

Field Services in ShelterPact

Detailed instructions with real ShelterPact screenshots

Interface reviewed October 12, 2026. Screenshots show fictional demo records. Available features and actions depend on organization modules, permissions, and record state.

Capture calls, dispatch staff, work maps and investigations, and manage licensing, citations, and compliance follow-up.

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Create a Call for Service

Calls for Service captures the initial dispatch report and preserves later assignments, status changes, notes, and links. Record the actual incident location and narrative once.

Before you begin: Open Operations / Calls for Service / New Call. Have caller information, incident details, known hazards, and initial priority available.

Step-by-step instructions

1. In Dispatch Intake, choose Priority, Call Type, Source, and Received Date / Time. Confirm the received time reflects the report.
2. Enter Location / Address. Review the automatically placed map pin; adjust the exact incident point only when the address match is not the response location.
3. Enter Location Notes and Hazards / Officer Safety. Distinguish confirmed information from unverified reports.
4. Enter Caller First Name, Last Name, Phone, and Email as known. Choose caller address same as incident location only when accurate.
5. If the caller address differs, enter the separate street, unit, city, state, and ZIP fields.
6. Record Narrative with the initial report and choose Assign Officer or leave Unassigned for dispatch review.
7. Select Create Call. Review the assigned call number, location, priority, narrative, and assignment, then manage response through the call record.

Screenshots

Figure 1. Call creation separates dispatch intake, location and safety, caller details, narrative, and assignment. (part 1 of 3)



OPERATIONS

Dashboard

Calls for Service

Field Operations

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Calls for Service / New

Create Call for Service

Capture the dispatch record once, then preserve every assignment, status change, note, and linked animal in the audit timeline.

Dispatch Intake

How and when the call entered Animal Services.

Priority

Normal

Call Type

Stray Animal

Source

Phone

Received Date / Time

10/12/2026, 03:59 PM

Location & Safety

Where the officer is responding and what they should know before arrival.

Location / Address *

Street address, intersection, park, or location description

Auto map

Enter the incident address normally. ShelterPact automatically maps it using your organization's city, state, and ZIP as geographic context. The map pin only needs to be moved when the exact incident point differs from the address match.

Address matches are placed automatically. Click or drag only to override the exact incident point.



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Figure 1. Call creation separates dispatch intake, location and safety, caller details, narrative, and assignment. (part 2 of 3)



Location Notes

Apartment, gate code, landmark, access instructions...

Hazards / Officer Safety

Aggressive animal, weapons warning, traffic hazard, known bite history, special access concerns...

Complainant
Contact information associated with the initial report.

Caller First Name **Caller Last Name**

Caller Phone **Caller Email**

☐ **Caller address same as incident location**
Use the response location entered above as the caller address.

Caller Street Address

Street number and street name

Apartment / Unit / Address Line 2

City **State**

Figure 1. Call creation separates dispatch intake, location and safety, caller details, narrative, and assignment. (part 3 of 3)

ZIP / Postal Code

Narrative & Assignment
Initial complaint narrative and first dispatch decision.

Narrative *

What was reported? Include animal description, direction of travel, injuries, witnesses, and other relevant information.

Assign Officer

Unassigned

Cancel **Create Call**

Practical checks

The organization's geographic context assists address mapping. Confirm the pin visually before relying on directions.

Troubleshooting

What you see	What to check
The pin is incorrect	Verify the full address and adjust the incident point through the map controls.
The caller address was copied incorrectly	Correct it separately from the incident location; do not treat the two as interchangeable.

Assign an Officer, Update Response Status, and Close a Call

Dispatch Control manages the response lifecycle. Notes and Timeline preserve context for the staff handling or reviewing the incident.

Before you begin: Open the call by number and review the narrative, hazards, linked animals and people, and current assignment.

Step-by-step instructions

1. In Overview, review Call Information and the initial report before changing Dispatch Control.
2. Select Assigned Officer and an appropriate Disposition when known, then use Save Dispatch Changes for those edits.
3. Update Call Status to reflect actual progress: Open, Assigned, En Route, On Scene, Transporting, or Complete.
4. Use Notes to add a timestamped officer or dispatch note, then select Add Note. Record material actions and observations in the call.
5. Use People and Animals to review the connected permanent records; use Timeline for recorded activity.
6. Before Complete, confirm the response work, final disposition, and outstanding follow-up under agency policy.
7. If an investigation continues, create or update the linked Case and necessary tasks. Completing the call does not by itself close the case or release an animal from custody.

Screenshots

Figure 1. The call record separates dispatch control from linked record sections.

