

State of Maine

Dog Licensing Database User Training: Setting up Automatic Reports



Log in at www.petpoint.com/sms3

PetPoint
A 24Pet Company

Login

Shelter ID

USME70

NEXT

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This training document covers setting up the monthly report to submit to AWP with your monthly dog licensing payments.

Users can set up any report designated as “5.0” on the Reports Website to auto-send daily, weekly, monthly or annually.

You can utilize the same steps to set up other reports as needed.

Go to Reports, then choose Scheduled Reports from the drop down

The screenshot displays the PetPoint software interface. At the top left is the PetPoint logo, labeled 'A 24Pet Company'. A search bar is located at the top center. The top navigation bar includes links for Edit, Care, PPTN, Licensing, Finance, Reports, Admin, and Support. A 'Learn More' button is on the far right. Below the navigation bar, there is a home icon and a search bar containing '#ActiveAnimals'. A filter bar shows 'Animal(0)', 'Person(0)', 'Agency(0)', and 'License(0)'. A table with columns for Name, Age, Sex, Spay/Neu..., Primary C..., On Hold, Microchip, Location, Sublocati..., and Reference... is visible. A dropdown menu is open under the Reports link, listing several options: Report Website, Location View, Incoming Applications, View Unattached Animals, Report Builder, Document Builder, Kennel Card Builder, and Scheduled Reports. The 'Scheduled Reports' option is circled in red. At the bottom, there is a footer with the PetPoint logo and the text 'BROUGHT TO YOU BY Pethealth'.

Click on the green PLUS icon to begin adding a scheduled report.

Scheduled Reports

Reports



<input checked="" type="checkbox"/>	Report Name	Schedule Name	Created	Last Updated By	Schedule Type	Last Run	Next Run	Last Run Status
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A pop up will open. Before you complete any of the red-indicated fields, click on the magnifying glass icon next to <add existing report>

Schedule Report ✕

Schedule Name **Existing Report**

<Add Existing Report>

Schedule Time

🕒

Schedule Type

Once **Recurrence**

Schedule On 📅

Recipients ?

To **CC** **BCC**

Email Subject

Email Body

The Reports website will open. Open the FINANCE tab, then choose Receipt: Revenue

The screenshot shows a software interface with a dropdown menu. The menu is titled 'Schedule' and is currently open, displaying a list of options. The 'Finance' option is highlighted in green and circled in red. Below it, several other options are listed, each with a green '5.0' and a blue information icon 'i'. The 'Receipt: Revenue' option is also circled in red.

Option	Value	Info Icon
Receipt: Cash Balance	5.0	i
Receipt: Cash Drawer Closing	5.0	i
Receipt: Cash Drawer Closing Extended	5.0	i
Receipt: Daily Cash	5.0	i
Receipt: Discount		i
Receipt: Items		i
Receipt: Receipt Crosstab	5.0	i
Receipt: Revenue	5.0	i
Receipt: Revenue Extended	5.0	i
Receipt: Tax Amount		i
Receipt: Voided		i

You will choose CUSTOM dates:
Receipt Date From: First Day of Last Month
Receipt Date To: Last Day of Last Month

General

Receipt Date From 11/1/2024 12:00 AM [calendar icon] [clock icon] First Day Of Last Month ▼

Receipt Date To 11/30/2024 11:59 PM [calendar icon] [clock icon] Last Day Of Last Month ▼

Site --All-- x

Cash Drawer --All-- ▼

Group By 1 Item Name ▼

Group By 2 Account Code ▼

Detail/Summary Detail ▼

Advanced ▼

Submit

Choose the following settings:

Site= ALL



Cash Drawer= Your municipality



Group By 1 and Group By 2: Default is correct

Detail/Summary= Detail

Click the green submit button

General ▲

Receipt Date From   ▼

Receipt Date To   ▼

Site

Cash Drawer ▼

Group By 1 ▼

Group By 2 ▼

Detail/Summary ▼

Advanced ▼

Submit

Back at the pop up:

Report Name will enter automatically but you can change it

Schedule Time: choose a time in the middle of the night for quickest processing

Schedule Type= RECURRENCE, then choose MONTHLY


Repeat Every= 1 month

Repeat on= date of month you would like to receive the monthly report each month


End= Never

Schedule Report ✕

Schedule Name Existing Report

Receipt: Revenue Receipt: Revenue 

Schedule Time


1:30 AM 

Schedule Type

Once Recurrence


Daily Weekly **Monthly** Yearly

Repeat every:

1 

month(s)


Repeat on:

Date: 3 

first

End:

Never

After 1  occurrence(s)

Scroll down

Recipients: Emails of whomever will receive the report. We recommend at least 2 in case one is out.

Email Subject: User's choice

Email Body: User's choice

Export= PDF

Hit SAVE

Schedule Report ✕

first ▼ Monday ▼

End:

Never

After ▲▼ occurrence(s)

On 📅

Recipients ?

To	CC	BCC
<input type="text" value="testperson@pretendmunicipality.com"/>	<input type="text" value="deputypretendperson@pretendmunicipality.com"/>	<input type="text"/>

Email Subject

Email Body



Export

▼

After you hit SAVE, you will return to the main Scheduled Reports page. In a minute or two, the new report will show up in the Scheduled Reports list.

Scheduled Reports

Reports +

<input checked="" type="checkbox"/>	Report Name ▼	Schedule Name ▼	Created ▼	Last Updated By ▼	Schedule Type ▼	Last Run ▼	Next Run ▼	Last Run Status ▼	
<input type="checkbox"/>	▶ Receipt: Revenue	Receipt: Revenue	12/23/2024 11:25 AM	TestUser	Monthly		01/03/2025 1:30 AM		 



Questions??

Email to Connor.Egan@Maine.gov