Getting Started

Animal Shelter Starter Pack

v1.23

Feb 2024

Introduction

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Considerations

Audience

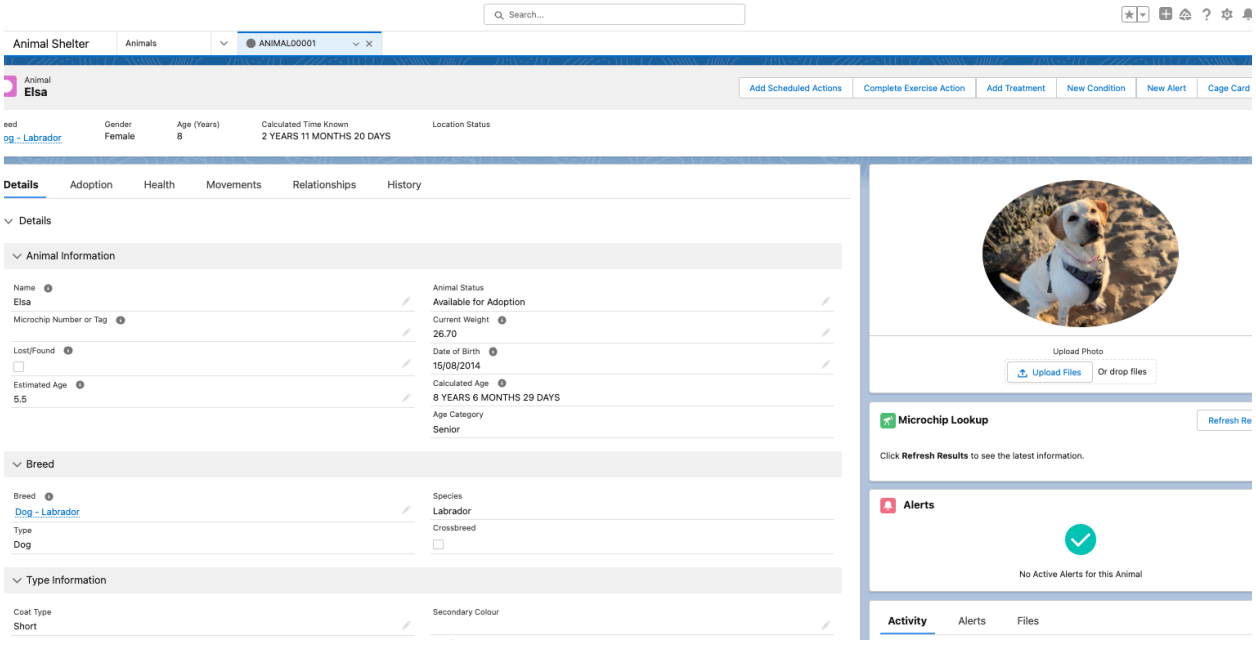
This document is intended for users who are new to the Animal Shelter Starter application but have knowledge of using Salesforce from a user perspective (i.e. Can login, search and navigate the user interface, create and update records, view reports).

Required User Permissions

To use this guide, you must have access to a Salesforce environment with the Animal Shelter Starter app installed. You will also need to be able to access the objects included in the App, which we will be covering in more detail within this guide.

Animal Management

Animal Record Overview



Above is an example of the Animal record for our example dog, Elsa. At the top of the record, there is the Highlights Panel, which shows key information “at a glance”. For example on this record we have her name, type, breed, Gender, Age and Total Stay.

Also within the highlight panel, we have buttons, located at the top right, to help quickly create the following records: (Note, you may have to click on the small arrow to get additional options)

- **New Condition** - Add a medical condition to the Animals record.
- **Add Treatment** - Add information about a treatment which has been provided to the animal or which needs to be provided in the future.
- **New Exercise Action** - Creates a new Action record to record a one off exercise session for the animal
- **Complete Exercise Action** - Select one of an exercise schedule record and mark it as completed.
- **Add Scheduled Action** - Creates a series of scheduled records for the animal, for Treatments, Exercise or Nutrition.
- **Multi Animal Clone** - Runs a flow that allows the current animal record to be cloned a selected number of times.
- **Start Adoption Process** - Initiates a Screen Flow to create a new Adoption record, related to the Animal.
- **New Alert** - Creates a new Alert on the Animal record.
- **New Case** - Create a new Case record within Salesforce.

- **Printable View** - Creates a printable view of the Animal record.
- **Edit** - Switches the page to Edit mode, so that you can change field information. You can also click on any editable field on the record and it will switch to Edit mode.
- **Clone -** Creates a copy of the current record, with everything from the Details tab only.
- **Delete -** Deletes the Record. Note that deleted records are held in the Salesforce Recycle Bin for 14 days before they are permanently deleted, so contact your Salesforce administrator if you accidentally delete a record and they can restore it from the Recycle Bin.
- **Print Cage Card** - Displays a printable view of key Animal record data that can be attached to a cage (Unit) location.
- **Mark as Deceased** - Runs a flow to capture deceased data, which then updates the Animal and Movement records.
- **Update Animal Location** - Runs a flow that will update the Geolocation fields for the Animal record based on current Browser or Mobile device location.
- **Find Adoption Matches** - Runs a flow to allow the user to select possible adoption matches for the animal.
- **New Assessment** - Runs a flow to allow the user to create a new assessment record, related to the animal.
- **Vaccination -** Runs a flow to allow the user to create a new Vaccination record (Animal Action - Treatment)

Animal Image and Activity

On the right side, we have the animal image which has a picture of the animal.

Below that we see the Microchip Look component (See Microchip Lookup), then we see the new Alerts component, and finally there is an Activity Feed area (See Activity Tracking) where Email, Appointments, Tasks, Calls and notes can be stored, which are related to this animal or any of the activity related to them.

Below that, starting on the left, we have a number of tabs, starting with **Details**.

Animal Details

On the details tab we store Elsa's information, which is split into the following sections with the following fields.

- **Name** - This is the animal's name.
    - Note: The application (based on a Custom Setting) can automatically provide the Animal Name. This will be base on the Unique record name, i.e. ANIMAL000001. Additionally a prefix can be specified to be included in the Animal Name, i.e. TEST-ANIMAL000001. See Implementation Guide for Custom Settings.
- **Microchip or Tag** - The Microchip or Tag number/reference for the animal.

- **Lost/Found** - Check/Tick this box if the animal has come in as a stray/lost animal. (Note: This also creates an automatic alert)
- **Animal Status** - This is the current status of the animal and can also be used to track which stage the animal is in.
- **Current Weight (kg)**: The numerical value for the weight of the animal in kg.
- **Current Weight (lbs):** A formula field of the animal's weight in lbs, based on the kg value.
- **Age Category**: based on the age of the animal a category is specified. See the Implementation Guide on how to update this.

Below that we have the **Breed** section, where we can track the type of animal and its key features.

- **Breed** - Animals breed. This is a lookup to the Breeds object.
- **Type** - This is a formula field that displays the Type from the chosen Breed record.
- **Species** - This is a formula field that displays the Species from the chosen Breed record.
- **Crossbreed** - This is a formula field that displays the Crossbreed from the chosen Breed record.

Below that we have the **Type Information** section, where we can track the type of animal and its key features.

- **Coat Type** - The type/length of the animal's coat/hair.
- **Crossbreed** - If the animal is not a pure breed, check this box to mark it as a cross-breed.
- **Primary Colour** - The predominant colour of the animal.
- **Secondary Colour** - If the animal is more than one colour, then this is the secondary colour of the animal.
- **Size** - This defines if the animal is a small, medium or large animal.
- **Gender** - The animal gender.

The **Age** section, where we track the animals' age.

- **Estimated Age** - As you may not know when the animal was born, this field allows a numeric value to be entered, which is in Years. Note that one decimal place can be used so for example if the dog was 5 ½ then we can enter 5.5.
- **Calculated Age** - This is an auto-calculated field, based on the Birth Date field.

Then the **Requirements** section where we can track specifics about the animals behaviour and requirements.

- **Behaviours** - Select behaviours of the animal, so that these can be taken into consideration when rehoming or even which volunteers to assign to the animal. Some examples are Bad Recall and Good with Children. Multiple options can be selected for this field.
- **Rehoming Requirements** - Any specifics related to rehoming the animal, for example if they need a secure garden and have dietary needs, then you can select “Secure Garden” and also “Dietary”.

- **Related Schemes** - If you have certain schemes or memberships that animals can be a part of, such as the Home for Life Scheme, for example, then these can be selected here.

Remember to review these fields often and update them as required.
Next we have the **Tracking** section, which stores information about certain dates and related tracking information, related to the animal.

- **Date of Arrival** - The date which the animal first arrived at the shelter.
- **Date of Birth** - The animal's date of birth, if known. This will also be used in the Calculated Age field to calculate their current age, down to Years, Months and Days.
- **Neutered/Spayed** - If the animal has been neutered/Spayed then check this box.
- **Neutered/Spayed Date Time** - The date and time when the animal was neutered or spayed.
- **Hold Until Date Time -** If the animal needs to be held until a certain date and time, then enter it here. For example if the animal has been involved in an animal abuse case, then the date and time which you are required to hold them to should be entered here. It's also recommended that you create an alert (See Animals Alerts) to let all staff know.
- **Total Length of Stay in Shelter** - This is an auto-calculated field which calculates the amount of time the animal has been in the shelter since the Date of Arrival and minus any time away which has been recorded (i.e. Adoptions, Fostering, etc).

The next section is the **Entry** information section, which should be completed when the animal is first brought into the shelter.

- **Previous/Current Owner** - This is where you should link the primary contact for the animal. If it was handed in/taken from an owner then they should be linked here. If it's from another organisation (aka a Transfer) then set it as your point of contact at that organisation.
- **Previous/Current Organisation** - If this animal has come from another organisation, then this is where you link the Account record, which stores the information about the organisation.
- **Entry Reason** - The reason the animal has been brought in. Remember that if it's a lost animal then check/tick the Lost/Found box on the Animal record.
- **Entry Comments** - Free text field to record any other notes about the animal and their entry to the shelter. This could also include how it was brought in and its condition.

Our next section is the **Deceased Information** section, where we record details about an animal passing away or being put to sleep.

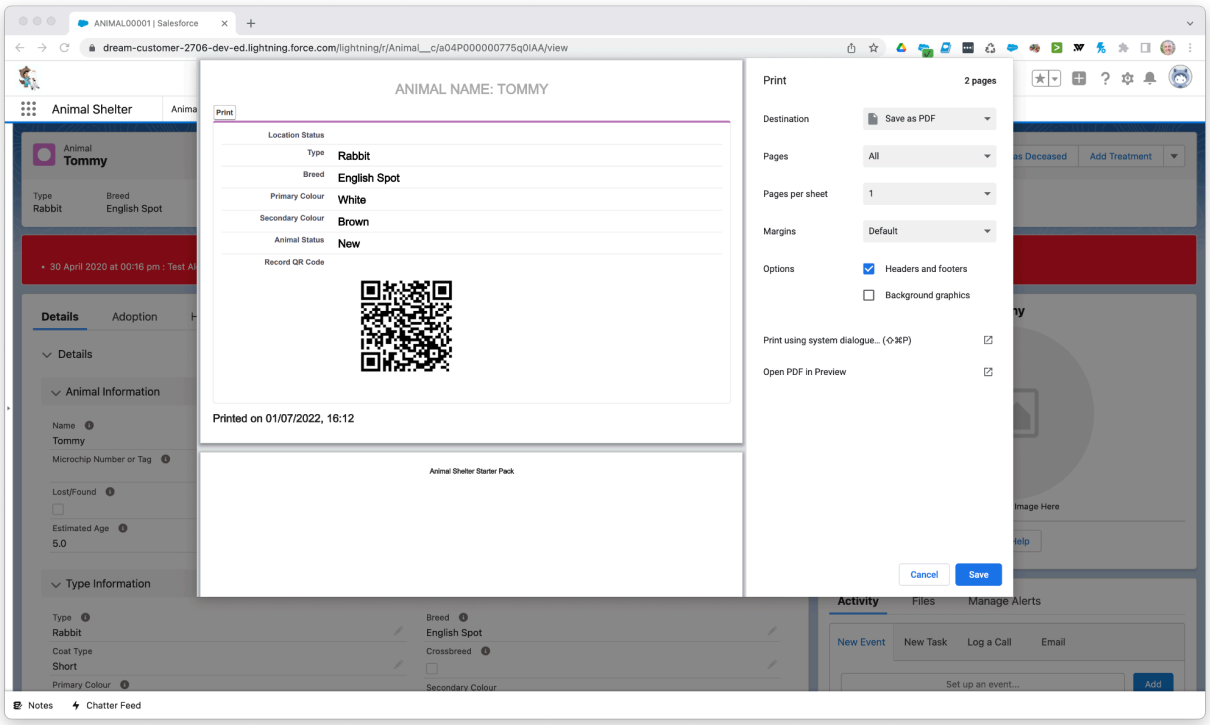
- **Deceased Reason** - The reason why the animal is being marked as deceased. If the animal was Put To Sleep, then the dependent PTS Reason is displayed.
- **Deceased Date** - The date which the animal passed away or was put to sleep.
- **PTS Reason** - The reason why the animal had to be put to sleep (PTS).

The final section is **Location Information**, where we record detail about the animals location

- **Geolocation** - Location coordinates generated from a flow.
- **What3words** - enter a what3words phase to get location coordinates (if enabled)
- **Site** - The site that the animal is located at.

