report 1 ☐ Comments1

Report 2 ☐

Report 3 ☐

Report 4 ☐

Comments2

Records: 12 of 12

The ANIMAL RECORDS form is used to accept a pet into the shelter, maintain information on it during its stay, and to help it find a home. Some of the features of this form are:

- Wanted Poster – Press the PRINTER icon to create a poster for this pet that can be given to prospective adopters, or hung on the shelter wall.
- Surrender Agreement – You create the wording for your agreement.
- Cage Card – Print a card for the cage.
- Health Records – Monitor health issues for this pet.
- Match with waiting list. – Check to see if someone is looking for a pet just like this one!
- Archive This Record – Stores the current animal information record like a snap shot, before you make updates to the animal record. This history of the animal can then be accessed with the View Archive button.
- Add New Person to the Master List – Allows easy addition of a Master List record based on the current Owner/Finder information.



- USER DEFINED FIELDS – Create your own fields to add to the pet record. You can modify these fields for your own use by typing SETUP as the user name when you log into Adopt-A-Friend 7.0™.
- Record Label – Print a label to apply to any manual record
- Wildlife Flag – Will display additional fields pertaining to Wildlife/Exotics

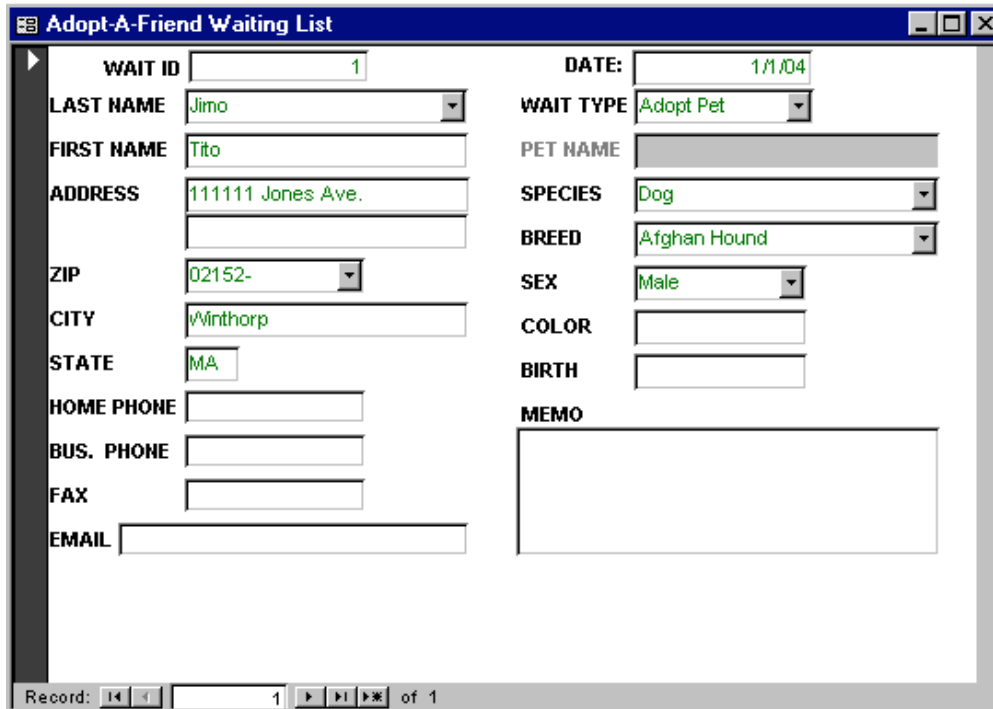
### Adoption Records

The Adoption Records form is used to enter information regarding adopted pets. You can print the Adoption Contracts and Health Records, as well as add your own USER DEFINED FIELDS to the form.

### Lost And Found

The Lost And Found form is used to enter information about pets that are either Lost or Found. The CONTACTS and CHECK STRAYS button presents additional information about this pet.

## Waiting List



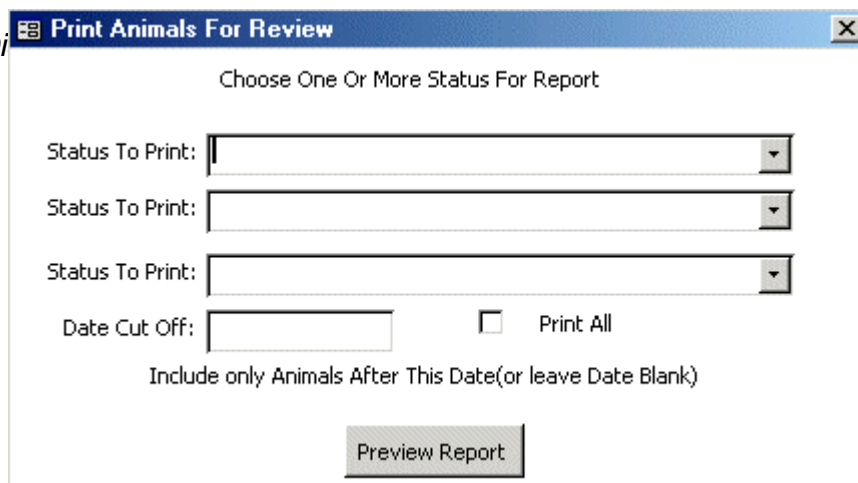
**Adopt-A-Friend Waiting List**

<b>WAIT ID</b>	1	<b>DATE:</b>	1/1/04
<b>LAST NAME</b>	Jimo	<b>WAIT TYPE</b>	Adopt Pet
<b>FIRST NAME</b>	Tito	<b>PET NAME</b>	
<b>ADDRESS</b>	111111 Jones Ave.	<b>SPECIES</b>	Dog
<b>ZIP</b>	02152-	<b>BREED</b>	Afghan Hound
<b>CITY</b>	Winthrop	<b>SEX</b>	Male
<b>STATE</b>	MA	<b>COLOR</b>	
<b>HOME PHONE</b>		<b>BIRTH</b>	
<b>BUS. PHONE</b>		<b>MEMO</b>	
<b>FAX</b>			
<b>EMAIL</b>			

Record: 1 of 1

The Waiting List is used to maintain information and Pets waiting to be put up for adoption, or owners waiting to adopt a certain type of pet.

## Animals For Di



**Print Animals For Review**

Choose One Or More Status For Report

Status To Print:

Status To Print:

Status To Print:

Date Cut Off:  ☐ Print All

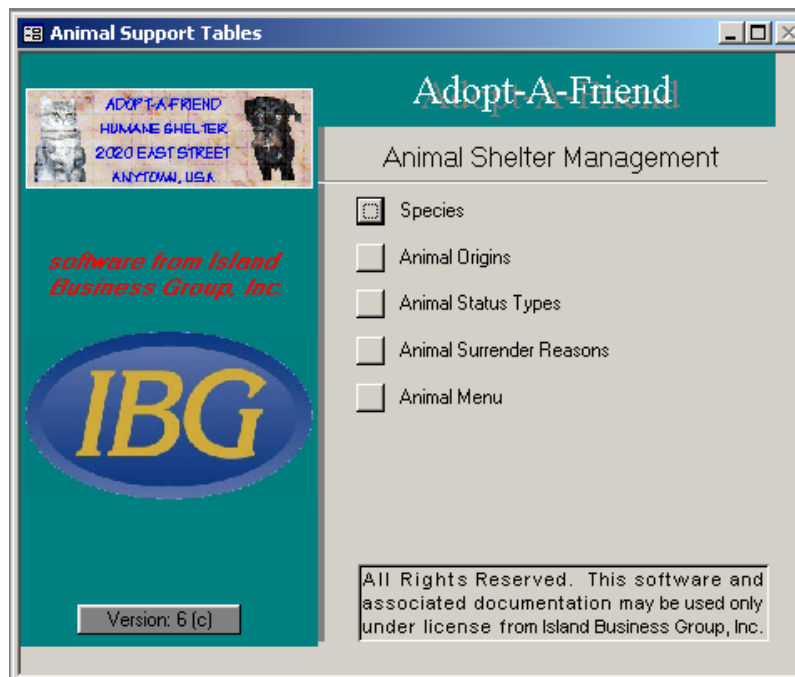
Include only Animals After This Date(or leave Date Blank)

