

Using ServicePoint for Pet Grooming

Some of the built-in customization and maintenance features of ServicePoint allow it to be used effectively in a pet grooming business. Pet types and service pricing by breed can be set up to automate the process of booking appointments. Groomers are assigned to the grooming work orders, and all charges and inventory items used can be passed along to CounterPoint for billing and checkout when the customer picks up their pet.

Below are some screen shots from ServicePoint, configured for use in a grooming salon.

The screenshot shows the 'Customer Pets' window in ServicePoint. The window title is 'Customer Pets'. The interface includes a toolbar with navigation and search icons. The main form contains the following fields:

- Owner: BOB
- Address ID: "MAIN"
- Breed: LABRADOODLE
- Pet name: Hooper
- Quantity: (empty)
- Description: Labradoodle
- Peach

Below the main form are three tabs: 'General', 'Contract info', and 'Profiles'. The 'General' tab is active and contains the following fields:

- Color: BROWN
- Visit frequency: 6M
- Rabies exp: 10/15/2012
- Birth date: 6/27/2010
- Last visit: 6/8/2011
- Next visit: 12/8/2011
- Category/Sex: Dog Female
- Notes: (empty)

This is the customer pets screen. Customer pets may be defined from the ServicePoint menu, or “on the fly” during the entry of a grooming appointment.

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Address ID: "MAIN"

Time: 4:40 PM Name: Bob Smithson

General info | Task Detail | Labor | Add-ons | Grooming Fee | WQ Summary | Profitability

Address 1: 123 Ferdinand Rd

Address 2:

City: Fallston State: MD

Zip code: 21220 Country:

Contact 1:

Phone 1: 410-555-3417

Reservation date:

History Existing Print

Created by RTM, 7/26/2011 4:48:15 PM
Updated by RTM, 10/19/2011 3:00:47 PM

Grooming work order entry screen. A full history is available by pet to review past services and pricing.

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Address ID: "MAIN"

Time: 4:40 PM Name: Bob Smithson

General info | Task Detail | Labor | Add-ons | Grooming Fee | WQ Summary | Profitability

Task_Seq	Name	Model	Serial_No	Description
> 10	Pet Grooming	LABRADOODLE	Puffy	Labradoodle
20	Long hair wash small	2	ralph	Afghan Hound

Seq #: 10 Task name: Pet Grooming

Breed: LABRADOODLE Pet name: Puffy

Description: Labradoodle Peach

Notes:

Invoicing code: TM-F Service code: GROOM

Contract Status: n/a

Warranty Status: n/a

PM Repair

Labor: 1 Parts: 0

Grooming tasks. Multiple pets may be assigned to the same grooming order for a customer.

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Address ID: "MAIN"

Time: 4:40 PM Name: Bob Smithson

General info | Task Detail | Labor | Add-ons | Grooming Fee | WQ Summary | Profitability

Lbr_Seq	Tech_ID	Work_Description	Hourly_Price	Hours_To_Bill	Date_For_Sched
> 10	DB-LS	Full Grooming	.0000		2011-10-20 00:00:00

Seq # 10 Groomer DB-LS DAPHNE BEATTY Work description Full Grooming

Reg OT Spec NC Tax

Schedule Date: 10/20/2011 Time: 10:00 AM

Start: [] [] Stop: [] []

Seq # 10 Task name Pet Grooming Invoicing code TM-F

Model LABRADOODLE Serial Puffy Description Labradoodle

Groomers are assigned to the work order task directly in the grooming order, or via the scheduling calendar.