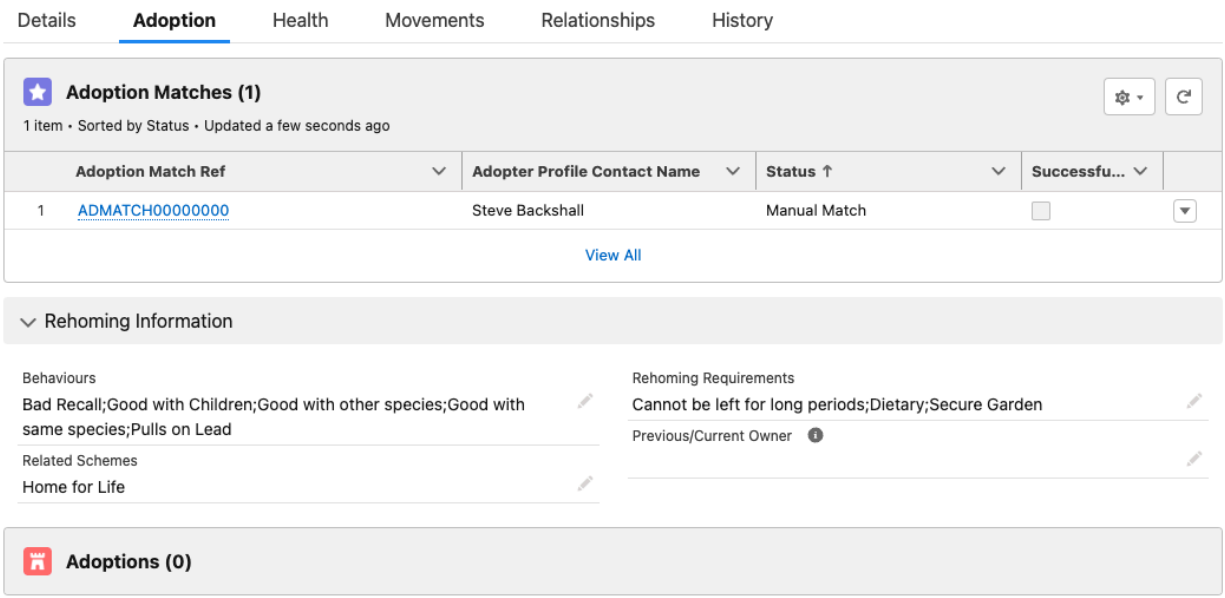
The System Information area at the bottom records who created the record (Created By) and when, along with who last modified the record and the record ID (Animal Reference). The Owner field can be used to record who is the primary point of contact, internally at the shelter, for the animal.

Cage Card



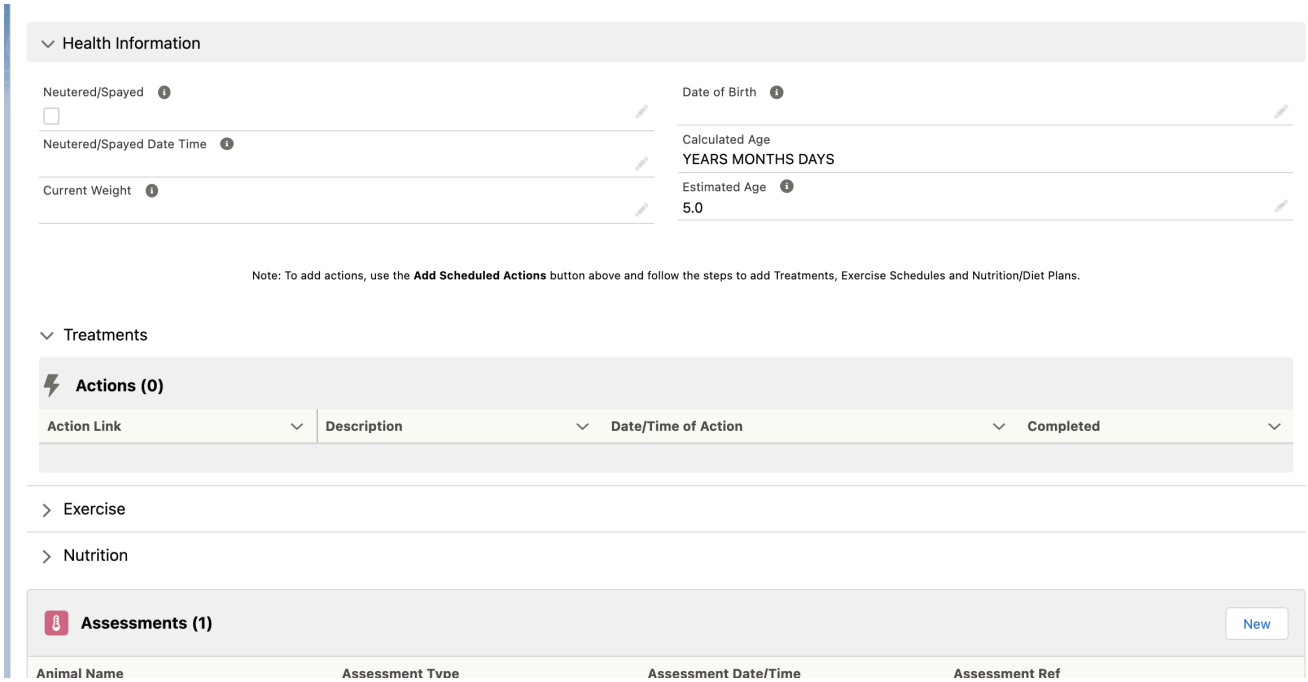
Using the Cage Card button in the Highlights Panel, a pop up screen will appear with specific Animal details. The intention is that this information can be printed (using the print button) and attached to the cage (Unit) where the animal is being housed.
A QR Code is generated for the Animal record, so when scanned using a mobile device the Animal record will be displayed.

Adoption



From the animal record, we then have the Adoption tab. This screen is broken into 3 sections;
At the top is a list of possible Adoption Matches (See Adoption Matches section of this document), then some information regarding the behaviours and rehoming requirements of the animal, and finally any related Adoption records. You can store more than one adoption against an animal and each has their own related information. Access adoption records by clicking the Adoption ID next to the relevant record, within the Adoptions table. See more on Adoptions in the Adoption section of this guide.

Health

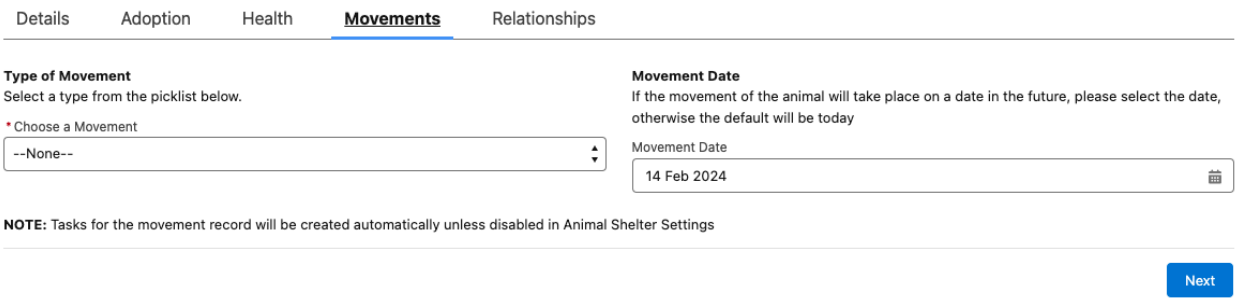


This tab on the animal record stores information about the animal's health, and provides access to Conditions, Treatment Actions, Exercise Actions, Nutrition Actions and Vaccinations. Treatment and Exercise records can be created as one-off actions, or using the Add Scheduled Action button, a schedule, or regime, can be created for the animal that can be followed, for example a schedule could be created indicating that daily at 4pm the animal needs to be exercised. The scheduled action records will then appear in the filtered list.

See more on the different Actions in the Treatment, Exercise and Nutrition sections of this guide.

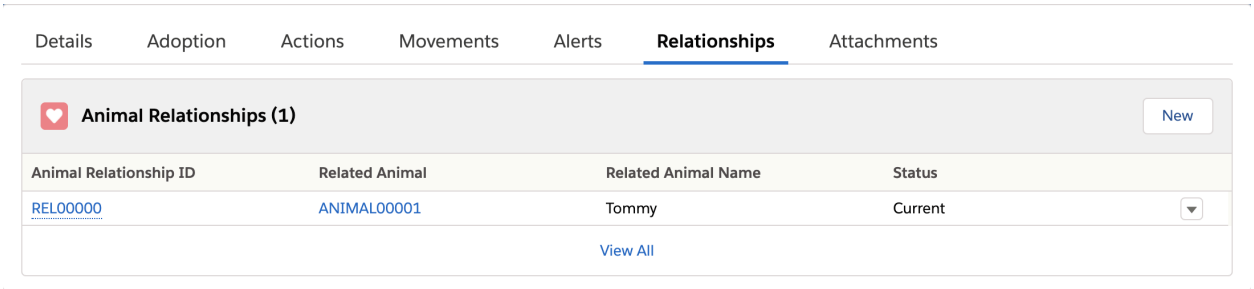
The Assessment section provides the capability to capture an assessment of the animal's health either at entry of the animal into the shelter or at any time throughout the animal's stay. See the Assessment section of this guide.

Movements



Here on the Movements tab, you can track where the animal has moved from and where they have moved to using the Movement Process tool and also see a history of where the animal has been located in the Movement Records area.
See the *Animal Movements* section for more information.

Relationships

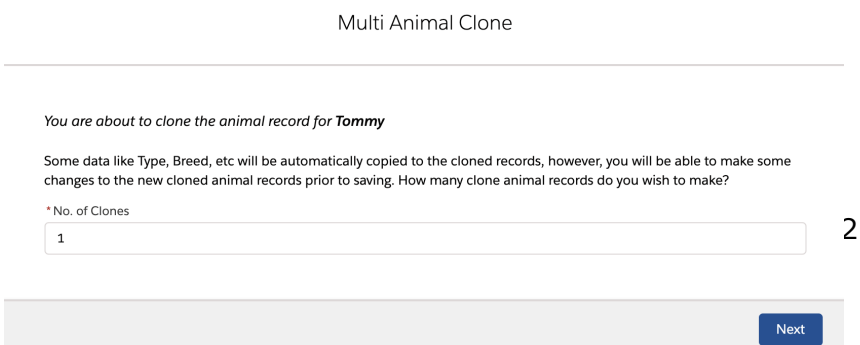


On the Relationships Tab you can see the relationship that this animal has with other animals in the shelter.
See the Animal Relationships section for more information.

Multi Animal Clone

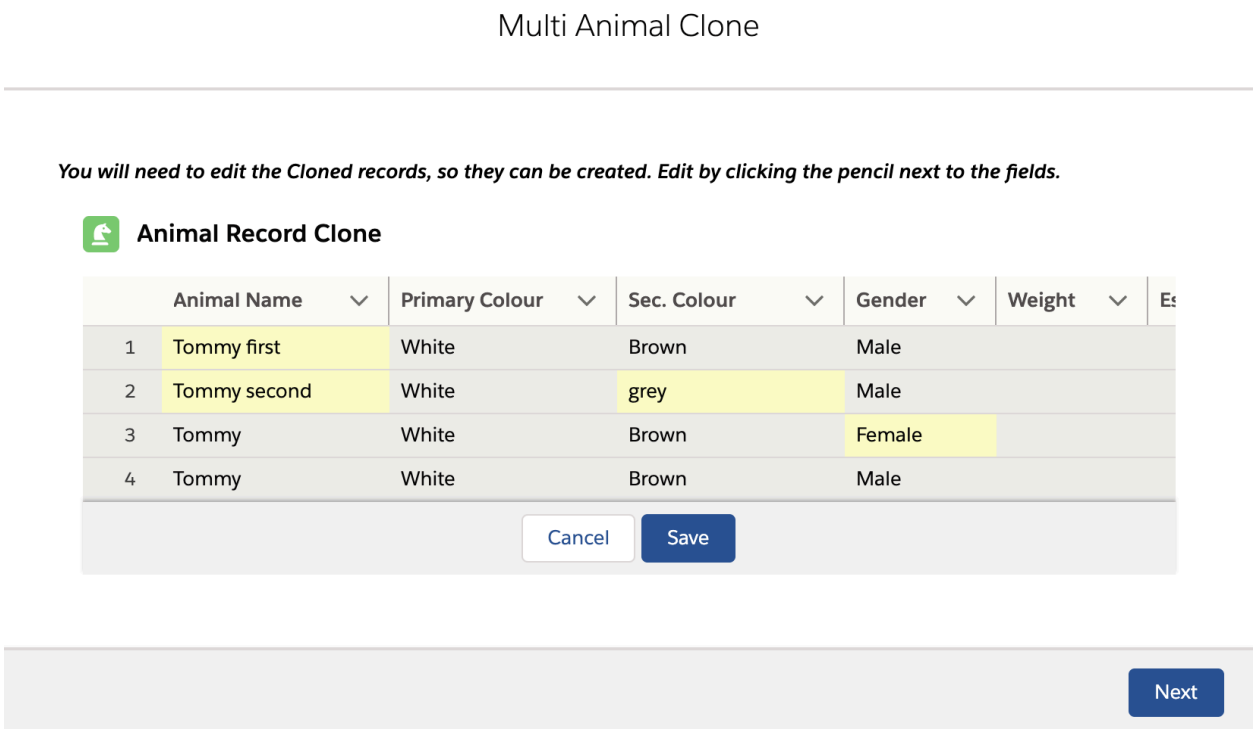
The Multi Animal Clone action from the drop down, allows the current animal record to be cloned a selected number of times, which can be useful if the intake is a litter.

On running the process you are first presented with the selection screen, you



must enter at least one, and a maximum of 10 as the number of clones to be made.

On clicking Next you are presented with a screen (shown below) that allows you to update the details of the cloned records.



Click on the pencil beside the field to update the required information for each of your cloned records. Once complete, click Save and next to write the records into Salesforce.

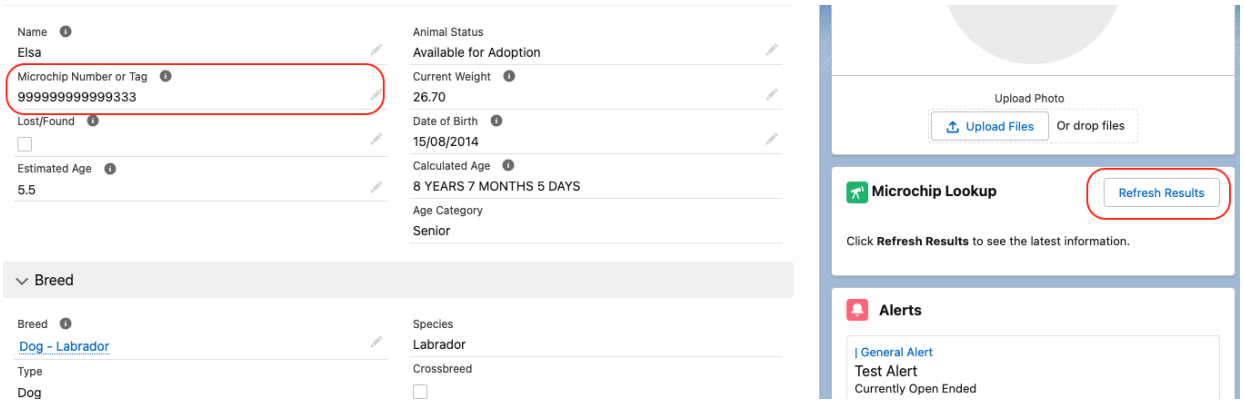
Some fields can be edited during this process, while other fields are automatically copied. These are as follows:

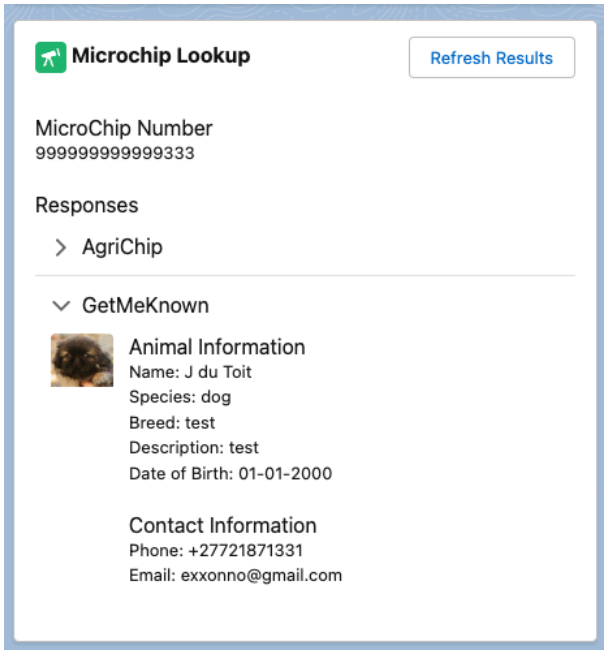
Fields you can edit	Fields automatically copied
• Animal Name • Primary Colour • Secondary Colour • Gender • Weight • Estimated Age • Microchip No.	• Previous/Current Organisation • Previous/Current Owner • Animal Status • Breed • Crossbreed • Date of Arrival • Entry Reason • Lost/Found

Microchip Lookup

From version 1.14 we have introduced a Microchip lookup feature. This feature uses data from a provider called [Chipndoodle](), and can provide microchip data for Europe, Africa and Australia.