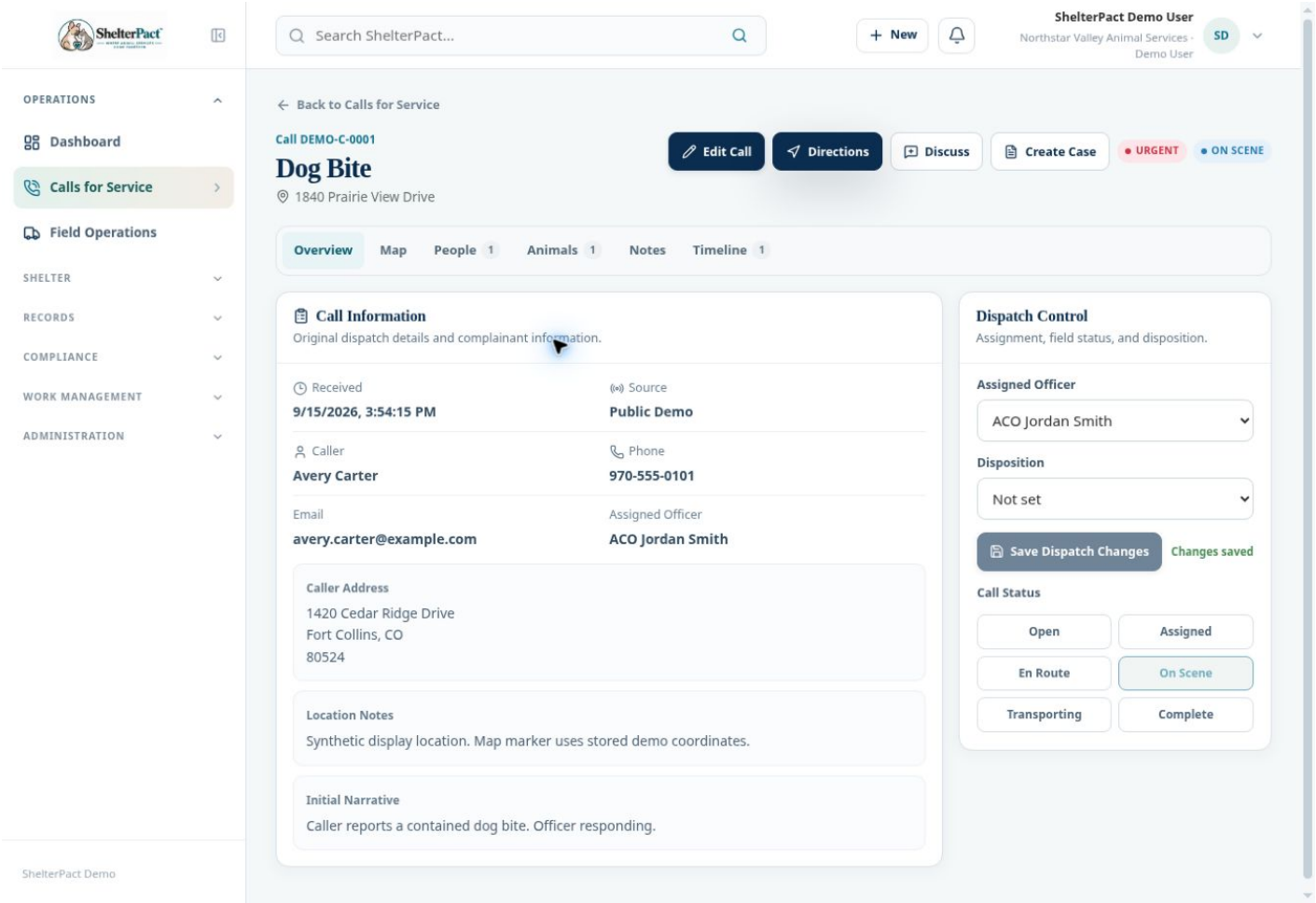


Figure 2. Notes adds operational narrative to the call history. (part 1 of 2)