Preview Report



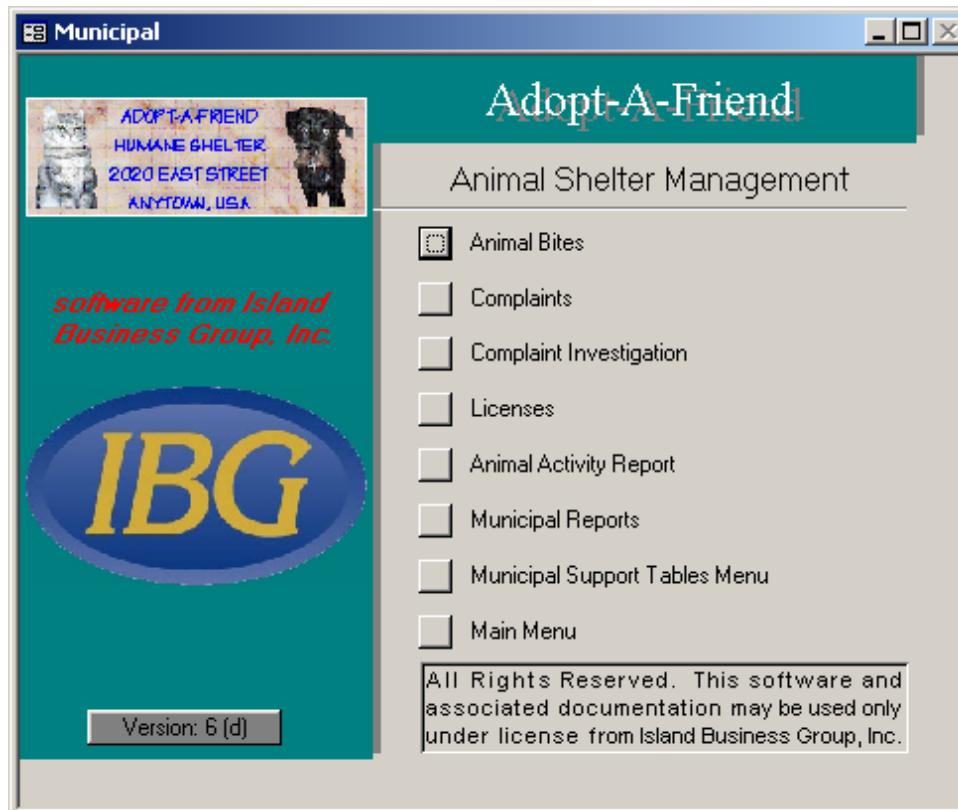
This screen will allow you to create a report to monitor animals in your shelter that need reviewing (ie: Strays). Choose up to three status types at one time to print. Choose a CUTOFF date to view only animals who have DATE fields (date they were entered into the system) greater or equal to this date. Choose PRINT ALL to print all animals regardless of status, but subject to the DATE CUTOFF. This is a good way to review STRAYS pets in the shelter clinic, etc.

### *Animal Support Menu*



This menu allows you to add, edit, delete or change tables that are accessed in the Pet Records. Certain pre-entered records in these tables should not be deleted (ie: ADOPTED) as they are required by some automatic functions (ie: updating a pet that has been adopted).

## Municipal Menu



The Municipal Menu offers the following functions:

- Animal Bites – Maintain information on Animal Bites.
- Complaints – Maintain Complaint information related to animal control.
- Complaint Investigation – Maintain information on investigations of complaints.
- Licenses – Track Licenses and Expiration dates.
- Animal Activity Report – Shows a cross-tabulation of species and intake/disposition types.
- Municipal Reports – Print Animal Bite and License reports.
- Municipal Support Tables Menu – Maintain information used within the municipal section.

## Animal Bites

Adopt-A-Friend Animal Bite

Animal Bite ID #:  Reported By:  Date/Time: 10/08/02 2:35 PM Location of Incident:

**Victim Information**

Last Name:  Parents or Guardian:   
First Name:  Home Phone:   
Age:  Work Phone:   
ZIP:  Place of Wound:   
Address:  Nature:   
City:  Physician:   
State:  ☐ Current Tetanus Shot

**Owner Information**

Master ID:  \* If existing master list person.  
Last Name:   
First Name:   
DOB:   
Address:   
City:   
State:  ZIP:   
Home Phone:   
Work Phone:

**Animal Information**

Animal ID:  \* If existing pet record.  
Species:  Rabies Shot: ☐ Due:   
Breed:  Vet.:  At Large: ☐ Vicious: ☐  
SEX:  Previous Bites:  Animal Held At:   
Age:  Last Bite:   
Name:  Veterinarian who checked the animal:  Date:   
Tag:  ☐ Victim Notified ☐ Statistic File  
☐ Public Health Nursing ☐ AC Health  
Animal Color:   
Description:

Remarks:

Date/Time of Incident:

Record: 14 of 1



Maintain information on Animal Bite reports.

## Complaints

**ADOPT-A-FRIEND Cruelty Complaints**

**ADOPT-A-FRIEND HUMANE SHELTER**

**INVESTIGATIVE DEPARTMENT**

**COMPLAINT** No 1

DATE/TIME (of incident) 11/13/02 9:59 AM TAKEN BY JONES, MARY COMPLAINT TYPE Cruelty/neglect

CONTACTED BY Letter ☒ INVESTIGATION AUTHORIZED

**NATURE OF COMPLAINT:**

**COMPLAINING WITNESS:**

MASTER ID\* \* If existing master list person.

LAST NAME aaaaaaaaaaaaaaaaaa DIRECTIONS:

FIRST NAME aaaaaaaaaaaaaaaaaa

ADDRESS 123 aaaaaaaaaaaaaaaaaa

ZIP 00771-3122

CITY Oyster Bay

STATE NY

MUNCPLTY

PHONE

BUSINESS

**PHYSICAL ADDRESS**

**INVESTIGATION OF:**

MASTER ID\* \* If existing master list person.

LAST NAME bbbbbbbbbbbbbbbb

FIRST NAME bbbbbbbbbb

ADDRESS 123 bbbbbbbbbbbbbb

ZIP 01340-

CITY Colrain

STATE MA

MUNCPLTY

PHONE

BUSINESS

DRV LIC.

DOB

**PHYSICAL ADDRESS**

**NEAREST INTERSECTION:**

**DIRECTIONS:**

HEIGHT

WEIGHT

EYES

**ADDITIONAL INFORMATION:**

Record: 1 of 1

Maintain information on complaint animal control reports.

## Complaint Investigation

**ADOPT-A-FRIEND Cruelty Complaints**

**ADOPT-A-FRIEND HUMANE SHELTER**

**Cruelty/neglect COMPLAINT INVESTIGATION**

DATE/TIME 11/13/02 9:59 AM No 1

**OFFICER ASSIGNED**

**OFFICER(S) ASSISTING**

**COMPLAINING WITNESS:**

LAST NAME aaaaaaaaaaaaaaaaaa

FIRST NAME aaaaaaaaaaaaaaaaaa

ADDRESS 123 aaaaaaaaaaaaaaaaaa

CITY Oyster Bay

STATE NY ZIP 00771-3122

MUNCPLTY

PHONE

BUSINESS

**INVESTIGATION OF:**

LAST NAME bbbbbbbbbbbbbbbb

FIRST NAME bbbbbbbbbb

ADDRESS 123 bbbbbbbbbbbbbb

CITY Colrain

STATE MA ZIP 01340-

MUNCPLTY

**INVESTIGATION DATE/TIME**

**CASE #**

**COMPLAINT TYPE** Cruelty/neglect

**NATURE OF COMPLAINT:**

**COMMENTS:**

**ADDITIONAL INFORMATION:**

**NARRATIVE:**

**ANIMAL INFORMATION**

Animal ID\* 0 \* If existing pet record.

Name Color:

Species

Breed Description:

Sex

DOB Vet.

☐ Animal Collar Collar Info

Animal Held At:

**PHYSICAL STATE**

**ATTITUDE**

**FOOD AVAILABLE**

☐ WATER AVAILABLE

☐ PREGNANT OFFSPRING PRESENT

**METHOD OF CAPTURE:**

**RESOLUTION**

**VIOLATION**

☐ COMPLIANCE

☐ FOLLOWUP CALL REQUIRED

☐ WARNING ISSUED DATE

Record: 1 of 1



Maintain information on complaint investigation animal control reports.

## Licenses

Adopt-A-Friend License	
License ID	1
Date	11/13/02
Expires:	1/1/02
<b>Primary Address</b>	
LAST NAME	jnk
FIRST NAME	Claire
ZIP	30022-
ADDRESS	231 Honds Lane hjkjkh
CITY	Alpharetta
STATE	GA
<b>Physical Address</b>	
ADDRESS:	
ZIP:	
ST:	
CITY:	
Phone:	
<b>Pet/Other Information</b>	
NAME	TINY
SPECIES	Dog
BREED	Airedale Terrier
SEX	Male
Tag	111
OldlicenseID:	1
RABIES EXP.	12/1/04
VET OFFICE	DR. JANE SMITH
FEE PAID	\$25.00
ISSUED BY	Administrator
PAY METHOD	COUPON

Record: 14 1 of 1

Maintain information on Licenses.