This functionality requires you to enter your own API Token, which can be provided by Chipndoodle on a free fare usage basis. The API Token needs to be entered into the App (See Custom Settings).





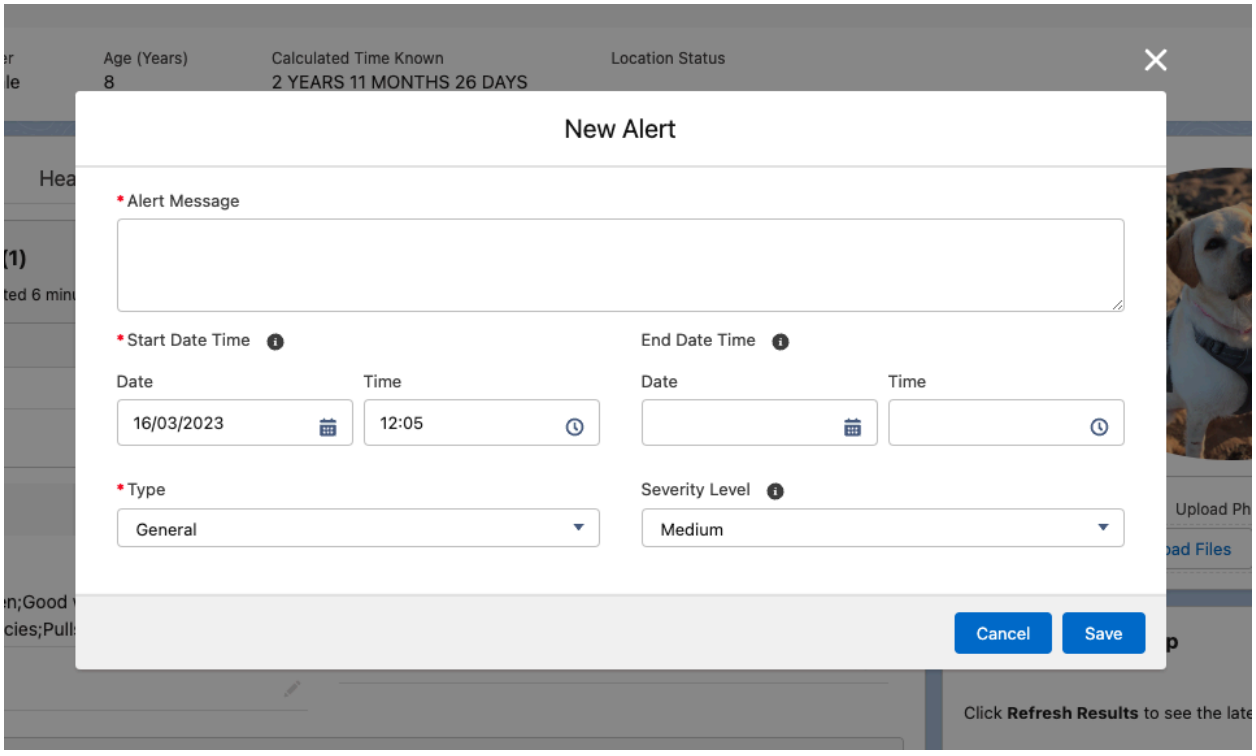
Now when an Animal has Microchip data entered into the Microchip field, you can click on the **Refresh Results** button on the Microchip Lookup component to find a match, as can be seen in the image above.

Alert System

Included in the app is an alert system on the animal record which shows alerts based on certain conditions, which are:

- The Alert Start Date and Time is equal to or greater than the current date and time.
- The Alert End Date and Time is less than or equal to the current date and time. Note that Alerts can also be “open-ended” so they do not have an end date and will show until an end date and time has been specified on the alert.

Creating an Alert

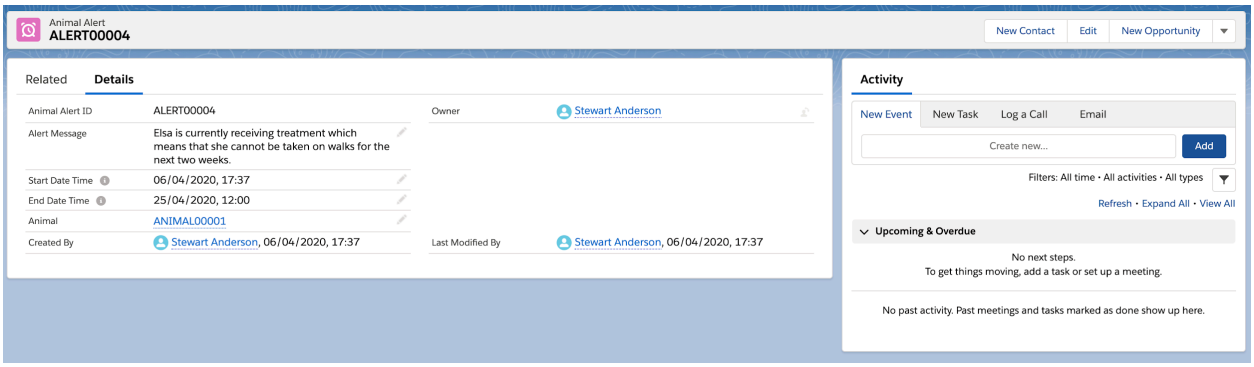


1. Open the related Animal record
    a. In the Highlights Panel at the top of the page, click on **New Alert**
2. In the new window, complete the information as required:
    a. Alert Message - This is the message you want to show in the alert (e.g. Animal under legal hold)

b. Start Date/Time - This is the date and time you want to show the alert from. This will default to the current date and time.
c. End Date/Time - This is the date and time that the alert no longer needs to be shown. Note that you can leave this blank if you want to show the alert until an End Date/Time has been given.
d. The Type alert, i.e. Behaviour, Medical, etc
e. The Severity of the alert

3. Done - The Alert will now show in a red box at the top of the Animal record.

Modifying an Alert



1. Open the related Animal record and click on the name of the **Alert** in the Alerts component.
2. Click **Edit** at the top of the page.
3. Make the required changes and click **Save**

Automated Alerts

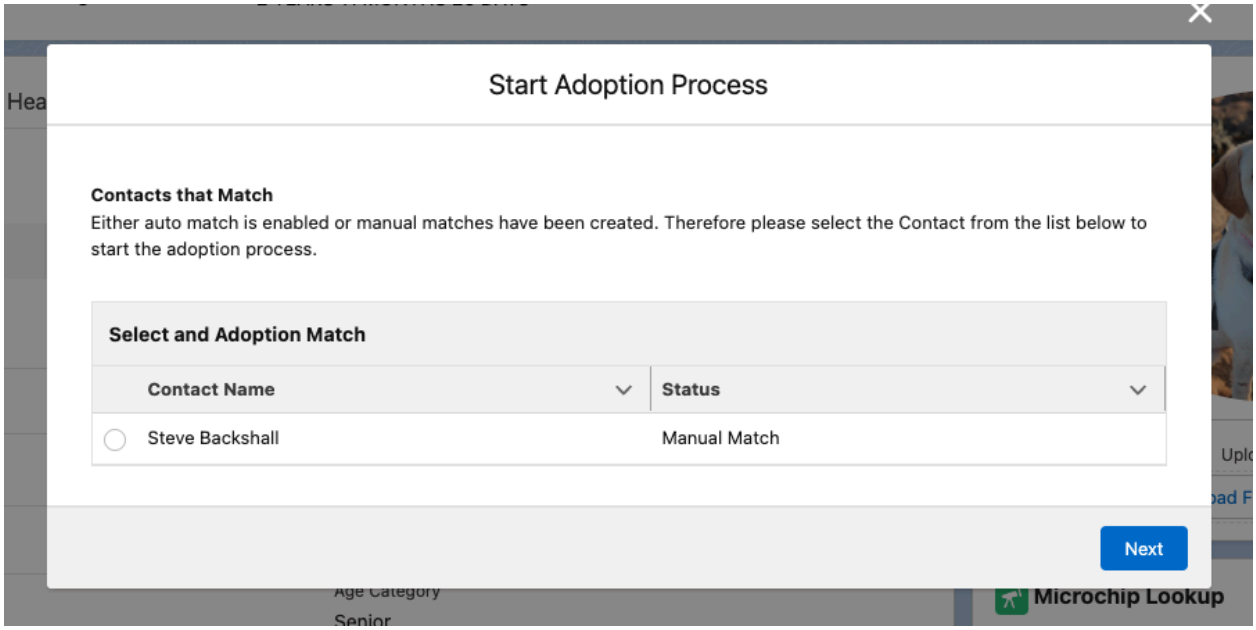
Currently there is one automated alert, which is created when an Animal is marked as "Lost/Found". When the checkbox called "**Lost/Found**" is checked on the Animal record, an alert is automatically created for the next 30 days on the related Animal record.
Note that although the creation of the alert is automated, you can still modify the alert if required, from the related list called Alerts on the Animal record.

Adoption

Creating an Adoption record

To start an Adoption:

1. Open the **Animal** record and click on **Start Adoption Process** from the top right.
2. This initiates a screen flow to step you through the process.



3. You are presented with a list of Adoption Matches, that have either been created automatically or manually.[1]
4. Select the Contact that is going to be the potential adopter
5. The flow copies data from the Contact's current approved Adopter Profile record to populate the Adoption record, this removes duplication of effort from the user.
6. This creates a new Adoption record, which can be found on the **Adoption** tab. Click on the **Adoption ID** for the newly created record to open the Adoption record.
7. Done.

Adoption Management and Tracking

Each Adoption record allows you to track the various stages the adoption goes through and the related information required for the adoption. We have left the system fairly flexible so that you can configure a process which works for you, however, out of the box you can track the following on the Adoption record.

Main Adoption Details

On the **Details** tab is where we track all the main information, such as:

- **Primary Contact** - This is the Contact within the household, or the individual who is responsible for adopting the animal.
- **Adoption Stage** - The current stage of the adoption, starting with Initial Review. Keep this up to date more easily using the stages at the top of the page.
- **Date of Adoption** - This is the start date of the adoption.
- **Date Collected** - Once the adoption is confirmed, this is the actual date when the animal is collected. Note this can be the same as the Date of Adoption and you can also use this date field to track when the animal will be collected and update as required.

[1] Adoption Match records need to exist to start the Adoption Process

- **Trial End Date Time** - If this is going to be a trial adoption, then this is the date and time which the trial will end and a review of the adoption will take place.

Adoption Inspections

There are a number of fields, located on the **Details** tab, related to information collected during an inspection of the location where the animal will be kept, should the adoption be successful.

Note: most of this data will have been copied from the Contact's approved Adopter Profile record, however, here is the opportunity to augment, or update the data.

Note: Remember that these records can be accessed from a mobile device using the Salesforce app for iOS and Android devices.

- **Local Vet** - This is a lookup to your Account records where organisations are stored. Select or create a record for the local vet which this animal will be registered with.
- **Total Adults** - The total number of adults living at the location.
- **Total Children** - The total number of children living at the location.
- **Type of Accommodation** - Specifies the type of accommodation, which the animal will be located in. (i.e. House, Flat, Farm, etc)
- **Reason for Adoption** - This is a free text area, where details can be recorded as to why the individual wants to adopt the animal.
- **Facilities Available** - This is a free text area, where details of any specific facilities and equipment can be recorded.
- **Current Daytime Arrangements** - This is where information can be recorded about what will happen during the daytime and how long the potential owners will be away from the location, if at all.
- **Location of the Animal (Daytime) -** Details of where the animal will be kept during the day and any additional information related to where it will be kept such as location and equipment related to housing or moving the animal during the day.
- **Location of the Animal (Night time)** - Details of where the animal will be kept during the night and any considerations which are being put in place to house the animal overnight at this location.
- **Other Pets/Animals** - Details of other animals which are also located at the same location.

Adoption Stages

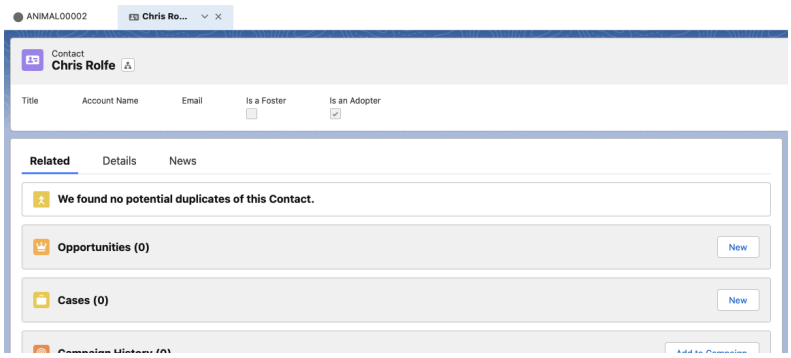
As you are updated about the animal moving to a new Adoption stage, update the **Stage** field on the Adoption record.
You can also use the Stage names at the top of the record to update the current stage of the record. To do this, click on the relevant **stage** and then click on **Mark Adoption Stage as Complete**
By default the stages are as follows:

1. **Initial Review** - This is the default stage and is where you are still collecting information.
2. **Reserved** - This stage is where the animal has been reserved for the primary contact on the adoption record.
3. **Home Inspection** - Move to this stage when the inspection is now due/being carried out at the location where the animal is intended to be kept. (See Adoption Inspections above)
4. **Declined** - If for any reason the adoption is not going to move forward, for example they failed the inspection, then move the stage to Declined. (See Adoption Declined below)
5. **Veterinary Check** - This stage is when the animal is going through its veterinary check prior to collection.
6. **Trial Period** - Set this stage if it's a trial adoption and the animal has been collected. Note something to check is that there should be no adoption records set to Trial Period where the Trial End Date has passed.
7. **Adopted** - This is where the animal has been adopted and has either been collected or is due to be collected.
8. **Returned** - This is where the animal has been returned. Remember to update the related fields (See Animal Returned below).