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Address ID: "MAIN"

Time: 4:40 PM Name: Bob Smithson

General info | Task Detail | Labor | Add-ons | Grooming Fee | WQ Summary | Profitability

Pts_Seq	Item_No	Inv_Loc	Description	Qty_Used	Unit_Price
> 10	*MISC	3	Puppy Shampoo	1.00	.0000
20	0012152	4	Grooming, nails	1.00	12.5000

Seq # 10 Item # *MISC Item description Puppy Shampoo

Inventory location 3 Shop

Quantity used 1.00 Unit price 0.00 Discount % Unit cost 0.00 Tax

Calc'd Price-1 NC

Seq # 10 Task name Pet Grooming Invoicing code TM-F

Model LABRADOODLE Serial Puffy Description Labradoodle

Add-on services or inventory items can be added to the base grooming charge,

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Address ID: "MAIN" Name: Bob Smithson

Time: 4:40 PM

General info | Task Detail | Labor | Add-ons | **Grooming Fee** | WQ Summary | Profitability

Addl_Chg_Seq	Description	Amount	Cost	Sales_Acct_No
> 10	Base Charge	45.0000		4010

Seq # 10 Charge amount 45.00 Tax Cost amount

Additional charge description: Base Charge Sales acct: 4010 Cost acct:

Seq # 10 Task name: Pet Grooming Invoicing code: TM-F

Model: LABRADOODLE Serial: Puffy Description: Labradoodle

The base charge for a service can be defaulted based on the combination of the pet/breed and the service to be performed.

Work Orders, 10775 Bob Smithson

Work order: 10775 Owner: BOB Status: SCHED

Open date: 7/26/2011 Time: 4:40 PM

General info | Task Detail | Labor

Task_Seq	Name
> 10	Pet Grooming
20	Long hair wash s

Seq # 10 Breed: LABRADOODLE Description: Labradoodle

Invoicing code: TM-F Service code: GROOM

Work Order notes

Work order: 10775 Print on W/O form

Note ID: 2011/07/26 16:41:15 Print on invoice

Uses blade #3

Prefers Acme shampoo

Multiple notes can be added to a pet or to a grooming order to assist with future appointments.

Whisper Emporium
6800 Hilltop Road
Harrisburg, PA 17112
Phone: 717-333-2222
Fax: 717-333-2222



WO # 10775
WO Date 07/26/2011

Grooming Order

Customer BOB
Bob Smith
123 Ferdinand Rd
Fallston MD 21220

410-555-3417 Email

Notes: Uses blade #3
Prefers Acme shampoo

<u>Service</u>	<u>Pet's name</u>	<u>Breed</u>	<u>Color</u>	<u>Birthdate</u>	<u>Sex</u>
Pet Grooming	Puffy	Labradoodle			

Groomer / Bather	DB-LS	Scheduled	10/20/2011 10:00 am		
Qty used	Unit	Item	Description	Unit price	Ext price
			Base Charge		45.00
1.00	EACH	*MISC	Puppy Shampoo	0.00	0.00
1.00	EACH	0012152	Grooming, nails	12.50	12.50

- Are there any health issues? No Yes
If yes, please explain:
- Is your pet pregnant or in heat? No Yes
If yes, please explain:
- Are there any behavioral issues? No Yes
If yes, please explain:
- Is your pet under sedation? No Yes
If yes, please explain:

Customer signature _____ Date _____

We use industry-standard Crystal Reports to print reports and appointment forms.

Schedule/Dispatch

Service orders
 CP tickets/orders

Work order: 10775 Date: 7/28/2011 Tech: All

All Thursday, 7/28/2011

12a	05:00 AM	
1a	06:00 AM	
2a	07:00 AM	
3a	08:00 AM	
4a	09:00 AM	BOB, Bob Smith, Long hair wash small, , Zip: 21220, W/D
5a	10:00 AM	
6a	11:00 AM	DB-LS, Bob Smithson, Pet Grooming, Full Grooming .
7a	12:00 PM	
8a	01:00 PM	
9a	02:00 PM	
10a	03:00 PM	BOB, Fred Saunders, Pet Grooming, , Zip: 10012, W/D: 10
11a	04:00 PM	
12p	05:00 PM	
1p	06:00 PM	
2p	07:00 PM	
3p	08:00 PM	
4p	09:00 PM	
5p	10:00 PM	

Address: 123 Ferdinand Rd

Interval: 1 hour 30 min 15 min

Disp note

Month View | Week View | Gantt Chart | Work Order

July 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
			0 / 1		0 / 1	
17	18	19	20	21	22	23
		0 / 2				
24	25	26	27	28	29	30
		0 / 1		0 / 3	0 / 1	0 / 1
31						
0 / 1						

10/19/11 | 07/28/11

Calls: 3 (0 closed / 3 open)
Hours: 5.5
Capacity %: 11.46 (6 techs)
Completed %: 0

Single month Two months

Show hours

Seq # 10 Groomer DB-LS DAPHNE BEATTY Work description Full Grooming

Reg OT Spec NC Tax

Schedule 7/28/2011 11:00 AM

Start Stop

Clock in/out

Appointments can be scheduled using our calendar based scheduler. This can be accessed directly from CounterPoint or from within ServicePoint.