## Animal Activity Report

**Animal Activity Report**

For Dates: 2/1/2000 thru 10/18/2002

**ADOPT-A-FRIEND HUMANE SHELTER**  
2020 EAST STREET  
ANYTOWN, USA 07724

Municipal Location: ALL

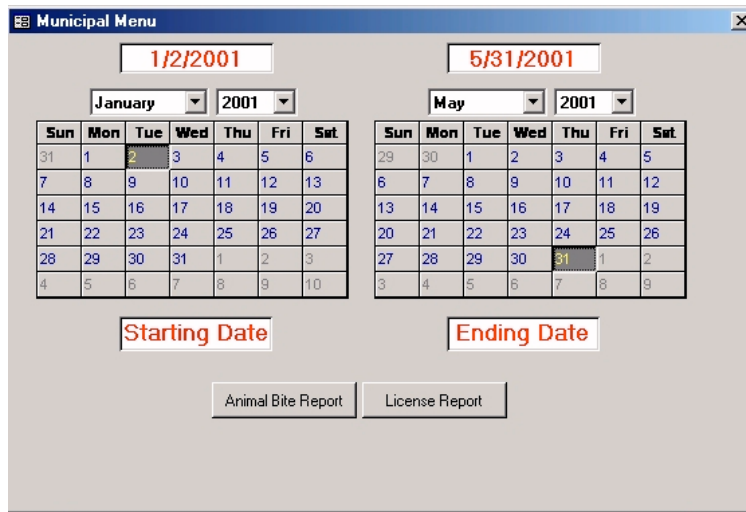
Intake	BIRD	BARNYARD	CAT	DOG	FERRET	GUINEA PIG	HAMSTER/MOUSE	HORSE	PIG	RABBIT	REPTILE	SMALL & FURRY	WILDLIFE	OTHER	Total
			1	2											3
Breeder/Pet Store			1	1											1
Total for Intake			1	3											4

Disposition	BIRD	BARNYARD	CAT	DOG	FERRET	GUINEA PIG	HAMSTER/MOUSE	HORSE	PIG	RABBIT	REPTILE	SMALL & FURRY	WILDLIFE	OTHER	Total
				1											1
Adopted				1											1
AVAILABLE FOR ADOPTION			1												1
Available to Adopt				1											1
Lost				1											1
Total for Disposition			1	3											4

This report shows a cross-tabulation of species and intake/disposition types.



## Municipal Reports



**Municipal Menu**

1/2/2001 5/31/2001

January 2001 May 2001

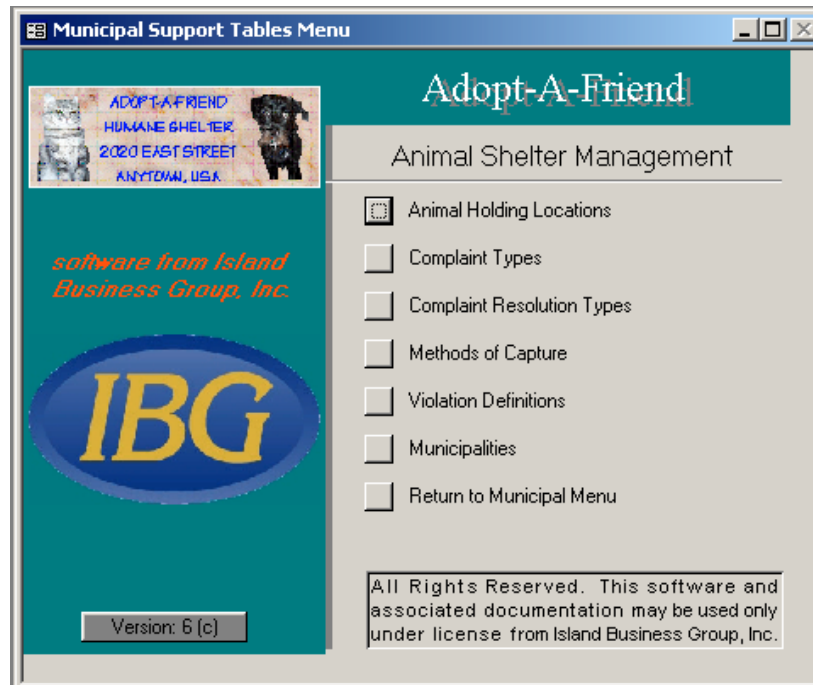
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Starting Date Ending Date

Animal Bite Report License Report

Click on the Calendars to choose the date range, and then press the buttons to preview the reports.

## Municipal Support Tables Menu



**Municipal Support Tables Menu**

ADOPT-A-FRIEND  
HUMANE SHELTER  
2020 EAST STREET  
ANYTOWN, USA

software from Island Business Group, Inc.

**IBG**

Version: 6 (c)

**Adopt-A-Friend**

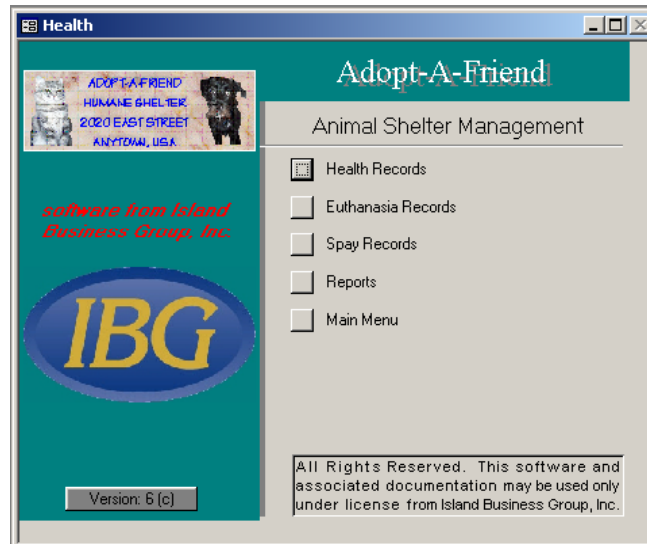
Animal Shelter Management

- ☒ Animal Holding Locations
- ☐ Complaint Types
- ☐ Complaint Resolution Types
- ☐ Methods of Capture
- ☐ Violation Definitions
- ☐ Municipalities
- ☐ Return to Municipal Menu

All Rights Reserved. This software and associated documentation may be used only under license from Island Business Group, Inc.

This menu allows you to add, edit, delete or change tables that are accessed in the municipal section.

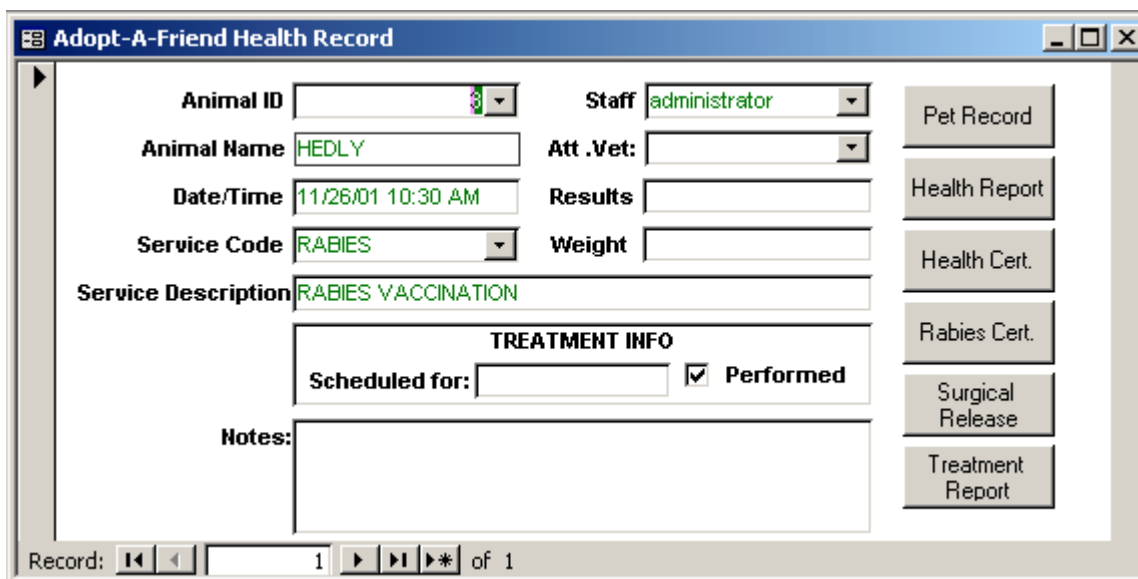
## Health Menu



The Health Menu offers the following options:

- Health Records – Access to Health Records for all Pets
- Euthanasia Records - Maintain information on pets Euthanised.
- Spay Records – Enter information on Spay and Neutering and print certificates.
- Health Reports – Print reminders, spay and euthanasia reports.

## Health Records

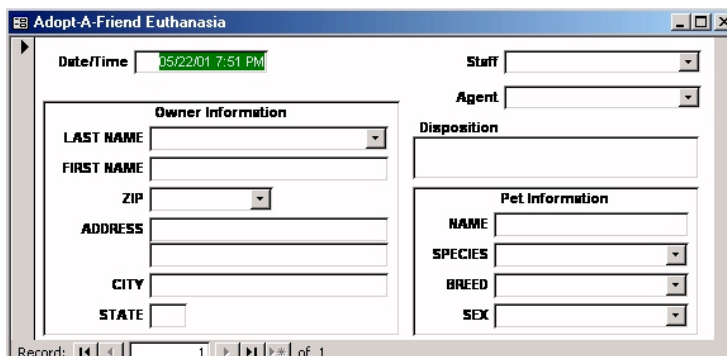


The HEALTHRECORDS form is used to maintain information on health related items or services scheduled and/or rendered for a pet. Some of the features of this form are:

- Treatment Info – Treatment services can be scheduled for a future date/time. Unchecking the Performed box will clear the Date/Time the service was performed, shown directly beneath the pet name. A treatment report showing all the scheduled treatments for the currently listed pet by schedule date/time regardless of the 'performed' status.
- Pet Record – Opens the Animal Records form, filtered to just the currently shown pet.
- Health Report – Prints the Health Report for the currently shown pet.
- Health Cert. – Prints a Health Certificate report for the currently shown pet.
- Rabies Cert. – Prints a Rabies Certificate report for the currently shown pet.
- Surgical Release – Prints a Surgical Release Form for the currently shown pet.
- Treatment Report – Prints a Treatment Report showing all the scheduled treatments for the currently shown pet by scheduled date/time, regardless of the 'Performed' status.

