

# Getting Started with ShelterPact: A Complete Site Walkthrough

Explore the workspaces used to manage field response, animal custody, shelter care, permanent records, compliance, staff work, finances, documents, and public services. This guide explains what each section is for, where to find it, and how it connects to the rest of ShelterPact.

Interface reviewed October 12, 2026. Screenshots use fictional records from the ShelterPact demo. Names, totals, dates, and available actions in your organization may differ.

Your navigation and available controls depend on your organization's enabled modules and your assigned permissions. A visible page does not necessarily grant permission to change its settings. The shared demo restricts some administration and public-portal actions.

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# 1. Finding your way around

Use the left navigation to open a workspace. Select a group heading to expand its links; use Collapse navigation when you need more room. The top bar stays available throughout the main staff application. Record names and reference numbers are often links that open the underlying record.

| Navigation group | What you will find                                                                                             |
|------------------|----------------------------------------------------------------------------------------------------------------|
| Operations       | Dashboard, Calls for Service, Field Operations                                                                 |
| Shelter          | Current Population, Kennel Board, Intake, Holds & Quarantine, Medical, Movements & Outcomes, Inventory & Stock |
| Records          | Animals, People, Partner Organizations, Addresses, Cases, Forms & Documents                                    |
| Compliance       | Compliance Operations, Licensing, Rabies Compliance, Citations                                                 |
| Work Management  | Tasks, Diary, Operational Calendar, Staff Rota, Messages                                                       |
| Administration   | Financial, Financial Operations, Reports, Public Portal, Signatures, Settings                                  |

| Shared control           | How to use it                                                                                                                                                                              |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search ShelterPact       | Enter a term in the top search field and submit it to find records. Use a workspace's own search and filters when you already know the record type.                                        |
| New                      | Open the quick-action menu to start a call, intake, animal, person, or task. Search quick actions or expand Records & Intake, Outcomes & Care, Compliance, and Staff Work.                 |
| Notifications            | Open the bell for alerts and reminders. View All Notifications opens the full notification workspace; mark read only after reviewing the item.                                             |
| Account menu             | Open the staff name/avatar menu for My Account, My Signature, Settings, and Sign Out. Account changes may be restricted in the shared demo.                                                |
| Refresh, search, filters | Refresh reloads a workspace's information. Search narrows records; status, date, species, officer, and location filters vary by workspace. Reset filters if an expected record is missing. |

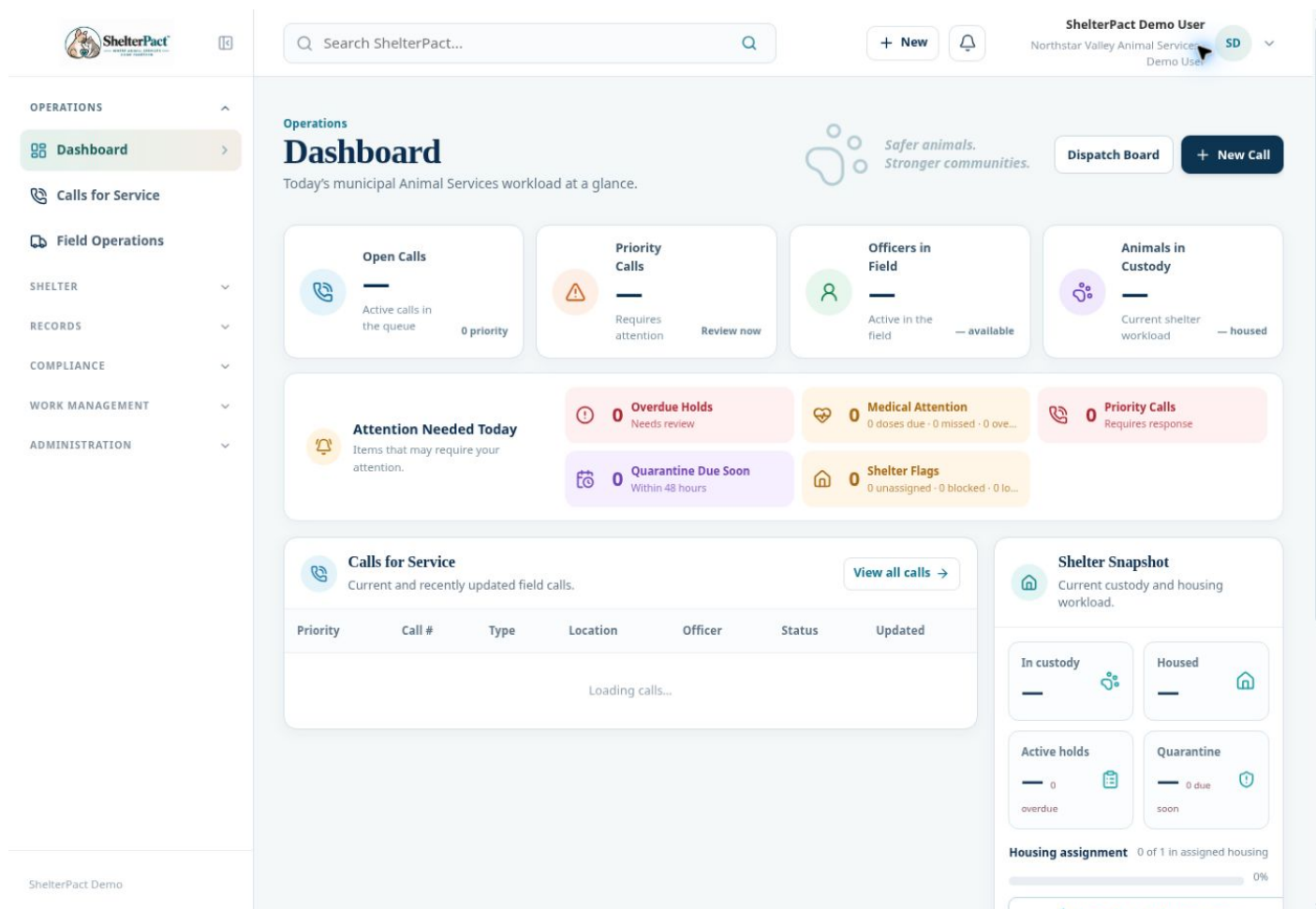


Figure 1. The Dashboard shows the main staff navigation and shared top-bar controls.

My Signature is the entry point for managing a staff signature used in document workflows. Review a document and its signer requirements before signing. Sign Out ends your session when you finish using a shared computer.

# 2. Operations

## Dashboard

Find it: Operations / Dashboard

Start here to review today's workload. Summary cards open the call queue, field workspace, and current shelter population. Attention Needed Today highlights holds, medical attention, priority calls, quarantine timing, and shelter flags. Shelter Snapshot summarizes custody, housing, and restrictions. Recent Dispatch Activity and Today's Tasks provide links to work that needs review; Users Online Now shows recently active staff.

Review the attention cards, open the relevant queue, and inspect the underlying record before taking action. Dashboard totals are summaries; the record contains the details.

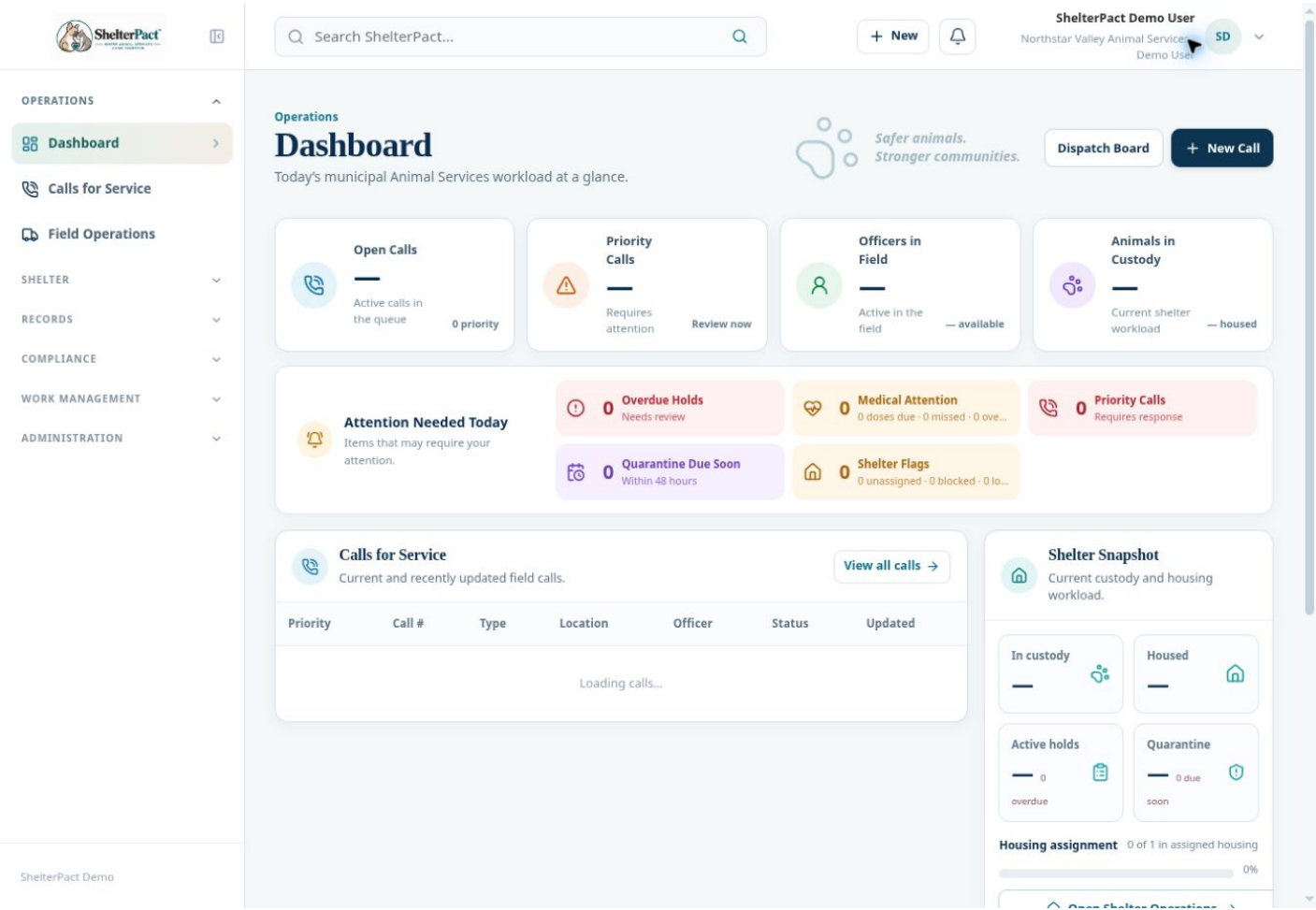


Figure 2. Dashboard workspace in the ShelterPact demo.

# Calls for Service

Find it: Operations / Calls for Service

This is the register for dispatch and field calls. Use status, priority, officer, and date filters to find a call, or select New Call to begin a report. The list shows the call number, received time, type, location, assigned officer, and current status. Open the call number or Open link to work the record.

Use the call record for assignment, response progress, notes, and final disposition. A completed field call and a closed investigation are separate operational decisions.



OPERATIONS

Dashboard

Calls for Service

Field Operations

SHELTER

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

+ New

ShelterPact Demo User

Operations

Calls for Service

Dispatch, assign, work, and audit municipal Animal Control calls from intake through completion.

Search call #, type, location, officer, source...

5 of 8 calls

Status

Priority

Officer

Date

Filters

Active

All

All

All Dates

Reset

| Priority | Call #      | Received        | Type              | Location                 | Officer          | Status   |
|----------|-------------|-----------------|-------------------|--------------------------|------------------|----------|
| NORMAL   | DEMO-C-0008 | Sep 17, 9:54 AM | Barking Complaint | 890 Canyon Meadow Street | Unassigned       | OPEN     |
| HIGH     | DEMO-C-0005 | Sep 16, 3:54 PM | Aggressive Animal | 412 Redtail Court        | ACO Jordan Smith | OPEN     |
| HIGH     | DEMO-C-0003 | Sep 16, 3:54 AM | Animal Welfare    | 2610 Timber Creek Road   | ACO Taylor Jones | ASSIGNED |
| NORMAL   | DEMO-C-0002 | Sep 15, 9:54 PM | Stray Animal      | 720 Silverleaf Avenue    | Unassigned       | OPEN     |
| URGENT   | DEMO-C-0001 | Sep 15, 3:54 PM | Dog Bite          | 1840 Prairie View Drive  | ACO Jordan Smith | ON SCENE |

Figure 3. Calls for Service workspace in the ShelterPact demo.

# Inside a call record

Overview shows dispatch details, the caller, location notes, initial narrative, and Dispatch Control. Map shows the incident location. People and Animals connect permanent records. Notes records supporting narrative; Timeline shows recorded activity. Dispatch Control manages officer assignment, disposition, and response statuses: Open, Assigned, En Route, On Scene, Transporting, and Complete. Create Case links field response to an investigation.

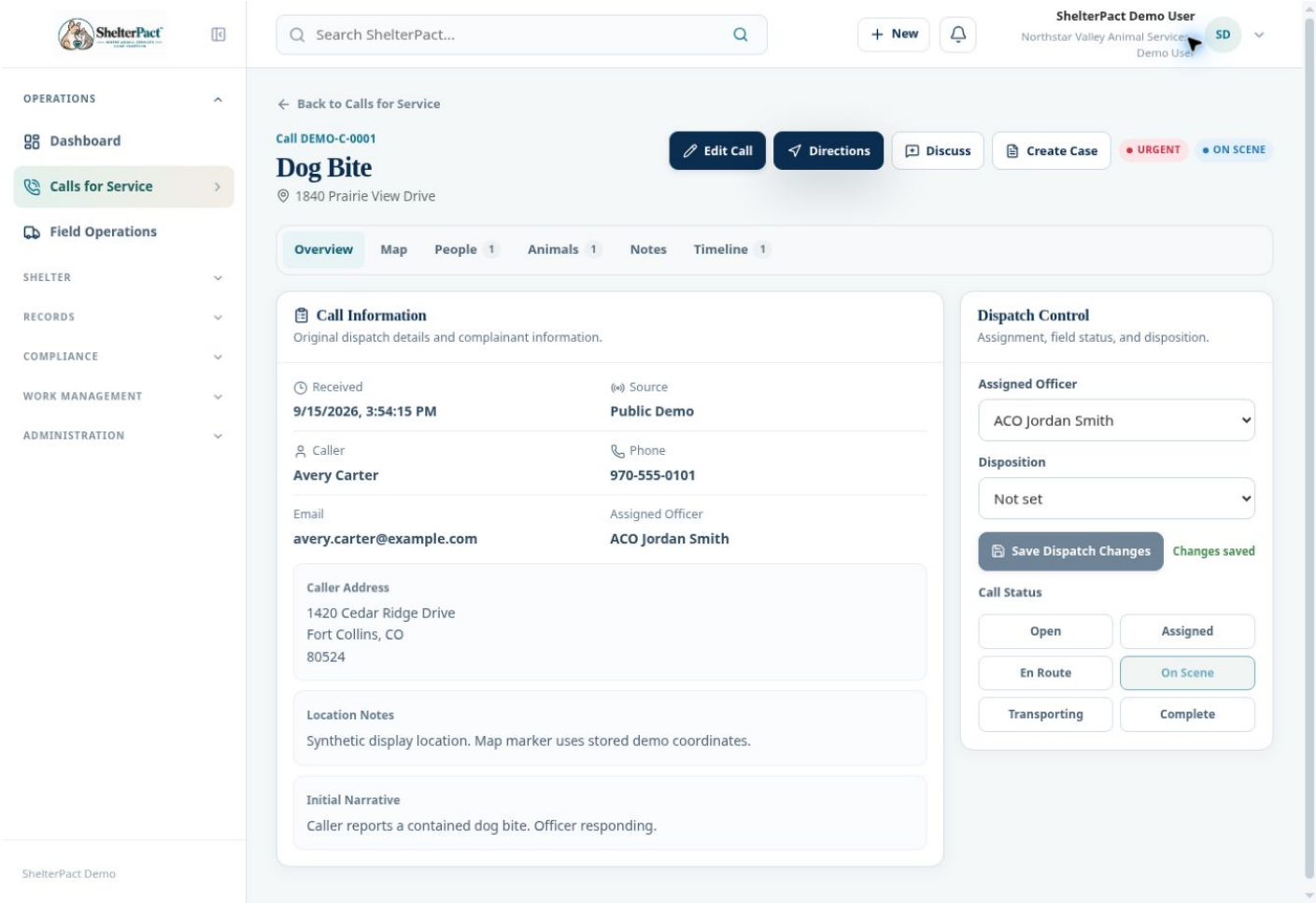


Figure 4. A call record connects dispatch control with people, animals, narrative, and timeline sections.

# Field Operations

Find it: Operations / Field Operations

The dispatch workspace combines active calls, available units, assignments, and a map. Review the Unassigned Queue for calls needing an officer and Active Assignments for work already allocated. Map filters separate all, assigned, and unassigned incidents; select a pin to open the call or access directions. Officer & Unit Status identifies staff and unit availability.

The page refreshes automatically and also has a Refresh control. Device location sharing is optional and must be enabled and chosen by permissioned staff. Stale unit positions should not be treated as current locations.

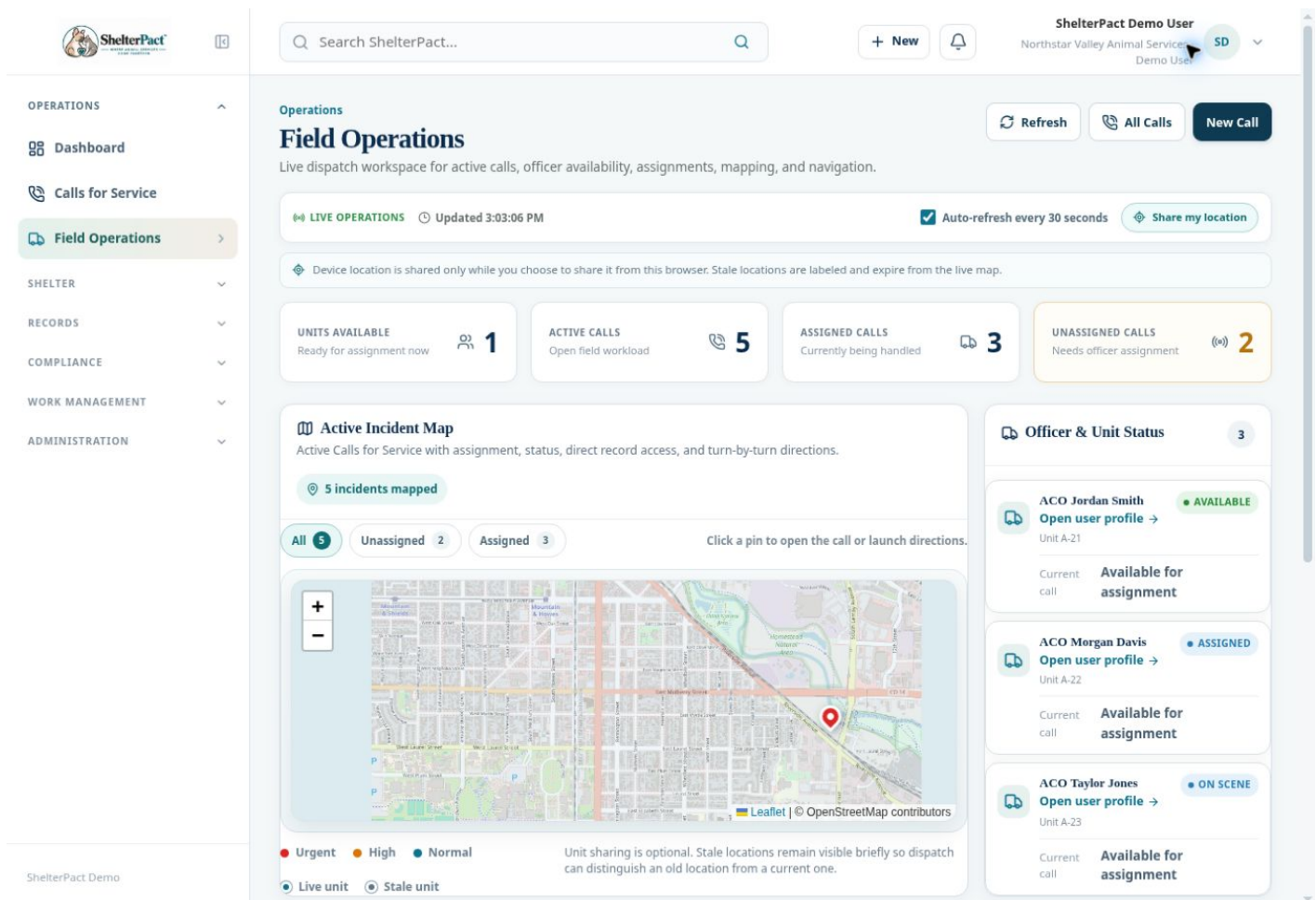


Figure 5. Field Operations workspace in the ShelterPact demo.

# 3. Shelter

## Current Population

Find it: Shelter / Current Population

Use this workspace for animals currently in agency custody. The Shelter Command Center groups animals needing housing, medical review, restriction resolution, or disposition review, and identifies long or extended stays. Housing Operations summarizes capacity and unassigned animals. The live population can be filtered by status, species, and location.

Open an animal for its full history, or use the housing controls to move it through the movement workflow. Current Population is a custody view; Animals is the permanent record directory.