Adoption Completed - Contact Update

When an adoption reaches the stage of Adopted, a flow will be executed to update the Animal record details with new owner (Contact), and the status of the animal. A Movement record will also be generated.

On the Contact a checkbox is set to indicate that this Contact is now an Adopter. The intention behind this is to easily identify the Contacts that are adopters and thus supporters.



Adoption Declined

Should there be a reason that the adoption is no longer going ahead, then the stage should be set to **Declined** and the reasons added to the **Declined Reason** field.

Animal Returned

If the animal has been returned, then create the required movement (*See Animal Movements*) and update the related Adoption record stage to **Returned** and complete the **Date Returned** and **Returned Reason** fields with the requirement information.

Adoption Documents/Files

Any documents/files which relate to this specific adoption, can be uploaded and stored on the record in the **Notes and Attachments** are on the **Documents** tab.

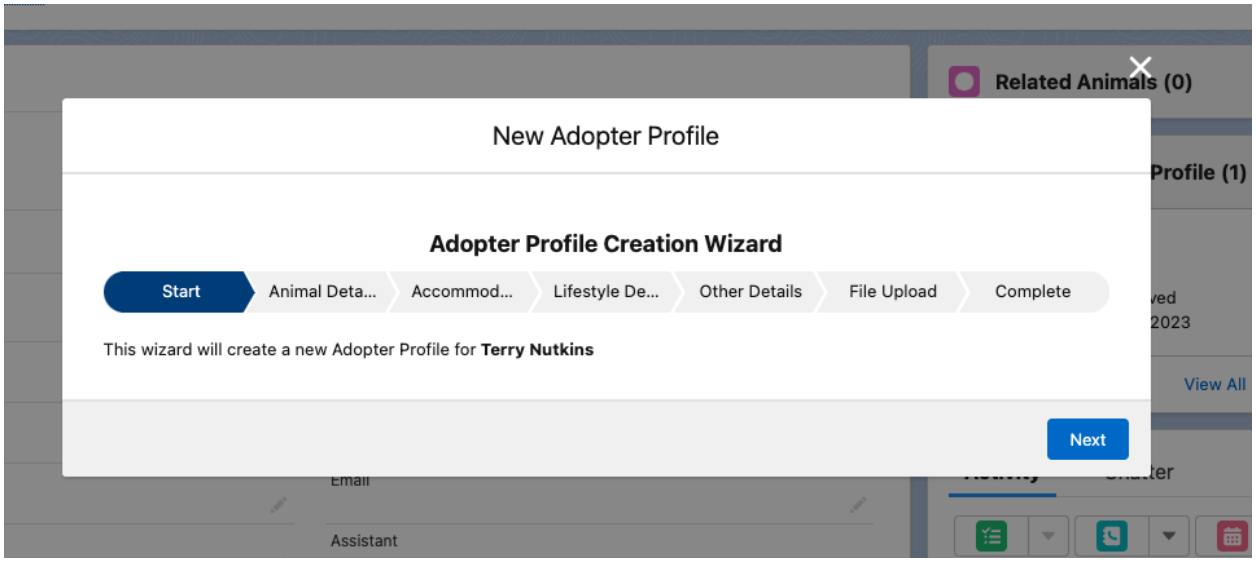
Activity Tracking

Activity tracking is enabled by default on the Adoption record, where emails, calls, tasks, meetings and notes can be tracked. (See *Activity Tracking*)

Adopter Profile

New in version 1.14 is the ability to create an Adopter Profile for a potential adopter (a Contact). This Adopter Profile is used to populate the Adoption record and also as part of the automatic/manual Adoption Match process (see section on Adoption Matches)

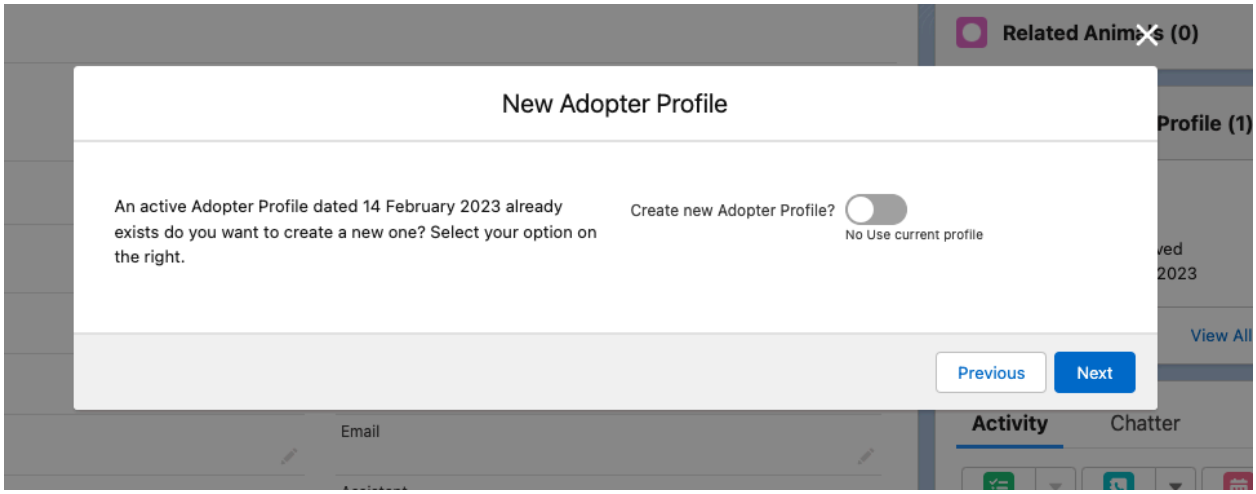
From a Contact record, the Highlight Panel, is the New Adopter Profile button, which initiates a screen flow to capture the required information.



Adopter Profile Lifecycle

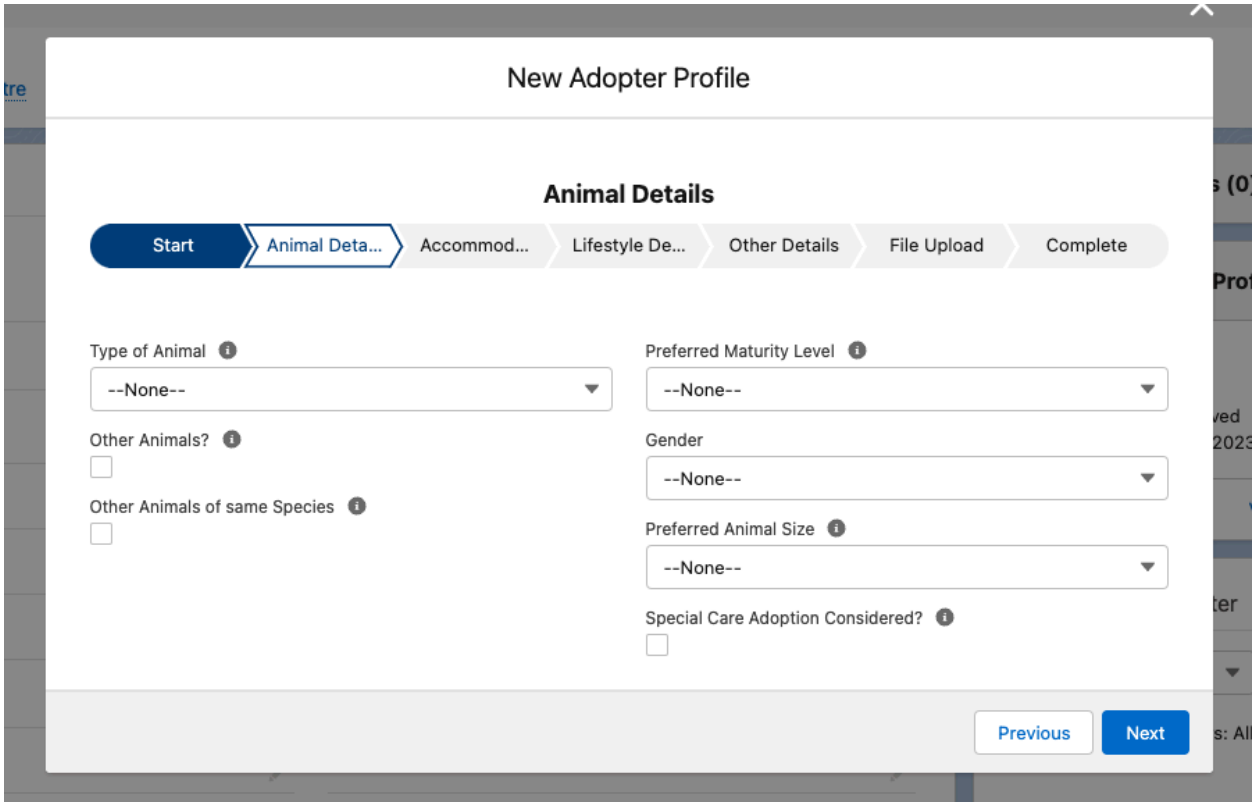
An Adopter Profile has a start and an end date. This allows the Contact to have an updated profile with differing information, but preserves any previous information captured regarding their animal adoption preferences, for example,

An adopter may have a profile stating that they have no existing animals, and then go on to adopt an animal, so their profile will need to be updated. They will create a new profile, which in turn will close the old profile. This can be seen in a step in the flow which looks for existing profiles, and prompts the user to continue or create a new profile.



Adopter Profile data

The majority of the Adopter profile data that is captured reflects that, that is required on the Adoption record.



Once the profile details have been completed the Adopter Profile is set to a status of 'New', and a Task is generated and assigned to the **Adoption Tasks** queue for review. It is assumed

that the Adopter Profile will need to be reviewed, and approved before the Contact can adopt an animal, and the Adoption Matches process will only consider Adopter Profiles that have been approved.

NOTE: The Adopter Profile has a Master-Detail relation with Contact, therefore if the Contact is deleted all Adopter Profile records related to the Contact are also deleted.

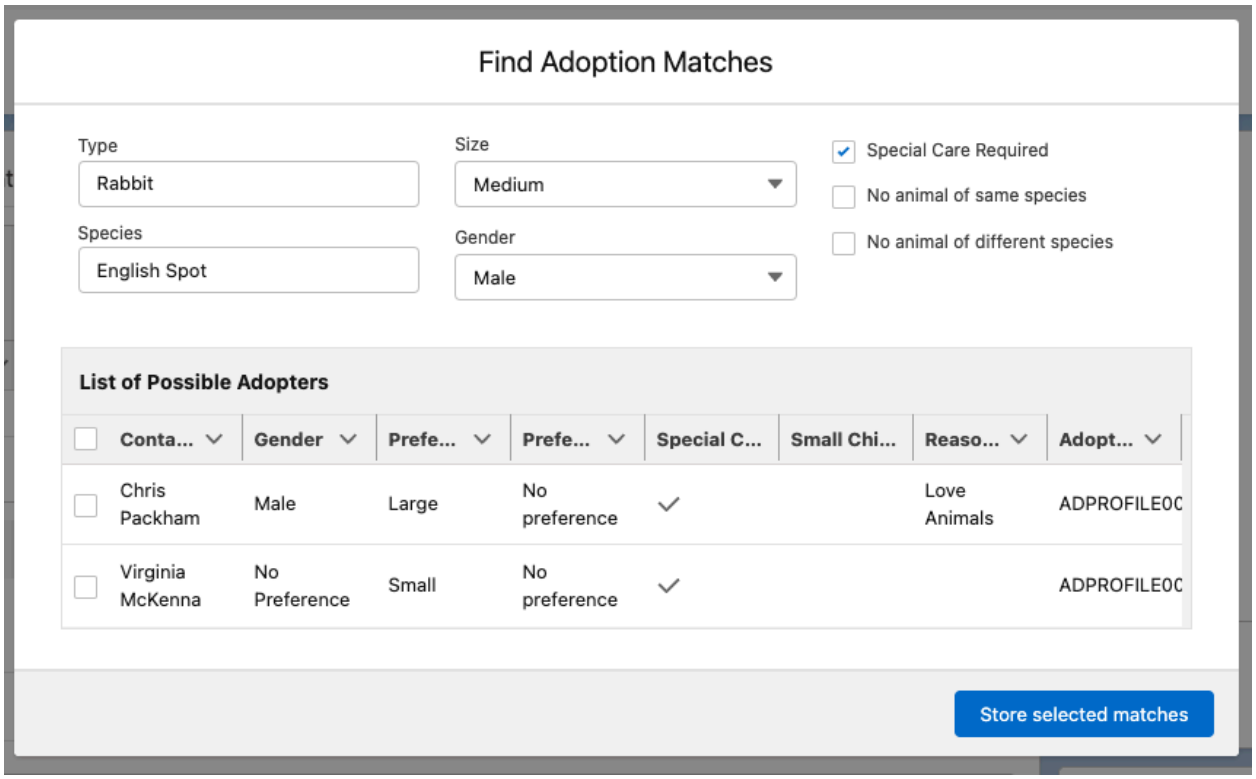
Adoption Matches

New in version 1.14 is Adoption Matches. This is the process of matching potential Adopters to an Animal that is available for adoption.

Adoption Match records are created based on the details of the animal, and the Contact's current approved Adopter Profile. Adoption Match records can be created in one of two ways

Manual Adoption Matches

From the Animal record, click on the additional actions drop down and choose **Find Adoption Matches**. This initiates a screen flow to allow you to create manual adoption matches. The adopter profile records displayed are approved and only match the Animal Type.