Note: A treatment Report for all pets for a specific date range is available from the Health Reports form.

## Euthanasia Records



Use this form to maintain information on euthanised animals.



## Spay Records

The form is titled "ADOPT-A-Friend Spay Records". It is divided into several sections:

- Owner Information:** Includes fields for LAST NAME, FIRST NAME, ADDRESS, ZIP, CITY, STATE (pre-filled with "NY"), PHONE, and BUS. PHONE.
- SURG. DATE:** A date field.
- SURG. TYPE:** A text field.
- ANIMAL NAME:** A text field.
- SPECIES:** A dropdown menu.
- BREED:** A dropdown menu.
- SEX:** A dropdown menu.
- AGE:** A text field with a "0" pre-filled.
- COLOR:** A text field.
- VAC. HISTORY:** A text field.
- FEE:** A text field with "\$0.00" pre-filled.
- MEMO:** A large text area for notes.
- Print Certificate:** A button.

At the bottom, it says "Record: 14 of 1".

Use this form to maintain spay and neuter information.

## Health Reports

The form is titled "ADOPT-A-Friend Health Reports". It features two calendar views for the month of October 2002, with the date 10/9/2002 highlighted. Below the calendars are two buttons: "Starting Date" and "Ending Date". At the bottom, there are four buttons: "Reminders", "Euthanasia", "Spay/Neuter", and "Treatment". To the right of these buttons is a section for "Treatment Report Options" with two radio buttons: "By Treatment Schedule" (selected) and "By Pet", and a checkbox for "Show only treatments not performed".

Choose the date range and press the button for the report you wish to run.



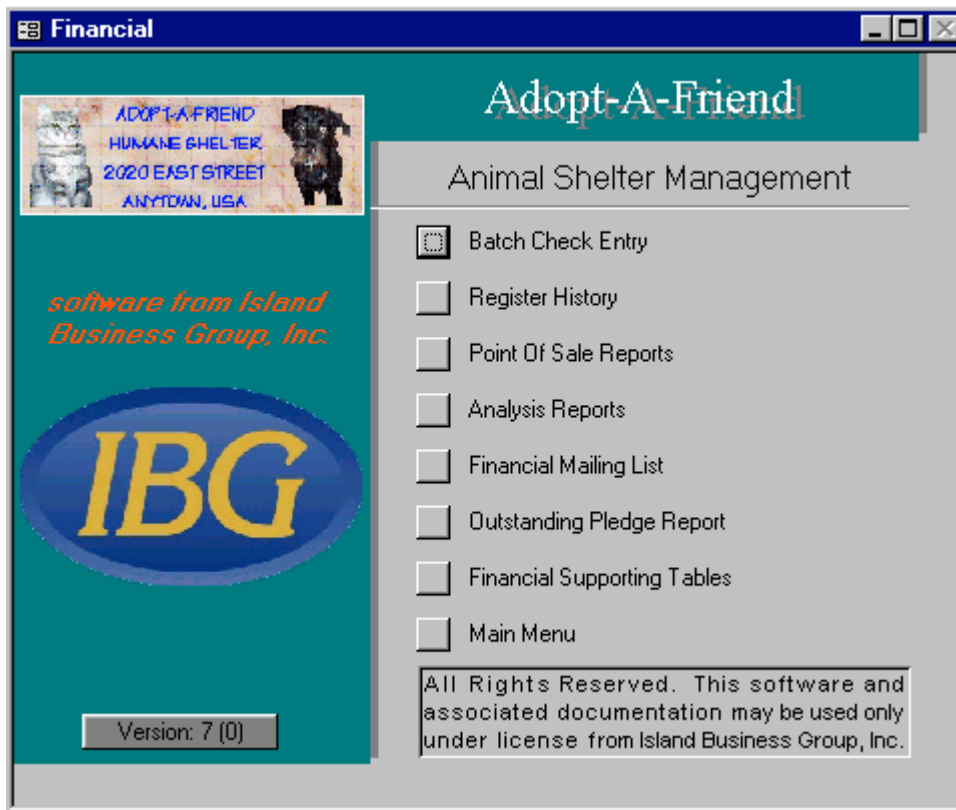
## Point Of Sale

The Point Of Sale form lets you process various types of transactions and procedures. When properly configured, the Point Of Sale form will automatically generate Adoption Forms, Appeals Updates, Rabies & Health Certificates and Health Forms. You enter and process any type of service or item for sale. You can also launch and work with the Items/Services, Master List and Pets forms from this form.

### Processing A Transaction

1. Choose the customer from the drop down list, or enter them into the list by clicking the master list button.
2. You may enter or edit items for sale by choosing the item to be sold from the **ITEMS/SERVICES drop down** or scan the bar code on the item with an optional **Bar Code Scanner**. When properly configured, choosing the item will retrieve the correct item description, price and tax information. You may change the quantity
3. You may look up a specific item that is in your transaction by pressing the ITEM LOOKUP button while you have an item selected.
4. When you have completed the entry of items, enter the **PAYMENT INFORMATION**.
5. DOUBLE CLICK the **RECORD SALE button** to complete the sale and print a receipt.
6. Receipts can be reprinted by pressing the **PRINT RECEIPT button**.
7. After the receipt has printed, appropriate reports will be automatically printed when applicable.

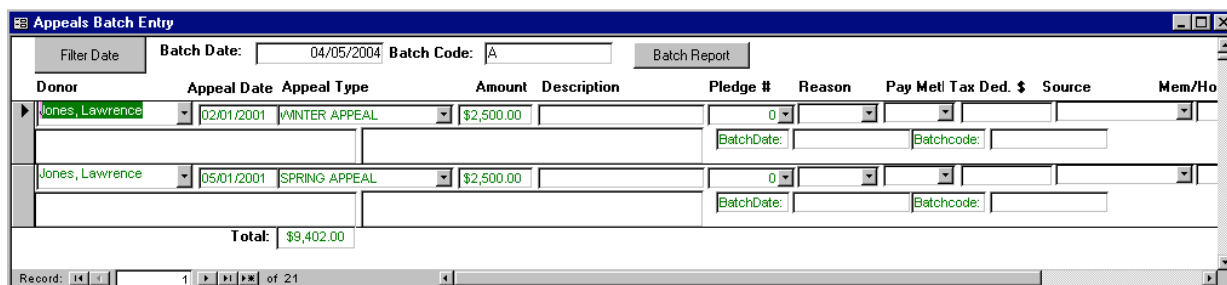
## Financial Menu



The Financial Menu offers the following options:

- Batch Cash Entry - Enter Cash/Checks in batches
- Register History – Lookup POS transactions
- Point Of Sale Reports – Print various reports from cash register transactions.
- Analysis Reports – Print various reports containing adoption statistics and analysis.
- Financial Mailing List– Print reminders, spay and euthanasia reports.
- Outstanding Pledge Report – Print a report of pledges with outstanding amounts.
- Payment Types – Maintain a list of accepted payment types.
- Financial Supporting Menu – Misc. setup finctions.

## Batch Check Entry



Donor	Appeal Date	Appeal Type	Amount	Description	Pledge #	Reason	Pay Met	Tax Ded. \$	Source	Mem/Ho
Jones, Lawrence	02/01/2001	WINTER APPEAL	\$2,500.00		0					
Jones, Lawrence	05/01/2001	SPRING APPEAL	\$2,500.00		0					
Total:			\$9,402.00							



This screen is used to enter batches of checks that come in (ie: mail), bypassing the POS or Appeal screen,

### Register History

Register History									
Customer:		Item	Category	Date	Apply Filter				
Invoice #	Customer:	Date:	Salesman:	Description:	Qty:	Price:	Ext-Price:	Pet:	AppealType:
80	bob lonzo	10/30/02	administrator	SPAY LARGE DOG	1	\$55.00	\$55.00		
125	bob lonzo	10/31/02	administrator	SPAY SMALL DOG	1	\$35.00	\$35.00		
125	bob lonzo	10/31/02	administrator	RABIES - 3 YEAR	1	\$35.00	\$35.00		
126	bob lonzo	10/31/02	administrator	SPAY LARGE DOG	1	\$55.00	\$55.00		
131	bob lonzo	11/13/02	administrator	OVER THE COUNTER DONATIC	1	\$15.00	\$15.00		
131	bob lonzo	11/13/02	administrator	OVER THE COUNTER DONATIC	1	\$0.00	\$0.00		
148	bob lonzo	11/18/02	administrator	BASIC ADOPTION	1	\$35.00	\$35.00	Julie	
140	Claire Danford	11/14/02	administrator	OVER THE COUNTER DONATIC	1	\$30.00	\$30.00		
153	Claire Danford	3/18/04	administrator	EUTHANASIA COMPOUND 1	1	\$0.00	\$0.00		
154	Claire Danford	3/18/04	administrator	OVER THE COUNTER DONATIC	1	\$22.00	\$22.00		Ad Journal
159	Eric Mirell	3/28/04	administrator	OVER THE COUNTER DONATIC	1	\$0.00	\$0.00		
27	hikj jhk	10/30/02	administrator	SPAY SMALL DOG	1	\$35.00	\$35.00		
127	hikj jhk	11/1/02	administrator	RABIES - 1 YEAR	1	\$35.00	\$35.00		
137	hikj jhk	11/13/02	administrator	OVER THE COUNTER DONATIC	1	\$15.00	\$15.00		
Grand Total:							\$767.00		
Record: 1 of 29									

This screen is used to lookup history of an item or person.