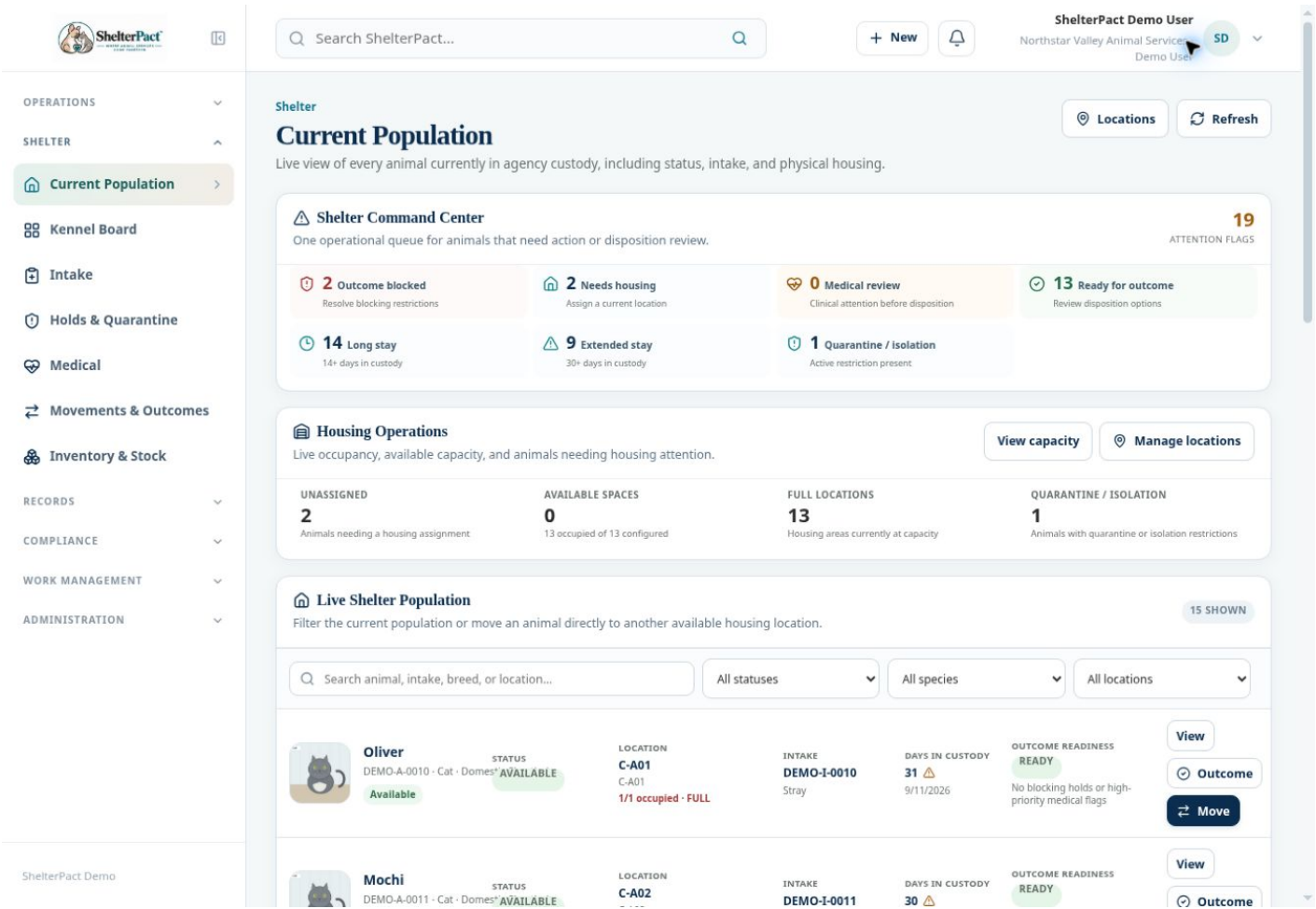


Figure 6. Current Population workspace in the ShelterPact demo.

# Kennel Board

Find it: Shelter / Kennel Board

This visual board organizes animals by housing area and individual kennel or cage. Summary cards show occupants, available housing, full housing, and special care. Unassigned Housing identifies animals in custody that still need a physical location. Filter by location or status, or search to find an animal.

Where authorized, drag an animal between kennels or use Move on touch devices. Moves pass through capacity, permission, and movement-history checks. Review the destination and restrictions before completing a move.

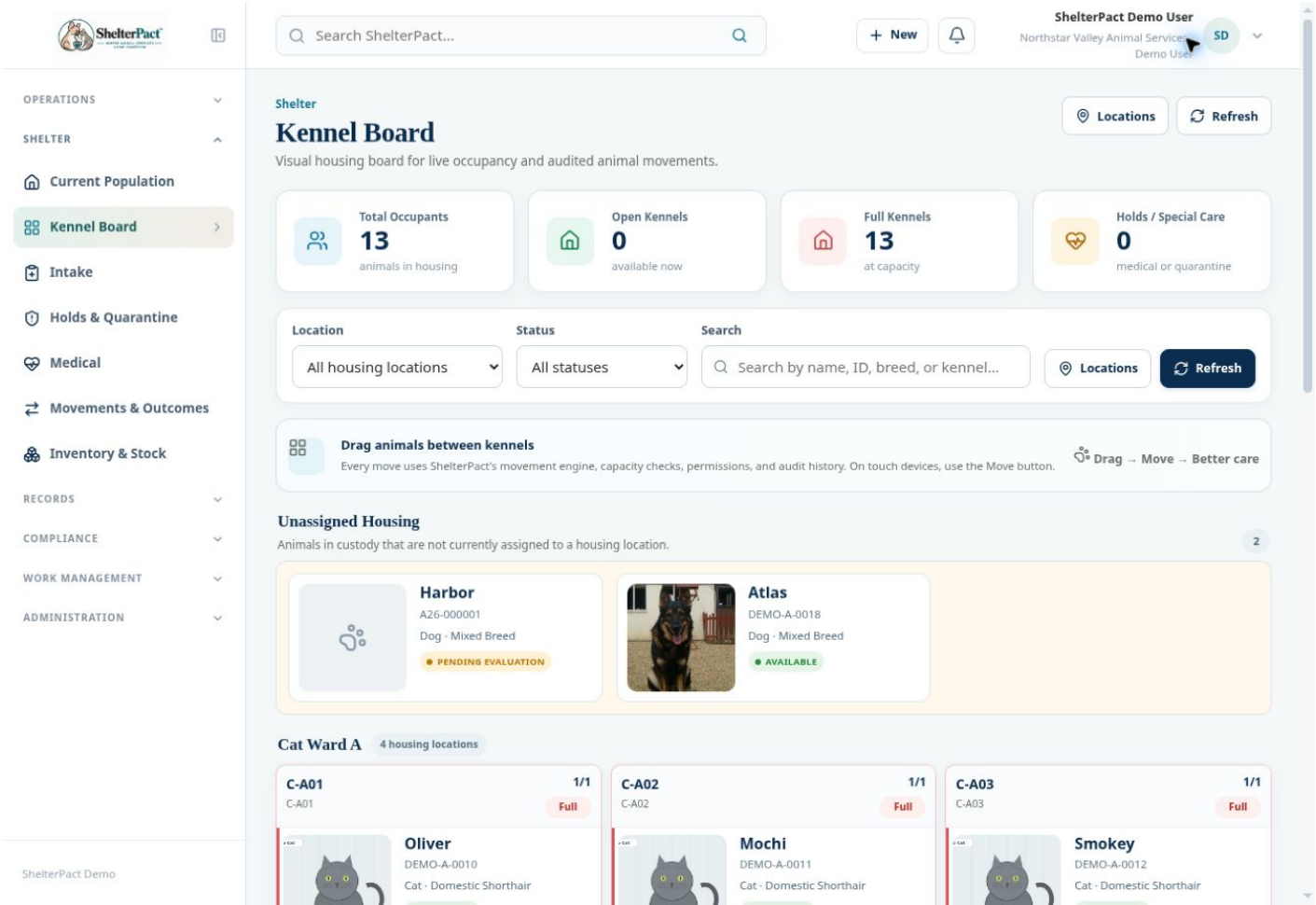


Figure 7. Kennel Board workspace in the ShelterPact demo.

# Intake

Find it: Shelter / Intake

Intake & Custody lists custody episodes rather than only animal identities. Each row connects an intake number to the animal, intake type and reason, animal state, custody episode, incident, case, related people, and intake date. New Intake starts the process of bringing an animal into agency custody.

Search for the existing animal before creating a permanent record. An intake can link an existing animal or create its record as part of the process. Open the intake number to review that specific custody episode.



OPERATIONS

SHELTER

Current Population

Kennel Board

Intake

Holds & Quarantine

Medical

Movements & Outcomes

Inventory & Stock

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

ShelterPact Demo

Search ShelterPact...

+ New

ShelterPact Demo User  
Northstar Valley Animal Services  
Demo User

Shelter

Intake & Custody

Take an animal into agency custody. Link an existing animal or create its permanent record as part of the intake.

Search intake number, animal, type, reason, or jurisdiction...

19 custody episodes

| Intake      | Animal                       | Type / Reason                  | Animal State                         | Custody Episode   | Incident      | Case | People / Location                     |
|-------------|------------------------------|--------------------------------|--------------------------------------|-------------------|---------------|------|---------------------------------------|
| I26-000001  | A26-000001 · Harbor Dog      | Stray<br>Stray / Unknown Owner | PENDING EVALUATION<br>In custody     | In agency custody | Direct intake | None | Owner unknown<br>Finder: Taylor Hayes |
| DEMO-I-0018 | DEMO-A-0018 · Atlas Dog      | Stray<br>Demo intake           | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |
| DEMO-I-0017 | DEMO-A-0017 · Biscuit Rabbit | Stray<br>Demo intake           | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown<br>Finder: Taylor Hayes |
| DEMO-I-0016 | DEMO-A-0016 · Hazel Rabbit   | Owner Surrender<br>Demo intake | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |
| DEMO-I-0015 | DEMO-A-0015 · Cleo Cat       | Stray<br>Demo intake           | RESCUE TRANSFER<br>Lifecycle outcome | Closed            | Direct intake | None | Owner unknown                         |
| DEMO-I-0014 | DEMO-A-0014 · Willow Cat     | Stray<br>Demo intake           | ADOPTION<br>Lifecycle outcome        | Closed            | Direct intake | None | Owner unknown                         |
| DEMO-I-0013 | DEMO-A-0013 · Tux Cat        | Stray<br>Demo intake           | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |
| DEMO-I-0012 | DEMO-A-0012 · Smokey Cat     | Owner Surrender<br>Demo intake | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |
| DEMO-I-0011 | DEMO-A-0011 · Mochi Cat      | Stray<br>Demo intake           | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |
| DEMO-I-0010 | DEMO-A-0010 · Oliver Cat     | Stray<br>Demo intake           | AVAILABLE<br>In custody              | In agency custody | Direct intake | None | Owner unknown                         |

Figure 8. Intake workspace in the ShelterPact demo.

# Holds & Quarantine

Find it: Shelter / Holds & Quarantine

Manage release restrictions, quarantine periods, legal holds, and review deadlines. Summary cards distinguish active holds, blocking restrictions, quarantine, and overdue or upcoming reviews. Filter the Hold Register by status and timing, then open or review the relevant animal and hold information. New Hold begins a restriction when authorized.

Review the authority, reason, assigned staff, and dates. A review or expiration date does not by itself authorize release. Resolve restrictions through the authorized hold workflow before completing a blocked outcome.



ShelterPact

OPERATIONS

SHELTER

Current Population

Kennel Board

Intake

Holds & Quarantine

Medical

Movements & Outcomes

Inventory & Stock

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

+ New

ShelterPact Demo User

Shelter / Legal

Holds & Quarantine

Manage release restrictions, quarantine periods, legal holds, and review deadlines.

Active holds 2

Blocking 2

Quarantine 1

Overdue / Due soon 2 / 0

Hold Register

Active and historical restrictions for animals in your organization.

Search animal, type, authority, reason...

Active

All timing

| Animal               | Hold              | Timing                | Authority / Reason              | Assigned                  |
|----------------------|-------------------|-----------------------|---------------------------------|---------------------------|
| DEMO-A-0003 - Ranger | Quarantine        | OVERDUE               | Not specified                   | ShelterPact Administrator |
| DEMO-I-0003          | Blocking - Active | 9/20/2026, 9:54:15 AM | Bite quarantine pending review. |                           |
| DEMO-A-0005 - Copper | Medical           | OVERDUE               | Not specified                   | ShelterPact Administrator |
| DEMO-I-0005          | Blocking - Active | 9/20/2026, 9:54:15 AM | Medical hold pending recheck.   |                           |

Figure 9. Holds & Quarantine workspace in the ShelterPact demo.

# Medical

Find it: Shelter / Medical

The medical workspace combines daily care, clinical records, and documents. Today shows scheduled medication administrations due now or within the next eight hours, along with overdue, due-soon, active, and completed care summaries. Medical Records provides access to the clinical register; Documents provides related paperwork. New Medical Entry records care for an animal.

Record medication administration as it occurs and review overdue care rather than assuming it has been completed. Use the animal's Medical section for its individual history and the organization's clinical policies for care decisions.

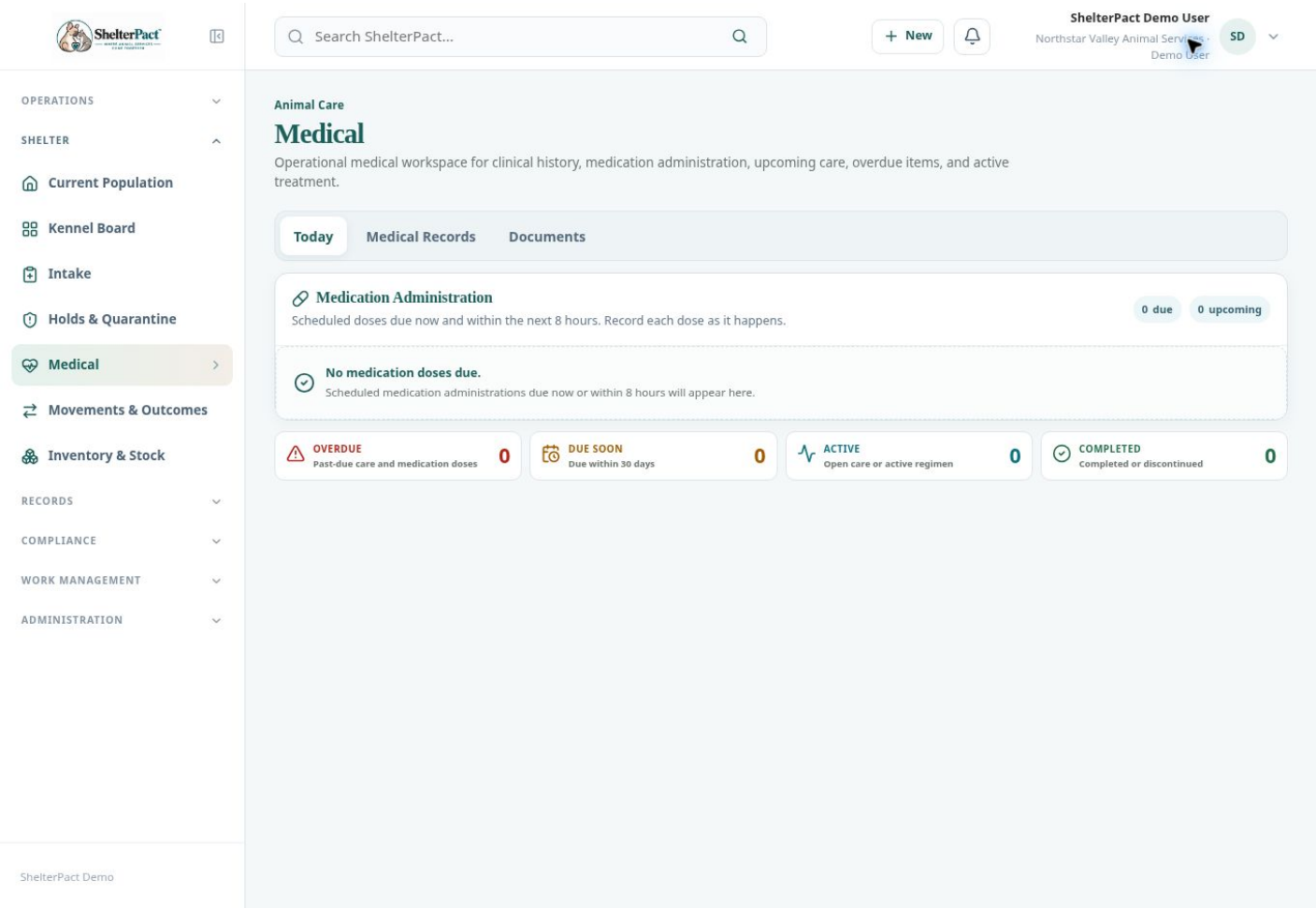


Figure 10. Medical workspace in the ShelterPact demo.

# Movements & Outcomes

Find it: Shelter / Movements & Outcomes

This hub opens the guided workflows for Adoptions, Reclaims, Owner Surrenders, Foster Care, Rescue Transfers, Euthanasia, and Other Outcomes. Choose the workflow matching the actual event. Each pathway keeps eligibility, recipient or destination information, financial review, documents, and final custody actions together as applicable.

Use housing moves for physical location changes, foster placement for temporary care, and an outcome workflow for a disposition that closes custody. These actions have different effects on the animal's history.

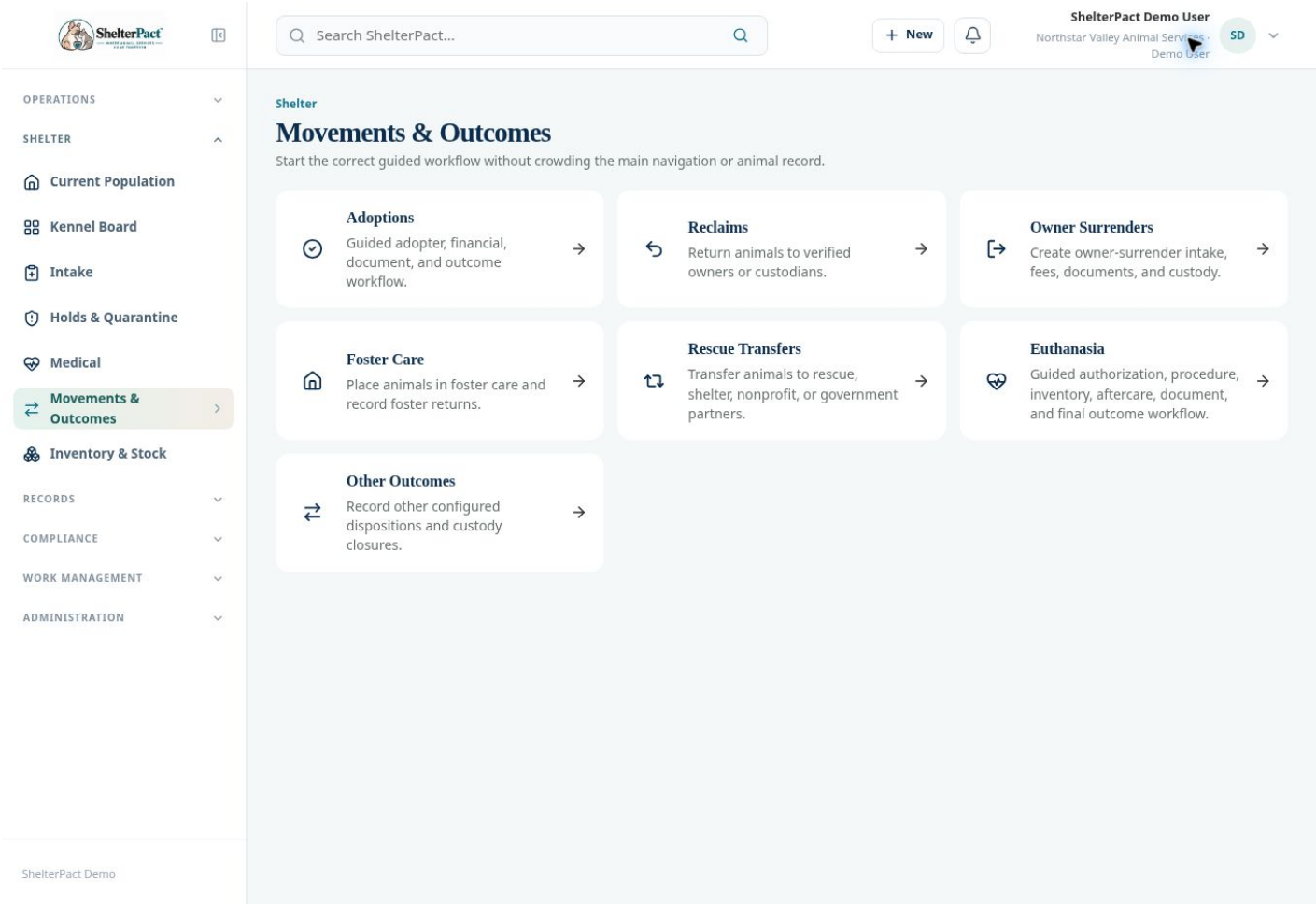


Figure 11. Movements & Outcomes workspace in the ShelterPact demo.

## Inventory & Stock

Find it: Shelter / Inventory & Stock

Track supplies by item, location, lot, and expiration. Summary cards identify active items, low stock, out-of-stock items, expiring lots, expired lots, and inventory value. Stock shows balances; Lots & Alerts shows lot attention; Ledger shows movement history; Items, Locations, and Categories organize the inventory catalog.

Record receipts, use, returns, adjustments, disposal, and transfers with the correct quantity and location. Lot recommendations favor the earliest usable expiration. Review product, lot, and expiration before recording medical stock use.



OPERATIONS

SHELTER

Current Population

Kennel Board

Intake

Holds & Quarantine

Medical

Movements & Outcomes

Inventory & Stock

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

New

ShelterPact Demo User

Northstar Valley Animal Services

Demo User

Shelter Operations

Inventory & Stock

Track supplies by location, lot, and expiration with an auditable stock ledger.

Phase 1C - Lots & alerts

ACTIVE ITEMS

7

0 retired

LOW STOCK

0

At or below reorder

OUT OF STOCK

0

Needs replenishment

EXPIRING SOON

0

Within 30 days

EXPIRED LOTS

0

Positive balance remains

INVENTORY VALUE

\$1,132.85

On hand × unit cost

Stock

Lots & Alerts

Ledger

Items

Locations

Categories

Record Stock Movement

Tracked items use lot-level balances. FEFO recommendations prefer the earliest usable expiration.

Item \*

Select item

Action \*

Receive Stock

Location \*

Select location

Quantity \*

Unit Cost

Reference

PO, invoice, case, etc.

