Owner / Pet Relationship

Client Relationship Module allows you to create a Owner/Pet Relationship.
Contact your Tech Rep at DigitalRez to enable.

Introduction: Create Member Types for Pets for easy identification.
Member Types can have specific Custom Fields assigned to display in the booking’s Guest Folio.
Member Types allow for specific Rate Group assignment that will automatically apply the Rate Group’s rates and rules for their assigned Members/clients/pets. If you wish to have automatic rates for specific pets i.e. Senior Pets, you can create multiple Member Type, allowing you even greater flexibility in rates.

1 Setup – Member Types

Creating Member Type(s) for the Owner and the Pet will help in Searching and assigning Rate Groups to specific Pet Types.
Owners will be the system default of Non Member.
A Member Type needs to be created for the Pets.
Click Setup, expand Admin/Accounting and select 5. Member Type Setup. (Alternatively, click Menu, select the Setup tab and select Member Type Setup).
Click Add and enter in the Label: Pet; or Dogs, Cats, Birds etc.
Press Submit to finalise.
Repeat if creating individual Member Types i.e. Dogs, Cats, Birds etc.
This is all that is required for this setup stage.

2 Custom Fields assigned to Member Types

Custom Fields allow for unique Client and Reservation information to be entered.
Client Fields: Will remain on the Client File; display on each of the client’s reservations.
Reservation Fields: Will remain on the reservation only.
NB: Credit Card Details can not be stored within Custom Fields.

You can assign specific Client Custom Fields to display for the different Member Types.
Expand Admin/Accounting and select 6. Custom Fields.
All created Custom Fields will display a Member Types setting.
Click on the setting to assign the Custom Fields to the required Member Types.

When creating new Custom Fields, ensure that you assign to the required Member Type.

Reservation Field(s): If the reservation custom field applies to all Member Types, ensure they are assigned to both Member Types.

View: To view what Member Types the Custom Fields have been assigned to, click View.
If the custom field is not assigned to a Member Type, it will not display in the Guest Folio when a member type is selected.

NOTE: Future development will see some Custom Fields available for Online Web Bookings.
Owner / Pet Relationships

1. Member Type Setup
   - Non Member
     - Pet
     - Label
     - Member Type ID: 2544
     - "Member Type" Type: Consumer Membership
     - Description: None

2. Custom Field Setup
   - Client Field(s)
     - Animal Name
     - Animal-Temperament
   - Breed-Description
     - Label
     - Field Type
     - Include in Export?: On
     - Searchable?: On
     - Force?: Off
     - Member Types
     - D.O.B / Age
     - Diet Requirements-AM/PM
   - Reservation Field(s)
     - Additional Services?
     - Pick up/Taxi
     - Special Requirements

   - Member Types
     - Select Member Types
     - Non Member: [ ]
     - Pet: [ ]
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You can create an Owner/Pet Relationship.

3  Client Editor

The Client Editor will have a flag: Relationships. This will allow for Owners and their Pets to be ‘grouped’ together. When a relationship has been established between created client files (owners and pets), each will display Yes.

4  Owner Files

Owners will be classed as Non Members. When creating new Owners, ensure their Member Type is Non Member.

5  Pet Files

Pets will be classed as Pets or the created Member Type for pets. Already created Pet Files: The only change required for Pet records is to change the Member Type from Non Member to the Pet Member Type. The information entered into the custom fields will still remain. When creating a new Pet, expand Client Editor. Click Add. Change the Member Type from Non Member to the Pet Member. All the assigned custom fields will display to enter in the Pet’s information.

C  Creating a Relationship

Once the owner and Pet(s) files have been created, assigning the Relationship will ensure for faster handling in future visits. Within the Client Editor, search for the Owner and click on the Relationship flag. Click Add and search for the first Pet’s file. (As Pets are under the Member Type: Pet, you can change the Member Type drop down in the Search box to help narrow down the search). Select the required Pet file. In the Relationship box, you can enter in the Titles for both files. Under the Pets Title, enter in Cat; Dog; Pet etc. Under the Owners Title, enter in Owner. Repeat with all pets belonging to the Owner.

7  Searching for Pets and Owners

The Search button allows you to search for specific Member Types. Changing the Member Type from All Types to Non Member (to search for Owner records) or Pet (to search for Pet records). Once a ‘client’ has been selected, within the Client Editor, you can click on the Relationship box to view the assigned records in the relationship.
Owner / Pet Relationships

Owner’s Record

Pet’s Record