### Analysis Reports

Shelter Analysis

10/9/2002

10/31/2002

October

2002

October

2002

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

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

Starting Date

Ending Date

Adoption Analysis

Appeals By Month

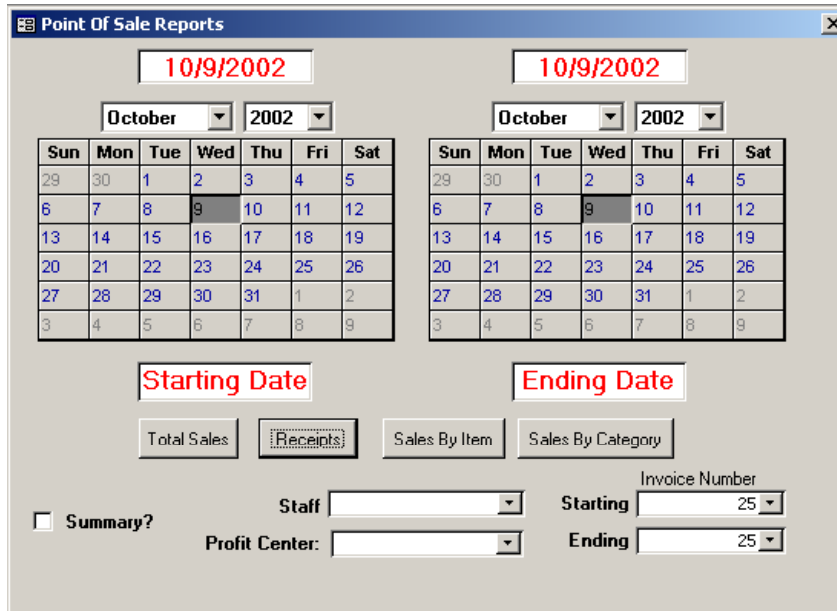
Appeals By Town

Appeals By Type

TOP 100

Choose the date range for the report and press the button for the desired report.

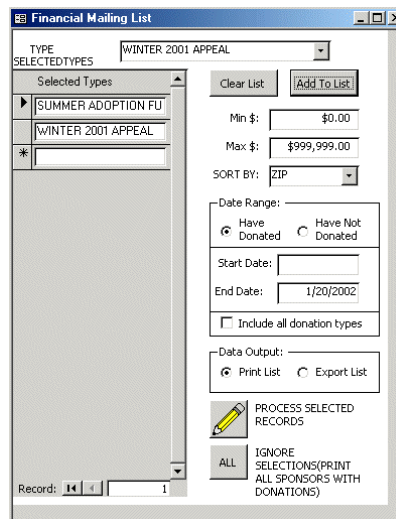
## Point Of Sale Reports



The Point Of Sale Reports window displays two identical calendar grids for October 2002, both showing the date 10/9/2002. Below the calendars are buttons for 'Total Sales', 'Receipts', 'Sales By Item', and 'Sales By Category'. At the bottom, there are fields for 'Starting Date', 'Ending Date', 'Staff', 'Profit Center', 'Starting Invoice Number', and 'Ending Invoice Number'. A 'Summary?' checkbox is also present.

Choose the date range for the report and press the button for the desired report. Click the SUMMARY button to generate a summary only for the RECEIPTS and TOTAL SALES reports. Select from a STAFF member to see only their transactions. Select a PROFIT CENTER to see only certain areas of the shelter. Use STARTING and ENDING invoice numbers to zero in on a specific range of transactions (ie: the start of someone's shift).

## Financial Mailing List



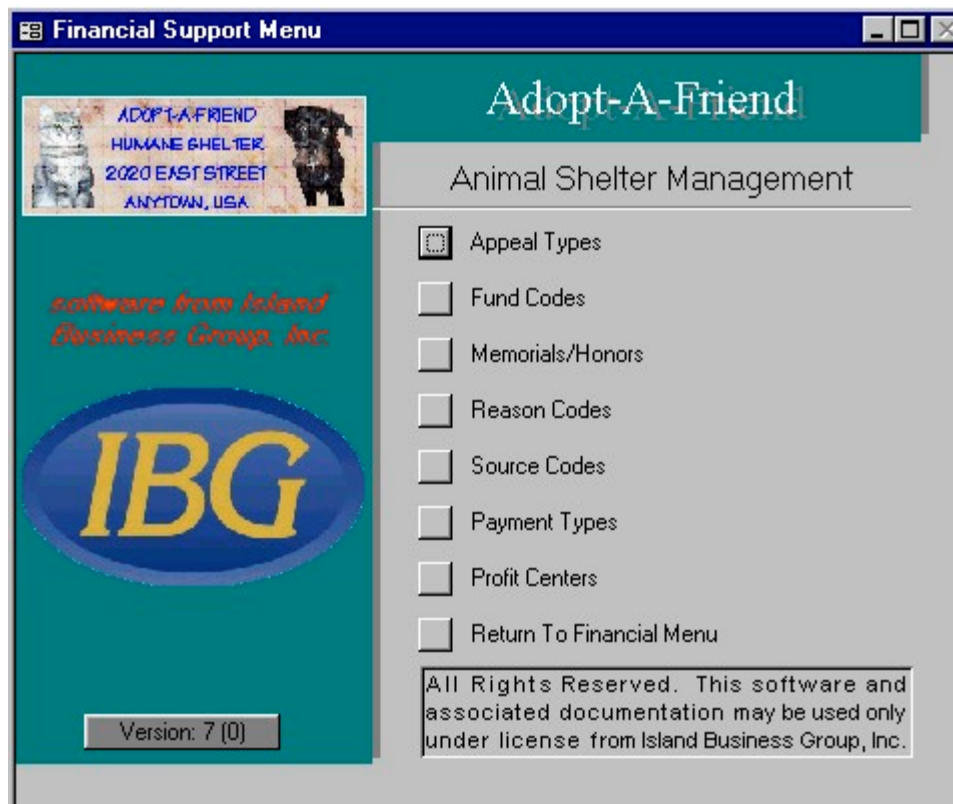
The Financial Mailing List window shows a list of 'SELECTED TYPES' including 'SUMMER ADOPTION FU' and 'WINTER 2001 APPEAL'. It includes fields for 'Min \$' (\$0.00) and 'Max \$' (\$999,999.00), a 'SORT BY' dropdown (ZIP), and 'Date Range' options (Have Donated, Have Not Donated). There are also fields for 'Start Date' and 'End Date' (1/20/2002). The 'Data Output' section has radio buttons for 'Print List' and 'Export List'. At the bottom, there are buttons for 'PROCESS SELECTED RECORDS' and 'IGNORE SELECTIONS (PRINT ALL SPONSORS WITH DONATIONS)'. A 'Record' counter shows 1.

The Financial Mailing List will let you create mailing labels or export list information based on financial factors.



*Creating mailing labels or an export file*

1. Clear list (to remove prior settings). The Selected Types window will clear.
2. Choose your SORT option from the drop down list. You can sort by any criteria; ZIP code is the most common to take advantage of bulk mail rates.
3. Include optional dollar ranges by entering min and max dollar amounts.
4. Choose an optional date range and whether you are targeting people that have or have not donated in that time period.
5. Choose the APPEAL type from the dropdown window, then press ADD TO LIST or click the INCLUDE ALL DONATIONS type to select anyone who has donated.
6. Repeat step 5 as needed to create your labels.
7. Choose to either PRINT LIST (labels) or EXPORT LIST to create the ASCII export file from your selections.
8. Press the PENCIL button to process the labels. If you have chosen PRINT LIST, the labels will preview on your form. Press the printer ICON to send them to the printer. If you have chosen EXPORT LIST, you will be prompted for an EXPORT FILE NAME.
9. Press the ALL button to print to ignore any selections and simply print (or export) all records on the master list that have at least one contribution in the APPEALS detail on the Master List.

*Financial Support Menu*

### ***Appeal Types***



The screenshot shows the 'Adopt-A-Friend Appeal Types' window. It contains three input fields: 'Appeal Type' with the value 'Ad Journal', 'Appeal \$' with the value '\$25.00', and 'FundCode:' with a dropdown menu showing 'Bank of NY One'. At the bottom, there is a record navigation bar showing 'Record: 1 of 56'.