Reason

Why is stock changing?

Notes

Current Stock

On-hand totals are calculated from the immutable ledger.

Search item or stock location...

| ITEM                                 | LOCATION                           | ON HAND | UNIT   |                            |
|--------------------------------------|------------------------------------|---------|--------|----------------------------|
| Amoxicillin 250mg<br>NVAS-AMOX250    | Treatment Room<br>TREAT            | 180     | tablet | <a href="#">Edit Stock</a> |
| Carprofen 75mg<br>NVAS-CARP75        | Treatment Room<br>TREAT            | 86      | tablet | <a href="#">Edit Stock</a> |
| DHPP Vaccine<br>NVAS-DHPP            | Medical Refrigerator<br>MED-FRIDGE | 30      | dose   | <a href="#">Edit Stock</a> |
| Exam Gloves - Medium<br>NVAS-GLOVE-M | Supply Room<br>SUPPLY              | 18      | box    | <a href="#">Edit Stock</a> |
| FVRCP Vaccine<br>NVAS-FVRCP          | Medical Refrigerator<br>MED-FRIDGE | 24      | dose   | <a href="#">Edit Stock</a> |
| Microchip                            | Treatment Room                     | 63      | each   | <a href="#">Edit Stock</a> |

Figure 12. Inventory & Stock workspace in the ShelterPact demo.

## 4. Choosing a movement or outcome workflow

An animal identity, a custody episode, a housing location, and a disposition are separate parts of the record. A housing move changes location. Foster placement maintains shelter custody. A completed custody-closing outcome records why the animal left agency custody. Starting or saving a draft is not the same as completing the event.

### Adoptions

Choose an available animal, or include other animals in custody for authorized exception review. Start Adoption begins the guided pathway; Recent Adoption Workflows lets staff resume a draft. Complete eligibility, adopter, financial, document, and final outcome review before releasing the animal.

The screenshot displays the ShelterPact web application interface. On the left is a sidebar menu with categories: OPERATIONS, SHELTER, RECORDS, COMPLIANCE, WORK MANAGEMENT, and ADMINISTRATION. Under ADMINISTRATION, there are links for Financial, Financial Operations, Reports, Public Portal, Signatures, and Settings. The main content area is titled 'Movement Workflows' and 'Adoptions'. It includes a search bar for 'Search ShelterPact...' and a 'Start Adoption' section with a description and a 'Show All In Custody' button. Below this is another search bar for 'Search animal number, name, breed...'. A list of animals is shown, each with a status of 'AVAILABLE': DEMO-A-0016 Hazel (Rabbit - Mixed Breed), DEMO-A-0011 Mochi (Cat - Domestic Shorthair), DEMO-A-0010 Oliver (Cat - Domestic Shorthair), DEMO-A-0006 Luna (Dog - Chihuahua), DEMO-A-0004 Juniper (Dog - Golden Retriever), DEMO-A-0002 Scout (Dog - Beagle), and DEMO-A-0001 Maple (Dog - Labrador Retriever). On the right, there is a 'Recent Adoption Workflows' section showing a draft for 'DEMO-A-0004 Juniper' by Jordan Reeves.

Figure 13. Adoptions pathway in the Movements & Outcomes hub.

# Reclaims

Select an animal currently in custody and start the reclaim pathway. Review release eligibility and restrictions, verify the owner or custodian, then complete financial, document, and final outcome review. Recent Reclaim Workflows provides access to drafts and completed returns.

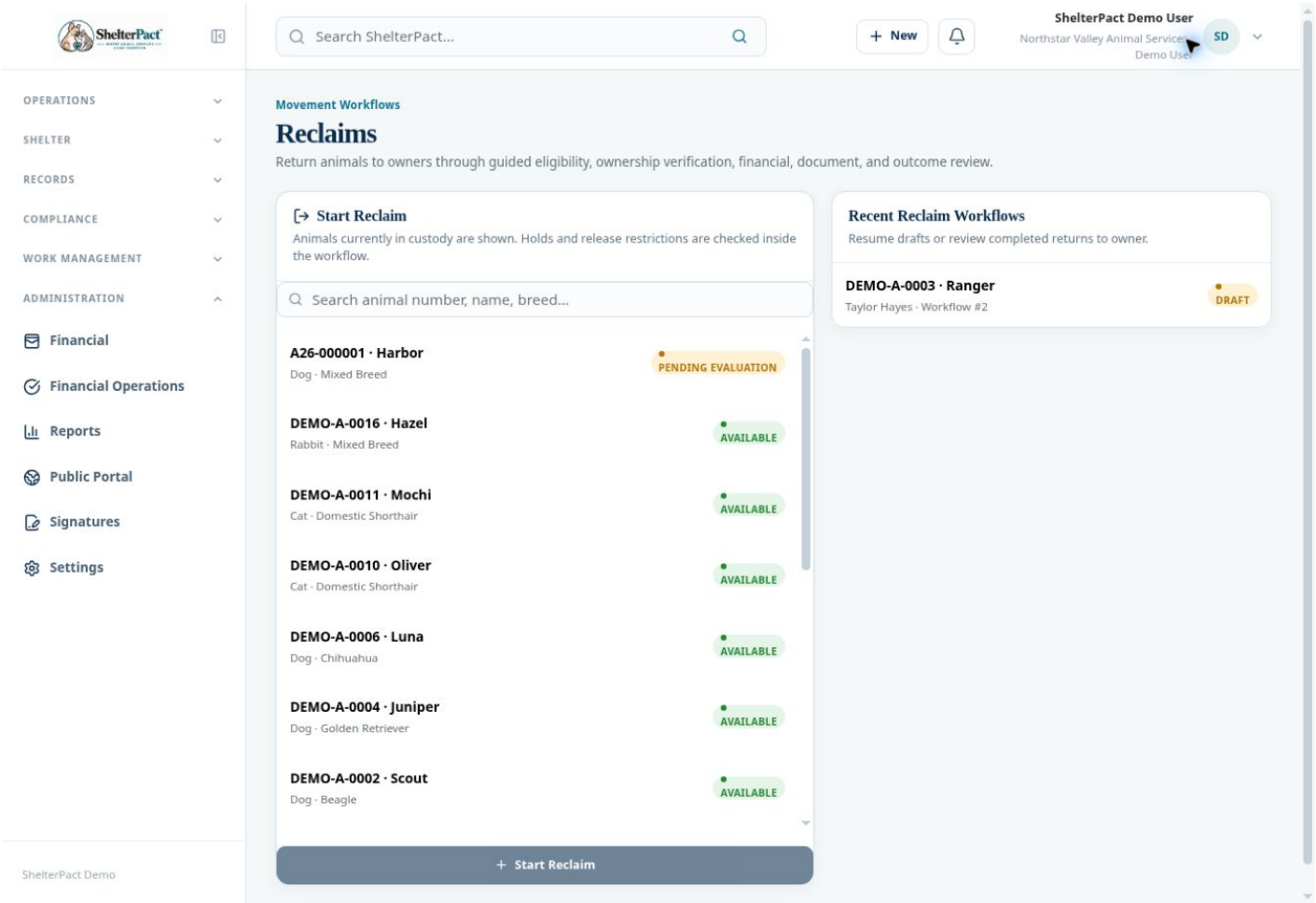


Figure 14. Reclaims pathway in the Movements & Outcomes hub.

# Owner Surrenders

Select an existing animal without active custody, or use Add Animal & Start Surrender when a new identity is needed. The guided pathway includes ownership verification, fees, documents, and creation of the custody intake. Resume an existing draft rather than opening a duplicate workflow.

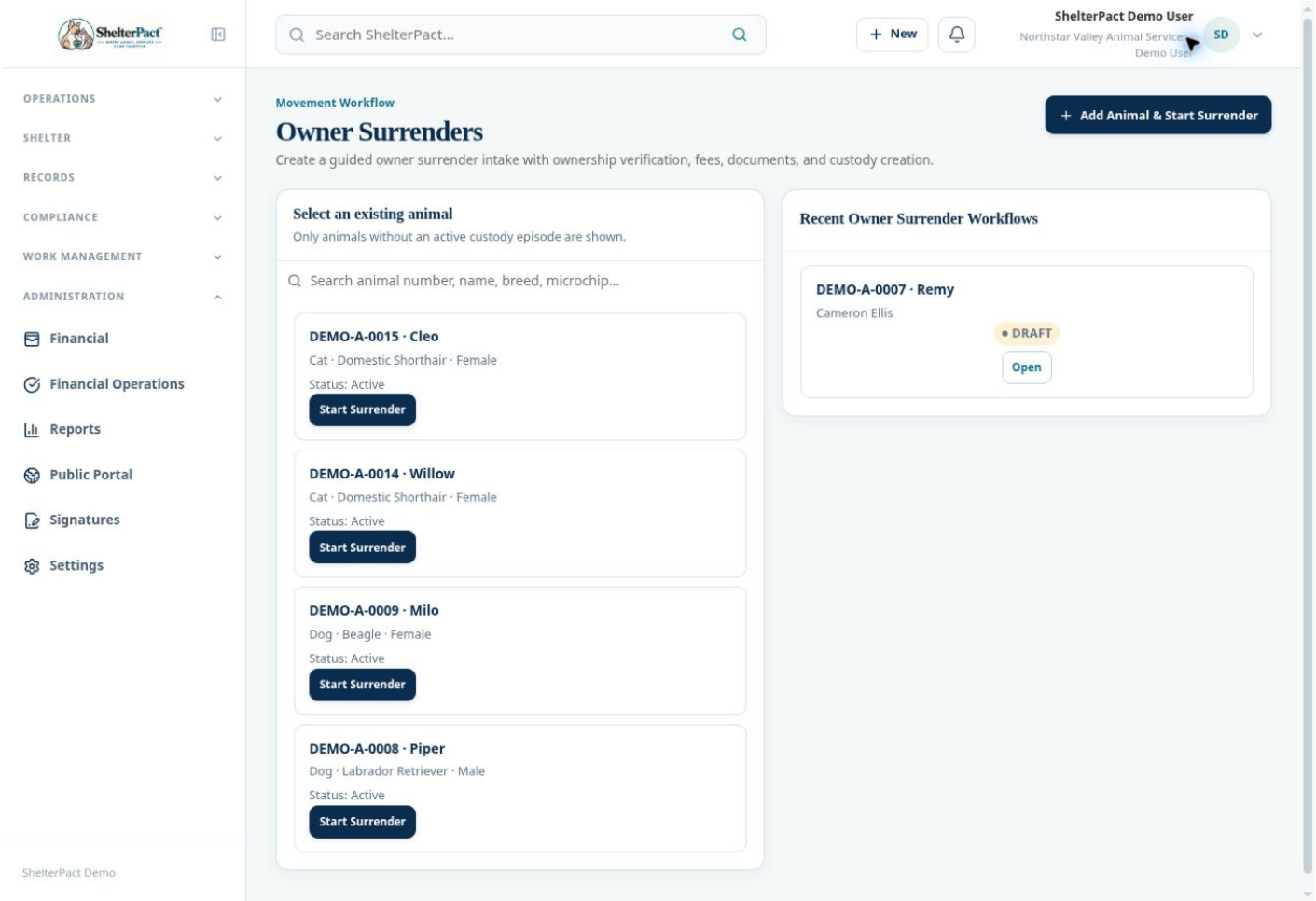


Figure 15. Owner Surrenders pathway in the Movements & Outcomes hub.

# Foster Care

Select an animal in shelter custody to start placement with a foster caregiver. Finish placement details, due-back timing, documents, and review. Pending Foster Placements lists unfinished placements; Active Foster Placements lists animals currently with caregivers. Record returns through the foster pathway, preserving shelter custody history.

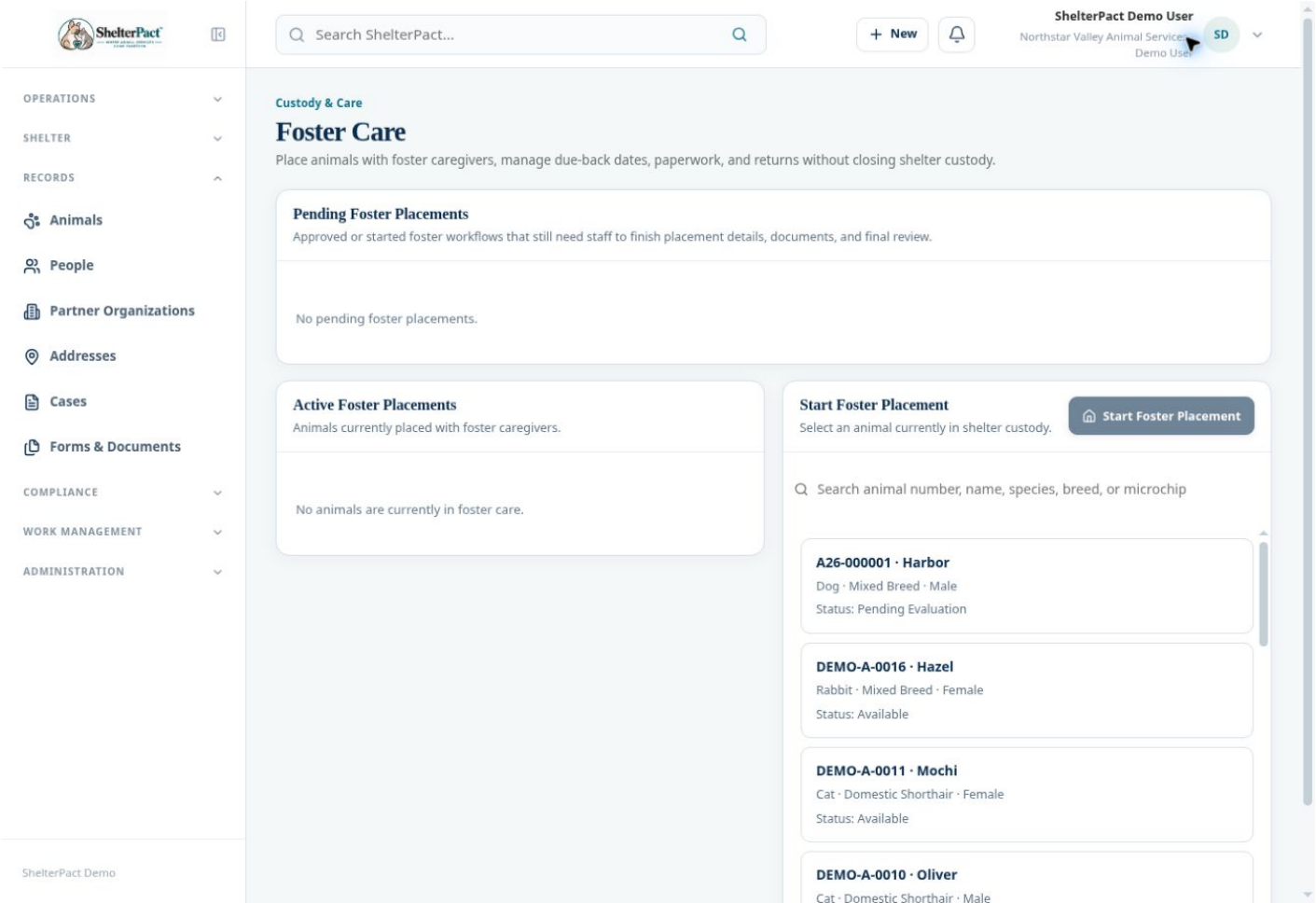


Figure 16. Foster Care pathway in the Movements & Outcomes hub.

# Rescue Transfers

Select an animal in agency custody and identify the active destination partner organization. Complete the applicable financial review, transfer paperwork, and final custody closure. Recent Transfers lets staff open drafts and completed transfers. Confirm the destination rather than using a person record as a substitute for a partner organization.

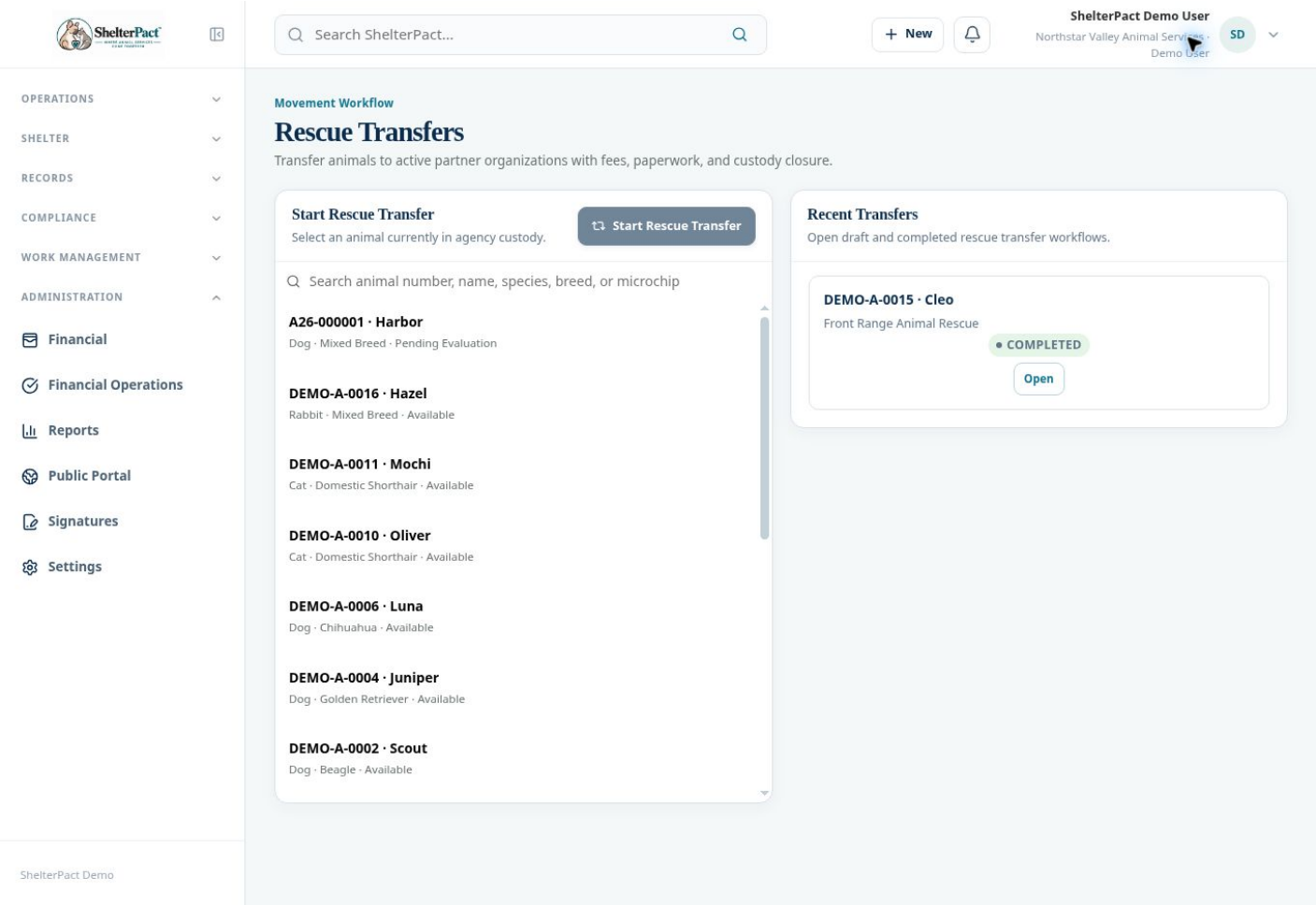


Figure 17. Rescue Transfers pathway in the Movements & Outcomes hub.

# Euthanasia

This guided workflow organizes authorization, procedure records, medical inventory, aftercare, documentation, and final custody closure. It starts from animals currently in custody and checks custody and blocking restrictions before completion. Only authorized staff should record an event under the agency's approved procedures; this walkthrough does not provide clinical instructions.

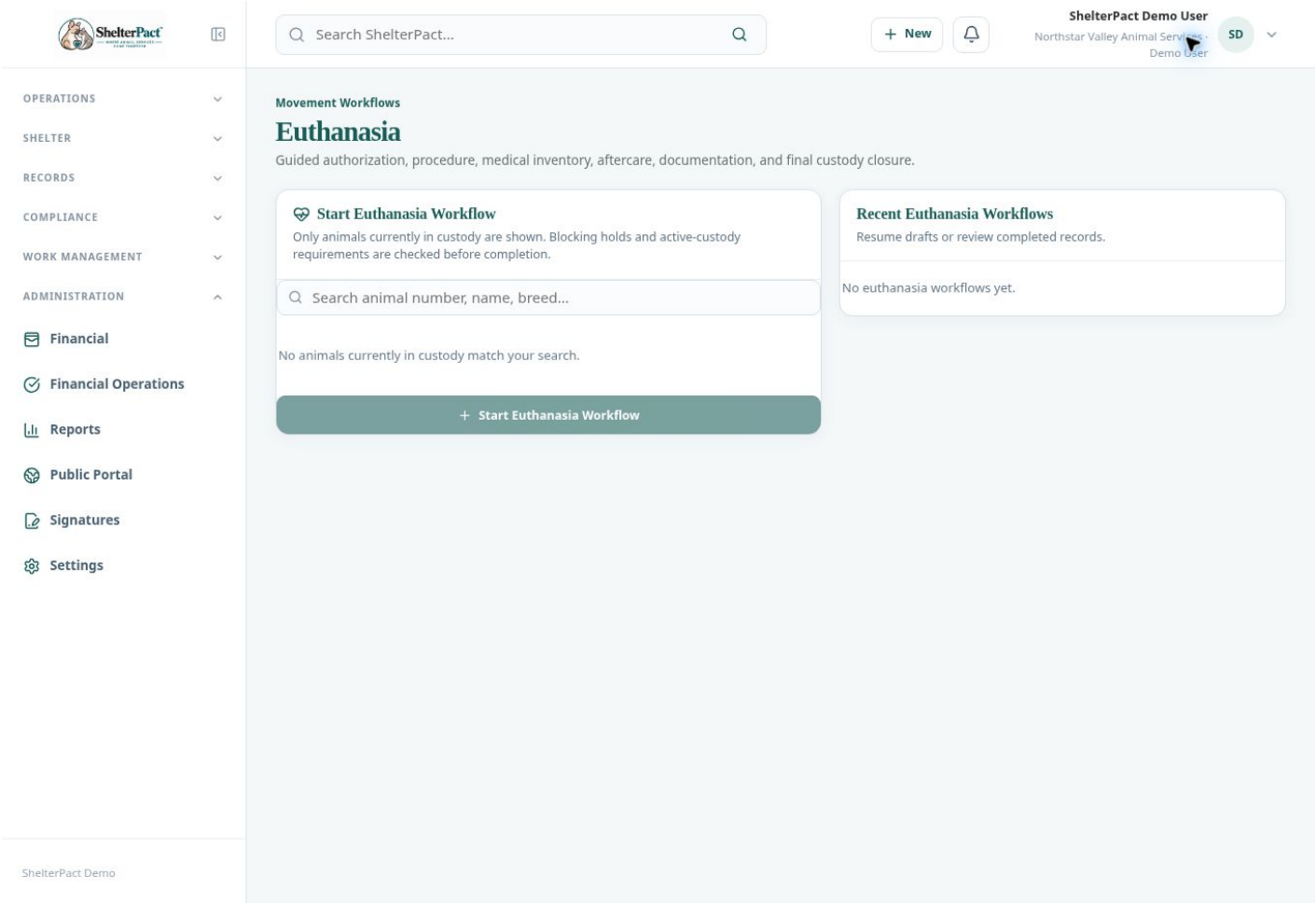


Figure 18. Euthanasia pathway in the Movements & Outcomes hub.