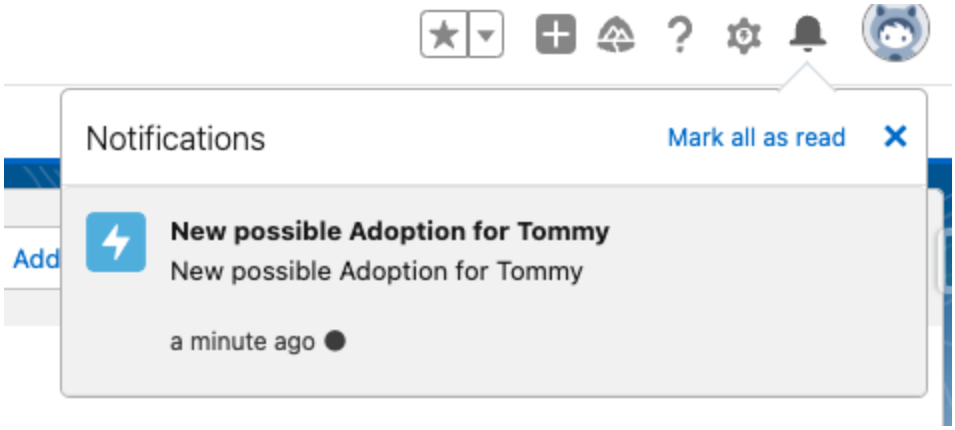
At the top you can see the characteristics of the select animal, followed by the list of Adopter Profiles that match the animal type.
You can select one or many possible adopters, to create Adoption Matches
These Adoption Matches will be created with a Status of Manual Matched.

Automatic Adoption Matches

This feature is enabled by default, and will create Adoption Match records automatically, when either an animal is set to a Status of **Available for Adoption** , or an Adopter Profile is **approved**. Automation is initiated to look for Adopter Profiles and Animals that match four characteristics[2], which are:

Type
Age Category (Junior, Adolescent, Mature, Senior, No Preference)[3]
Size (Small, Medium, Large, Very Large, No Preference)
Gender (Male, Female)

If one or more successful matches are found, Adoption Match records are created with a Status of **Auto Matched**, and a notification is indicated to the User.



Adoption Match Clean Up

An Adoption Match Clean Up process is executed in the following circumstances:

- If an animal had a status of **Available for Adoption**, but this status changes to **Adopted**, all Adoption Match records are deleted, except the Adoption Match record that was related to the successful adoption, in this case its record is marked with a flag to indicate it resulted in a successful adoption.

- If an animal had a status of **Available for Adoption**, but this status changes to anything other than **Adopted**, all Adoption Match records are deleted.

[2] Note: your can modify the flow to include/change these characteristics
[3] Set in Custom Metadata Types

- If an Adopter Profile record's active flag (checkbox) is unticked, normally indicating it has been replaced with an updated profile, then all Adoption Matches related to the Adopter Profile are deleted

Animal Image

It's important to have an image of the animal on the record to help identify them, so we have added an image upload component on the Animal record.

Upload an Image

To upload an image, simply drag and drop an image file onto the component from a folder on your computer. The image file will be uploaded to the Attachments area on the Animal record.

Change an Image

If there is a need to upload a replacement image on a record, then drag and drop a replacement image onto the existing image, on the Animal record page. This will upload the new image and become the new image of the animal.

Animal Movements

Recording an animal movement

On the Movements tab, on the Animal record, you can use the flow to walk through the steps to move an animal. To do this:

1. Open the relevant **Animal** record and click on the **Movements tab**.
2. On the **Movements Process** click on the relevant option, detailed in the table below.
3. Follow the steps and complete the required information.
4. Done - The movements related list will be updated with the new movements.

From version 1.23 you now have the ability to create a Movement record that may be in the future. This allows the destination location to be reserved (as it will be set as allocated). If a future date is set an additional Movement record will be created for the new Location and Date, and the current record will stay in place. Once the movement has taken place and the associated task is completed the Movement records will be updated

NOTE: if the animal has a status of deceased the Movement flow will not be available.
NOTE: The generation of Tasks for the movement of animals is enabled by default

Movement Type	**Description**
Incoming/Internally Housed	This is where the animal is coming into the shelter and/or is being housed internally and is being moved to another

	location on the same site. **Option: House Internally**
Boarding	This is where the animal is coming into the shelter for boarding only. **Option: Animal is Boarding**
Fostering	This is where the animal is being moved to a foster. **Option: Move to a Foster**
Organisation Transfers	This is where the animal is being moved to another organisation. **Option: Transferred to another Organisation**
Adoption	Where the animal has been adopted. **Option: Animal has been adopted**

Locations

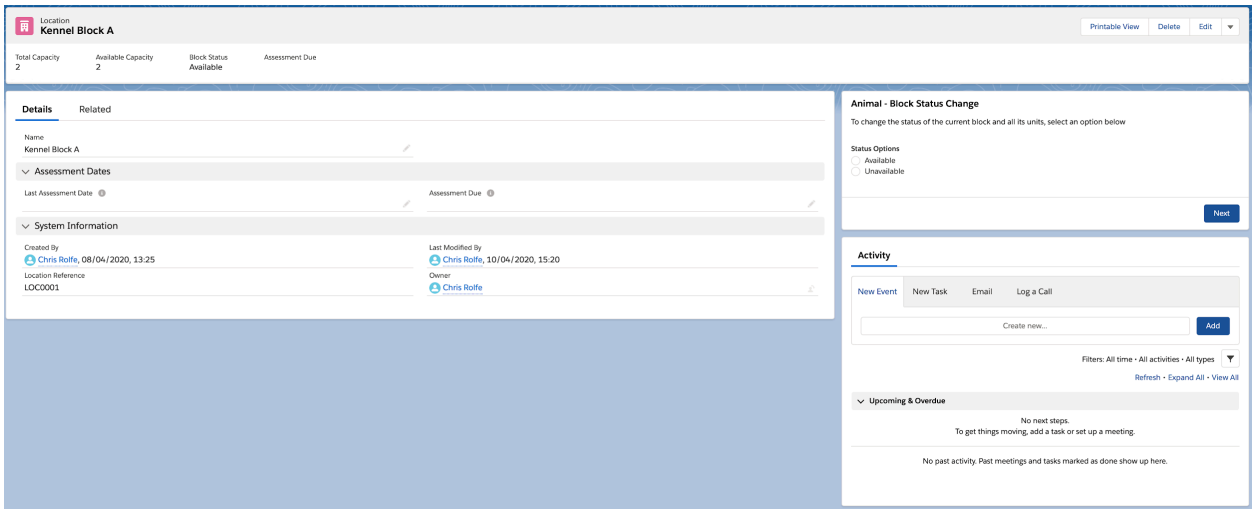
Location records need to be configured in the app, so the animal's location can be tracked. There are four different types of location that can be configured.
All location types have fields for;

- **Last Assessment Date** - The date the location was assessed for suitable, welfare standards, etc.
- **Assessment Due** - The date of the next due assessment. If using the "Set Assessment Date" button the Last Assessment Date is set to today's date, and the Assessment Due is set to 12 months from the Last Assessment Date.

Site

If your organisation has multiple physical locations, you can create a Site Location record, which will be the parent to your Block locations

Block

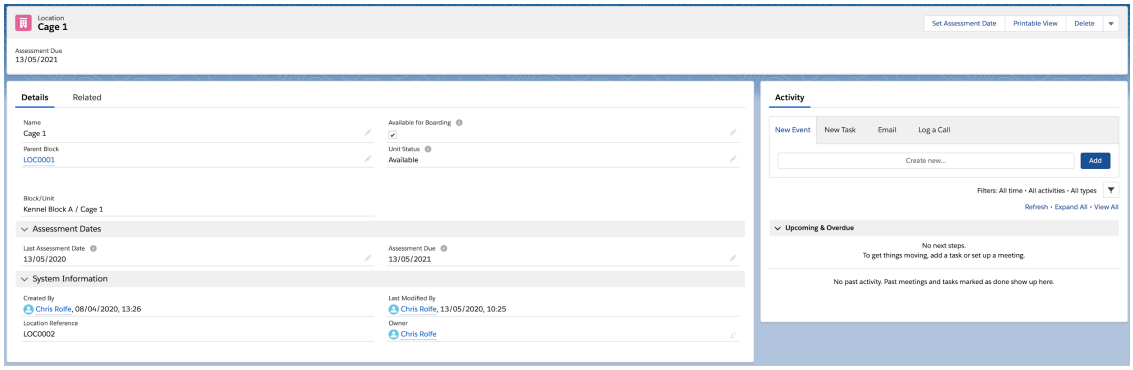


This is a location within the Shelter. Examples of a Block are Kennel Block, Cattery, Small Animals, Isolation, etc. It is intended that a Block has sub units, i.e. Cage, Pod, Pen, etc where the animals are actually housed.

The record page for Block has some additional information. In the highlights panel at the top of the screen there are details for Total and Available Capacity, and Block Status. The Total and Available Capacity are calculated automatically by an automation each time a Block record is created/edited.

To the right of the Block record page is the Block Status Change wizard. This allows you to set the status of a Block and all the underlying sub units. Typically this may be used if a Block needs to be made unavailable for maintenance or cleaning. Execute the wizard by selecting the desired status, and clicking Next. The wizard examines the Units in the Block, and if any are already allocated the wizard stops and prompts you to relocate any animals. If all units are free then the Block and Units are set to the desired status.

Unit



A Unit is a sub location within a Block. Examples could be a Pod, Cage, Pen, etc. When creating a Unit you can pick the Parent Block that the Unit belongs to, and a number of Units can belong to a Block. So the hierarchy can look as follows:

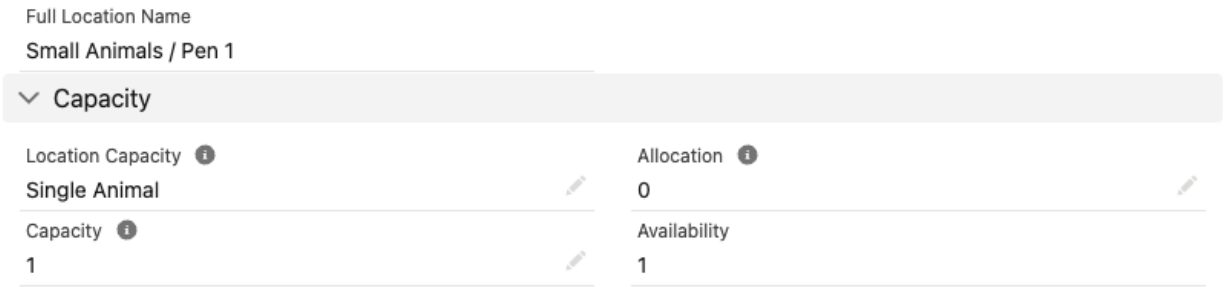
- ❏ Kennel Block A (Block)
  - ❏ Cage 1 (Unit)
  - ❏ Cage 2 (Unit)
- ❏ Small Animals (Block)
  - ❏ Pen 1 (Unit)
  - ❏ Pen 2 (Unit)

The information for the Unit Location is:

- **Available for Boarding** - Indicates that this Unit can be used for animals that are boarding and maybe not for long stay animals. If selected this flag is used in the movement wizard to filter for available locations for Boarding.
- **Block/Unit** - This is a formula field which displays the full location of the Unit.
- **Parent Block** - Allows the selection of the Block where the Unit is housed.
- **Unit Status** - This shows the status of the Unit, Available, Unavailable, Allocated. The value of the field is usually set by an automation (Block Status Change, Movement Wizard), however, it can be set manually. NOTE, if you manually set a Unit as Available or Unavailable, and the Block Status Change process is run, the Unit Status will be updated to the selected Block Status.

Multiple Animals per Unit

You can now determine whether a single animal or multiple animals can be stored at a Unit Location.

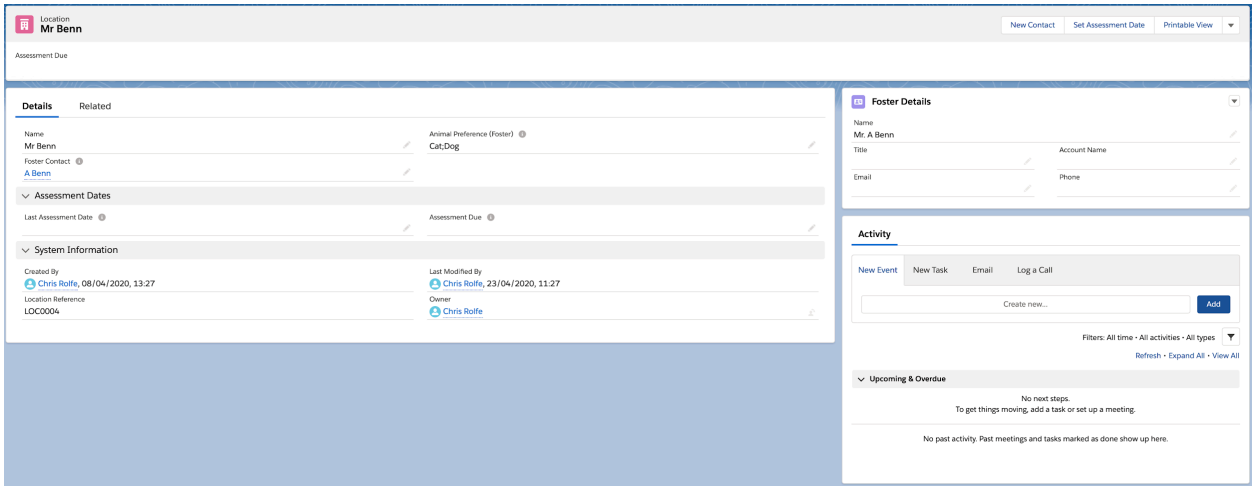


- **Location Capacity** - Select the type of capacity this location has
  - Single Animal - Unit only has capacity for a single animal
  - Multiple Animals - The unit can hold more than one animal. Set the Capacity field to the number of animals that can be stored.
  - Untracked - The unit has a capacity that is unlimited.
- **Capacity** - The number of animals that can be housed in the same unit.
- **Allocation** - The number of animals currently allocated to the unit
- **Availability** - The remaining capacity of the unit (automatically calculated)

When the Single or Multiple animal option is selected the availability field is used to determine whether the unit is made available in the Movement flow.

The multiple animals per unit functionality can easily apply to Foster Locations and Organisation Locations.