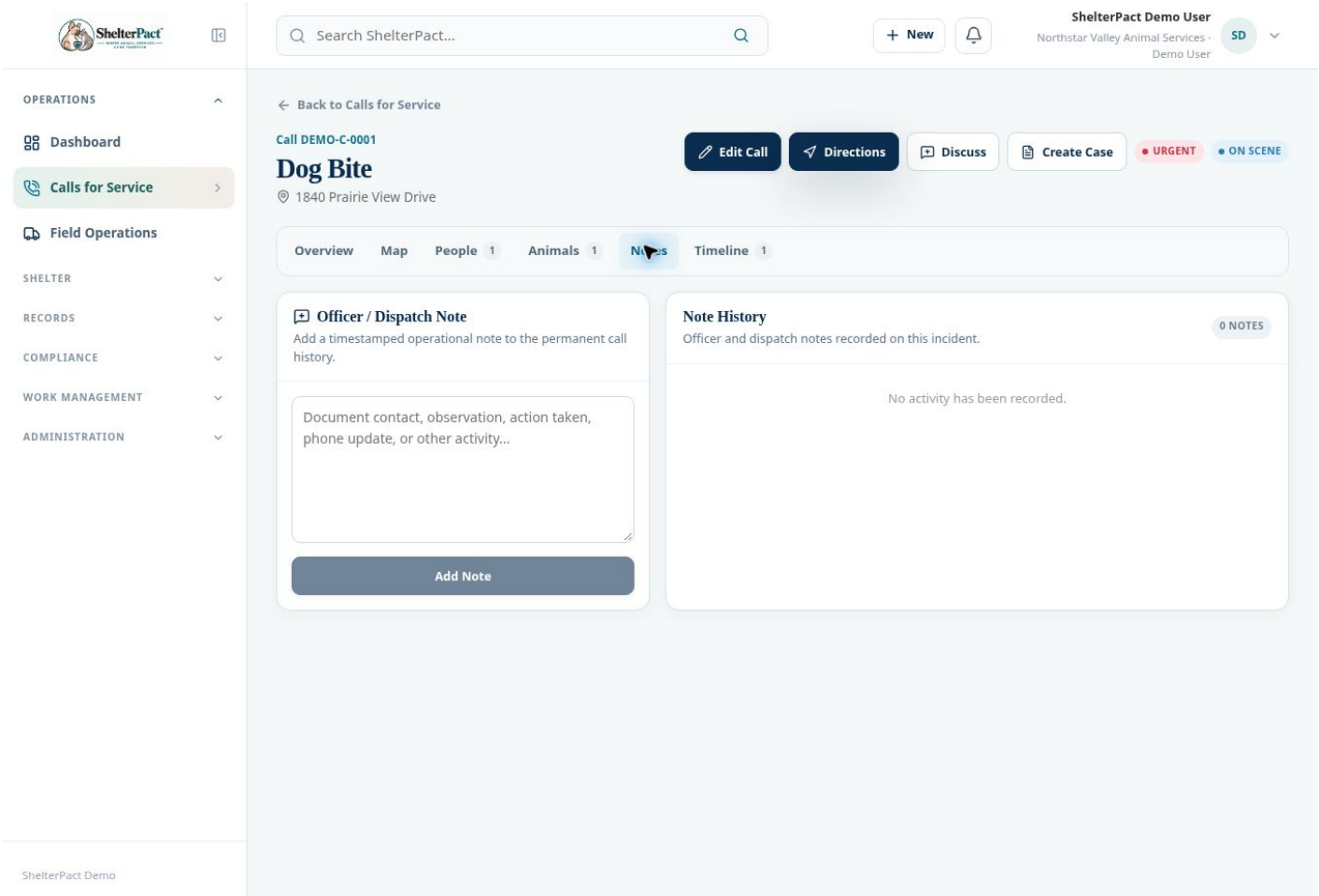


Figure 2. Notes adds operational narrative to the call history. (part 2 of 2)

Practical checks

Use Discuss for conversation but keep authoritative response updates and facts in the call record.

Troubleshooting

What you see	What to check
Save Dispatch Changes is disabled	No unsaved assignment/disposition change may exist; inspect the current values.
The call is complete but case work remains	Manage the investigation in Cases and assign follow-up tasks.

Use Field Operations Maps and Unit Status

Field Operations brings the live call queue, officer/unit status, assignments, and incident map into one dispatch workspace.