# Other Outcomes

Use the Outcomes register to review recorded dispositions and their date, animal, recipient or destination, staff member, and related financial actions. Record Outcome is the entry point for other configured dispositions. Verify the reason and required information; active blocking holds are enforced before custody can close.



OPERATIONS

SHELTER

RECORDS

Animals

People

Partner Organizations

Addresses

Cases

Forms & Documents

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Q Search ShelterPact...

+ New



ShelterPact Demo User

Northstar Valley Animal Services

Demo User

SD

Shelter · Disposition

+ Record Outcome

Outcomes

Record the authoritative reason an animal leaves agency custody. Active blocking holds are enforced before custody can close.

Q Search animal, outcome, person, destination...

4 outcomes

| Date                  | Animal                              | Outcome                                            | Recipient / Destination   | Performed By              | Financial   |
|-----------------------|-------------------------------------|----------------------------------------------------|---------------------------|---------------------------|-------------|
| 9/18/2026, 9:54:15 AM | DEMO-A-0015 - Cleo<br>DEMO-I-0015   | • RESCUE TRANSFER<br>Transferred to partner rescue | Front Range Animal Rescue | ShelterPact Administrator | \$ Checkout |
| 9/18/2026, 9:54:15 AM | DEMO-A-0014 - Willow<br>DEMO-I-0014 | • ADOPTION<br>Demo adoption                        | Taylor Hayes              | ShelterPact Administrator | \$ Checkout |
| 9/18/2026, 9:54:15 AM | DEMO-A-0009 - Milo<br>DEMO-I-0009   | • ADOPTION<br>Demo adoption                        | Morgan Bennett            | ShelterPact Administrator | \$ Checkout |
| 9/18/2026, 9:54:15 AM | DEMO-A-0008 - Piper<br>DEMO-I-0008  | • RECLAIMED<br>Returned to owner                   | Avery Carter              | ShelterPact Administrator | \$ Checkout |

ShelterPact Demo

Figure 19. Other Outcomes pathway in the Movements & Outcomes hub.

ShelterPact Help Center | Complete Site Walkthrough

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## 5. Permanent records

### Animals

Find it: Records / Animals

Animals is the permanent directory, including animals with current custody and animals with historical outcomes. Search identity, descriptors, identifiers, custody, location, or history; use status and Advanced Filters to narrow results. The table shows species and breed, sex and age, identifiers, current state, and recent updates.

Open an animal name or View to review its record. New Animal creates identity information; use Intake when the event is admission into custody. Reuse an existing identity for a returning animal.

The screenshot displays the ShelterPact Animals workspace. On the left is a sidebar with navigation links: OPERATIONS, SHELTER, RECORDS, Animals (selected), People, Partner Organizations, Addresses, Cases, Forms & Documents, COMPLIANCE, WORK MANAGEMENT, and ADMINISTRATION. The main area is titled 'Animal Records' and 'Animals'. It includes a search bar for 'Search ID, name, chip, license, rabies tag, breed or color...', a dropdown for 'All statuses', and an 'Advanced Filters' button. A table lists 19 records, with the first eight visible. Each record includes an animal photo, name, ID, species/breed, sex/age, identifiers, current state, and update date.

| Animal                                                                                                            | Species / Breed           | Sex / Age                    | Identifiers                  | Current State                                        | Updated                         |
|-------------------------------------------------------------------------------------------------------------------|---------------------------|------------------------------|------------------------------|------------------------------------------------------|---------------------------------|
|  <b>Harbor</b><br>A26-000001   | Dog<br>Mixed Breed        | Male<br>Unknown · Unknown    | None recorded                | <span>PENDING EVALUATION</span><br>In agency custody | 10/12/2026 <a href="#">View</a> |
|  <b>Hazel</b><br>DEMO-A-0016   | Rabbit<br>Mixed Breed     | Female<br>~2 years · Altered | 985141000000016<br>Microchip | <span>AVAILABLE</span><br>Small Animal / S-A01       | 9/27/2026 <a href="#">View</a>  |
|  <b>Mochi</b><br>DEMO-A-0011   | Cat<br>Domestic Shorthair | Female<br>~1 year · Altered  | R26-1011<br>Rabies tag       | <span>AVAILABLE</span><br>Cat Ward A / C-A02         | 9/27/2026 <a href="#">View</a>  |
|  <b>Oliver</b><br>DEMO-A-0010  | Cat<br>Domestic Shorthair | Male<br>~2 years · Altered   | 985141000000010<br>Microchip | <span>AVAILABLE</span><br>Cat Ward A / C-A01         | 9/27/2026 <a href="#">View</a>  |
|  <b>Luna</b><br>DEMO-A-0006    | Dog<br>Chihuahua          | Female<br>~7 years · Intact  | 985141000000006<br>Microchip | <span>AVAILABLE</span><br>Dog Ward A / D-A06         | 9/27/2026 <a href="#">View</a>  |
|  <b>Juniper</b><br>DEMO-A-0004 | Dog<br>Golden Retriever   | Female<br>~2 years · Altered | 985141000000004<br>Microchip | <span>AVAILABLE</span><br>Dog Ward A / D-A04         | 9/27/2026 <a href="#">View</a>  |
|  <b>Scout</b><br>DEMO-A-0002   | Dog<br>Beagle             | Female<br>~3 years · Altered | 985141000000002<br>Microchip | <span>AVAILABLE</span><br>Dog Ward A / D-A02         | 9/27/2026 <a href="#">View</a>  |
|  <b>Maple</b>                  | Doq                       | Male                         | R26-1001                     | <span>AVAILABLE</span>                               |                                 |

Figure 20. Animals workspace in the ShelterPact demo.

# Inside an animal record

The header separates Operational Status, Custody, Housing, and Restrictions. The custody lifecycle panel identifies the current stage and next action. Quick actions open medical, holds, housing moves, and movement pathways. A status label describes the animal's operational state; it does not replace the intake or outcome workflow.

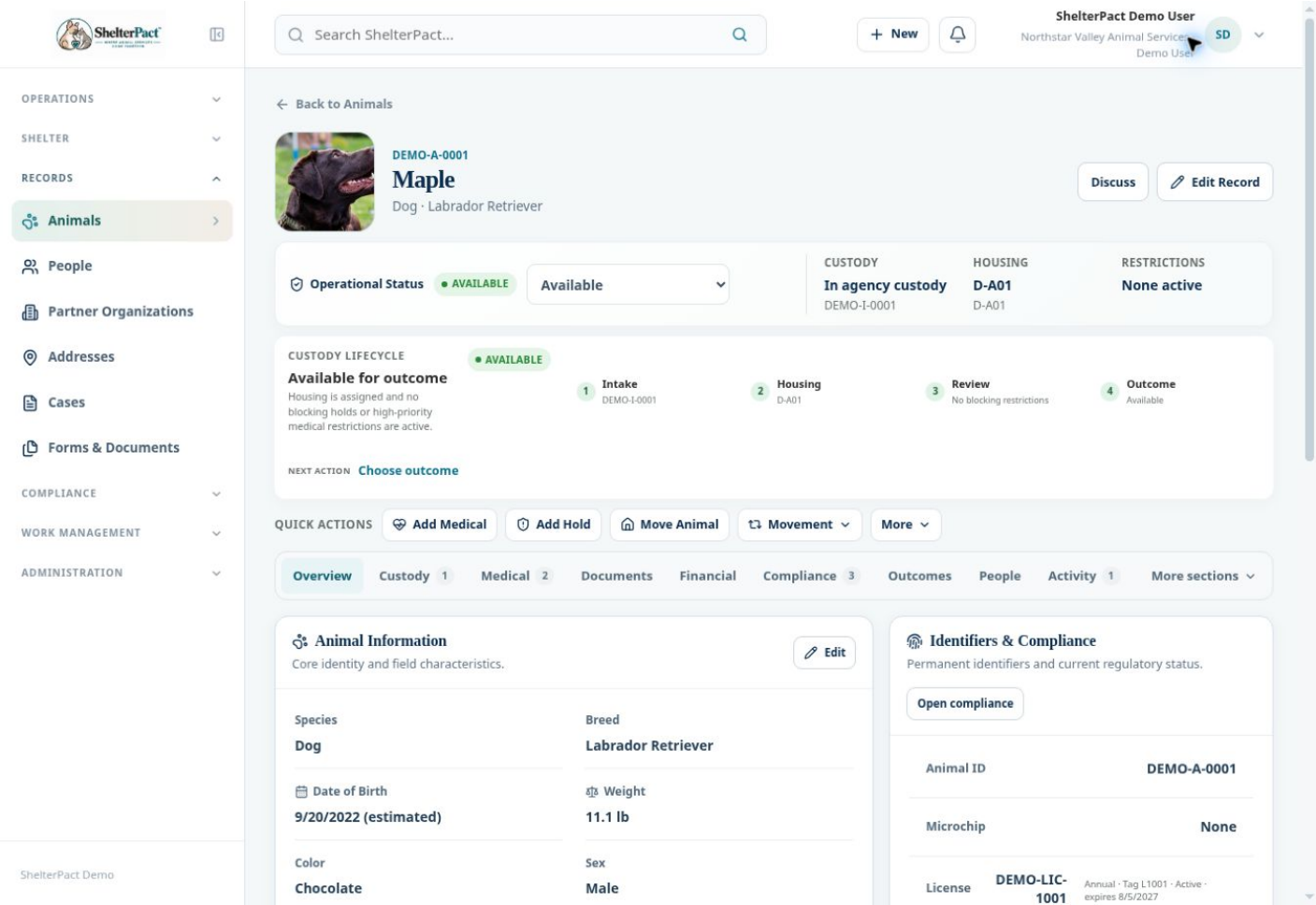


Figure 21. The animal record separates identity, custody, housing, restrictions, and lifecycle review.

| Animal section | What it explains                                                                                                                             |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Overview       | Identity, descriptors, identifiers and compliance summary, ownership, care alerts, related activity, documents, and public adoption profile. |
| Custody        | Intake/custody episodes associated with the permanent animal record.                                                                         |
| Medical        | Individual clinical history and care entries.                                                                                                |
| Documents      | Documents and forms connected to this animal.                                                                                                |

| Animal section                | What it explains                                                  |
|-------------------------------|-------------------------------------------------------------------|
| Financial                     | Animal-related charges, payments, and financial details.          |
| Compliance                    | Licenses, rabies history, and citations connected to the animal.  |
| Outcomes                      | Recorded dispositions for custody episodes.                       |
| People                        | Ownership, custodianship, finder, and other person relationships. |
| Activity                      | Recorded changes and activity history.                            |
| More sections / Holds         | Animal-specific release restrictions and review timing.           |
| More sections / Housing       | Housing and movement information.                                 |
| More sections / Cases & Calls | Linked field calls and investigations.                            |
| More sections / Tasks & Diary | Linked assignments, reminders, and scheduled notes.               |
| More sections / Media         | Photos and supporting media.                                      |

The Public Adoption Profile on Overview contains adopter-facing information used by external publishing. Review public content separately from internal operational notes. Tab counts indicate related items; use More sections to reach tabs that do not fit on the main row.

# People

Find it: Records / People

Maintain permanent records for owners, custodians, finders, complainants, adopters, and other contacts. Search by name, person ID, phone, or email. Open a person to review contact information, addresses, linked animals, compliance, documents, finances, and activity. New Person adds a contact; Addresses opens the reusable location directory.

Search before creating a person. Keep relationships attached to the correct records rather than repeatedly creating the same contact for different events.



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Search ShelterPact...

+ New



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People

Addresses

New Person

Search name, person ID, phone, or email...

8 records

| Person                                                                                                        | Phone        | Email                       | Updated   |                         |
|---------------------------------------------------------------------------------------------------------------|--------------|-----------------------------|-----------|-------------------------|
|  Parker SullivanDEMO-P-0008  | 970-555-0108 | parker.sullivan@example.com | 9/27/2026 | <a href="#">View</a> -- |
|  Cameron EllisDEMO-P-0007   | 970-555-0107 | cameron.ellis@example.com   | 9/27/2026 | <a href="#">View</a> -- |
|  Riley FosterDEMO-P-0006   | 970-555-0106 | riley.foster@example.com    | 9/27/2026 | <a href="#">View</a> -- |
|  Casey MonroeDEMO-P-0005   | 970-555-0105 | casey.monroe@example.com    | 9/27/2026 | <a href="#">View</a> -- |
|  Jordan ReevesDEMO-P-0004  | 970-555-0104 | jordan.reeves@example.com   | 9/27/2026 | <a href="#">View</a> -- |
|  Taylor HayesDEMO-P-0003   | 970-555-0103 | taylor.hayes@example.com    | 9/27/2026 | <a href="#">View</a> -- |
|  Morgan BennettDEMO-P-0002 | 970-555-0102 | morgan.bennett@example.com  | 9/27/2026 | <a href="#">View</a> -- |
|  Avery CarterDEMO-P-0001   | 970-555-0101 | avery.carter@example.com    | 9/27/2026 | <a href="#">View</a> -- |

ShelterPact Demo

Figure 22. People workspace in the ShelterPact demo.

# Inside a person record

Overview shows contact information, internal notes, identification and ownership-verification information, and reusable addresses. Animals lists connected animals. Compliance gathers related compliance records. Documents and Financial hold person-related paperwork and transactions; Activity provides recorded history.

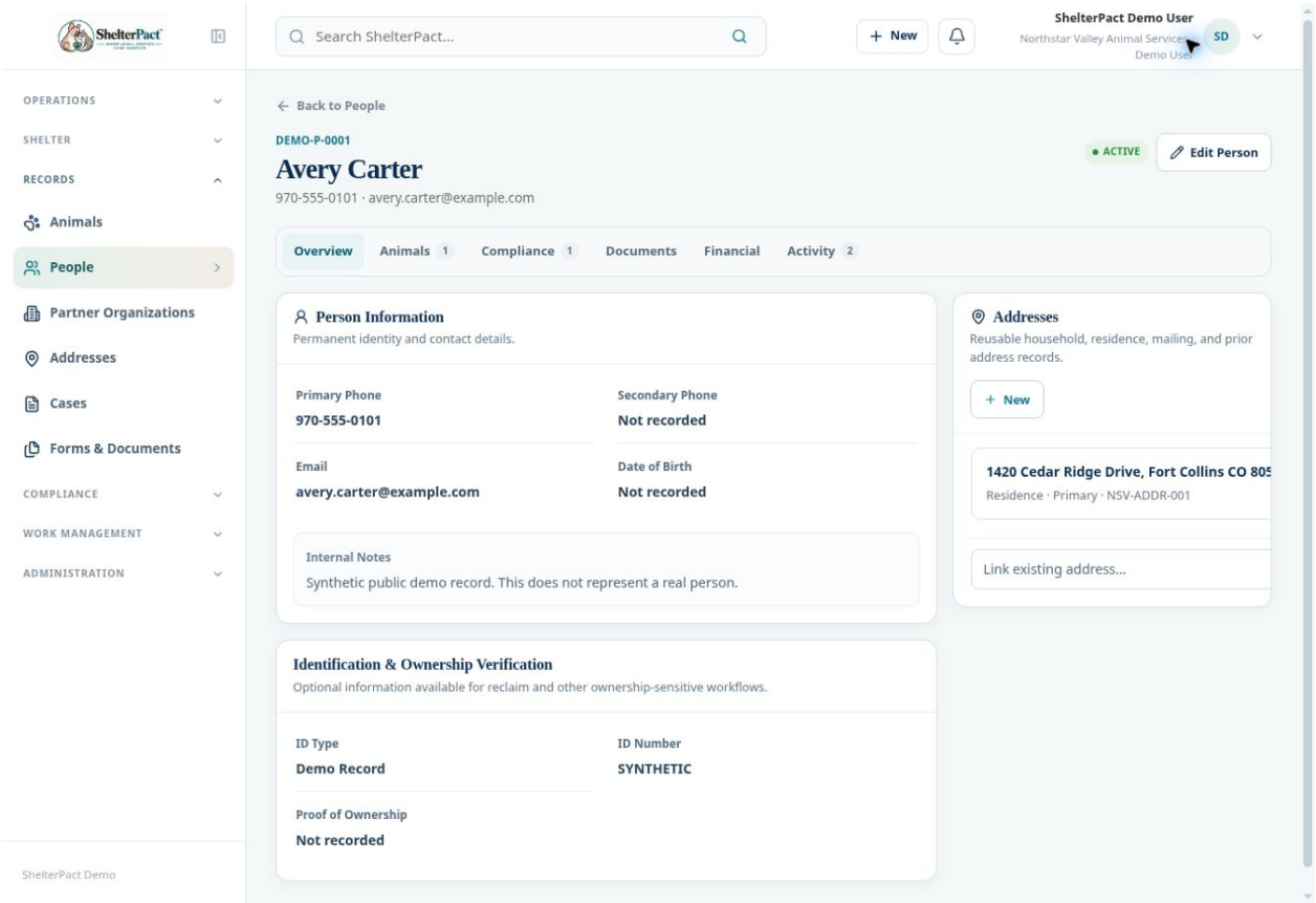


Figure 23. Person records keep contact details, address links, verification information, and related sections together.

# Partner Organizations

Find it: Records / Partner Organizations

Maintain organizations used in transfers and partner relationships, including rescues, shelters, veterinary providers, government agencies, nonprofits, and businesses. Filter by type and active or inactive status. The register shows organization identity, contact details, status, and update date.

Use New Organization for a partner record and View for its details. Rescue transfer workflows use partner destinations; confirm the organization and contact before proceeding.



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+ New

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People & Partners

Partner Organizations

Rescue groups, shelters, veterinary providers, government agencies, nonprofits, businesses, and other partner records.

Search organization, ORG number, phone, email, or website...

All types

All statuses

3 records

| Organization                            | Type       | Contact                                            | Status | Updated   |                      |
|-----------------------------------------|------------|----------------------------------------------------|--------|-----------|----------------------|
| Foothills Humane NetworkDEMO-ORG-003    | shelter    | 970-555-0203<br>partners@foothills-humane.example  | ACTIVE | 9/27/2026 | <a href="#">View</a> |
| Front Range Animal RescueDEMO-ORG-001   | rescue     | 970-555-0201<br>transfer@frontrange-rescue.example | ACTIVE | 9/27/2026 | <a href="#">View</a> |
| Northstar Veterinary CenterDEMO-ORG-002 | veterinary | 970-555-0202<br>care@northstar-vet.example         | ACTIVE | 9/27/2026 | <a href="#">View</a> |

Figure 24. Partner Organizations workspace in the ShelterPact demo.

# Addresses

Find it: Records / Addresses

Addresses stores reusable location records with city, state, county, and the number of connected people. Search or open an address to review it, or select New Address to add a location. Person records can link an existing address and distinguish its relationship, such as a primary residence.

Use the same address record for the same location where appropriate. Verify address details before linking people or using the location in another workflow.



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Search ShelterPact...

+ New

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← Back to People

Addresses

+ New Address

Reusable location records connected to people and future ShelterPact workflows.

Search street, city, ZIP, county, or location ID...

9 addresses

| Address                                             | City / State          | County  | People |                        |
|-----------------------------------------------------|-----------------------|---------|--------|------------------------|
| <b>100 Example Lane</b><br>L26-000001               | Northstar Valley NC   | —       | 0      | <a href="#">View →</a> |
| <b>1190 Cottonwood Ridge Avenue</b><br>NSV-ADDR-008 | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>3048 Juniper Meadow Way</b><br>NSV-ADDR-007      | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>628 Northstar Court</b><br>NSV-ADDR-006          | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>1775 Willow Creek Drive</b><br>NSV-ADDR-005      | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>914 Blue Sage Lane</b><br>NSV-ADDR-004           | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>2317 Aspen Hollow Road</b><br>NSV-ADDR-003       | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>805 Meadowlark Avenue</b><br>NSV-ADDR-002        | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |
| <b>1420 Cedar Ridge Drive</b><br>NSV-ADDR-001       | Fort Collins CO 80524 | Larimer | 1      | <a href="#">View →</a> |

Figure 25. Addresses workspace in the ShelterPact demo.

ShelterPact Help Center | Complete Site Walkthrough

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# Cases

Find it: Records / Cases

Cases / Enforcement tracks investigations, ordinance violations, deadlines, notices, and related records. Filter by status or search case number, title, type, or officer. The register shows officer, priority, status, and follow-up timing. New Case starts an investigation; a call record can also provide a Create Case entry point.

Open the case to maintain case control, violations, enforcement actions, linked records, and its permanent history. Keep the case's status and closing summary consistent with the actual investigation.



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+ New



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Cases + Enforcement

Cases / Enforcement

Investigations, ordinance violations, compliance deadlines, notices, citations, and linked permanent records.