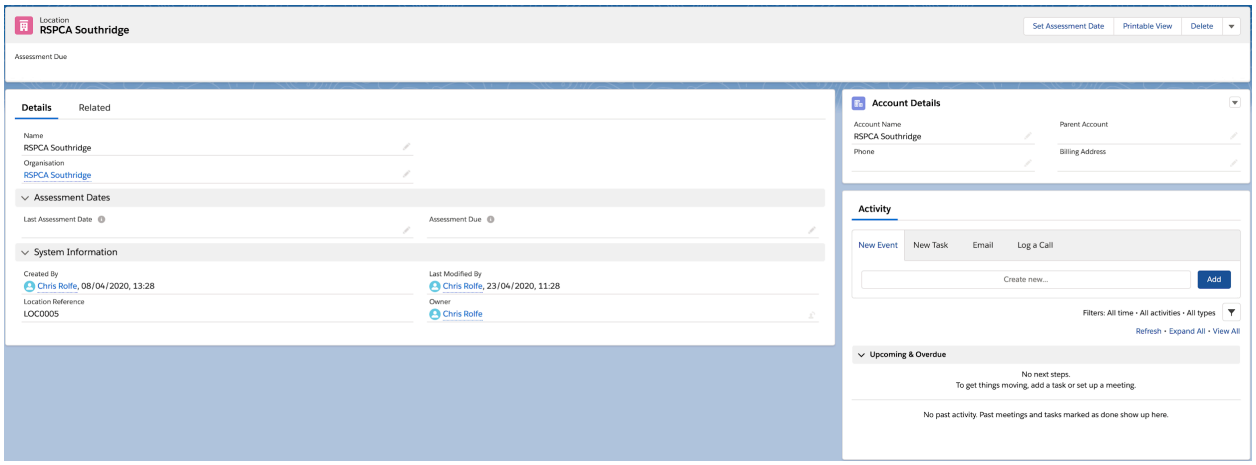
Foster



If your Shelter uses Foster's to care for animals then you can create a Foster Location record. The information stored includes;

- **Foster Contact** - If required you can use Contacts to store information about your Fosterers, i.e. name, address, contact details, etc. On the Contact a checkbox has been provided named "Is a Foster", which if checked allows you to filter the lookup to display a specific set of Contact records, however, you are not restricted to these records only.
- **Animal Preference (Foster)** - This is a multi selection list that you can use to indicate which animal types the Foster is comfortable with.

Organisation



An Organisation Location is a 3rd Party Organisation that you can move animals to and from. This could be another Shelter, Animal Welfare Organisation, Local Authority, etc

- **Organisation** - If required you can use Accounts to store information about the other organisations that you work with, i.e. name, address, contact details, etc. On the Account a checkbox has been provided named “Animal Organisation”, which if checked allows you to filter the lookup to display a specific set of Account records, however, you are not restricted to these records only.

Tasks

As part of the Movement Process, there is an option to generate tasks, which is enabled by default. A task is created and assigned to the Animal Tasks queue, as a reminder for the animal to be moved. The due date on the task, by default, is set to 2 days from the current date.
Tasks can be viewed from the App main dropdown and selecting **Tasks**.

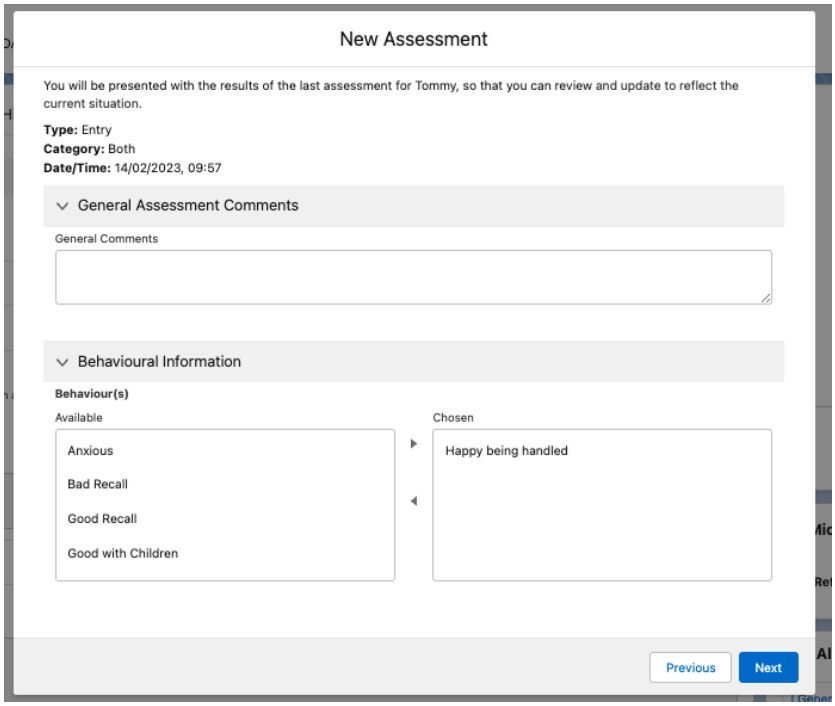
Animal Relationships

On the Relationships tab, on the Animal record, you can create a relationship between the current animal and another animal in the system. This could indicate a parent/child relationship or sibling relationship. To do this:

1. Open the relevant **Animal** record and click on the **Relationships tab**.
2. Click on **New** to create a new relationship

Assessment

From the Animal screen, click on the more actions dropdown in the Highlights Panel and select **New Assessment**.
This initiates a flow to create a new assessment record.



You can choose between a Health, Behaviour or both assessment category, and whether this is an Entry or Follow Up assessment.

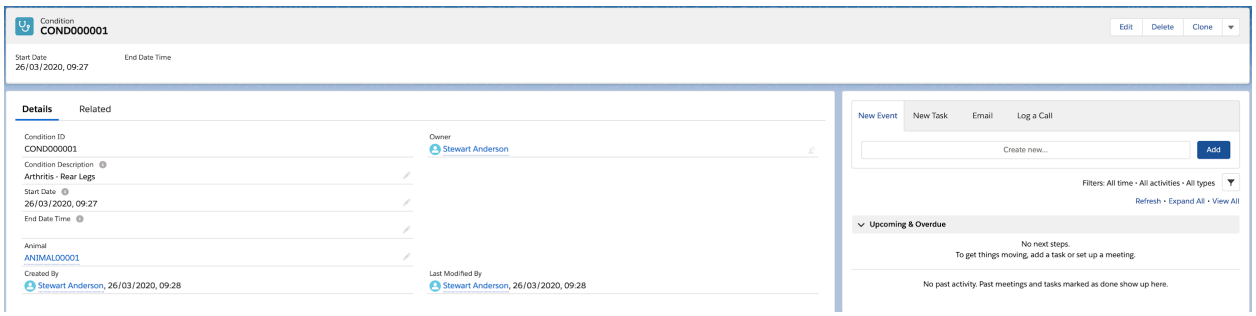
If previous assessments for the animal have taken place, then the most recent assessment is opened and the results of that assessment are populated in the flow, so that you can see the previous results and update them.

The flow also allows you to create Condition records related to the Animal and Assessment that may need to be treated.

Medical Tracking

There are a number of Medical elements that the app can track.

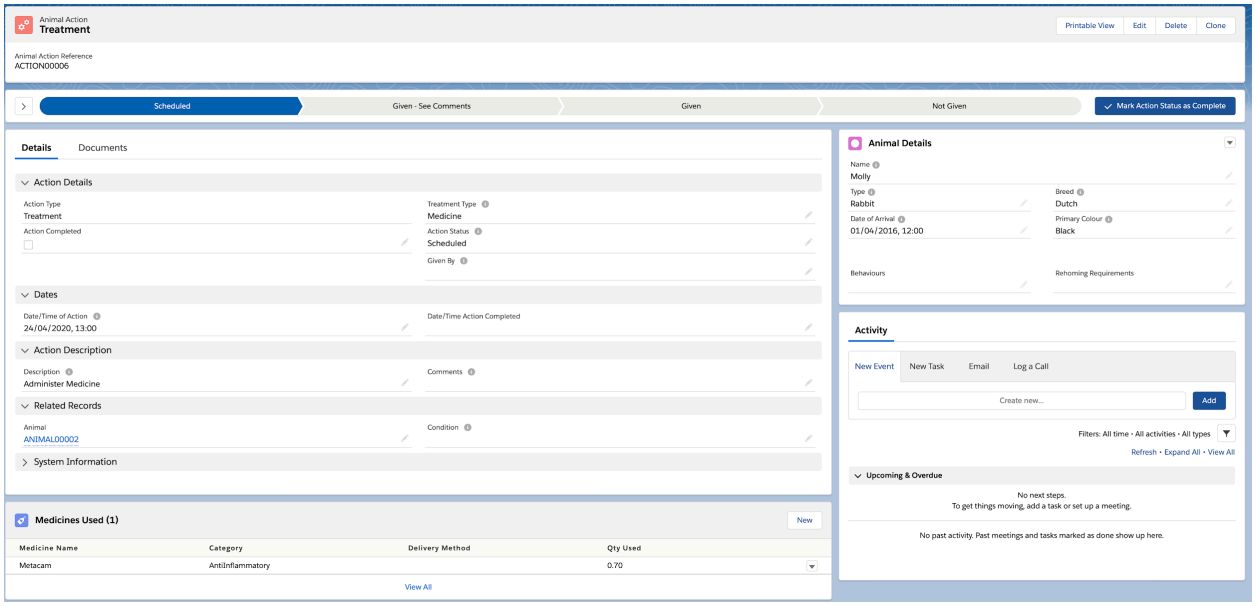
Conditions



This allows you to capture specific conditions that an animal may suffer from.

- **Condition Description** - A free text description of the condition.
- **Start Date** - The date and time the condition was first observed/reported.
- **End Date** - The date and time the condition was resolved.

Treatment



A Treatment is a type of Action record that can be recorded against an animal. It can be recorded as a one-off treatment or a series of scheduled treatments.

Action Details Section

- **Action Type** - Is set by default to Treatment.
- **Action Completed** - Indicates whether the treatment has been completed (administered, etc).
- **Treatment Type** - The type of treatment that has been or needs to be administered. The default options are Medicine, Surgery, Vaccination, Physio.
- **Action Status** - Is the status the treatment is at, and the status is also indicated at the top of the treatment screen. Default options are Scheduled, Given - See Comments, Given, Not Given.
- **Given By** - This is a lookup to Contacts. If you wish to record who administered the treatment then you would need to create Contact records, i.e. for Staff, Locum Vets, etc.

Dates Section

- **Date/Time of Action** - This is the date and time the treatment should be administered (if scheduled).
- **Date/Time Action Completed** - This is the date and time the treatment was completed.

Action Description Section

- **Description** - Free text description of what the treatment needs to be.

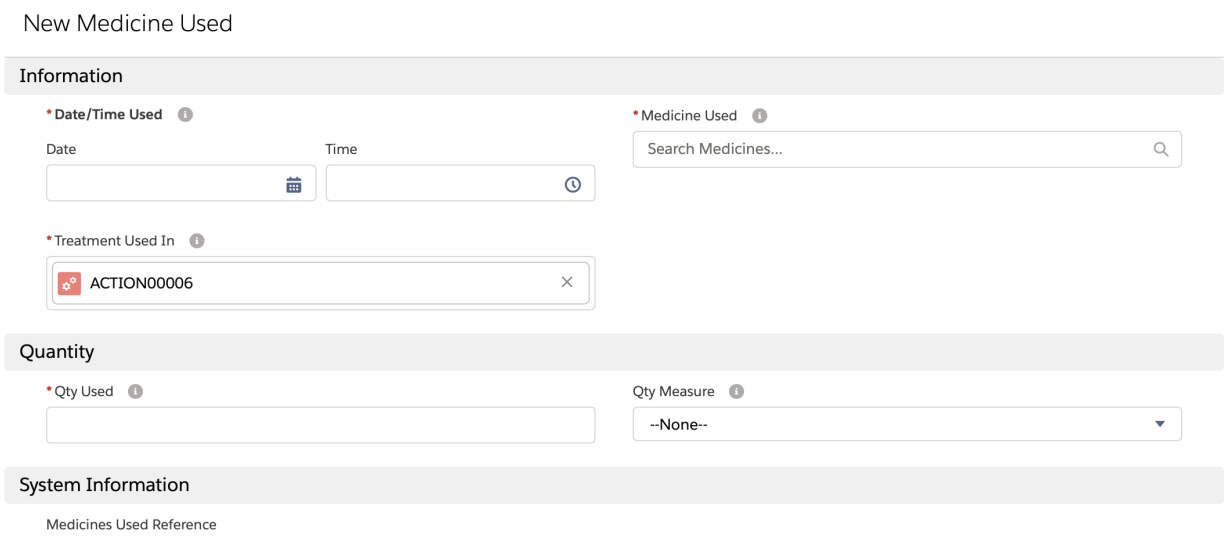
- **Comments** - General free text area for comments

Related Records Section

- **Animal** - The animal the treatment is related to.
- **Condition** - If required a Condition can be related to the treatment.

The Treatment has a related list for Medicines Used, so a full treatment and medication history can be recorded against the animal.

Medicines Used



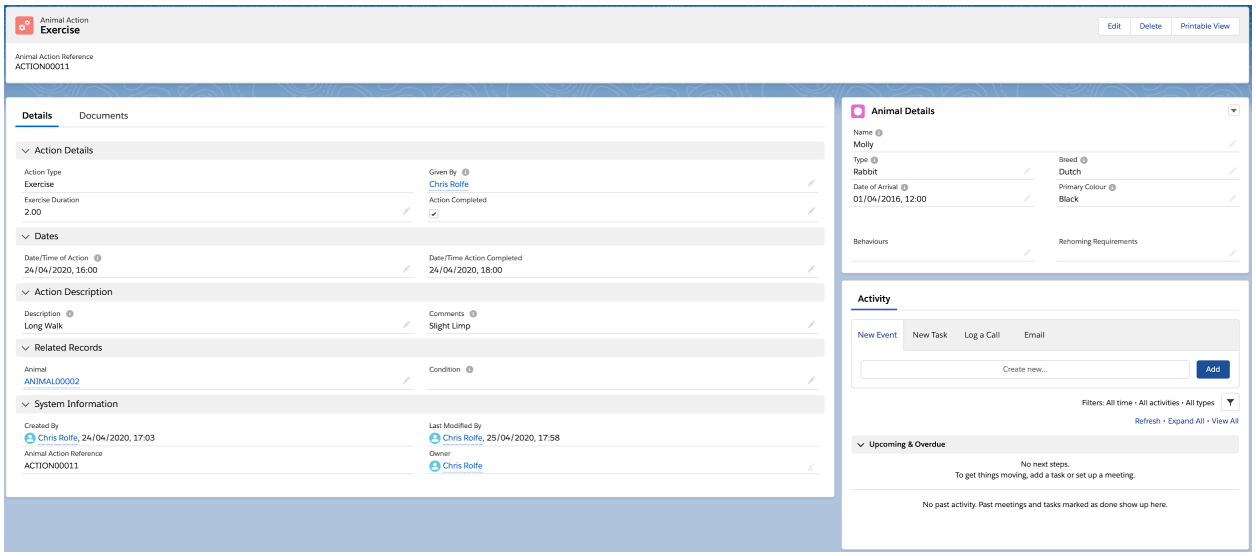
Information Section

- **Date/Time Used** - The date and time the medicine was used.
- **Medicine Used** - This is a lookup to the list of Active medicines that have been created in the App. See section on Medicines later in this document.
- **Treatment Used in** - The relation to the Treatment record, which will be automatically populated.