Schedule/Dispatch

Service orders
 CP tickets/orders

Work order: Date: 7/28/2011 Tech: All

All Thursday, 7/28/2011

12a	05:00 AM	
1a	06:00 AM	
2a	07:00 AM	
3a	08:00 AM	
4a	09:00 AM	BOB, Bob Smith, Long hair wash small, , Zip: 21220, W/D
5a	10:00 AM	
6a	11:00 AM	DB-LS, Bob Smithson, Pet Grooming, Full Grooming .
7a	12:00 PM	
8a	01:00 PM	
9a	02:00 PM	
10a	03:00 PM	BOB, Fred Saunders, Pet Grooming, , Zip: 10012, W/D: 10
11a	04:00 PM	
12p	05:00 PM	
1p	06:00 PM	
2p	07:00 PM	
3p	08:00 PM	
4p	09:00 PM	
5p	10:00 PM	

Address

Interval: 1 hour 30 min 15 min

Disp note

Month View | Week View | Gantt Chart | Work Order

	Mon 7/25	Tue 7/26	Wed 7/27	Thu 7/28	Fri 7/29
BOB			10768 - MTC Visitor, , 11:00 AM	10769 - Bob Smith, Fallston, 09:00 AM	
BOB				10767 - Fred Saunders, New York, 03:00 PM	
DAVE					
DB-LS				10775 - Bob Smithson, Fallston, 11:00 AM	

Seq # 10 Groomer DB-LS DAPHNE BEATTY Work description Full Grooming

Reg OT Spec NC Tax

Schedule 7/28/2011 11:00 AM

Start Stop

Clock in/out

A weekly view of the scheduled appointments is available.

Schedule/Dispatch

Service orders
 CP tickets/orders

Work order: **10775** Date: **7/28/2011** Tech: **All**

All Thursday, 7/28/2011

12a	05:00 AM	
1a	06:00 AM	
2a	07:00 AM	
3a	08:00 AM	
4a	09:00 AM	<input type="checkbox"/> BOB, Bob Smith, Long hair wash small, , Zip: 21220, WD
5a	10:00 AM	<input checked="" type="checkbox"/> DB-LS, Bob Smithson, Pet Grooming, Full Grooming, . Zip: 10012, WO: 10
6a	11:00 AM	
7a	12:00 PM	
8a	01:00 PM	
9a	02:00 PM	
10a	03:00 PM	<input type="checkbox"/> BOB, Fred Saunders, Pet Grooming, . Zip: 10012, WO: 10
11a	04:00 PM	
12p	05:00 PM	
1p	06:00 PM	
2p	07:00 PM	
3p	08:00 PM	
4p	09:00 PM	
5p	10:00 PM	
6p		
7p		
8p		
9p		
10p		
11p		
12a		

Address: 123 Ferdinand Rd Interval: 1 hour 30 min 15 min

Disp note

Seq # Reg OT Spec NC Tax

Groomer: DAPHNE BEATTY

Work description:

Schedule: 7/28/2011 11:00 AM

Start: Stop:

Clock in/out

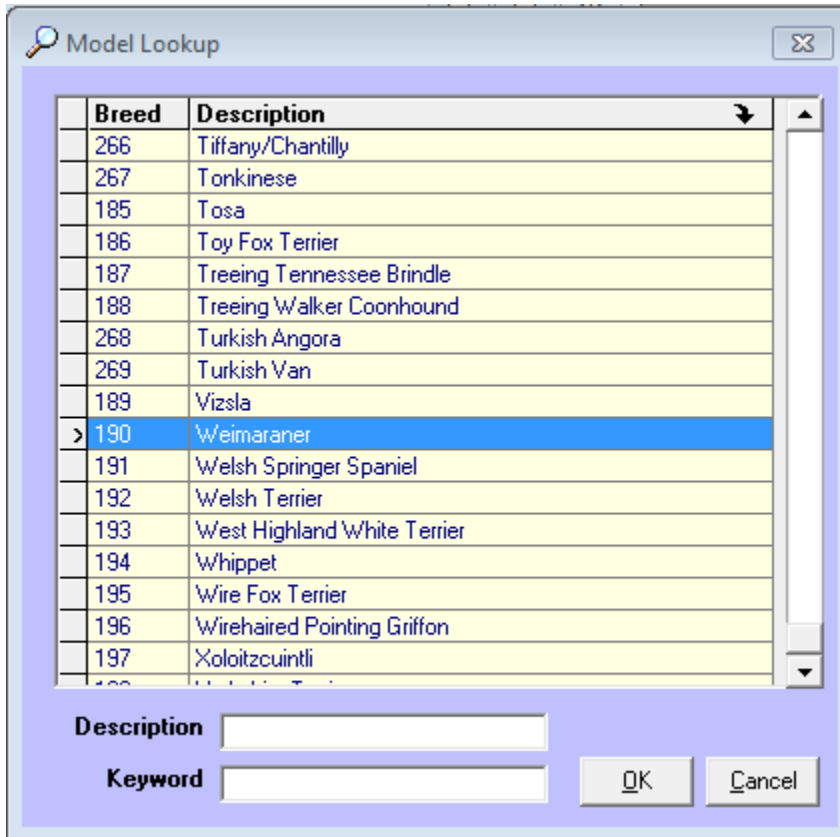
Month View | **Week View** | Gantt Chart | Work Order

7a 8a 9a 10a 11a 12p 1p 2p 3p 4p 5p 6p 7p 8p 9p

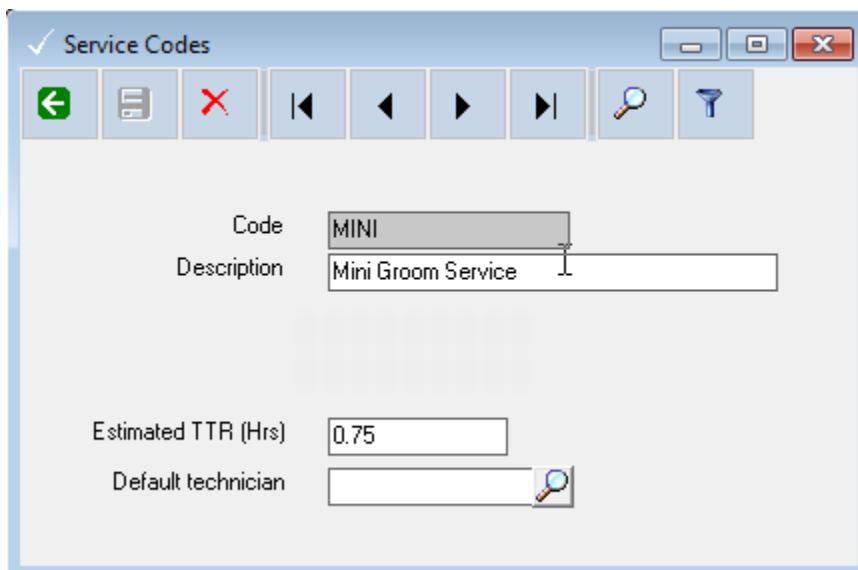
BOB
 DAVE
 DB-LS
 SHIRLEY
 TBA
 UVU-MSR

This schedule view show the allotted time for appointments by groomer for the day.

Here are some of the setup items behind the scenes that will help automate the pet entry, appointment entry, and pricing functions.



A sample from the pet breed lookup window.



A sample of a service code setup item.

✓ Breed/Service Prices

← [Menu] × [Home] [Left] [Right] 🔍 [Filter]

Breed 190 Weimaraner

Service Code MINI Mini Groom Service

Model / Service Fee 45.00

Breeds and services can be combined to provide default pricing for a pet's appointment