



Shelterly: How to use SEARCH Functions

July 2023 v1

Basics:

- Shelterly creates databases of Animals, Owners, Service Requests (SRs) and Dispatch Assignments (DAs). The SEARCH function on the left-hand menu allows you to search the databases.
- The database will load when you open it. Count to ten because it will take time to load. Your search won't work until the database loads.
- The "Print All" box/button in the top right-hand corner will show the number of search results.
- **Search by number only.** Don't enter the Initial (A, SR, DA) or the "#" sign. Just enter 1234.

Animals:

This is the database of animals in this Incident. The main reason you search here is to find an animal in order to get information or add documentation.

On the "search" line enter the animal name or number. (Number only, no A# or #)

Advanced filters: Species, Status, Sex, Owned, Fixed, Color (primary color only), Shelter

You can print information on all animals that are part of the incident including unable to locate, shelter in place and deceased.

- The format that prints for the animals is the "animal care schedule" format.

From the list of animals you can see/do:

- Click on bullseye to see animal detail.
- See animal number, name, current status and print the information in the "animal care schedule" format.
- See a picture if there is one.
- Read the icons that applied to the Service Request. Click the address to go to the detail on the SR.
- General information about animal
- Click on Owner Name to go to Owner Detail
- Shelter: if the animal is in a shelter, icons will give you intake dates and address.

What you can see/do in Animal Details:

- Update Animal Details.
- Print Animal Care Schedule.
- Reunite Animal.
- Cancel Animal.
- See more information about animal.
- Add or remove an owner.
- Get phone number of the owner.

Owners:

This is a database of all owners involved with this incident. The main reason you search here is to add or read contact notes.

Choose one: Owners or Reporters. Separate database searches for “Owners” and “Reporters”
Reporters are the Non-Owners/First Responders.

Search with: First or last name or any part of the words.

What you can see/do:

- Use scroll bar to see all the info.
- Click on bullseye and see owner details.
- If there was a Service Request, it will list the address. Click on address to see Service Request details.
- Tabs of species, click on tab to see list of animal #, name and Status. Click on animal name to go to animal detail page for that animal.

What you can see/do in **Owner Details**

- Update Owner info.
- Download printable owner summary/Liability form.
- If there is a service request, you can click on address and see SR details.
- Contact Log: click on icon next to Contact Log to add a new Owner Contact Note
- Read all the previous Owner Contact Notes.
- See all the animals connected with this owner.
- Add another owner to all the animals.
- Reunite all the animals.
- Print all the animal care schedules.
- See all animal numbers, their names, species and status. If there is a picture, you'll see the picture.
- Add photo documents that have to do with the owner. They must be saved in image format to upload.

Service Requests:

A Service Request (SR) is a request made by an owner or a reporter. It includes Animals, Owners, Addresses. The main reason you search here is to see information about a SR.

Choose options of “Open” (not yet assigned) “Assigned” (Assigned to a team in the field) “Closed” (Resolved) “Canceled” (SR was cancelled) For best results, run search on all 4 options.

Search with SR number, any part of address, any part of owner name. Enter the number only, not the “SR” or the “#”.

Search can be filtered for any time period.

What you can see/do with list of Service Requests:

- Click Bullseye to get SR detail. See SR #.
- See address and status of SR.
- Read icons for information that’s on the SR.
- See date opened.
- See if there is an owner or if it is Owner Unidentified
- Click on owner name to go to owner contact info and log of owner contact notes.
- Tabs of species, click on tab to see list of animal #, name and Status. Click on animal name to go to animal detail page for that animal.

What you can see/do by clicking on bullseye for Service Request

- Update the SR detail, download the SR information or cancel the SR.
- See icons with information included in the SR detail.
- See priority and status.
- See, or Update address – make notes in Field Instructions!
- See, enter or change date SR will be followed-up.
- Read Field Instructions.
- Add an owner, click on owners name to go to owner details.
- Add an animal to the service request (use caution, usually it’s better to create a new Service Request), reunite the animals, print animal info in an animal care schedule format.
- See animal number, picture, name, species, and status.
- Add documents in a jpeg format. Most documents can be saved as jpg or jpeg.
- See notes on all the visits done on the SR. SRs stay active as long as any animal on the SR still needs care: Reported, UTL, SIP.

Dispatch Assignments

A Dispatch Assignment (DA) is a daily assignment. It consists of one or more Service Requests assigned to a Team for resolution. The main reason you search here is to Debrief/Resolve the DA.

Dispatch Assignments must be resolved by the end of every day. The resolution may include that the Team could not finish every SR on their DA. Dispatch Assignments remain open until data entry is done to “Resolve” them, so they don’t have most current information about Animals.

Choose options of “Preplanned” “Active” “Resolved.”

You can filter by date range and can print every DA for the incident.

Search with: Dispatch assignment number, Team name, Evacuation person name.

What you can see/do with the initial list of Dispatch Assignments:

- Click on bullseye to get detail about the Dispatch Assignment
- See DA number, date assigned, Team name and icon that provides Team member names.
- See the SRs that are included in that DA. The SR info includes SR #, address, whether there is an owner and animal info.
- Click on the address to go to the SR Detail page.

What you can do by going to the Dispatch Assignment Details page

- Print the Dispatch Assignment Summary paperwork.
- RESOLVE THE DISPATCH ASSIGNMENT. This is how Dispatch Debrief/Resolution finds the DAs to resolve.
- Add Team members or Remove them from the Dispatch Assignment.
- Review the Service Requests within the Dispatch Assignment.

Computer tips

If you accidentally close the Shelterly tab by mistake: Reopen it by holding “Ctrl” and “Shift,” then pressing “T” on your PC (on a Mac it’s Command-Shift-T). Whatever tab you just closed will reappear.