Quantity Section

- **Qty Used** - A numeric value to capture the quantity of the medication used. Used in conjunction with the Qty Measure field.
- **Qty Measure** - This is used in conjunction with the Qty Used field. It is a picklist, which contains the following by default, millilitres, No Of Tablets, grams, centilitres.

Exercise Tracking



An Exercise is a type of Action record that can be recorded against an animal. It can be recorded as a one-off exercise or a series of scheduled exercises.

Action Details Section

- **Action Type** - Is set by default to Exercise.
- **Action Completed** - Indicates whether the treatment has been completed (administered, etc).
- **Exercise Duration** - The duration of the exercise in hours.
- **Given By** - This is a lookup to Contacts. If you wish to record who supervised the exercise then you would need to create Contact records, i.e. for Staff, Volunteer, etc.

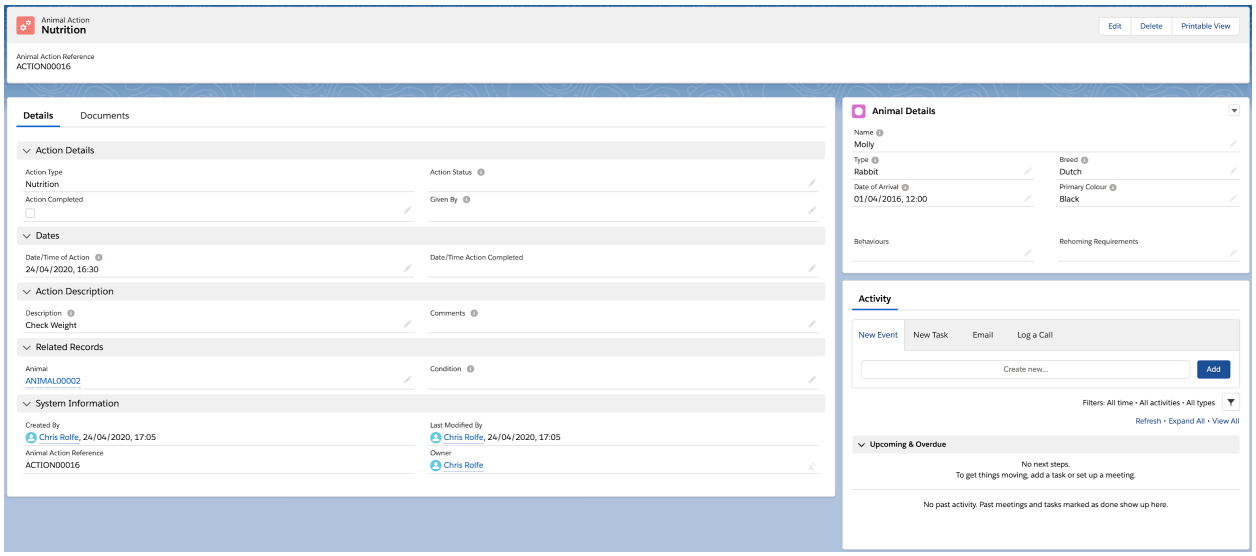
Dates Section

- **Date/Time of Action** - This is the date and time the exercise should be undertaken (if scheduled).
- **Date/Time Action Completed** - This is the date and time the exercise was completed. When using the “Complete Exercise Action” button from the Animal record page, the Date/Time Action Completed is calculated based on the Exercise Duration entered.

Action Description Section

- **Description** - Free text description of what the exercise should be.
- **Comments** - General free text area for comments, for example pulled on lead, etc.

Nutrition Tracking



A Nutrition record is a type of Action that can be recorded against an animal. It has been configured to be created as a series of scheduled nutrition records, or 'diet plan' and is created using the "Add Scheduled Action" button from the Animal record page.

Action Details Section

- **Action Type** - Is set by default to Nutrition.
- **Action Completed** - Indicates whether the nutrition action has been completed.
- **Given By** - This is a lookup to Contacts. If you wish to record who provided the nutrition then you would need to create Contact records, i.e. for Staff, Volunteer, etc.

Dates Section

- **Date/Time of Action** - This is the date and time the nutrition action should be undertaken (if scheduled).
- **Date/Time Action Completed** - This is the date and time the nutrition was given.

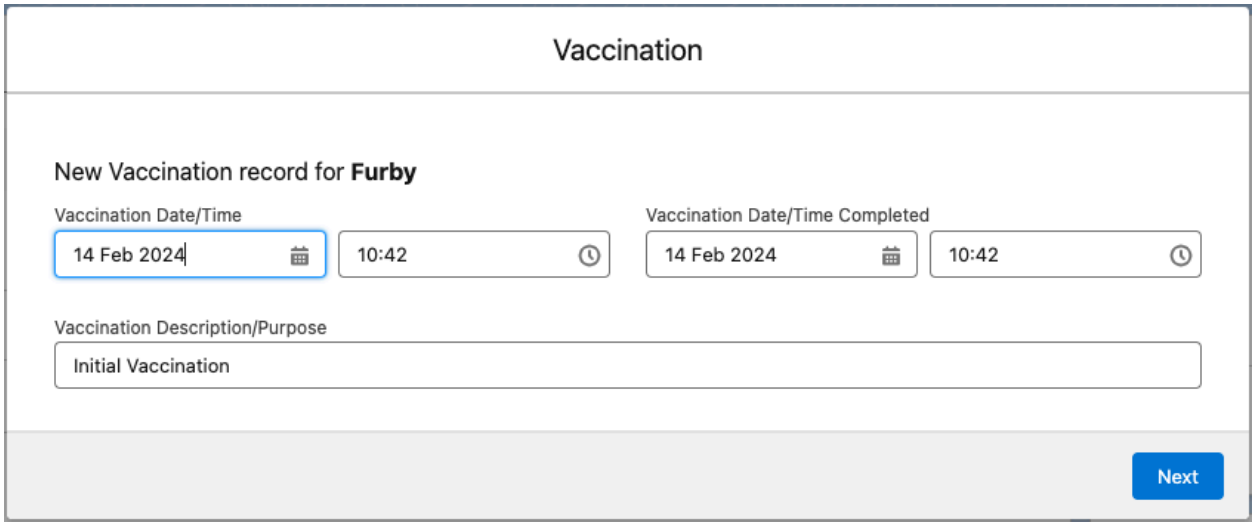
Action Description Section

- **Description** - Free text description of what the nutrition should be.
- **Comments** - General free text area for comments.

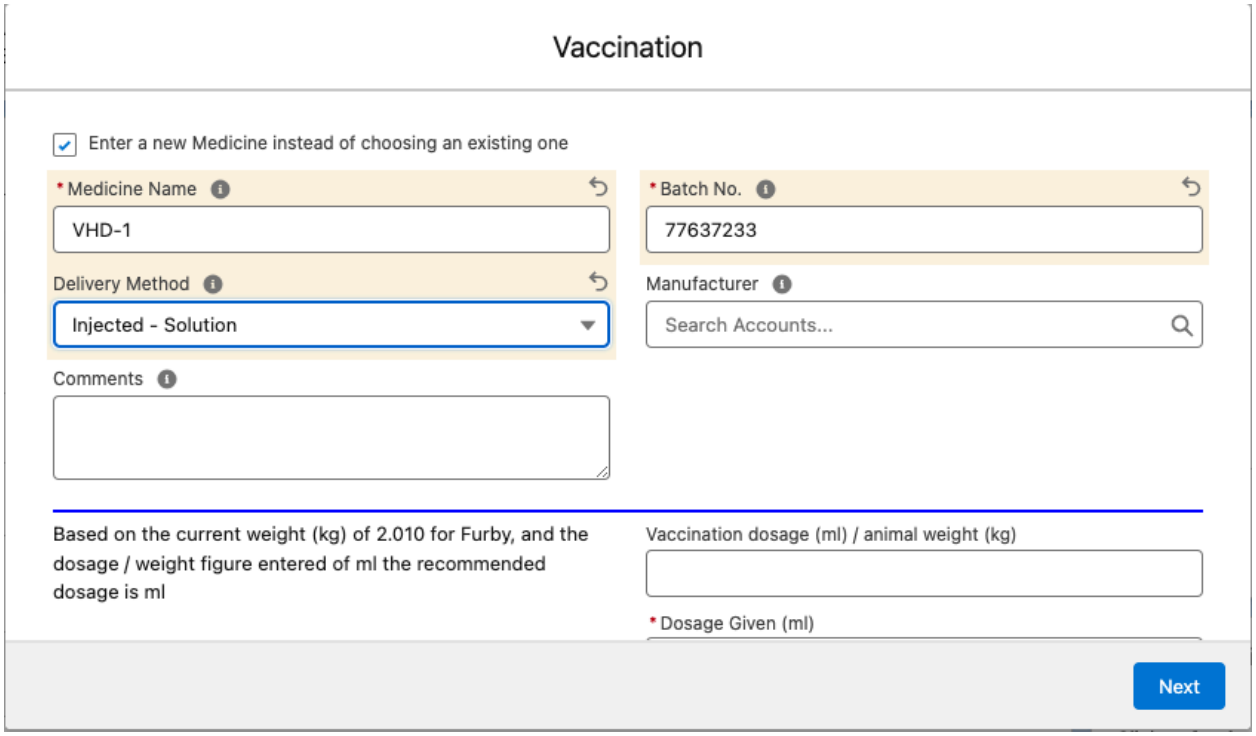
Vaccinations

From version 1.23 you can now create a Vaccination record (this is a Animal Action - Treatment record with Vaccination Type preconfigured).

A Vaccination is captured by clicking on the Vaccination quick action button. This initiates a flow



Enter the Date/Time of the Vaccination, and a description.

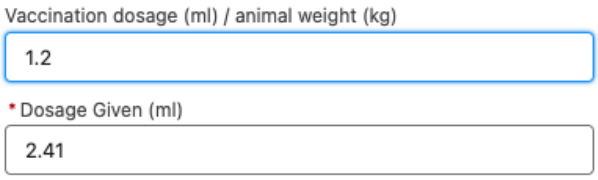


You can then select a Medicine that already exists or add details for a new medicine (with a different batch no.) that will be administered.

Based on the current weight (kg) of 2.010 for Furby, and the dosage / weight figure entered of 1.20ml the recommended dosage is 2.41 ml

If the current weight is 0 then no calculation is available.

Accept this dosage or enter a different dosage in the Dosage Given field

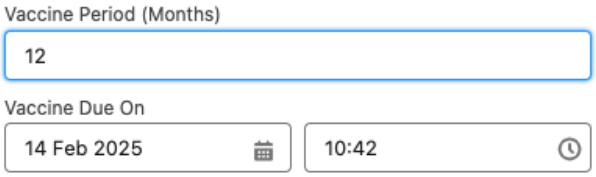


You can enter the dosage in ml per kg, and based on the Animal's Current Weight (if completed) the proposed dosage will be displayed. If no calculation is displayed it's likely the Animal's Current Weight is empty, so you will need to enter the dosage manually

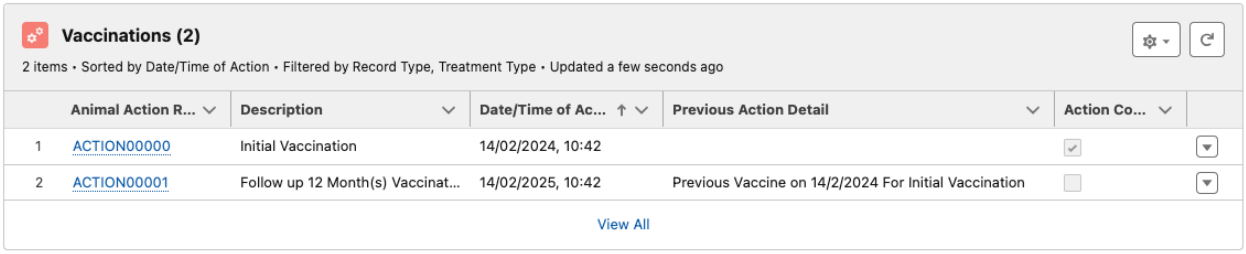
How long does this vaccination protect Furby?

Enter the number of months that the next vaccination is due, from today. A future Treatment record and Task will be created for this date/time

If no follow up Vaccination is required leave the Vaccine Period field empty

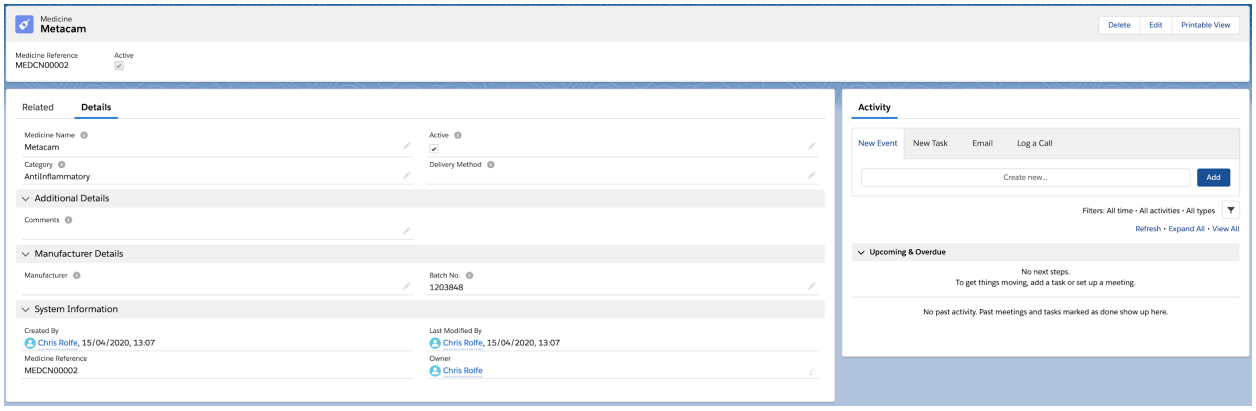


Finally to can set a time period in month for when the next follow up Vaccination should be given. This will create a new Animal Action record and Task for the Animal in the future.



Vaccinations can now be seen in a separate list.