Enter appeal name, default amount and fund code

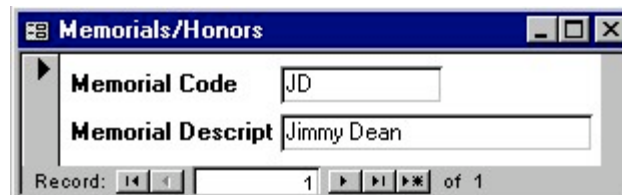
### ***Fund Codes***



The screenshot shows the 'FundCodes' window. It contains two input fields: 'Fund Code' with a small icon and 'Fund Description' with the value 'Bank of NY One'. At the bottom, there is a record navigation bar showing 'Record: 1 of 1'.

Enter fund information.

### ***Memorials/Honors***



The screenshot shows the 'Memorials/Honors' window. It contains two input fields: 'Memorial Code' with the value 'JD' and 'Memorial Descript' with the value 'Jimmy Dean'. At the bottom, there is a record navigation bar showing 'Record: 1 of 1'.

### ***Reason Codes***



The screenshot shows the 'ReasonCodes' window. It contains two input fields: 'Reason Code' with the value 'A' and 'Reason Description' with the value 'General Fund Gift'. At the bottom, there is a record navigation bar showing 'Record: 1 of 1'.

### ***Source Codes***



Source Codes

Source Code M1

Source Description Mailing One

Record: 1 of 1

### ***Payment Types***



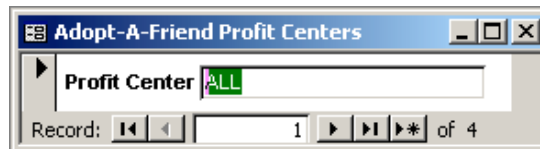
Adopt-A-Friend Animal Payment Types

Payment Type AMEX

Record: 1 of 9

Maintain the Payment Type list.

### ***Profit Centers***



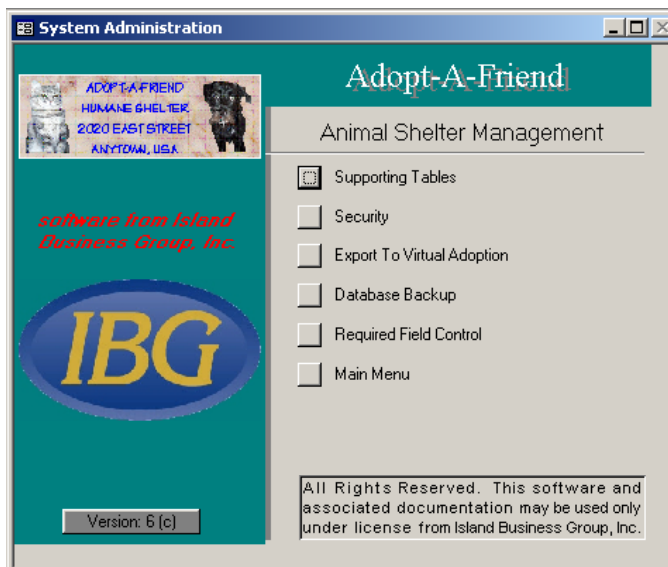
Adopt-A-Friend Profit Centers

Profit Center ALL

Record: 1 of 4

Maintain the Profit Center list.

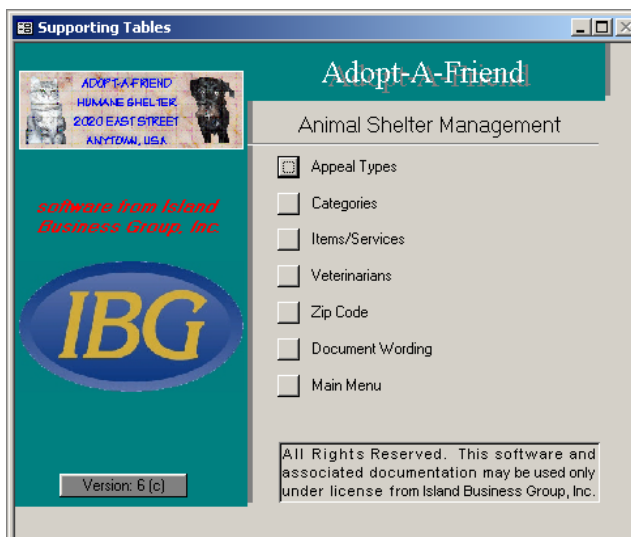
## System Administration Menu



The System Menu offers the following functions:

- Support Tables – Enter information used throughout the system.
- Security – Set Passwords and user privileges.
- Export To Virtual Adoption –Export your adoption records and images to your FTP/web site.
- Database Backup – Make backup copies of your Adopt-A-Friend data files to the Backup folder in the folder where your data is located.
- Required Field Control – Control which of the listed fields are required entries for the Master List. The 'Enforce Required Fields' check box switches this feature on/off globally.

## Supporting Tables





Enter and maintain the following information:

- Appeal Types – Define the type of appeals your shelter supports.
- Categories – Define the type of products and services your shelter provides. You can define which categories of Items and Services will update the Appeals, Adoptions, Surrender, Reclaim, Reminder and Health information.
- Items/Services – Maintain the Products and Services your shelter provides. Assign them to the various categories.
- Veterinarians – Maintain a list of local area veterinarians.
- Zip Code – Maintain a database of Towns and their associated zip codes for use throughout Adopt-A-Friend.
- Document Wording – Control the wording on various forms.

Maintain information on local area veterinarians.

### ***Zip Codes***

Maintain Zip Code Information .

### ***Document Wording***



**ADOPT A FRIEND Document Wording**

**Adoption Contract Wording:**  
I HEREBY ACKNOWLEDGE RECEIVING FROM THE [your company name] THE ANIMAL DESCRIBED ABOVE/WHICH I AGREE TO:  
1) GIVE THE ANIMAL PROPER AND HUMANE CARE, FOOD, WATER, SHELTER, EXERCISE, AND ALL OTHER NECESSITIES.  
2) PROVIDE THE PET WITH VETERINARY CARE AT MY OWN EXPENSE ON A YEARLY BASIS FOR BOOSTER VACCINATIONS AND AS NEEDED FOR MEDICAL PROBLEMS.

**Sterilization Contract Wording:**  
Note: Surgical Release  
This facility is not a hospital or a full care facility for the treatment of sick or injured animals. It is a specialized clinic established primarily for the purpose of spaying and neutering dogs and cats.  
All surgery and services are performed at the risk of the owner. The surgery performed is a major surgery.

**Surgical Release Wording:**  
Note: Surgical Release  
This facility is not a hospital or a full care facility for the treatment of sick or injured animals. It is a specialized clinic established primarily for the purpose of spaying and neutering dogs and cats.  
All surgery and services are performed at the risk of the owner. The surgery performed is a major surgery.

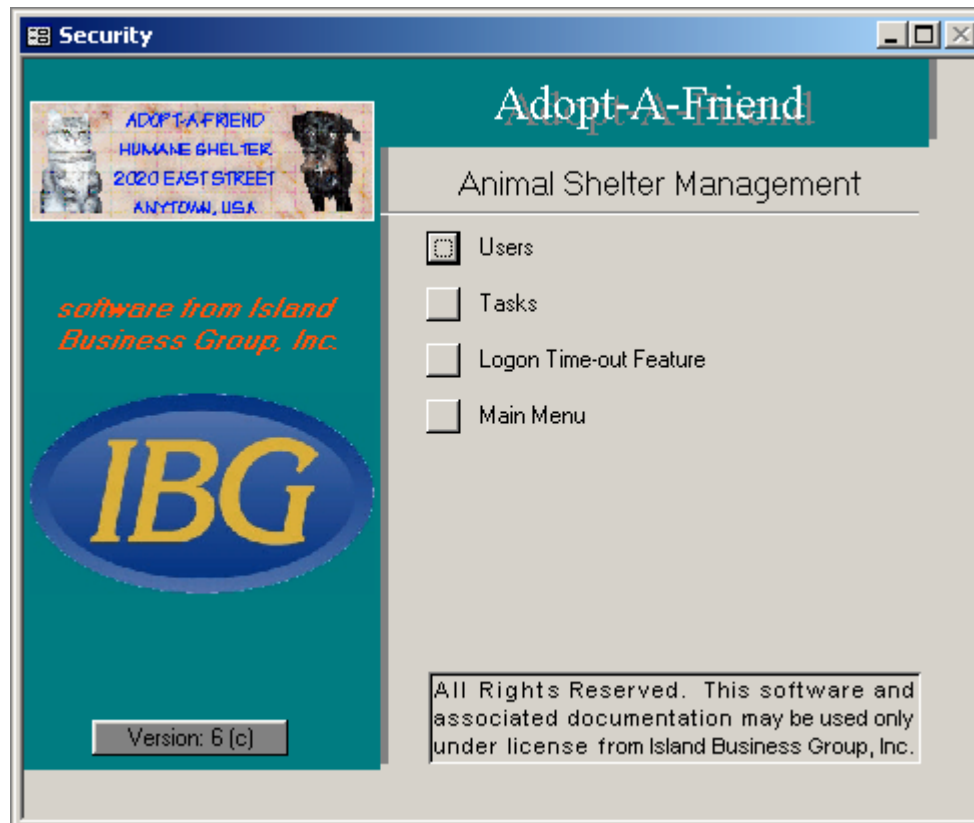
**Owner Animal Surrender Agreement Wording:**  
I am surrendering ownership of my pet to the [your company name]. I certify that I am legal owner of this animal. I understand that the [your company name] makes no guarantees or promises that it will place my animal in the adoption program. I agree that the disposition of my animal is left entirely to the discretion of the [your company name]. I relinquish the right to obtain any information about this animal upon surrender to the [your company name]. I relinquish all claims on my animal and will in no way hold the [your company name] responsible for the final disposition of the animal turned in by me. To the best of my knowledge, this animal has not bitten anyone in.