Search case number, title, type, or officer...

All statuses

3 cases

| Case                                                                                                                              | Type                  | Officer          | Priority | Status | Follow-up |
|-----------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|----------|--------|-----------|
|  Bite / Rabies Investigation - RangerDEMO-E-0001 | Bite Investigation    | ACO Jordan Smith | HIGH     | OPEN   | — View .. |
|  At-Large Repeat ViolationDEMO-E-0003            | Ordinance Enforcement | ACO Morgan Davis | NORMAL   | OPEN   | — View .. |
|  Welfare InvestigationDEMO-E-0002              | Cruelty / Neglect     | ACO Taylor Jones | HIGH     | OPEN   | — View .. |

ShelterPact Demo

Figure 26. Cases workspace in the ShelterPact demo.

# Inside a case record

Case Control holds the title, status, priority, assigned officer, compliance deadline, next follow-up, summary, and closing summary. Violations tracks allegations and compliance dates. Enforcement Actions records warnings, notices, citations, court activity, reinspections, and case notes. Linked Records connects people, animals, calls, and addresses; Case History retains the audit trail.

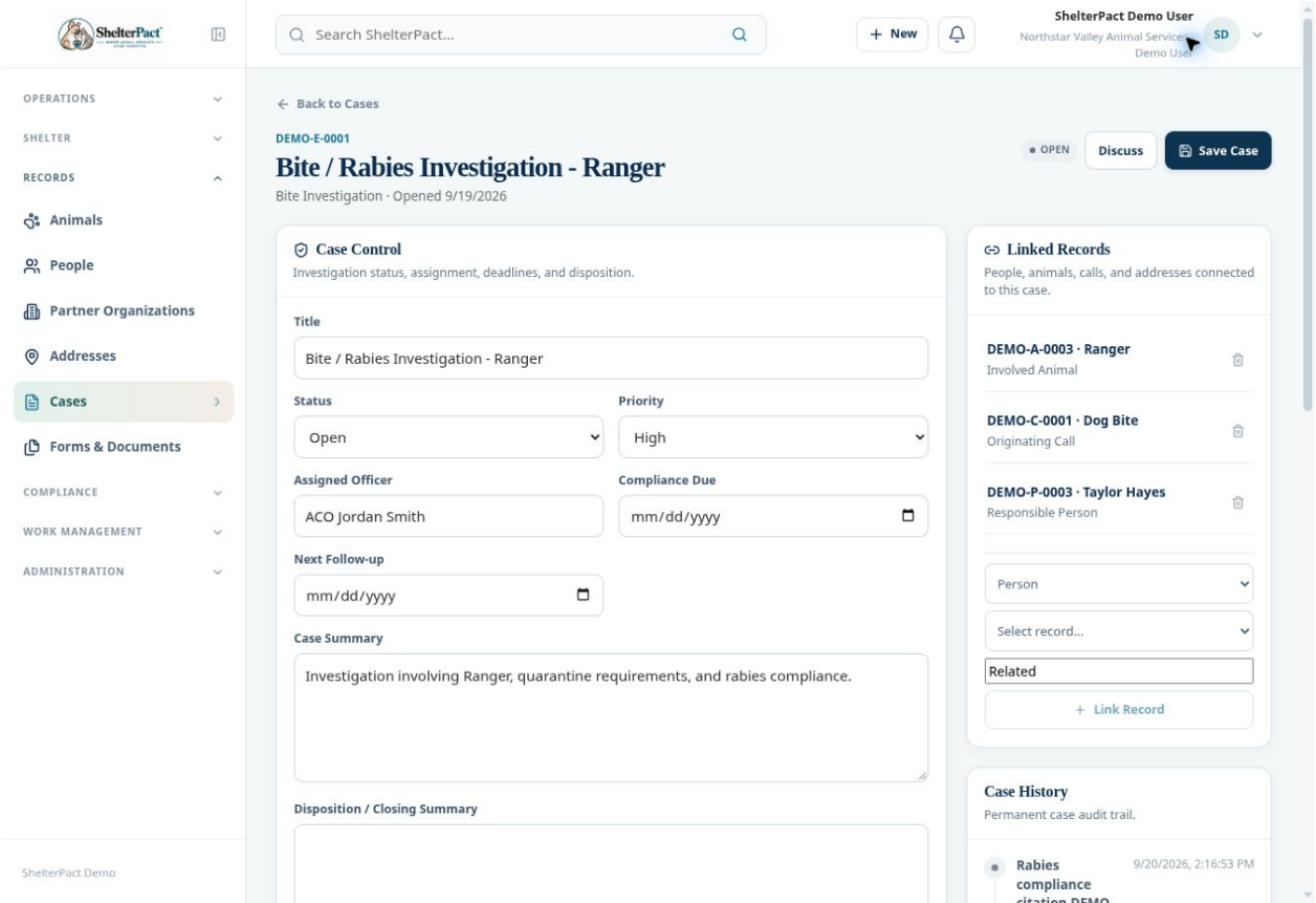


Figure 27. The case workspace connects investigation controls, violations, enforcement actions, and linked records.

# Forms & Documents

Find it: Records / Forms & Documents

Use this workspace for generated documents and reusable templates, including rich documents, structured forms, and supported fillable PDFs. Documents lists draft, completed, and voided paperwork. Select a document to review its template snapshot, linked records, content, signature requirements, final PDF, and history. Templates opens the reusable template collection.

Generate from the correct template and linked records. Review content and required signers before completion. Automatic workflow documents are configured separately in Settings / Automatic Documents.

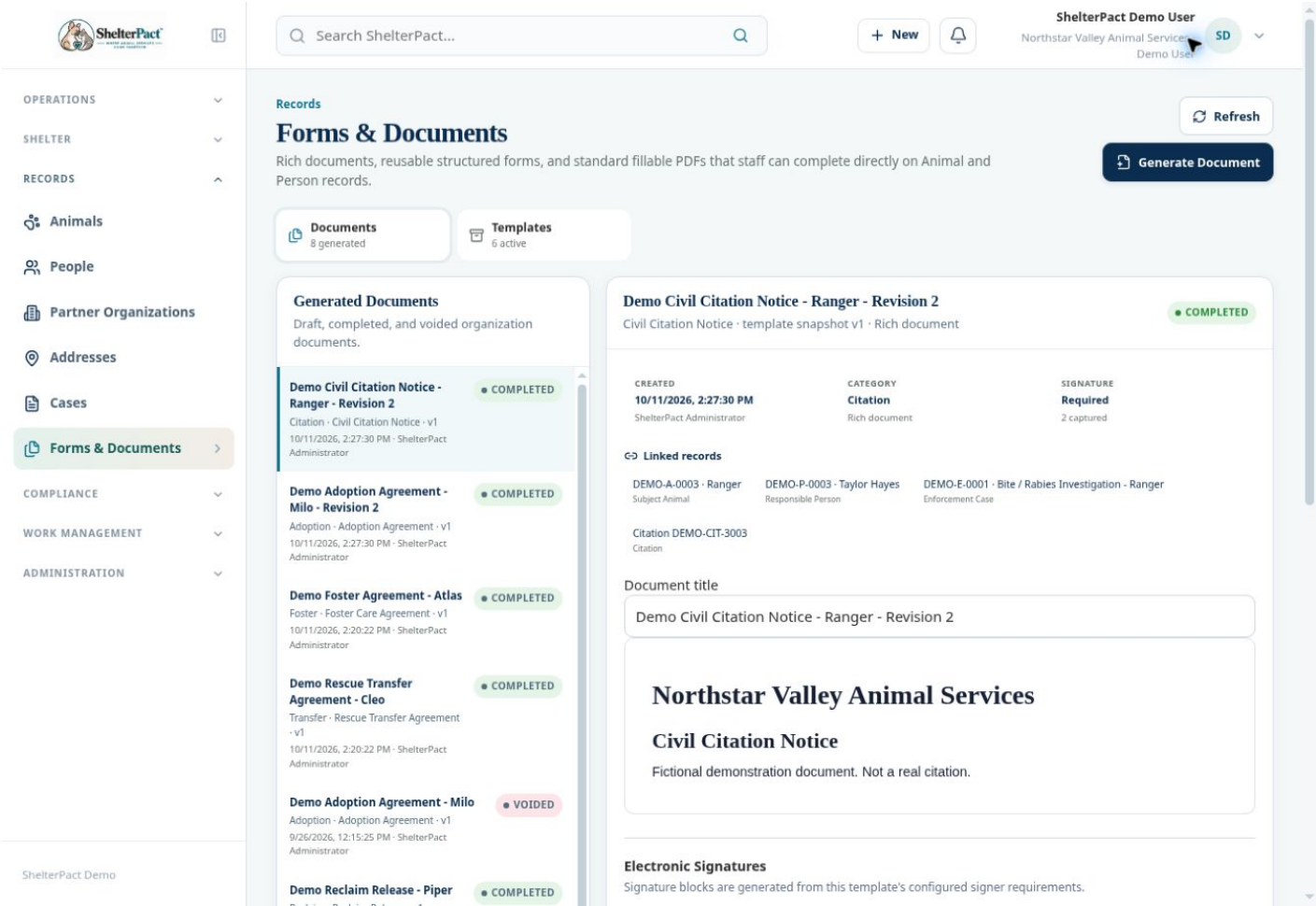


Figure 28. Forms & Documents workspace in the ShelterPact demo.

# 6. Compliance

## Compliance Operations

Find it: Compliance / Compliance Operations

This daily action center brings license renewals, rabies renewals, citation follow-up, and outstanding balances into one view. Open a queue item to review the record, use Renew where available, and use Pay for an eligible balance. Create Follow-up Tasks supports operational follow-up where authorized.

Use the individual Licensing, Rabies Compliance, and Citations registers for full history and record actions. Follow-up tasks support the work but do not replace the underlying compliance record.



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Q Search ShelterPact...

+ New



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Compliance & Financial Operations

Compliance Operations

Daily renewal, delinquency and balance follow-up in one action-focused workspace.

Create Follow-up Tasks

Refresh

Licenses due

2

renewal queue

Rabies due

2

renewal queue

Citations

2

due / delinquent

Outstanding

\$125.00

2 open charges

Action Center

6 compliance items currently need follow-up.

License renewals

Expired and soon-to-expire licenses.

2

DEMO-LIC-1002 · Scout

Due Soon · 2026-10-14 · No owner

Open

Renew

DEMO-LIC-1004 · Copper

Expired · 2026-09-09 · No owner

Open

Renew

Rabies renewals

Certificates due for renewal or already expired.

2

DEMO-RAB-2003 · Juniper

Expired · 2026-10-09 · No owner

Open

Renew

DEMO-RAB-2004 · Copper

Expired · 2026-08-25 · No owner

Open

Renew

Citation follow-up

Due-soon and delinquent civil citations.

2

DEMO-CIT-3001 · Avery Carter

Delinquent · Due 2026-10-07 · Animal running at large

\$75.00

Open

DEMO-CIT-3002 · Morgan Bennett

Delinquent · Due 2026-09-04 · Failure to obtain required animal license

\$50.00

Open

Outstanding balances

Open animal-services charges ready for collection.

2

Citation DEMO-CIT-3001

DEMO-CHG-4002 · Avery Carter

\$75.00

Pay

Citation DEMO-CIT-3002

DEMO-CHG-4003 · Morgan Bennett

\$50.00

Pay

Figure 29. Compliance Operations workspace in the ShelterPact demo.

# Licensing

Find it: Compliance / Licensing

Animal Licensing records issuance, renewal, license and tag numbers, owners, fees, expiration, and permanent history. Summary cards separate active, expiring, expired, and total records. Search and status filters narrow the register. Issue License begins issuance; Document opens associated paperwork.

Confirm the correct animal, owner, dates, and fee before issuing or renewing. Use the record's payment action when a balance is payable. Voiding changes the record's status and should be used only for a justified correction.



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Q Search ShelterPact...

+ New



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SD

▼

Compliance

Animal Licensing

Issue and renew animal licenses, track expiration, owners, fees, and permanent license history.

Refresh

+ Issue License

Active

4

current licenses

Expiring in 30 days

1

renewal attention

Expired

1

not current

Total history

6

license records

Q Search license, animal, owner, or tag...

All statuses ▼ 6 records

| License                             | Animal                | Owner | Issued / Expires                 | Fee       | Status        |                                     |
|-------------------------------------|-----------------------|-------|----------------------------------|-----------|---------------|-------------------------------------|
| DEMO-LIC-1005<br>Annual · Tag L1005 | DEMO-A-0007 · Remy    | —     | 2026-09-09<br>Expires 2027-09-09 | No charge | ACTIVE        | <div>Document</div> <div>Void</div> |
| DEMO-LIC-1001<br>Annual · Tag L1001 | DEMO-A-0001 · Maple   | —     | 2026-08-05<br>Expires 2027-08-05 | No charge | ACTIVE        | <div>Document</div> <div>Void</div> |
| DEMO-LIC-1003<br>Annual · Tag L1003 | DEMO-A-0004 · Juniper | —     | 2026-06-01<br>Expires 2027-06-01 | No charge | ACTIVE        | <div>Document</div> <div>Void</div> |
| DEMO-LIC-1006<br>Annual · Tag L1006 | DEMO-A-0008 · Piper   | —     | 2026-03-03<br>Expires 2027-03-03 | No charge | ACTIVE        | <div>Document</div> <div>Void</div> |
| DEMO-LIC-1002<br>Annual · Tag L1002 | DEMO-A-0002 · Scout   | —     | 2025-10-14<br>Expires 2026-10-14 | No charge | EXPIRING SOON | <div>Document</div> <div>Void</div> |
| DEMO-LIC-1004<br>Annual · Tag L1004 | DEMO-A-0005 · Copper  | —     | 2025-09-09<br>Expires 2026-09-09 | No charge | EXPIRED       | <div>Document</div> <div>Void</div> |

ShelterPact Demo

Figure 30. Licensing workspace in the ShelterPact demo.

ShelterPact Help Center | Complete Site Walkthrough

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# Rabies Compliance

Find it: Compliance / Rabies Compliance

Maintain vaccination certificates, tag numbers, provider and product details, vaccination dates, and expiration. Record Rabies starts an entry linked to the animal's medical history. The register identifies current, due-soon, expired, and voided certificates and provides Document access.

Verify the administering provider, vaccine, lot, dates, and animal identity against source documentation. When stock integration is used, confirm the correct inventory product and lot.

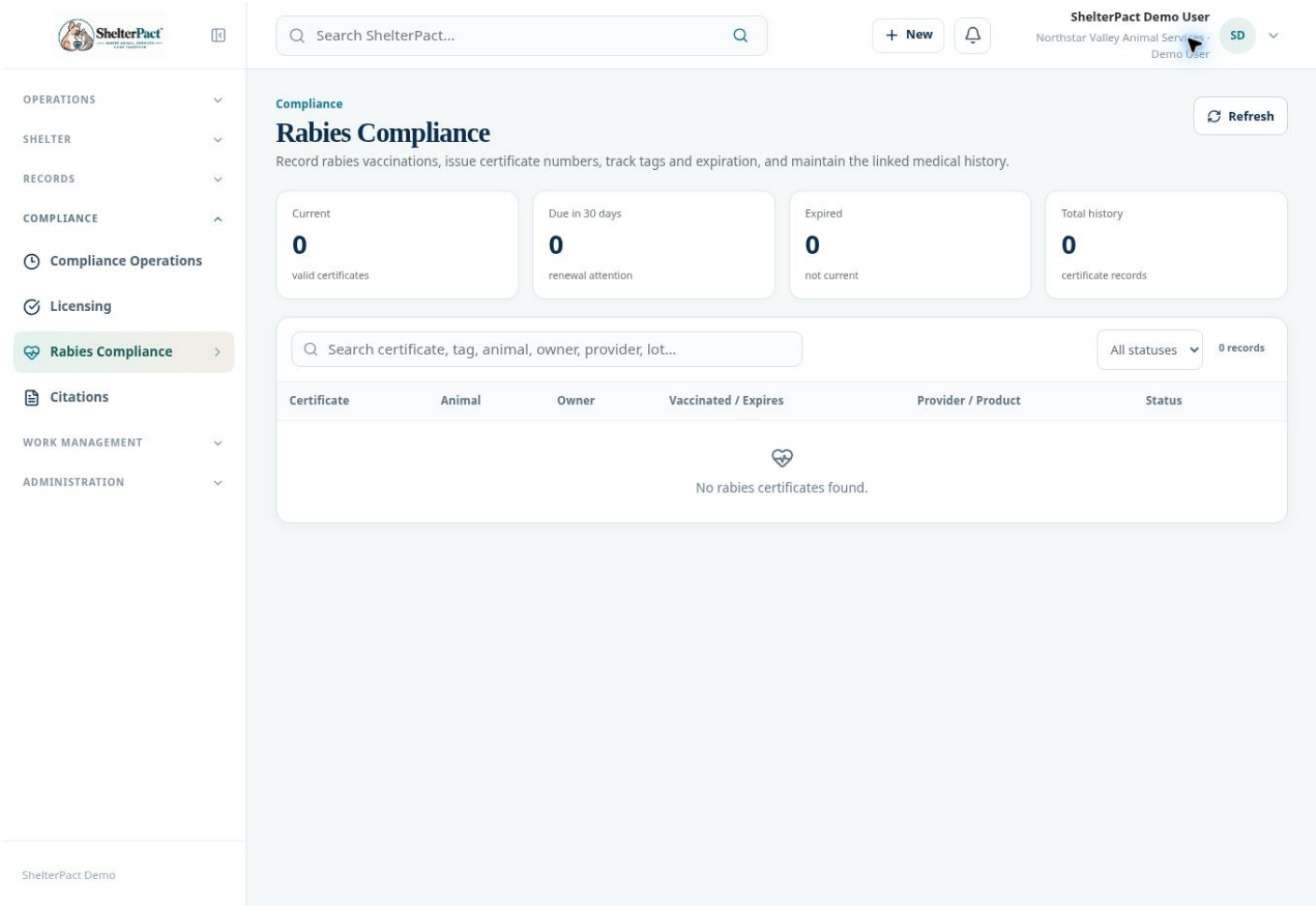


Figure 31. Rabies Compliance workspace in the ShelterPact demo.

# Citations

Find it: Compliance / Citations

Issue and monitor civil citations linked to responsible people, animals, and cases. Summary cards show issued items, delinquency, paid records, and outstanding balances. The register includes violation details, due dates, balances, and status. Issue Citation begins a citation; Document opens its paperwork.

Collect Payment is available for eligible balances. Review the responsible person and charge before collecting. A paid citation resolves its financial balance; review any separate enforcement or case requirements.



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Demo User

Compliance · Enforcement

Citations

Issue civil citations, link people, animals and cases, track due dates, balances, delinquency, and payment status.

Open / Issued  
0  
awaiting resolution

Delinquent  
2  
past due with balance

Paid  
1  
resolved financially

Outstanding  
\$125.00  
citation balances

Search citation, case, violation, person, animal, officer...

All statuses

3 records

| Citation                                       | Responsible person | Violation                                                | Case / Animal                       | Due / Balance           | Status     |                                                                |
|------------------------------------------------|--------------------|----------------------------------------------------------|-------------------------------------|-------------------------|------------|----------------------------------------------------------------|
| DEMO-CIT-3001<br>2026-09-07 · ACO Jordan Smith | Avery Carter       | AT-LARGE<br>Animal running at large                      | No case<br>DEMO-A-0001 · Maple      | 2026-10-07<br>75.00 due | DELINQUENT | <div>Document</div> <div>Collect Payment</div> <div>Void</div> |
| DEMO-CIT-3003<br>2026-08-20 · ACO Morgan Davis | Taylor Hayes       | RABIES<br>Failure to maintain current rabies vaccination | DEMO-E-0001<br>DEMO-A-0003 · Ranger | 2026-09-19<br>0.00 due  | PAID       | <div>Document</div> <div>Void</div>                            |
| DEMO-CIT-3002<br>2026-08-05 · ACO Taylor Jones | Morgan Bennett     | NO-LICENSE<br>Failure to obtain required animal license  | No case<br>DEMO-A-0002 · Scout      | 2026-09-04<br>50.00 due | DELINQUENT | <div>Document</div> <div>Collect Payment</div> <div>Void</div> |

Figure 32. Citations workspace in the ShelterPact demo.

ShelterPact Help Center | Complete Site Walkthrough

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# 7. Work Management

## Tasks

Find it: Work Management / Tasks

Assign and track operational work. A task can include staff assignment, priority, due date and time, reminder, recurrence, description, and a related record. The Task Board shows active work and supports My tasks and status filters. Automatically generated tasks identify their source.

Open the linked record to understand the work, then complete the task when the action is actually finished. Recurring tasks support repeat work; verify the schedule and number of occurrences before creating them.