Medicines & Manufacturers



The app has the capability to store a list of medicines that can be used. It is envisaged that, if required, the end user could extend this element of the app to provide a medicine inventory solution.

Details Section

- **Medicine Name** - The common name for the medicine, i.e. Metacam.
- **Active** - Indicates whether this medicine is still available to use. Only active medicines will be selectable in the Medicines Used records against Treatments.
- **Category** - The category the medicine is registered under. The current category list is a subset taken from the UK Government's Veterinary Medicines Directorate.
- **Delivery Method** - A selection of how the medicine is typically delivered, i.e. Injection, Ointment, etc

Additional Details Section

- **Comments** - General free text area for comments regarding the medicine.

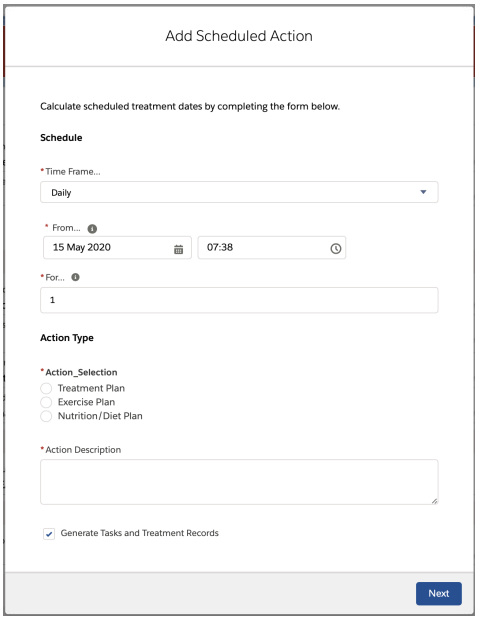
Manufacturer Details Section

- **Manufacturer** - If required you can use Accounts to store the medicine's manufacturers information, i.e. name, address, contact details, etc. On the Account a checkbox has been provided named "Medicine Manufacturer", which if checked allows you to filter the lookup to display a specific set of Account records, however, you are not restricted to these records only.
- **Batch No.** - Typically it is important to track the Batch Number of a medicine for traceability.

Action Scheduling

Actions for Treatment, Exercise and Nutrition can be created as a series of scheduled actions to be completed. This allows for the animal to be given a 'plan' of actions over a period of time, an example could be that the animal needs to have medication at a certain time over a number of days, weeks, etc

Scheduled Actions are created from the Animal record page using the 'Add Scheduled Action' button.



On clicking the button the user is presented with the schedule configuration screen.

- **Time Frame** - Allows you to select the interval for the action, Daily, Weekly, etc.
- **From** - The Date and Time that the scheduled actions will start on. The time selected will be the time set for all future actions.
- **For** - The number of scheduled actions to create.
- **Action Type** - The type of action you want to create. NOTE that if you choose a Treatment Plan, then you will additionally be prompted for a Treatment Type.
- **Action Description** - The instructions that need to be undertaken in the action, i.e. Administer Medication.
- **Generate Tasks and Treatment Records** - Action records will automatically be created for each instance in the schedule, but you can also select that Tasks can be created for each action as well. This may be useful if you wish to assign the tasks to another staff member. However, please note that marking an Action Task as complete will note update the Action record.

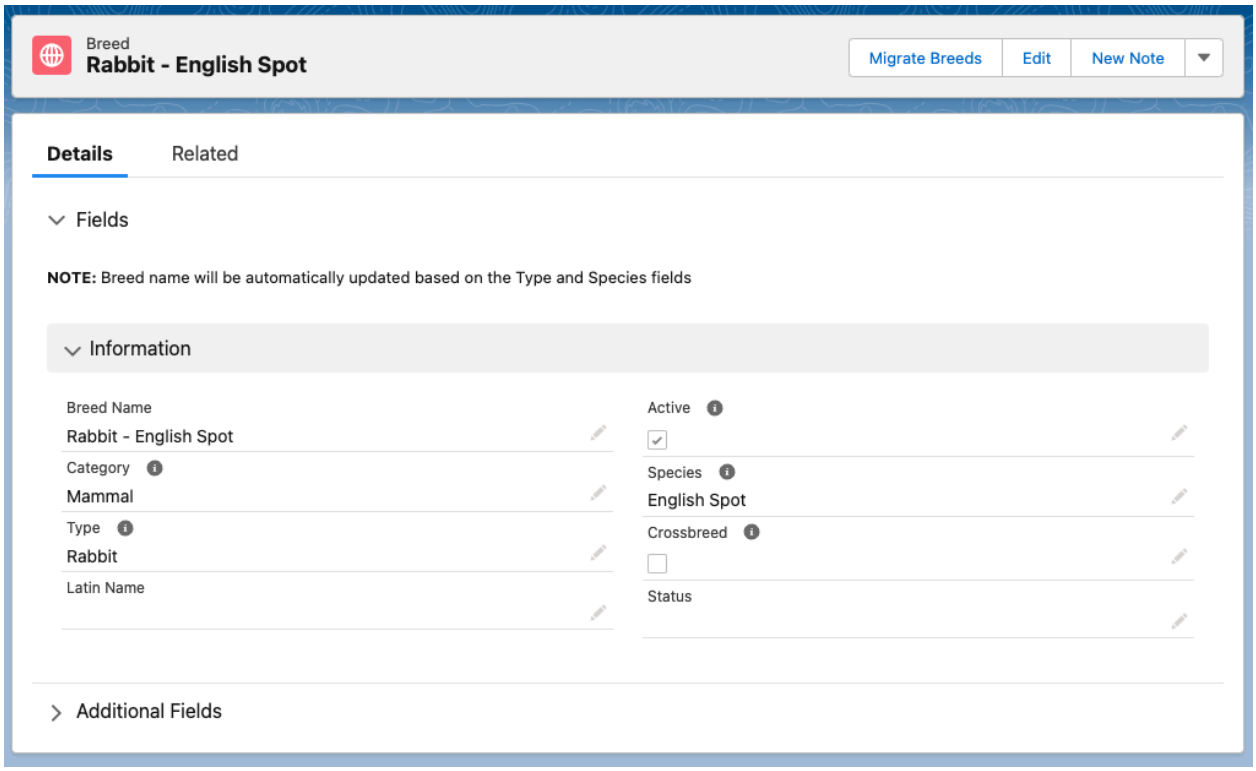
Clicking Next on this screen will then create the desired number of Action Records. So for example if you configure the following:

Time Frame - Daily
From - 1 June 2020, 10:00
For - 5
Action Type - Exercise
Action Description - 2Hr Walk.

This will create 5 Action records each for a 2Hr Walk at 10am, starting on the 1st June. The Action records will be seen in the Actions tab on the Animal record page.

Breeds

The solution (from version 1.12) stores the animal breed information in the Breeds object. This needs to be populated with the animal breed records that are being used in the shelter. See the Breeds Migration document for more information on the Breeds functionality



When new breed records are entered, on saving the record the Breed Name field will be updated to reflect the Type and Species, as can be seen in the screen above.
By default records are created in the active state, meaning that they will be available in the lookup from Animal. If you wish to limit the Breeds presented in the lookup field, deactivate the record by unchecking the Active field.

Breed records have duplicate rules enabled by default to prevent duplicate records.
Migrate Breeds - This is used to migrate records from the picklist version to the Breeds object solution. See the Breeds Migration document for more information.

Location

The solution has the capability to capture the location of the animals. This has been developed for two specific purposes, and two additional pages have been included.

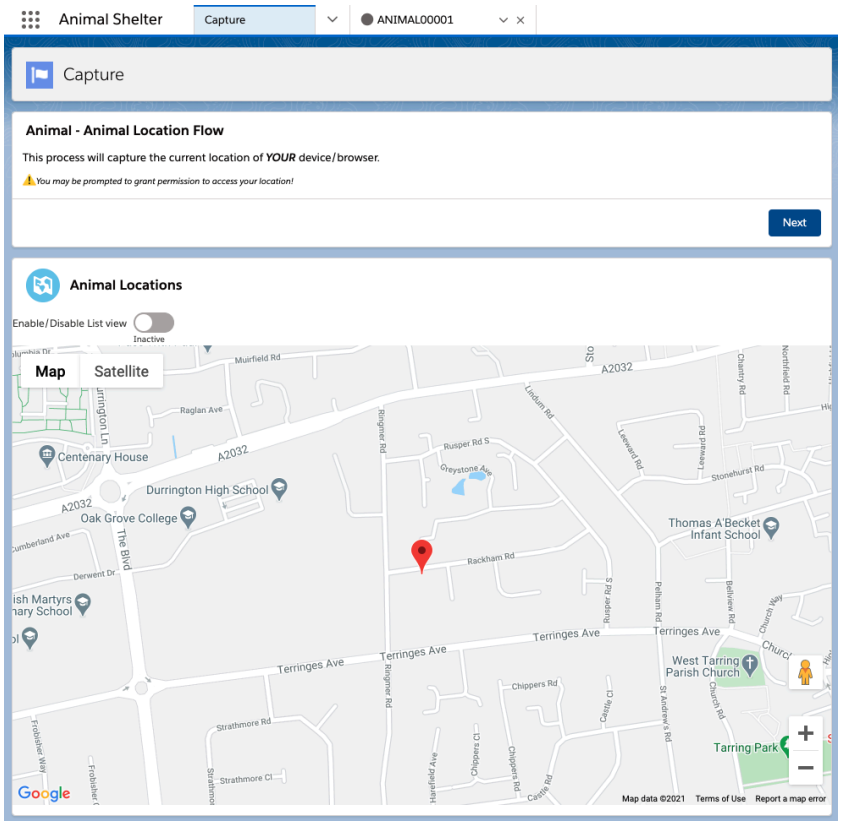
NOTE: - *The process obtains the geolocation data from the browser/device from where it is executed, during the execution of the process you may be prompted by your browser/device to grant permission, which must be done successfully to use this feature.*

Capture

For the capture process the geolocation, in the form of Latitude/Longitude, is stored against the animal to indicate where the animal was found. The capture process can be run in two ways;

- Quick Action on the animal record, will capture the coordinates and update the current animal record with the data.
- From the Capture page. Here you can select an existing animal, or create a new animal record, and capture the current location.
-

On the Capture page you will also see the location of the most recent 100[4] animals displayed as pin drops. Hovering over a pin drop will display the Animal Name, the breed and the date of arrival. The list view toggle that can be seen in the image enables/disables a list view that will appear to the right of the map.



Release

For the release process the geolocation, in the form of Latitude/Longitude, is stored against the movement record,

[4] The map is limited to 100 animals due to licensing restrictions by Google.

related to an animal to indicate where the animal has been released. This was developed with rehabilitation organisations in mind to track their release locations.
The Release screen is similar to the Capture screen as shown in the section above.

Releasing an Animal

For an animal to be released the process follows two stages:

1. From the animal screen, on the Movement tab, a new animal movement needs to be created. This is done by clicking on the dropdown and choosing 'Animal to be Released'. This will run the normal process, create a new movement record, and mark the animal to be released. This can be seen in the Location Status of the animal, which reads 'Release'. A task is also created and added to the queue to release the animal
2. At the release location, from the Release page, you can only select animals that have been marked as release (in step 1). Select the animal, click next and the location will be captured against the movement record, and the animal will be displayed on the map.

What3words

In addition to the Location capturing function mentioned above the application also provides Location lookup using what3words.

This functionality requires you to enter your own API key, which can be provided by what3words on a free or cost basis, depending on the number of lookups you need.

Once the API Key has been entered into the App (See Custom Settings) if you enter a what3words phrase into the what3words field on an Animal, an automation will lookup the phrase and return the coordinates to the Geolocation fields.

NOTE: the coordinates may not be returned immediately as the integration is using an asynchronous method, not realtime.

Reporting

Several reports are included within the package upon install to help provide some pre-configured reports to get you started.

Report Overview

Report Name	Description
Animal - Full Report	A complete report showing a summary for each animal
Locations - All Available Locations	Shows all locations which are currently available for animals
Locations - All Available for Boarding	Shows all locations which are currently available for boarding
Adoptions - Trials ending in next 7 days	The report shows all Adoptions records which have a Trial End Date in the next 7 days
Adoptions - Collection in next 7 days	The report shows all Adoptions records which have a collection scheduled in the next 7 days
Adoptions - All by Stage	The report shows all Adoption records by Stage
Locations - Upcoming Assessment	Shows all Locations which have an assessment due date in the next 30 days, or which have not had an assessment date recorded
Animals - Breeds Migration Not Completed	Shows the animals that were not successfully migrated to the new Breeds solution (see Breeds Migration documentation)

Animal Shelter Settings

New in version 1.14 we have introduced an Animal Shelter Settings component to enable users to modify some Apps settings without the need to go into Setup. The settings are broken down into five sections

Animal

Prefix Animal Name Setting: in some instances Animal Organisations may not give the animals in their care a human name. If so, this field is used when the Auto Generate Animal Name Setting is enabled, and anything in this field will be prepended to the automatically generated Animal name.
Default: Blank

Auto Generate Animal Name Setting: If this setting is enabled, then when an Animal is created, the Animals Name will automatically be set to the Animal Record Reference, i.e. ANIMAL00001. If the prefix option (above) is used then it will be prepended with the text entered
Default: Disabled

Animal Adoption

Adoption Auto-Matching: When enabled the App will create Adoption Matches (See Adoption Matches section).
Default: Enabled

Animal Assessments

Auto Behaviour Updates: When enabled the App performs a sync between behaviours captured on the Assessment records and updates the behaviours on the Animal record to reflect the changes.
Default: Disabled

Tasks

Enable Movement Tasks: When enabled Tasks will be created for each Movement record created.
Default: Disabled

Enable Animal Action Tasks: When enabled Tasks will be created for each Animal Action record created.
Default: Disabled

Task Queue Name: Tasks created for Movements and Actions will be assigned to the record Owner, unless a Queue is created and the DeveloperName of the Queue is entered here.

Default: Blank

Integrations

Microchip API Token: This is the API Token provided by Chipndoodle for your individual account to enable microchip lookup
Default: Blank

What 3 Words API Token: This is the API Token provided by what3words for your individual account to enable the what3words lookup
Default: Blank

Other

Breeds Migration Complete Setting: This indicates the migration to the breeds object has been successfully completed. On new installation of the App (from version 1.12) it will automatically be enabled. On older installations that haven't gone through the migration process it will be disabled. Please read the Breeds Migration document.
Default: Enabled

Contributions and Thanks

Developers

- Chris Rolfe - Salesforce
- Stewart Anderson - Salesforce

Thanks

- Salesforce colleagues for providing French, German and Spanish translations
- RSPCA for feedback