**Finder Animal Surrender Agreement Wording:**  
I am surrendering ownership of my pet to the [your company name]. I certify that I am legal owner of this animal. I understand that the [your company name] makes no guarantees or promises that it will place my animal in the adoption program. I agree that the disposition of my animal is left entirely to the discretion of the [your company name]. I relinquish the right to obtain any information about this animal upon surrender to the [your company name]. I relinquish all claims on my animal and will in no way hold the [your company name] responsible for the final disposition of the animal turned in by me. To the best of my knowledge, this animal has not bitten anyone in.

**Animal Control Warning Notice Wording:**  
This is not a court summons, but a warning issued as a courtesy in calling your attention to the legal violation as indicated above.

Maintain wording for the various contracts and forms.

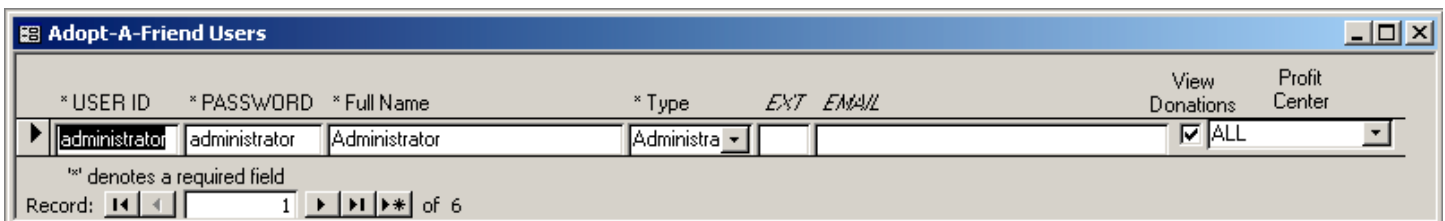
## Security Menu



Enter and maintain the following information:

- Users – Define the type of appeals your shelter supports.
- Tasks – Define the type of products and services your shelter provides. You can define which categories of Items and Services will update the Appeals, Adoptions, Surrender, Reclaim, Reminder and Health information.
- Logon Time-out Feature – Maintain the Products and Services your shelter provides. Assign them to the various categories.

## Users



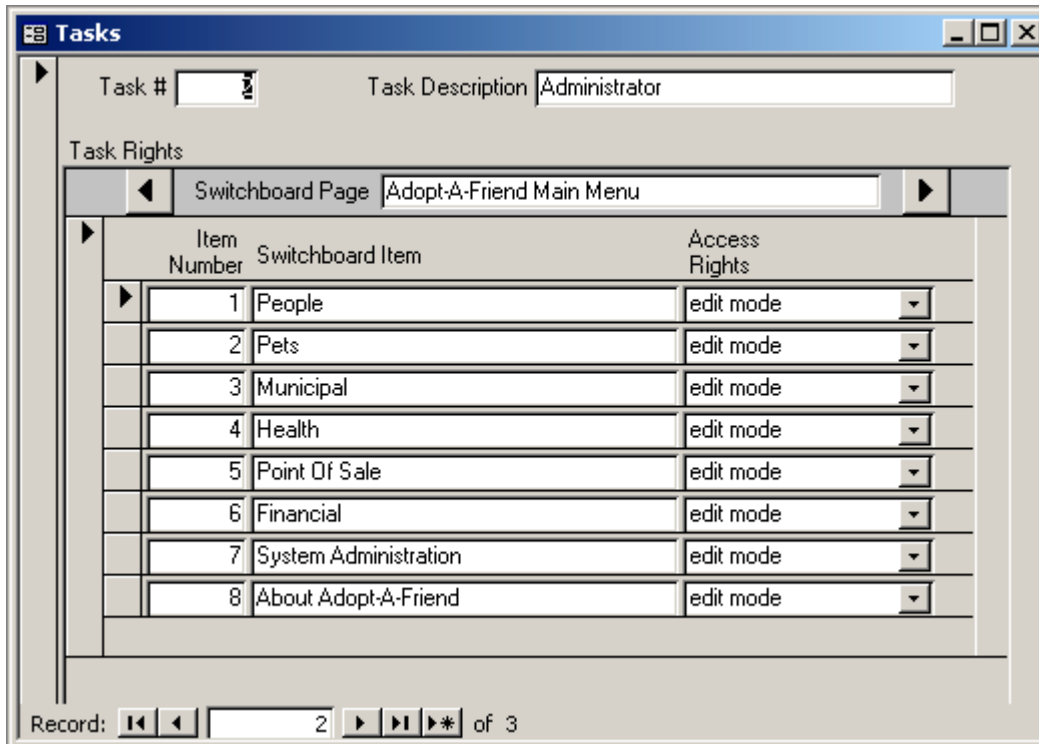
* USER ID	* PASSWORD	* Full Name	* Type	EXT	EMAIL	View Donations	Profit Center
▶ administrator	administrator	Administrator	Administra			<input checked="" type="checkbox"/>	ALL

\* denotes a required field

Record: 1 of 6

The Users form allows user information to be added and modified. A user type is selected from the standard types to define the users access rights. The View donations check box enables the viewing of the Master List forms Pledge/Appeal information and the Secure memo field.

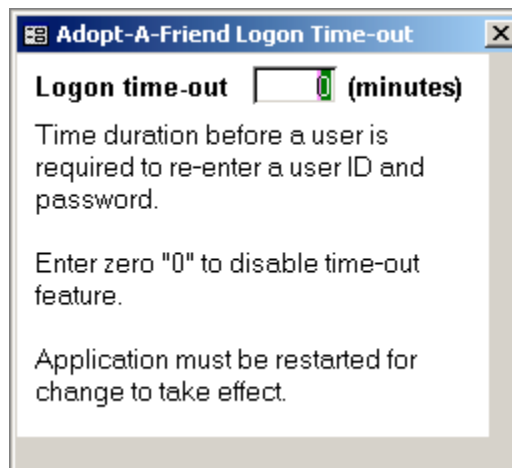
## Tasks



Item Number	Switchboard Item	Access Rights
1	People	edit mode
2	Pets	edit mode
3	Municipal	edit mode
4	Health	edit mode
5	Point Of Sale	edit mode
6	Financial	edit mode
7	System Administration	edit mode
8	About Adopt-A-Friend	edit mode

The Tasks form is used to maintain the standard task types and the rights these types have for each switchboard (menu) item.

## Logon Time-out



**Logon time-out**  (minutes)

Time duration before a user is required to re-enter a user ID and password.

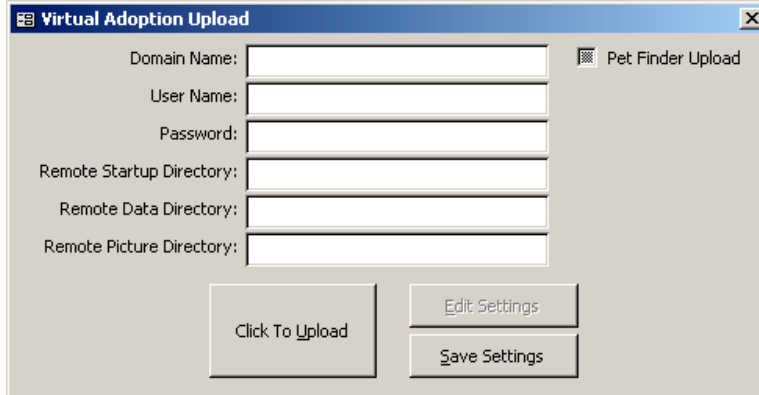
Enter zero "0" to disable time-out feature.

Application must be restarted for change to take effect.

The Logon Time-out form is used to control how long Adopt-A-Friend will remain idle before requiring the user to log on again. Entering 0 minutes will disable this feature, therefore only requiring user logon at program startup. This helps prevent someone from entering data under another users logon.



### Export to Virtual Adoption



The dialog box titled "Virtual Adoption Upload" contains the following fields and controls:

- Domain Name: [text box]
- User Name: [text box]
- Password: [text box]
- Remote Startup Directory: [text box]
- Remote Data Directory: [text box]
- Remote Picture Directory: [text box]
- ☐ Pet Finder Upload
- Click To Upload [button]
- Edit Settings [button]
- Save Settings [button]

Adopt-A-Friend 7.0™ can be configured to update your Microsoft Front Page website with pictures and descriptions. Fill in the appropriate account information, make sure that the the Petfinder upload check box is NOT selected, then CLICK TO UPLOAD and your descriptions and associated pet photos will be uploaded. (You must have the virtual adoption page installed on your web site and properly configured) .