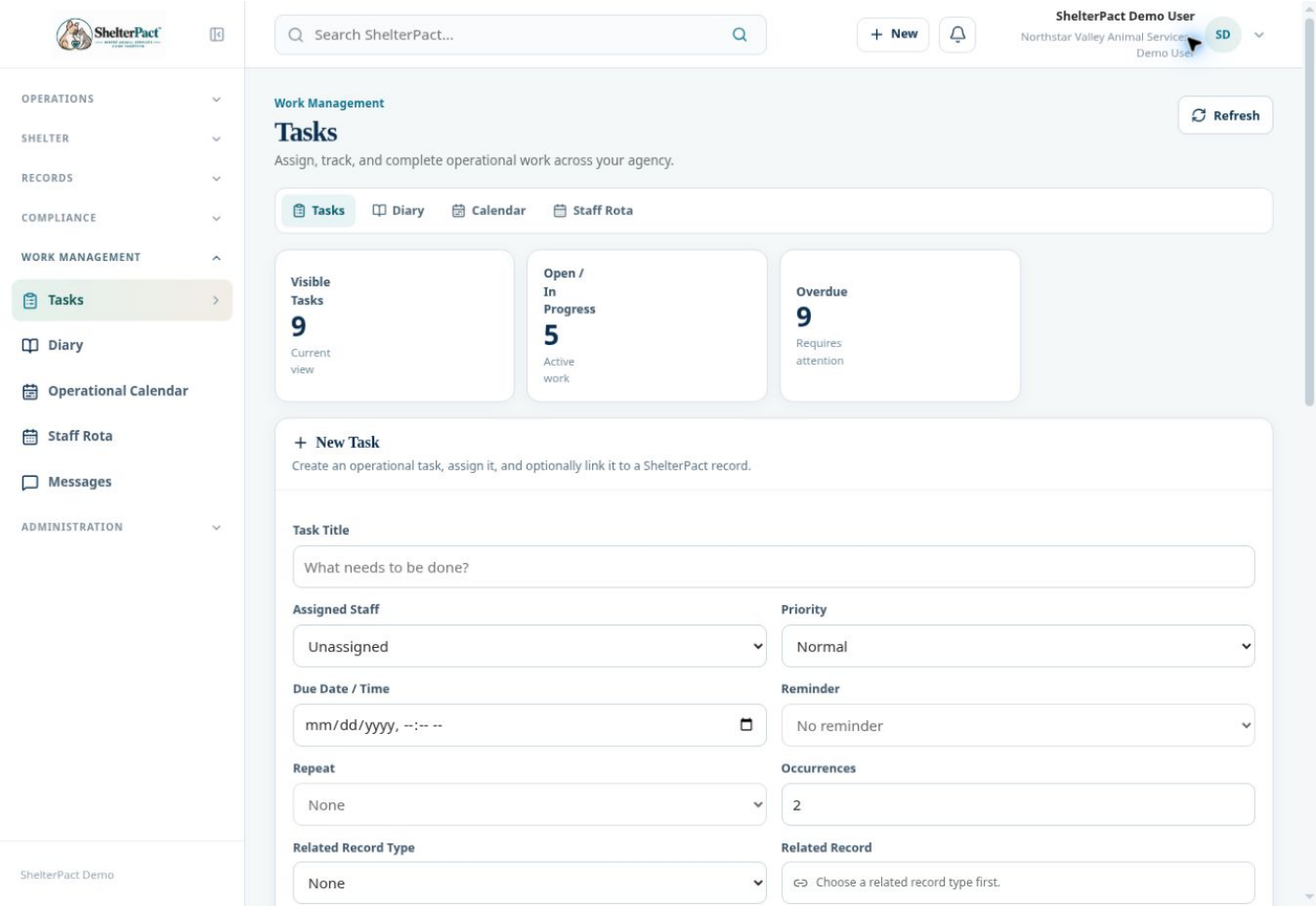


Figure 33. Tasks workspace in the ShelterPact demo.

# Diary

Find it: Work Management / Diary

Diary is for dated notes, appointments, and follow-ups. Entries can be assigned to staff, scheduled with start and end times or all-day status, given a reminder and recurrence, and linked to a record. Diary Entries lists the date, assignment, related record, status, and creator.

Use Diary for scheduled appointments or dated notes and Tasks for work requiring completion tracking. Both appear in the Operational Calendar.

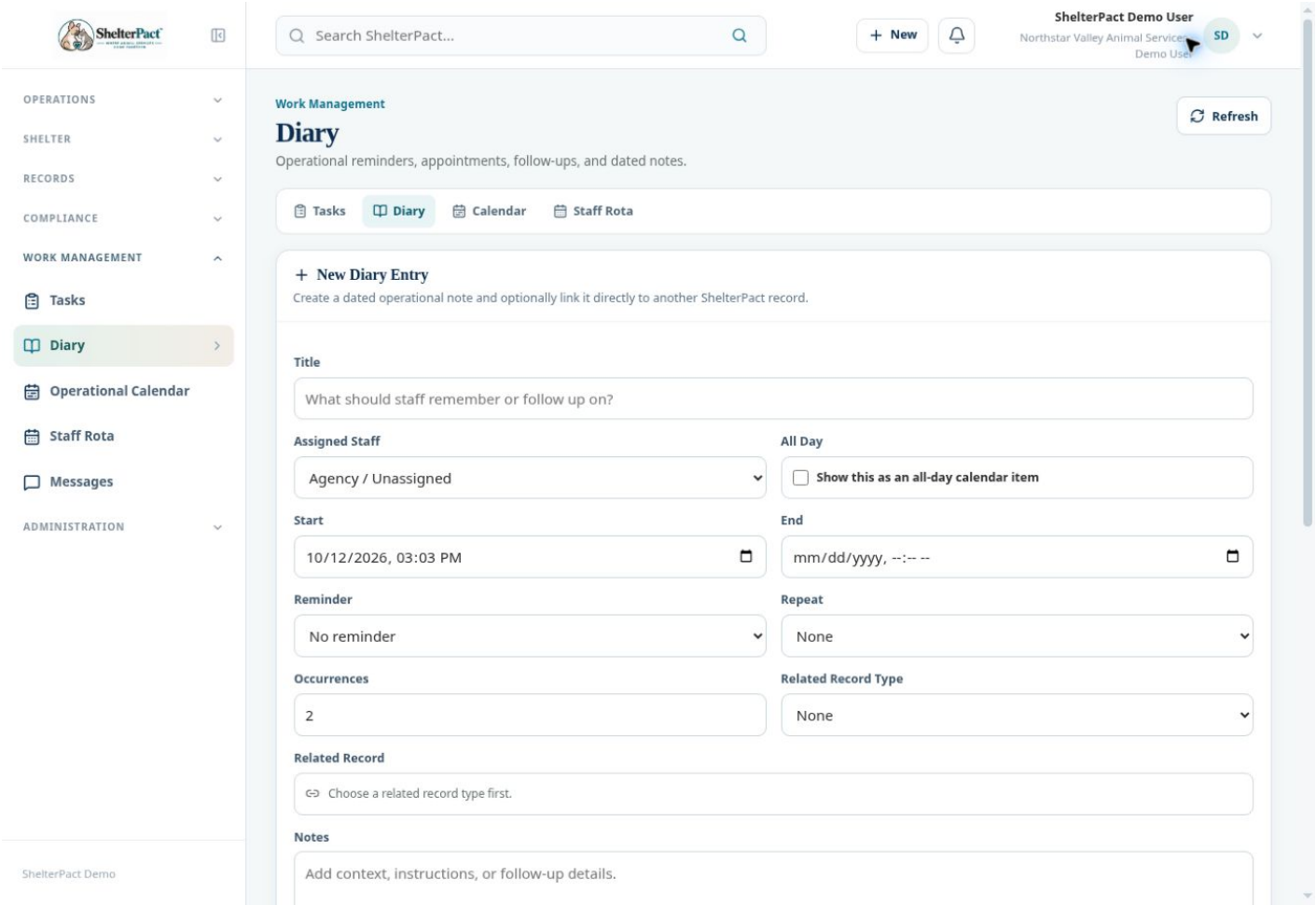


Figure 34. Diary workspace in the ShelterPact demo.

# Operational Calendar

Find it: Work Management / Operational Calendar

View tasks, diary entries, and staff shifts in a shared schedule. Select Day, Week, Month, or Agenda, change the displayed date, or use Today. Staff filters and the Tasks, Diary, and Shifts toggles control what is visible.

If an item seems missing, check the displayed dates, staff filter, and enabled item types. Use Tasks, Diary, or Staff Rota to maintain the source item.

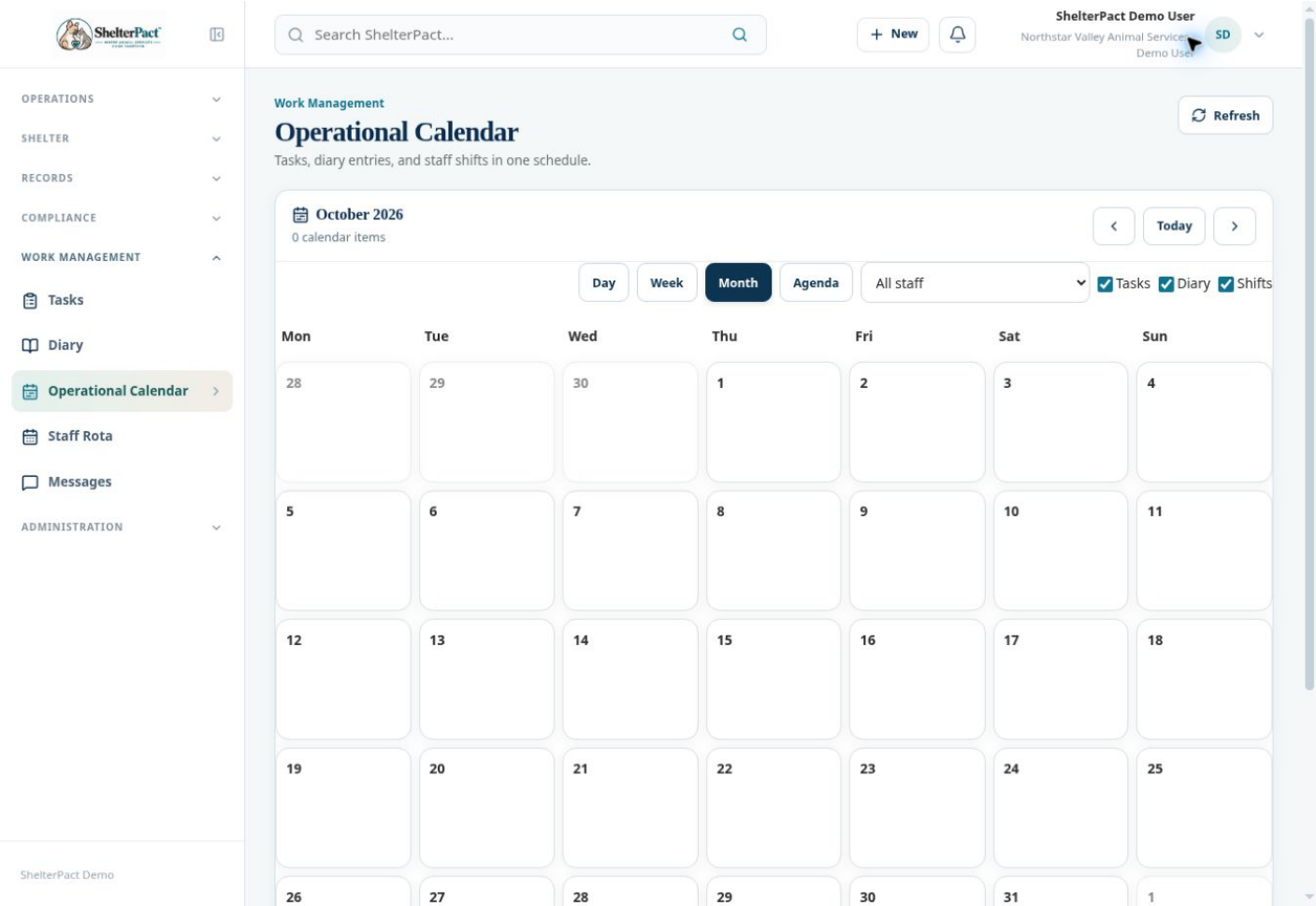


Figure 35. Operational Calendar workspace in the ShelterPact demo.

# Staff Rota

Find it: Work Management / Staff Rota

Schedule staff and review availability and required coverage. Select a date to load its Monday-through-Sunday week. Shifts include staff, date, start and end, type, status, assignment, breaks, recurrence, and notes. Coverage rules define minimum staffing for an assignment, time range, and days.

Review coverage gaps and conflicts after scheduling. Leave and Call Out affect availability. A view with no coverage warnings is meaningful only in relation to the configured coverage rules.

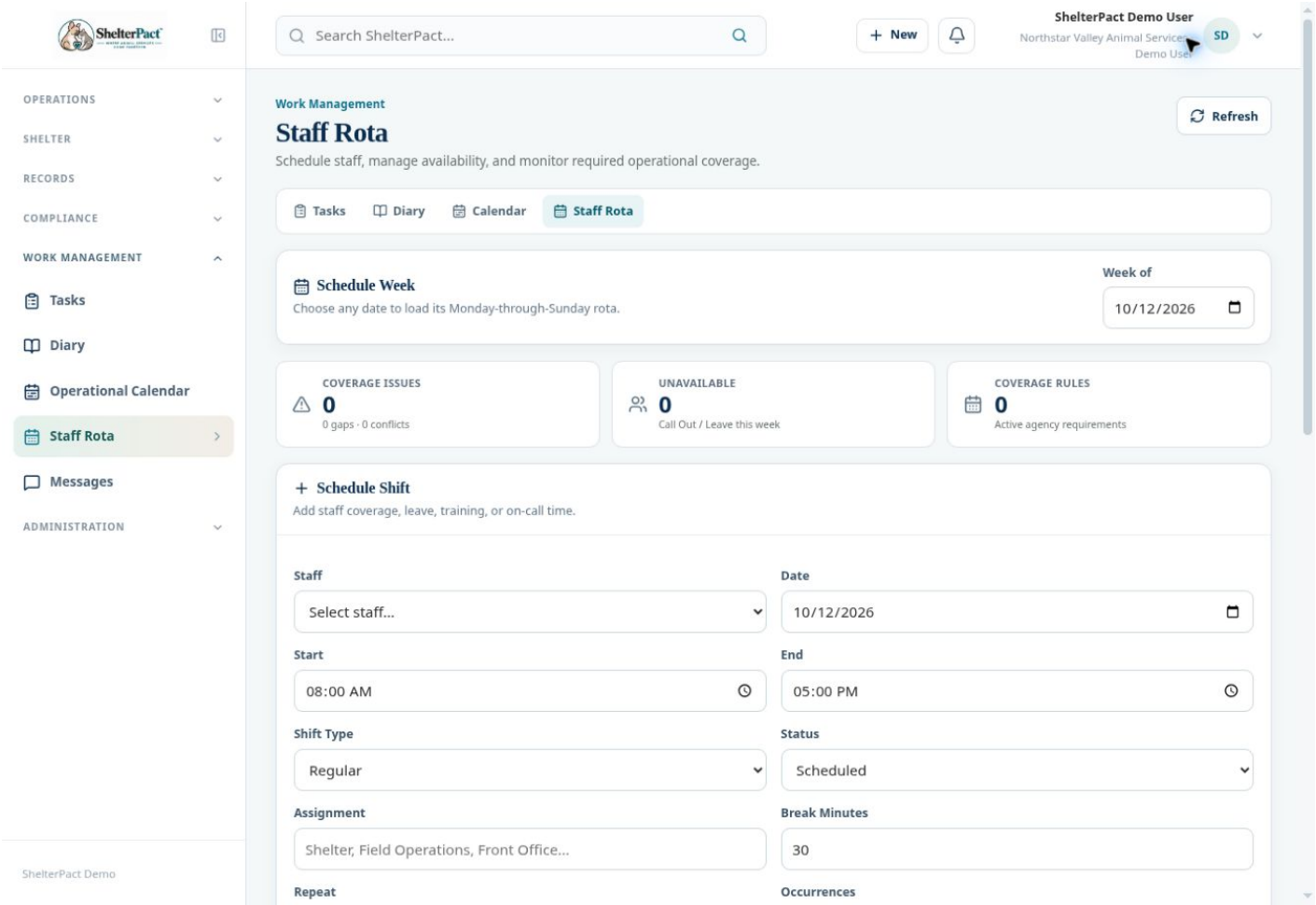


Figure 36. Staff Rota workspace in the ShelterPact demo.

# Messages

Find it: Work Management / Messages

Messages provides operational conversations linked to staff and records. Choose New Conversation or open an existing thread. Active, Closed, and Archived views separate current discussions from finished history. Discuss links on records help keep a conversation attached to its subject.

Use the linked record for formal changes and authoritative details. Close or archive finished discussions according to your agency's practices rather than treating a conversation as a substitute for a record update.

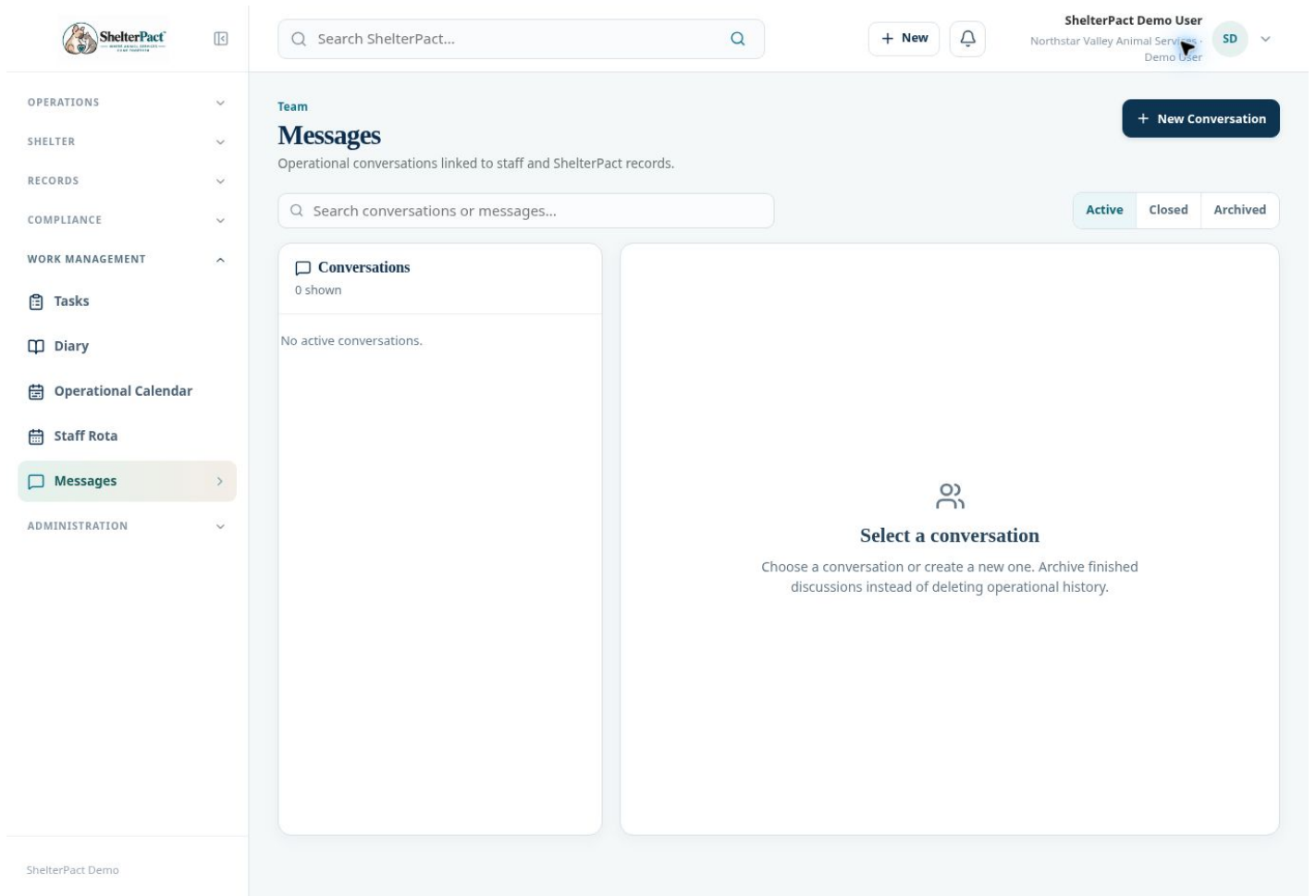


Figure 37. Messages workspace in the ShelterPact demo.

# 8. Administration

## Financial

Find it: Administration / Financial

Manage the fee schedule, charges, payments, receipts, adjustments, refunds, and audit history. Overview highlights outstanding balances and recent payments. Charges and Payments provide their registers; Fee Schedule controls configured fees; Audit is available to authorized staff. Pay begins collection for eligible outstanding items.

Verify the responsible person, selected charges, method, and amount before recording payment. Use the appropriate adjustment or refund workflow for corrections and preserve the financial history.



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Management

Financial

Organization fee schedule, charges, payments, receipts, adjustments, refunds, and audit history.

OUTSTANDING

\$125.00

2 open charges

COLLECTED TODAY

\$0.00

\$305.00 net collected

REFUNDED

\$0.00

4 payment records

FEE SCHEDULE

8

active fee items

Overview

Charges

Payments

Fee Schedule

Audit

Outstanding balances

Recent charges still requiring payment or adjustment. Use Pay to collect one or more outstanding items for the same responsible person.

|                                                    |         |     |
|----------------------------------------------------|---------|-----|
| Citation DEMO-CIT-3002                             | \$50.00 | Pay |
| DEMO-CHG-4003 · DEMO-A-0002 Scout · Morgan Bennett |         |     |
| Citation DEMO-CIT-3001                             | \$75.00 | Pay |
| DEMO-CHG-4002 · DEMO-A-0001 Maple · Avery Carter   |         |     |

Recent payments

Latest receipts and payment status.

|                                   |          |
|-----------------------------------|----------|
| DEMO-RCPT-RECLAIM-0001            | \$95.00  |
| Avery Carter · card · Completed   |          |
| DEMO-RCPT-5003                    | \$85.00  |
| Morgan Bennett · card · Completed |          |
| DEMO-RCPT-5002                    | \$100.00 |
| Taylor Hayes · cash · Completed   |          |
| DEMO-RCPT-5001                    | \$25.00  |
| Avery Carter · card · Completed   |          |

Figure 38. Financial workspace in the ShelterPact demo.

# Financial Operations

Find it: Administration / Financial Operations

Closeout, Deposits & Reconciliation manages the revenue process after collection. Cashier closeout closes collection periods and routes them for review when required. Undeposited payments are selected into deposit batches; batches are then reconciled to the bank deposit. Exceptions identify issues requiring attention.

Prepare and review a deposit before reconciling it. The workspace identifies reconciled deposits as locked. Review charge adjustments separately and use authorized correction workflows for differences.

