**Dog Walking Software Requirements**

**Client Details**

Demographics

Name, Address, Phone Number, Email address, Social Network Address, Gender, ` Client Contact Method, on hold details (with reason), emergency contact

**Pets**

Pet Name, Pet Type (ie Dog, Cat) Pet Breed (ie Cocker Spaniel, Husky), Pet Age, Pet Birthday, Pet Photo, Pet Likes, Pet Dislikes, Pet Feeding Times, Pet Comments, are they spayed, do they have vaccinations, are they insured, are they up to date with flea and worm treatment, and further medical history

Caution Register – Per Pet

**Vet Details**

Name of veterinary Centre, Name of Vet, Address, Phone Number, Opening Hours, Chip Numbers (Per pet)

**Visit Details**

What is going to be planned for the pet? Ie, Group Walk, Individual Walk, Letting out, Feeding etc

What time is best to walk the dog?, what days of the week will this be?, what is the price agreed on?, what date will the contract commence from?, how will the dog be accessed (where are the house keys) what is their alarm number.

Does the dog need any special requirements? Ie, treat when home, or special toy for bed etc.

**Evaluation**

Before each customer is taken on, an evaluation will take place…. Questions such as:

Are they allowed treats

Do they travel well in a car

Are they happy travelling with other dogs

Are they good with other dogs

Do they need a muzzle

What is their favourite game? Ball, catch, run?

Do they swim

Do they have any behaviour issues?

Do they have bad reactions to anything? Cat, other dogs, horses

**Assessment walk**

An assessment walk will take place with the owner

Full comments to take place and note down for future reference

**Agreements to service**

Upload form for agreement to walk

Agree payment and payment type – CAN CREDIT CARDS BE PROCESSED??

Agree to standard walking days/times, ie, Monday, Wednesday and Friday at 10:00 on a group walk for 1 hour.

Book appointments from the above. Put in general appointment for the next XXX months.

Set price and agree prices.

**Notes/Diary from day to client**

Add in notes to print/email/SMS to client following the dog walk

**Appointment Diary**

Need to manage business in advance, scheduling long term regular appointments, by making it easy to change appointments when needed. If changes to appointment, have the facility to text/or email customers.

Cancel and book new services from the diary. Drill into a service to see client, pet and visit routine information and print this out as a handy visit report. See how the schedule lets you mark work as complete so that you can make sure you never miss a service.

**Billing Module**

Pick out all your walking bills together with the appropriate covering email. Set different due dates to (for example) collect walking bills in arrears and payments in advance. Correct mistakes before sending out your bills and preview actual bills, Choose an appropriate email template for any billing run and then shows how these emails will look when they reach your clients inbox.

Automated emails at end of the month with bills attached

Log to show who has paid, what is outstanding and for how long.

Run a receipts report,

Automatically send email receipts to your clients,

Use the credit control report to send reminder letters to your clients,

Run a revenue analysis report.

**Document Repository**

Full document repository

**Mobile Device**

Available via iphone, showing basic details, ie, dogs on walks today, and information selected from demographics, visit details, house details (alarm, keys) etc.

**Reporting Module**

**SAMPLE SOFTWARE AVAILABLE:**

<http://www.petsitter-software.co.uk/>

[www.Narpsuk.co.uk](http://www.Narpsuk.co.uk)

[www.bettawalka.com](http://www.bettawalka.com)

[www.petsitclick.com](http://www.petsitclick.com)

[www.petsitter\_software.co.uk](http://www.petsitter_software.co.uk)

[www.pamimsoftware.com](http://www.pamimsoftware.com)

[www.capterra.com](http://www.capterra.com)

Dexter comments added on 19/09/2013

Each of the following paragraphs is a separate module with simple or more complicated functionality depending on the request.

Customers – simple form with ability to add photos for the house, neighbour, pets, owners etc.

Pets – simple form with ability to add photos of pets, name, dob, vaccinations etc. If history of vaccinations is required the form would become more complicated

Visitations – history with information about each event.

Evaluation Questionnaire – at client register or 1st visit; probably could be shown on Customer information screen

Vets – to be able to import vets from XLS file etc?

JM – Not necessary, only free text boxes required.

Document Repository – to store all documents related to customers (contracts, invoices, agreements, reports, letters etc.)

Assessment Walk – required to be done to estimate the behaviour of pets owned by the client. Should be the 1st thing to do. It is an event/appointment.

Appointments Scheduler – any event that requires visitation, assessment or evaluation to be done with the customer. Different views to be possible – daily, weekly, monthly with ability to filter by customer.

JM – Appointments will need to allow maximum of dogs (4) for group walks.

Look Up tables – various look ups depending on requirements

Invoices – history of paid and pending invoiced with ability to filter by date range, customer, amount etc. Need to know the fields required and the stage of entering them.

Reports – need to know what kind of reports are expected;

JM – How many dogs are walked in a group by date periods

How many dogs are walked on their own by date periods

How many small feedings have taken place per date period

(mainly events breakdowns for visits per client and per group of events)

Alerts & Reminders – by sms, e-mail

Customer area – to be able to register and book appointments. Pay in advance via credit card. To check his pending/paid invoices. To check his diary with the service. Should be simple enough to be viewed with mobile devices.

JM – not necessary at this point. I will be booking the appointments in.

Administrative Workflow:

Add New Customer 🡪 Add one or more pets 🡪 Complete Evaluation Form 🡪 Register appointment for assessment walk 🡪 Perform assessment walk 🡪 Sign and upload contract to Repository (send by e-mail/letter to customer) 🡪 Register single or recurrent appointment to perform services 🡪 Perform the Service and add details of behaviour 🡪 Send information about the service completed to customer via e-mail/sms 🡪 In Appointment area – build pending invoice with amount to be paied 🡪 Send the invoice via e-mail/sms/letter.

JM - Perfect

Customer Workflow:

Register as New Customer 🡪 Register my pets 🡪 Complete Evaluation Form 🡪 Offer appointment for assessment walk 🡪 Once the administrator contacts me he confirm the appointment or advice for another time and date. 🡪 Perform the assessment work with the service 🡪 I got a contract by e-mail/letter or by hand 🡪 Sign off and send back to service 🡪 Log in to my account 🡪 Add request for new appointment or recurrent appointments (at given time/date, service requested) 🡪 The service receives automated sms/e-mail about the request 🡪 The administrator (or the worker who is requested to perform the service) logs In and approves the request (if he is free for the given time/date) 🡪 System generates the invoice but is not yet to be paid (just for information about the cost) and visualize on screen for customer information 🡪 Appointment is performed and sms/e-mail is received by the customer (details of behaviour etc.) 🡪 After each appointment or at the end of the month (could be a configurable option for the customer) the customer receives his invoice(s) by e-mail/letter and got sms about the cost etc.

JM – Customers will not be able to complete their own tasks at this stage. I imagine this could be a year away if the business goes well.