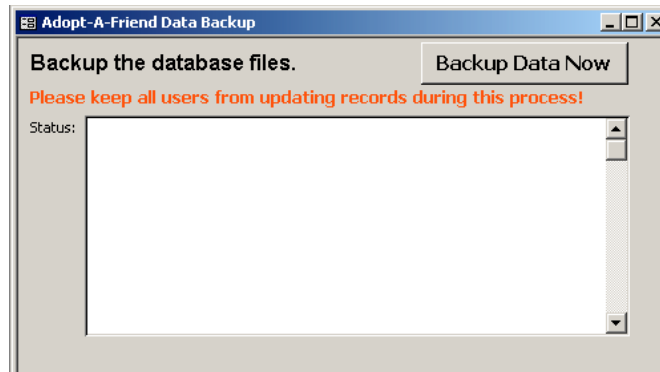
(\*\*PLEASE CONTACT YOUR PETFINDER.ORG© AND/OR WEBMASTER BEFORE ATTEMPTING THIS UPLOAD\*\*)

### Export to Petfinder.org©



With the cooperation of the good people at petfinder.org, Adopt-A-Friend 7.0™ can be configured to update your petfinder.com adoption listings. Fill in the appropriate account information, click the Petfinder check box, then CLICK TO UPLOAD and your descriptions and associated pet photos will be uploaded.

### Database Backup

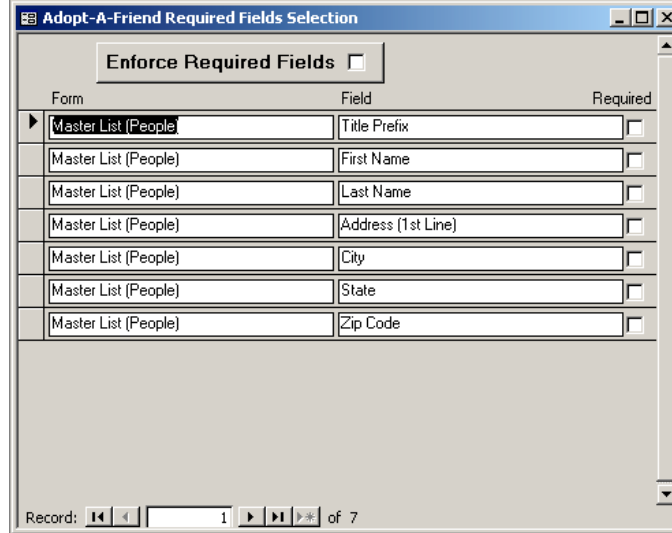


The dialog box titled "Adopt-A-Friend Data Backup" contains the following elements:

- Backup the database files. [button]
- Backup Data Now [button]
- Please keep all users from updating records during this process! [text]
- Status: [text box]

Makes backup copies of your Adopt-A-Friend data files to the Backup folder in the folder where your data is located. \*\*\*WARNING – THIS DOES NOT REPLACE A GOOD EXTERNAL BACKUP PROCEDURE. THIS SIMPLY PLACES A COPY OF THE DATABASE IN A SUBDIRECTORY OF THE SERVER. BACKUPS ARE EXTREMELY IMPORTANT, SEE YOUR SYSTEM ADMINISTRATOR\*\*\*

## Required Field Control



Form	Field	Required
Master List (People)	Title Prefix	<input type="checkbox"/>
Master List (People)	First Name	<input type="checkbox"/>
Master List (People)	Last Name	<input type="checkbox"/>
Master List (People)	Address (1st Line)	<input type="checkbox"/>
Master List (People)	City	<input type="checkbox"/>
Master List (People)	State	<input type="checkbox"/>
Master List (People)	Zip Code	<input type="checkbox"/>

This form controls which of the listed fields are required entries for the Master List. The 'Enforce Required Fields' check box switches this feature on/off globally.

## How To .....

### Process An Adoption

The process of adopting out a pet begins with having the proper Categories, Services and codes set up in Adopt-A-Friend©. An adoption proceeds as follows:

- 1) Go to the POS screen.
- 2) Start to type the last name of the person who is adopting the pet into the CUSTOMER drop down window. Drop down the list and see if the person is on it. If they are, choose their name from the list, and proceed to step 4 below.
- 3) Press the ESC key to exit the CUSTOMER drop down. Press the MASTERLIST button and enter the new customer.
- 4) From the Item Number Drop down, choose the appropriate code for this adoption service. The PET ID drop down on the right of the row will present a list of Adoptable pets. Choose the pet that is being adopted
- 5) Enter the payments in the payment box.
- 6) Press the RECORD SALE button and print a receipt if desired.
- 7) The Adoption form will Pop up, filled out appropriately. Print the adoption contract and applicable health records.

### Process An Intake

The process of taking in an Animal as an Owner or Finder surrender begins with having the proper Categories, Services and codes set up in Adopt-A-Friend©. An intake proceeds as follows:

- 1) Go to the POS screen.



- 2) Start to type the last name of the person who is surrendering the pet into the CUSTOMER drop down window. Drop down the list and see if the person is on it. If they are, choose their name from the list, and proceed to step 4 below.
- 3) Press the ESC key to exit the CUSTOMER drop down. Press the MASTERLIST button and enter the new customer.
- 4) From the Item Number Drop down, choose the appropriate code for this intake service. The PET ID drop down on the right of the row will present a list of pets. If the pet has already been entered into the system, choose that pet. If not. The system will prompt 'Add This Pet?'. Answer yes and complete the pet record
- 5) Enter the payments in the payment box.
- 6) Press the RECORD SALE button and print a receipt if desired.
- 7) The Pet Record will again pop up, filled out appropriately. Print the finder or surrender agreement and fill in any additional information.

### ***Process A Spay, Vaccination or Medical Procedure***

The process of a pet medical or surgical procedure begins with having the proper Categories, Services and codes set up in Adopt-A-Friend®. Proceeds as follows:

1. Go to the POS screen.
2. Start to type the last name of the person who is bringing in the pet into the CUSTOMER drop down window. Drop down the list and see if the person is on it. If they are, choose their name from the list, and proceed to step 4 below.
3. Press the ESC key to exit the CUSTOMER drop down. Press the MASTERLIST button and enter the new customer.
4. From the Item Number Drop down, choose the appropriate code for this medical service. The PET ID drop down on the right of the row will present a list of the customers pets. If the pet has already been entered into the system, choose that pet. If not. The system will prompt 'Add This Pet?'. Answer yes and complete the pet record.
5. Enter the payments in the payment box.
6. Press the RECORD SALE button and print a receipt if desired.
7. The appropriate spay, medical and or vaccination form will pop up automatically and any corresponding certificates and/or reports can be printed.

### ***Sell Any Item***

The process of a selling an item begins with having the proper Categories, Services and codes set up in Adopt-A-Friend®. Proceeds as follows:

1. Go to the POS screen.
2. Start to type the last name of the person who is bringing in the pet into the CUSTOMER drop down window. Drop down the list and see if the person is on it. If they are, choose their name from the list, and proceed to step 4 below. YOU MAY ALSO CREATE A 'DUMMY' CUSTOMER SUCH AS 'SHELTER CUSTOMER' TO SELL ANY ITEM THAT YOU DO NOT CARE ABOUT ASSOCIATING WITH AN INDIVIDUAL.
3. Press the ESC key to exit the CUSTOMER drop down. Press the MASTERLIST button and enter the new customer.
4. From the Item Number Drop down, choose the appropriate code for this item.
5. Press the RECORD SALE button and print a receipt if desired.



### ***Take A Donation***

The process of a taking a donation through the POS system begins with having the proper Categories, Services and codes set up in Adopt-A-Friend®. Proceeds as follows:

1. Go to the POS screen.
2. Start to type the last name of the person who is making the donation into the CUSTOMER drop down window. Drop down the list and see if the person is on it. If they are, choose their name from the list, and proceed to step 4 below. Press the ESC key to exit the CUSTOMER drop down. Press the MASTER LIST button and enter the new customer.
3. From the Item Number Drop down, choose the appropriate code for this donation. The Appeal drop down on the right (where you had the Pet ID dropdown before), gives you a choice of which appeal to apply the donation to. THERE ARE ADDITIONAL FIELDS THAT YOU MAY FILL OUT ON THE APPEAL RECORD OF THE DONATOR AFTER THE SALE.
4. Press the RECORD SALE button and print a receipt if desired.

### ***Tips For Making Getting The Most Out Of Adopt-A-Friend***

As with any software package, you will get out of Adopt-A-Friend, what you put into it. A thorough understanding of the use of computers and familiarity with the Microsoft Office Suite will help you utilize the software to its greatest potential.

Using the advance filtering and querying abilities of Adopt-A-Friend will help you find and analyze information about your database. We recommend training on Microsoft Access from a reputable computer school or training center to learn how to take advantage of these advance tools. There are also many good books that can help you learn how to use this very powerful database.