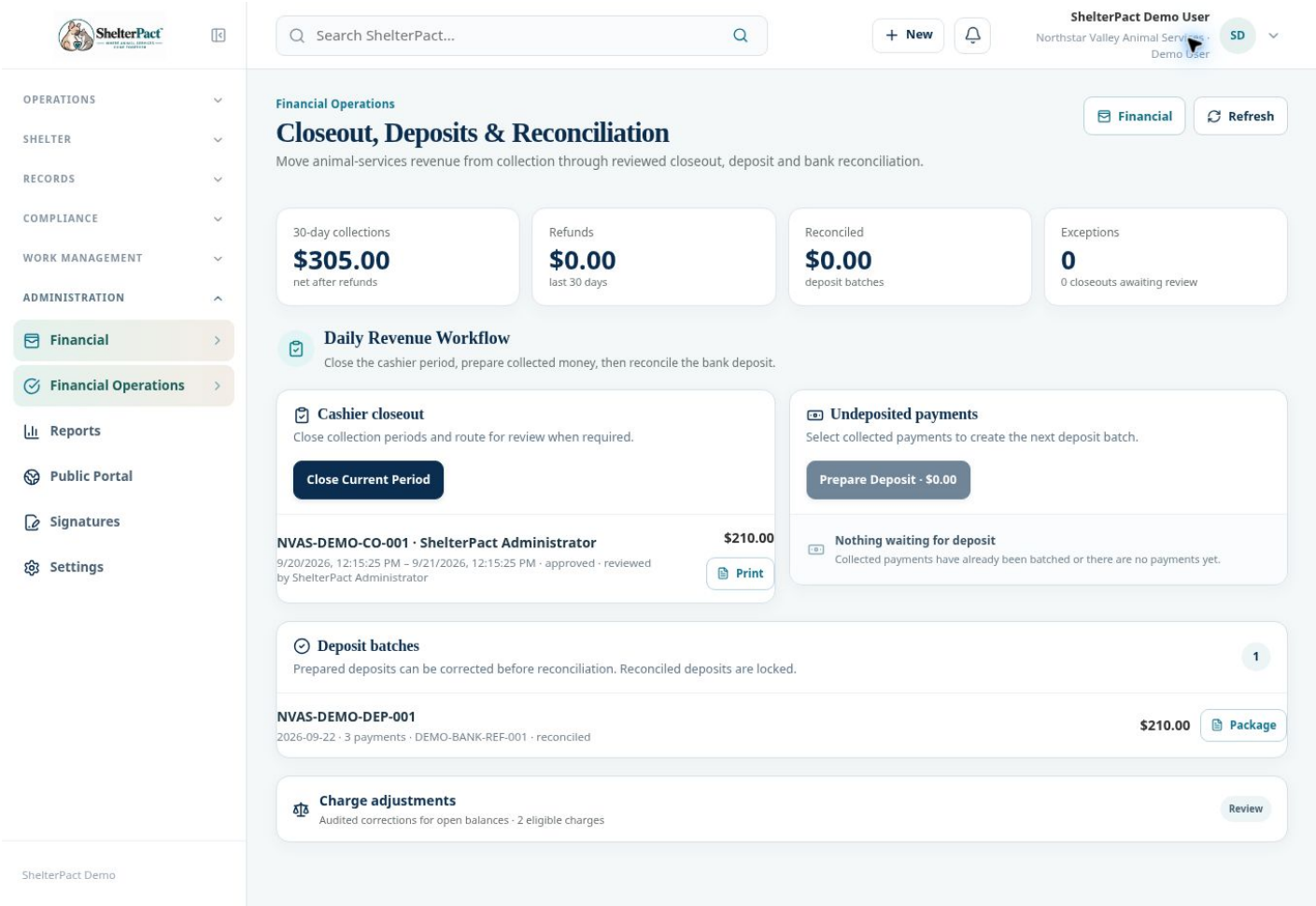


Figure 39. Financial Operations workspace in the ShelterPact demo.

# Reports

Find it: Administration / Reports

Report Center combines managed reports, standard operational reports, and organization-specific custom reports. Search or select a category, use favorites for frequent work, and review recent runs. Managed reports provide Run Report and, where permitted, Customize; Create Report opens report authoring.

Review a report's criteria and date range before running or exporting. Enabled managed reports depend on organization selection and module access. A report result reflects its selected data scope, not necessarily all agency records.

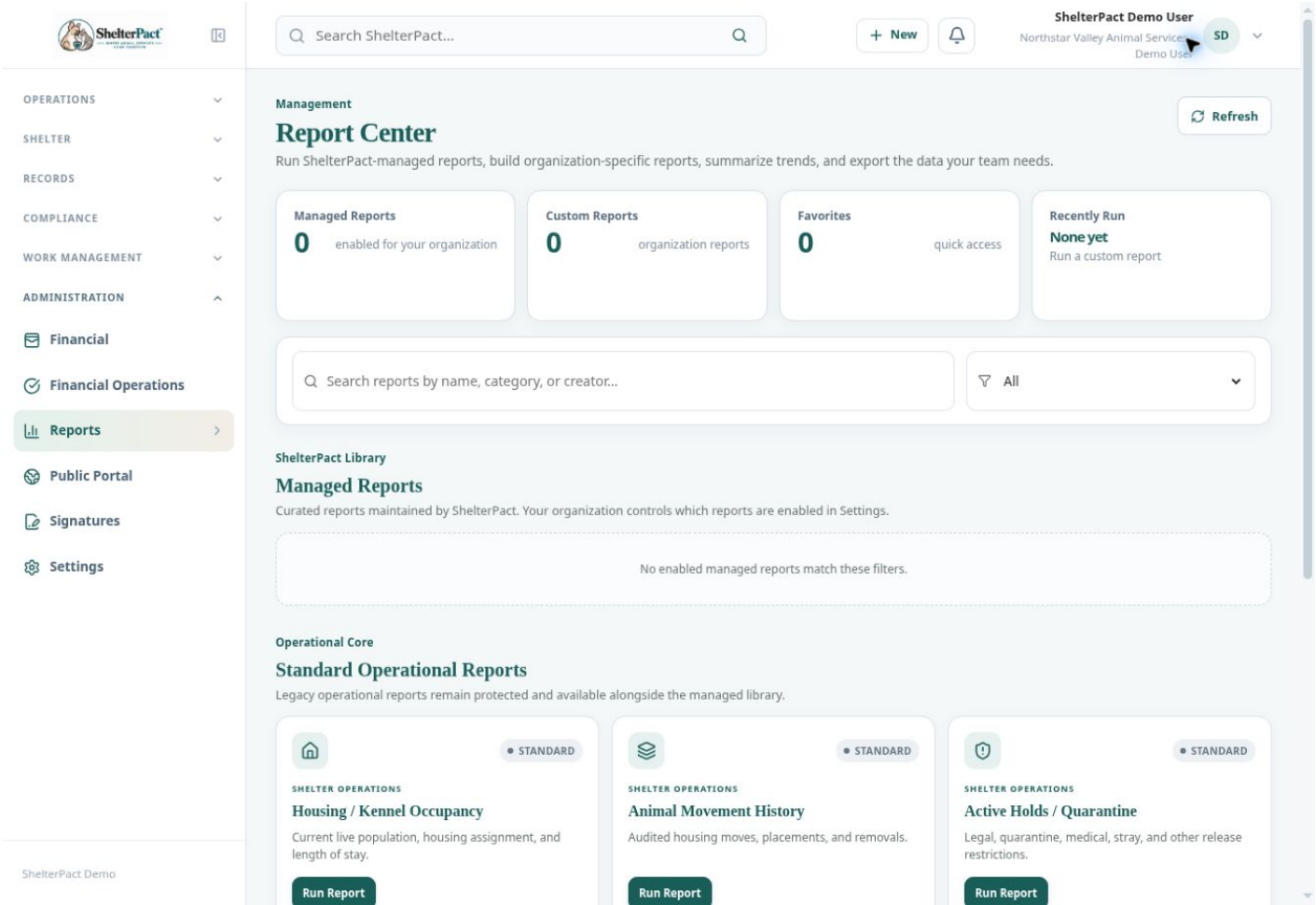


Figure 40. Reports workspace in the ShelterPact demo.

## Public Portal

Find it: Administration / Public Portal

The staff Public Portal area manages public submissions, applications, payments, service settings, and citizen-facing links. Overview summarizes activity and balances. Requests handles all submissions; Applications focuses on adoption, foster, and rescue applications; Payments shows portal-related amounts. Settings controls available services and instructions; Public Links provides service URLs.

Review the submission and linked workflow before processing it. ShelterPact Financial remains the authoritative ledger. Portal management uses its own navigation, with Back to ShelterPact returning to the main application.



## Public Portal

Manage public services, applications, requests, payments, and citizen-facing links.

[Open Public Portal](#)

[← Back to ShelterPact](#)

[Overview](#)
[Requests](#)
[Applications](#)
[Payments](#)
[Settings](#)
[Public Links](#)

Portal status

Enabled

Northstar Valley Animal Services

Open requests

8

Awaiting staff or public action

Applications

3

Adoption, foster, and rescue

Outstanding

\$75.00

\$75.00 collected

Requests

Review all public submissions.

Applications

Review adoption, foster, and rescue applications.

Payments

See assessed, paid, and outstanding portal amounts.

Settings

Control public services and instructions.

Public Links

Copy or open citizen-facing service links.

Recent activity

The five most recent public requests.

| REFERENCE                  | REQUEST          | PERSON                                       | STATUS           | BALANCE | SUBMITTED |
|----------------------------|------------------|----------------------------------------------|------------------|---------|-----------|
| NVAS-DEMO-PORT-009<br>Demo | Citation Payment | Morgan Bennett<br>morgan.bennett@example.com | Paid             | \$0.00  | 9/26/2026 |
| NVAS-DEMO-PORT-008<br>Demo | Animal License   | Avery Carter<br>avery.carter@example.com     | Awaiting Payment | \$25.00 | 9/25/2026 |
| NVAS-DEMO-PORT-007         | Animal Reclaim   | Taylor Hayes                                 | Awaiting Payment | \$50.00 | 9/24/2026 |

Figure 41. Public Portal workspace in the ShelterPact demo.

# The citizen-facing portal

Open Public Portal shows the organization-branded public services page. Depending on enabled services, citizens can access licensing, citation payment, adoption applications, foster applications, rescue partner applications, owner-surrender requests, and lost or found animal reports. Reclaims use the secure link provided by the agency. Public status pages are controlled through portal settings.

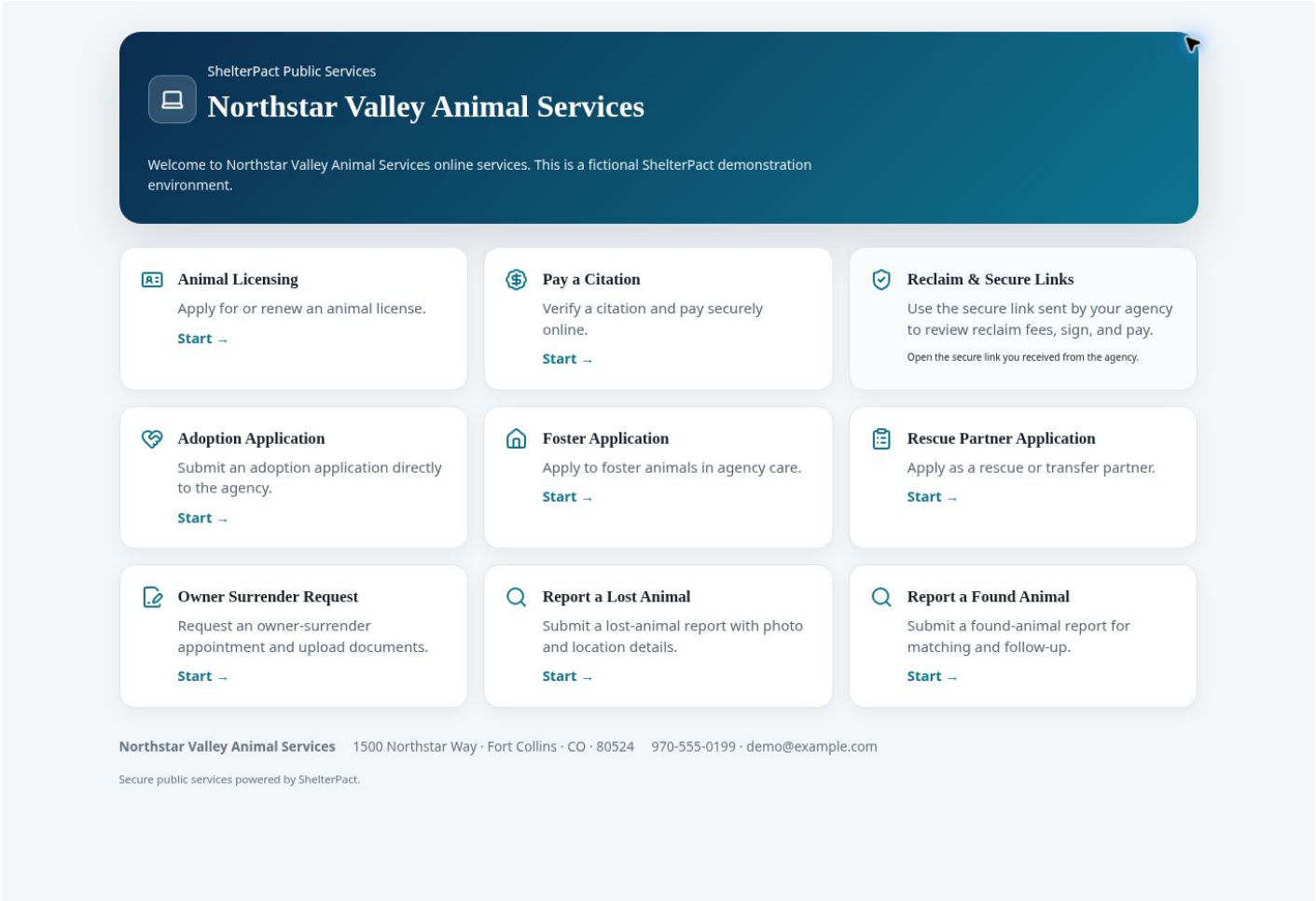


Figure 42. The public-facing demo portal shows enabled services for citizens.

The shared demo's portal management is read only: approvals, processing, payment, link renewal, and status-changing controls are disabled. The demo payment provider is disabled. A submitted public request still requires staff review and the appropriate operational workflow; it is not automatically a completed intake or outcome.

# Signatures

Find it: Administration / Signatures

The Signatures navigation link opens Document Center. It gathers documents needing attention, drafts, completed items, and all documents. Rows show type, status, signature progress, revision, and creation time. Open a document to review its signing and finalization state, final PDF, delivery, revision history, and audit status.

Required signer slots must be complete before finalization. Use All documents to include completed and voided history. Templates & Manual Documents returns to the Forms & Documents workspace.



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Search ShelterPact...

+ New

ShelterPact Demo User  
Northstar Valley Animal Services · Demo User

Documents

Document Center

One place for generated documents, signing, completion, final PDFs, delivery, revision history, and audit status.

0 Needs attention

0 Draft

6 Completed

8 All documents

Search document title or template...

8 documents

| Document                                                                         | Type     | Status    | Signatures     | Revision | Created                |                        |
|----------------------------------------------------------------------------------|----------|-----------|----------------|----------|------------------------|------------------------|
| <b>Demo Civil Citation Notice - Ranger - Revision 2</b><br>Civil Citation Notice | citation | COMPLETED | 2/2 · required | 2        | 10/11/2026, 2:27:30 PM | <a href="#">View →</a> |
| <b>Demo Adoption Agreement - Milo - Revision 2</b><br>Adoption Agreement         | adoption | COMPLETED | 2/2 · required | 2        | 10/11/2026, 2:27:30 PM | <a href="#">View →</a> |
| <b>Demo Foster Agreement - Atlas</b><br>Foster Care Agreement                    | Foster   | COMPLETED | 2/2 · required | 1        | 10/11/2026, 2:20:22 PM | <a href="#">View →</a> |
| <b>Demo Rescue Transfer Agreement - Cleo</b><br>Rescue Transfer Agreement        | Transfer | COMPLETED | 2/2 · required | 1        | 10/11/2026, 2:20:22 PM | <a href="#">View →</a> |
| <b>Demo Adoption Agreement - Milo</b><br>Adoption Agreement                      | adoption | VOIDED    | 0/1 · required | 1        | 9/26/2026, 12:15:25 PM | <a href="#">Open →</a> |
| <b>Demo Reclaim Release - Piper</b><br>Reclaim Release                           | reclaim  | COMPLETED | 1/1 · required | 1        | 9/25/2026, 12:15:25 PM | <a href="#">View →</a> |
| <b>Demo Rabies Certificate - Maple</b><br>Rabies Certificate                     | rabies   | COMPLETED | Not required   | 1        | 9/24/2026, 12:15:25 PM | <a href="#">View →</a> |
| <b>Demo Civil Citation Notice</b><br>Civil Citation Notice                       | citation | VOIDED    | 0/1 · required | 1        | 9/23/2026, 12:15:25 PM | <a href="#">Open →</a> |

ShelterPact Demo

Figure 43. Signatures workspace in the ShelterPact demo.

# Settings

Find it: Administration / Settings

Settings is the index for organization administration and configuration. It includes setup, agency identity, data portability, subscription, housing, users, roles, lookup lists, financial and compliance rules, reports, external publishing, document automation, holds, outcomes, and retention.

Open the relevant card to review its configuration. Some cards remain visible while their editing controls require administrator permissions. Changes should reflect your agency's approved operating procedures.

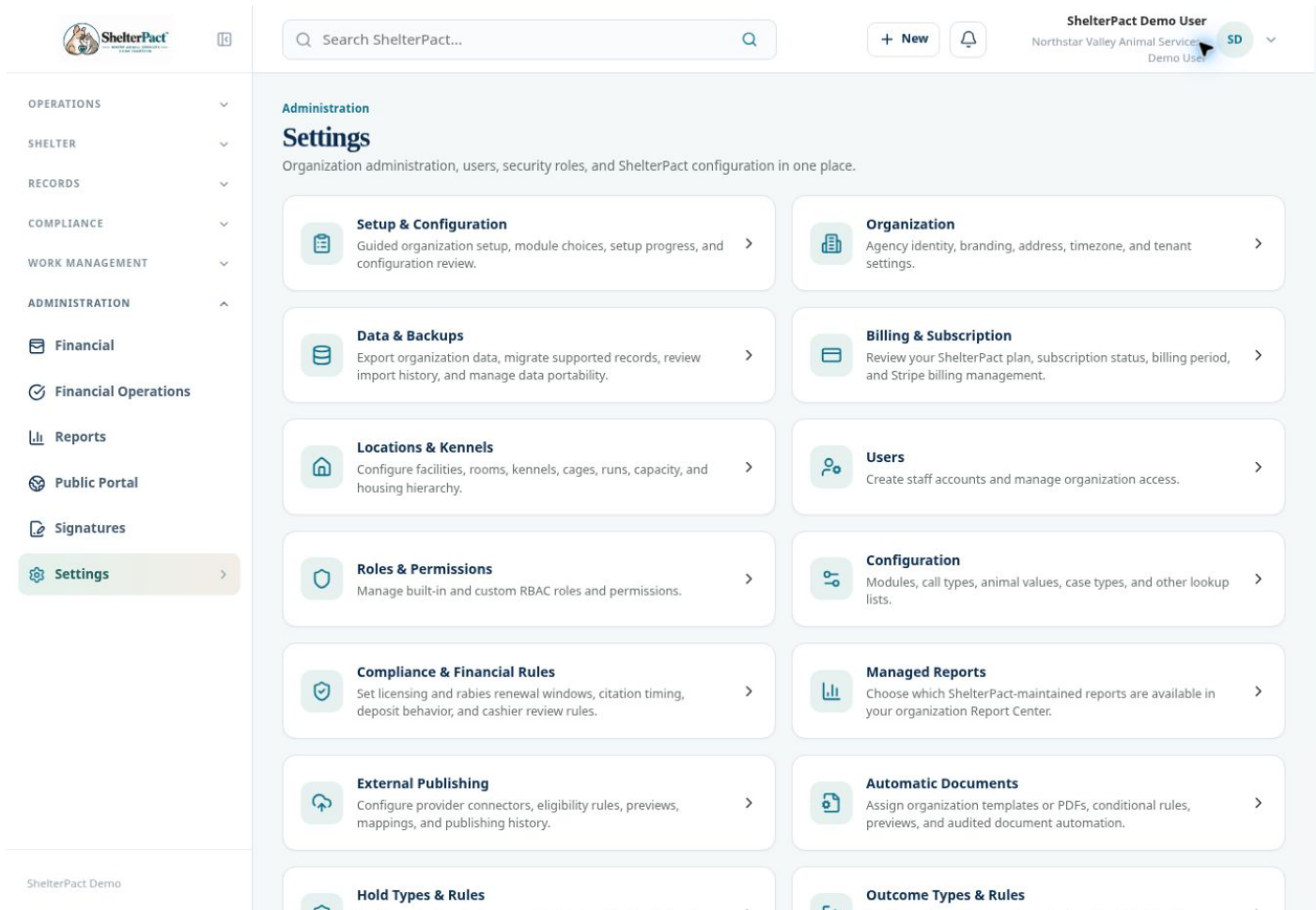


Figure 44. Settings workspace in the ShelterPact demo.

## 9. Organization settings and configuration

Select Administration / Settings to reach the following areas. The index describes all 15 settings destinations. Setup & Configuration, Billing & Subscription, and Compliance & Financial Rules require permissions unavailable to the shared demo account; their purpose is described here without implying the demo grants editing access.

| Settings area                | Purpose and use                                                                                                                                                                                                                                                                                                       |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Setup & Configuration        | Guided organization setup, module choices, setup progress, and configuration review.                                                                                                                                                                                                                                  |
| Organization                 | Agency identity, contact details, addresses, jurisdiction, timezone, public and field operating hours, branding, shelter stay thresholds, optional automatic intake hold, and map defaults.                                                                                                                           |
| Data & Backups               | Organization data export, supported migration, import history, and data portability.                                                                                                                                                                                                                                  |
| Billing & Subscription       | Plan, subscription state, billing period, and billing management for authorized administrators.                                                                                                                                                                                                                       |
| Locations & Kennels          | The physical housing hierarchy: facilities, rooms, kennels, cages, runs, receiving and isolation areas, and capacity. This supports Current Population and Kennel Board.                                                                                                                                              |
| Users                        | Staff accounts, assigned roles, and officer/unit numbers. The demo allows reviewing users; changing assignments requires management permission.                                                                                                                                                                       |
| Roles & Permissions          | Review access by role and permission category. Built-in roles are protected from rename/delete; the Administrator recovery role retains all permissions.                                                                                                                                                              |
| Configuration                | Lookup lists and module visibility. Lists include species, breeds, colors, sex, altered status, animal status, intake reasons, relationships, call and case types, priorities, actions, medical types, location types, and payment methods. Removed options are deactivated while history retains its original value. |
| Compliance & Financial Rules | License and rabies renewal timing, citation deadlines, deposit behavior, and cashier review requirements.                                                                                                                                                                                                             |
| Managed Reports              | Choose which maintained reports appear in Report Center. Disabling a report does not delete its data or custom reports. Availability also depends on module access.                                                                                                                                                   |
| External Publishing          | Provider settings, eligibility rules, previews, mappings, transport readiness, and publishing history.                                                                                                                                                                                                                |
| Automatic Documents          | Assign templates or uploaded PDFs, configure conditional rules, signing requirements, generation timing, and completion-delivery policy.                                                                                                                                                                              |

| Settings area            | Purpose and use                                                                                                                                                                         |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hold Types & Rules       | Default periods, review timing, notification lead time, blocking behavior, release authorization, and required linked information. Match approved local requirements and agency policy. |
| Outcome Types & Rules    | Available dispositions and required recipient, destination, reason, and custody-closure behavior. Deactivation removes future selections while preserving historical records.           |
| Data Retention & Archive | Retention for eligible completed tasks, diary entries, historical shifts, and read notifications; archive and purge review with permanent audit history.                                |

# Data export, migration, and backup boundaries

Data & Backups offers a tenant-scoped portability package containing organization records and organization-owned files. Passwords, sessions, MFA secrets, platform billing and entitlements, and external-publishing credentials are excluded or redacted. A data export is not a full disaster-recovery backup.

The migration area describes supported ASM3 packages containing animal.csv and owner.csv plus supported optional tables. Validation and planning precede execution. Customer import execution requires a fresh plan without blockers and an explicit IMPORT confirmation. Imports are disabled in the public demo. Full backup and restore controls are shown only when that feature is enabled.

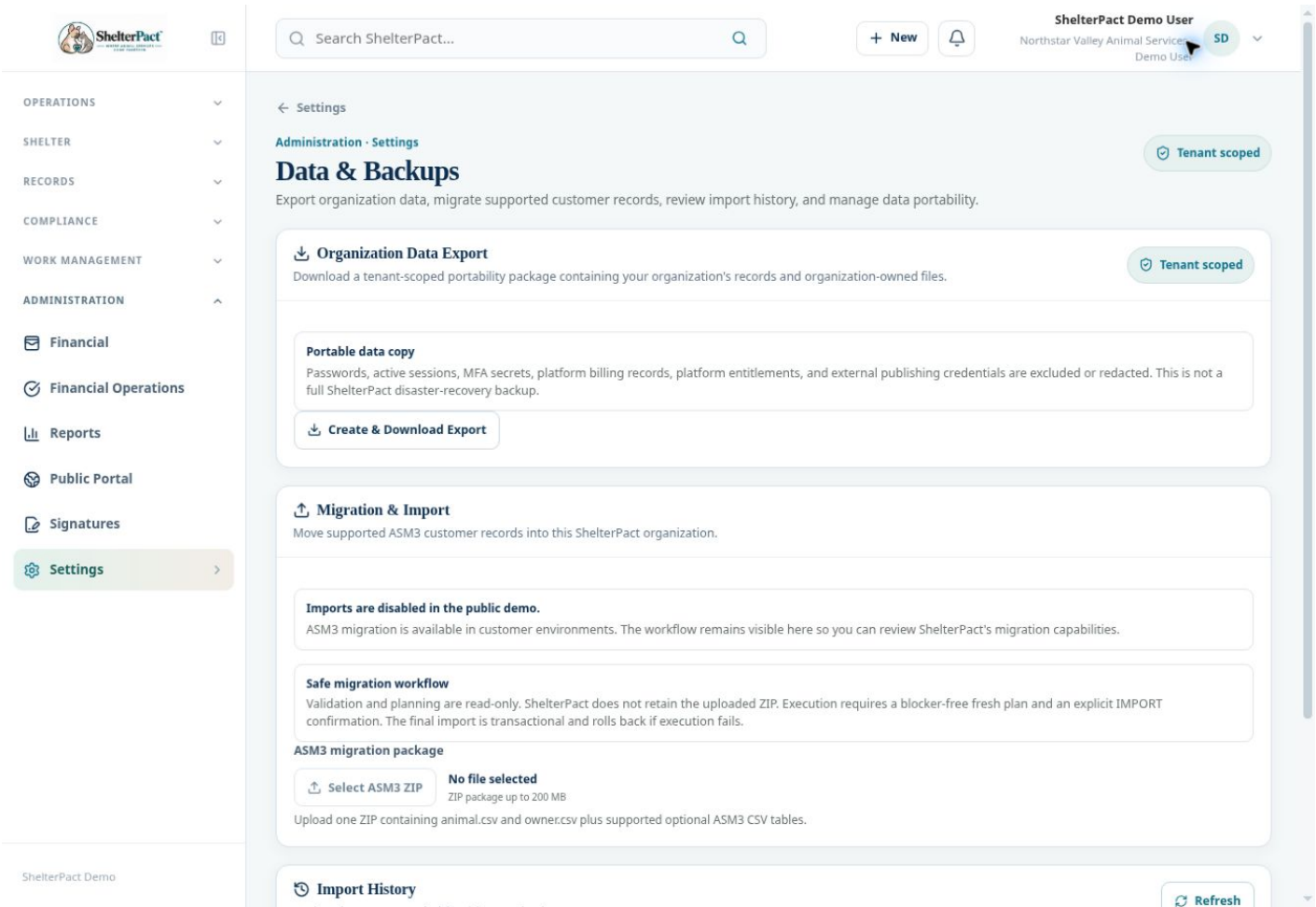


Figure 45. Data & Backups distinguishes portability exports, supported migration, and backup/restore availability.

# Staff access

Review Users to confirm each staff member's role and effective permissions. Review Roles & Permissions to see the categories and actions enabled for a role. Use the least access needed for assigned duties and have an authorized administrator make changes. An officer's unit number is connected to Field Operations.



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+ New

ShelterPact Demo User

Northstar Valley Animal Services

Demo User

SD

Administration

Users

Create organization accounts, ShelterPact roles, and officer/unit numbers.

Tenant scoped

Organization Users

6 users in this organization.

AJ

ACO Jordan Smith

jordan.demo@shelterpact.example

Animal Control Officer

AM

ACO Morgan Davis

morgan.demo@shelterpact.example

Animal Control Officer

AT

ACO Taylor Jones

taylor.demo@shelterpact.example

Animal Control Officer

DS

Demo Supervisor

supervisor.demo@shelterpact.example

Supervisor

SA

ShelterPact Administrator

demo.admin@shelterpact.com

Administrator

SD

ShelterPact Demo User

demo@shelterpact.com

Demo User

Role Assignment

Manage access for ACO Jordan Smith

☐ Administrator

Full organization administration and operational access.

115

☒ Animal Control Officer

Field and enforcement access for animal control officers.

62

☐ Dispatcher

Call taking, dispatch, records lookup, and related operational access.

46

☐ Read Only

View-only access to operational records and reports.

29

☐ Shelter Staff

Animal care and records access for shelter staff.

50

☐ Supervisor

Operational supervisory access without tenant/user/role administration.

96

☐ Demo User

Restricted shared account for the public ShelterPact demo.

100

Officer / Unit Number

A-21

Required for Animal Control Officers and synchronized with Field Operations.

Effective permissions

Figure 46. Users shows staff accounts and role assignment details without requiring a change.



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+ New



ShelterPact Demo User

Northstar Valley Animal Services - Demo User

SD

Administration

Roles & Permissions

Control what each organization role can see and do.

Choose a role

Select a role to review access. Built-in roles are protected from rename/delete.

Administrator

1 user

Built-in

Animal Control Officer

3 users

Built-in

Dispatcher

0 users

Built-in

Read Only

0 users

Built-in

Shelter Staff

0 users

Built-in

Supervisor

1 user

Built-in

Demo User

1 user

Administrator

115 of 115 permissions enabled.

ASSIGNED USERS

1

PERMISSIONS

115/115

ROLE TYPE

Built-in

STATUS

Active

Role name

Administrator

Description

Full organization administration and operational access.

☒ Role active

Search permissions...

Show enabled only

115 enabled

Dashboard

1 of 1 enabled

1/1

Search

1 of 1 enabled

1/1

Calls for Service

5 of 5 enabled

5/5

Field Operations

3 of 3 enabled

3/3

Animals

3 of 3 enabled

3/3

People

3 of 3 enabled

3/3

Figure 47. Roles & Permissions organizes access by role and permission category.

ShelterPact Help Center | Complete Site Walkthrough

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## External publishing readiness

External Publishing prepares animal data for adoption networks. The demo shows Petfinder configuration and field mappings, eligibility rules, prepared-export previews, connection status, and run history. Eligibility can require photos, breed, known sex, active custody, and absence of blocking holds. Prepared Export Preview validates preparation without transmitting data.

In the inspected demo, live Petfinder network sending is disabled by the platform safety switch and automatic publishing is unavailable. Adopt-a-Pet is represented as a reserved connector. A configured connector or successful preview should not be treated as proof that an animal has been published.

The screenshot displays the 'External Publishing' settings page in the ShelterPact interface. The left sidebar contains navigation links: OPERATIONS, SHELTER, RECORDS, COMPLIANCE, WORK MANAGEMENT, ADMINISTRATION, Financial, Financial Operations, Reports, Public Portal, Signatures, and Settings (highlighted). The main content area is titled 'Settings · Integrations' and 'External Publishing'. It includes a 'Refresh' button and a description: 'Prepare ShelterPact animal records for external adoption networks through reusable provider connectors.' Below this, there are two connector cards: 'Petfinder' (Not configured) and 'Adopt-a-Pet' (Not configured). The 'Petfinder' card shows 'Manual FTP transport' and 'No preview yet'. The 'Adopt-a-Pet' card shows 'Next connector' and 'No preview yet'. Below these cards is the 'Petfinder configuration' section, which includes a toggle for 'Integration enabled' (On), a status for 'Automatic publishing' (Unavailable), and input fields for 'Petfinder shelter / member ID' (DEMO-NVAS) and 'Petfinder FTP username' (Leave blank if Petfinder assigned the same value as the member ID). To the right is the 'Connector status' section, which shows a table of configuration details.

| Configuration            | Not configured      |
|--------------------------|---------------------|
| FTP credential           | Not stored          |
| Transport code           | Installed           |
| Live network sending     | Platform disabled   |
| Connection               | Not configured      |
| Managed snapshot records | 0                   |
| Last connection          | 9/25/2026, 12:15:25 |

Figure 48. External Publishing exposes eligibility, provider preparation, and transport readiness.

# Document automation and signatures

Automatic Documents uses conditional rules first, then the organization default, then the built-in fallback. Rules can assign rich-document templates or uploaded PDFs. Signing may follow the template, be unnecessary, be optional, or be required. Required signer slots must be complete before finalization and official printing. Review generation timing and delivery policy for each workflow.

Keep reusable templates in Forms & Documents, workflow assignments in Automatic Documents, and signing/completion review in Document Center. These are connected views of the document process.

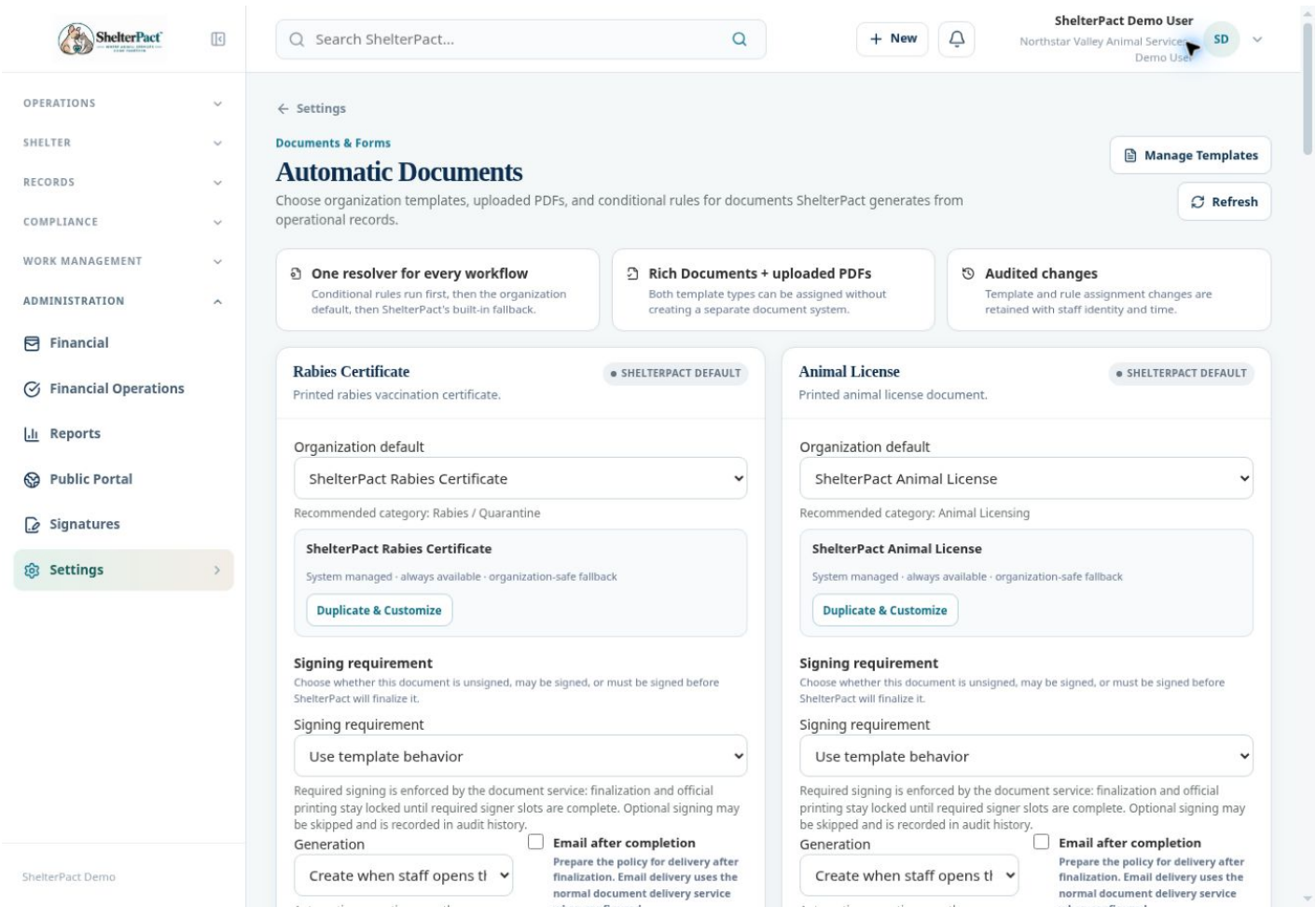


Figure 49. Automatic Documents sets template selection, required signing, and generation behavior.

## Hold rules and retention

Hold Types & Rules defines defaults for the organization, including expiry calculation, review requirements, notification lead time, movement and outcome blocking, supervisor release, required reasons or notes, and linked cases or calls. Staff must still review the individual restriction and its authority.

The screenshot displays the 'Hold Types & Rules' configuration page in ShelterPact. The interface includes a left-hand navigation menu with categories such as OPERATIONS, SHELTER, RECORDS, COMPLIANCE, WORK MANAGEMENT, ADMINISTRATION, Financial, Financial Operations, Reports, Public Portal, Signatures, and Settings. The main content area is titled 'Settings / Shelter' and 'Hold Types & Rules'. It features a search bar, a '+ New' button, and a user profile for 'ShelterPact Demo User'. Below this, there are four summary cards: 'Active hold types' (8), 'Blocking by default' (8), 'Automatic expiration' (3), and 'Review required' (6). The 'Organization Hold Rules' section allows managing default settings for each hold type. Two hold types are shown: 'Stray Hold' and 'Bite Quarantine'. Each has a 'Timing & Durations' section with 'Expiration hours' and 'Review after hours' fields, a 'Behavior Settings' section with various toggle switches, and an 'Instructions' section with a text box. The 'Stray Hold' is currently active and has an expiration of 72 hours and a review after 0 hours. The 'Bite Quarantine' is also active and has an expiration of 240 hours and a review after 216 hours.

Figure 50. Hold defaults combine timing, blocking behavior, authorization, and information requirements.

Data Retention & Archive applies only to eligible operational record categories. The inspected workspace excludes animal, medical, enforcement, financial, signed-document, and audit records from the general retention rules. It archives first and requires at least 30 days in archive before permanent purge; purge requires a reason and is permanently audited. Review eligible records and agency retention requirements before taking action.



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Settings / Data Governance

Data Retention & Archive

Control how long completed operational records remain in day-to-day views. ShelterPact archives first and requires a 30-day safety hold before permanent purge.

Protected record classes are excluded.

Animal, medical, enforcement, financial, signed-document, and audit records are not governed by these general retention rules.

Eligible to archive

0

Currently archived

0

Eligible to purge

0

Retention policies

Permanent keeps the category indefinitely. Other choices make closed/read records eligible for archive after the selected age.

|                                                                                              |                                          |                                                                      |
|----------------------------------------------------------------------------------------------|------------------------------------------|----------------------------------------------------------------------|
| <div>Completed &amp; Cancelled Tasks</div> <div>Only Completed and Cancelled tasks</div>     | <div>Keep for</div> <div>Permanent</div> | <div>0 eligible</div> <div>0 archived</div> <div>0 purge-ready</div> |
| <div>Completed Diary Entries</div> <div>Only Completed diary entries</div>                   | <div>Keep for</div> <div>Permanent</div> | <div>0 eligible</div> <div>0 archived</div> <div>0 purge-ready</div> |
| <div>Historical Staff Rota</div> <div>Completed, Call Out, Leave, and Cancelled shifts</div> | <div>Keep for</div> <div>Permanent</div> | <div>0 eligible</div> <div>0 archived</div> <div>0 purge-ready</div> |
| <div>Read Notifications</div> <div>Only notifications that have been read</div>              | <div>Keep for</div> <div>Permanent</div> | <div>0 eligible</div> <div>0 archived</div> <div>0 purge-ready</div> |

Permanent purge

Figure 51. Retention policies separate eligible operational records from protected record classes.

## 10. Where to go for common work

| I need to...                                        | Start here                                                      |
|-----------------------------------------------------|-----------------------------------------------------------------|
| Review today's priorities                           | Dashboard; then the relevant operational queue.                 |
| Dispatch an officer                                 | Calls for Service or Field Operations.                          |
| Find an animal, including past outcomes             | Animals.                                                        |
| Bring an animal into custody                        | Intake, or Owner Surrenders for the guided surrender pathway.   |
| Assign or change housing                            | Current Population, Kennel Board, or Move Animal on the record. |
| Review release restrictions                         | Holds & Quarantine and the animal's Holds section.              |
| Record care or review medication                    | Medical and the animal's Medical section.                       |
| Complete an adoption, reclaim, foster, or transfer  | Movements & Outcomes; choose the matching guided pathway.       |
| Manage a person or partner destination              | People or Partner Organizations.                                |
| Work an investigation                               | Cases; link the originating call and involved records.          |
| Issue a license, record rabies, or issue a citation | Licensing, Rabies Compliance, or Citations.                     |
| Schedule or assign work                             | Tasks, Diary, and Staff Rota; review Operational Calendar.      |
| Discuss a linked record                             | Messages or the record's Discuss control.                       |
| Collect charges or review receipts                  | Financial.                                                      |
| Close a cashier period or reconcile a deposit       | Financial Operations.                                           |
| Generate or maintain a template                     | Forms & Documents.                                              |
| Review required signing and a final PDF             | Signatures / Document Center.                                   |

| I need to...                        | Start here                                             |
|-------------------------------------|--------------------------------------------------------|
| Review public submissions           | Public Portal / Requests or Applications.              |
| Run or export a report              | Reports / Report Center.                               |
| Change agency rules or staff access | Settings, with the required administrator permissions. |

---

## 11. A connected daily workflow

1. Review Dashboard attention items and outstanding tasks.
2. Work incoming calls in Calls for Service and Field Operations; connect permanent people and animal records.
3. If the animal enters agency custody, complete Intake and assign appropriate housing.
4. Review holds, medical needs, compliance, and linked cases; create follow-up work as needed.
5. Use the correct guided movement or outcome pathway when placement or disposition is appropriate. Finish its financial, document, signature, and final review steps.
6. Review collections in Financial, then complete the appropriate closeout, deposit, and reconciliation steps in Financial Operations.
7. Use Reports to review the selected period and operational scope, and the Calendar and Rota to plan upcoming work.

## 12. Understanding unavailable actions

| What you see                                                    | What to check                                                                                                                    |
|-----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| A section is missing                                            | Ask your administrator whether its module is enabled and your role has view access.                                              |
| A page opens but controls are disabled                          | Review required permissions, demo restrictions, current record status, and any workflow requirements.                            |
| An animal does not appear in Current Population                 | Check Animals for its permanent record and Custody for whether it has an active episode.                                         |
| An outcome cannot complete                                      | Review blocking holds, eligibility, required recipient or destination, financial preparation, and required documents/signatures. |
| A report or record list looks empty                             | Reset search and status filters; verify date range, staff selection, module access, and the selected view.                       |
| A public request is submitted but no intake/outcome is finished | Review the request and its linked staff workflow; submission and operational completion are different stages.                    |
| A document cannot finalize                                      | Review required signer slots and document status in Document Center.                                                             |
| An animal is prepared but not on an external adoption network   | Check connector configuration, eligibility, mappings, preview freshness, transport availability, and successful run history.     |

Use the record's history to review what happened, the workspaces to manage current queues, and Settings to control approved organization defaults. Complete each workflow through its final review so custody, finances, and documents accurately reflect the event.