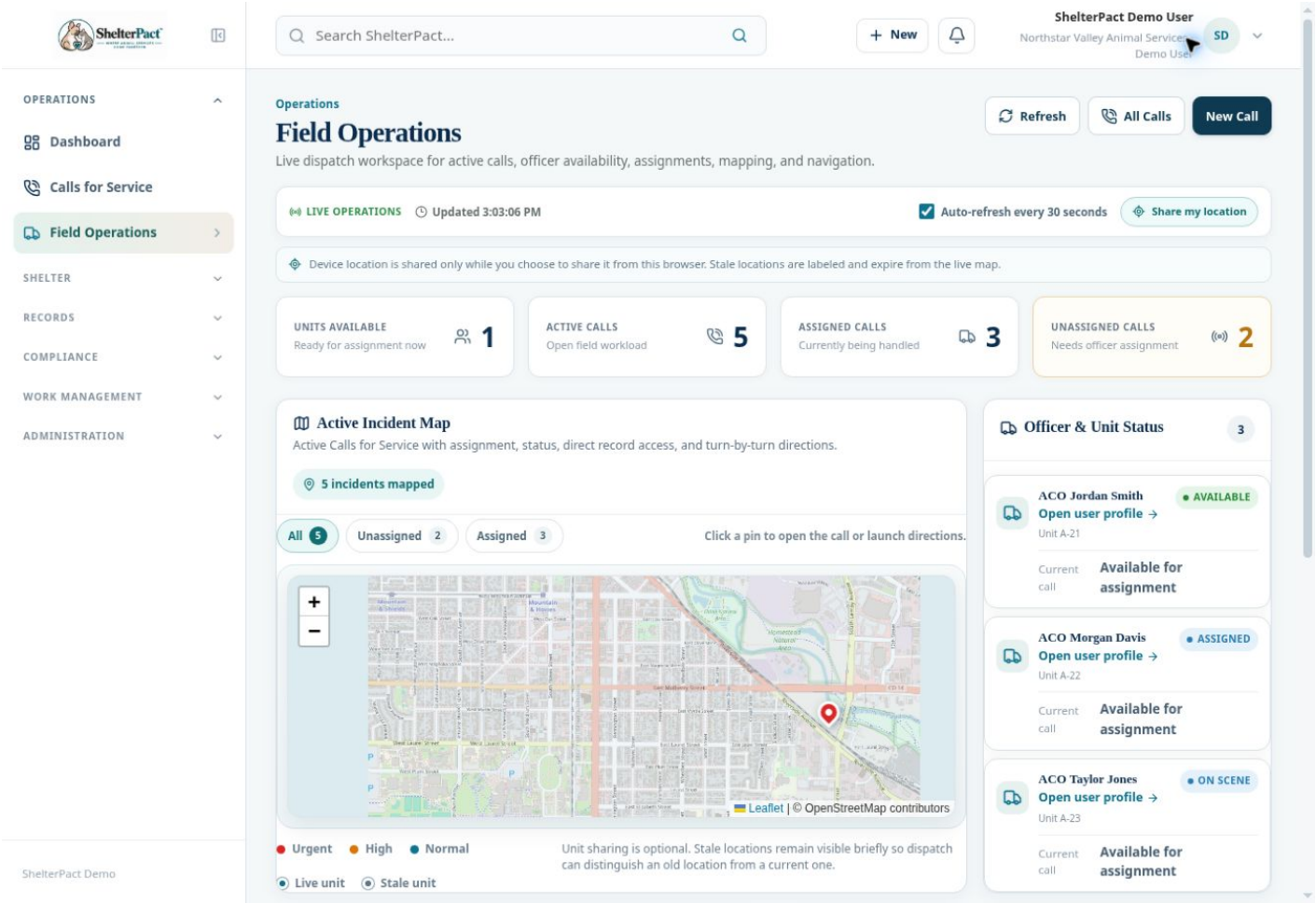
Before you begin: Open Operations / Field Operations. Review whether the organization permits optional device location sharing; do not enable browser location access on someone's behalf.

Step-by-step instructions

1. Review available units, active calls, assigned calls, and unassigned calls to assess dispatch workload.
2. Use Unassigned Queue to open a call needing assignment. Confirm priority, location, hazards, and required response before assigning an officer.
3. Use Active Assignments to open work already allocated. Review actual call status rather than assuming a unit label reflects the complete incident state.
4. Use map filters for All, Unassigned, or Assigned incidents. Select a pin to open its call or access directions.
5. Check whether a unit position is live or stale. A stale location is labelled and expires; it should not be treated as a current position.
6. If enabled and authorized, staff can choose Share my location from their own device. Sharing remains optional and begins only when chosen.
7. Use Refresh when needed; the workspace also indicates automatic refresh. Record assignment and response updates in the call itself.

Screenshots

Figure 1. Field Operations connects map pins, unit status, unassigned calls, and active assignments.



Practical checks

Map presence does not replace a safety briefing or confirmation of the actual response location.

Troubleshooting

What you see	What to check
A call has no pin	Review its address and coordinates in the call map.
The unit position is stale	Confirm location through normal dispatch procedures and inspect the sharing state.

Create and Work an Enforcement Case

Cases maintains investigation status, violations, compliance dates, enforcement actions, and connected records. A call can be its originating event without being the entire investigation.

Before you begin: Open Records / Cases / New Case, or Create Case on the relevant call. Gather the subject, animal, location, investigation type, and assignment.

Step-by-step instructions

1. Enter Case Title, Case Type, Priority, Assigned Officer, Compliance Due, Next Follow-up, and Summary as appropriate.
2. Link Originating Call, Subject / Responsible Person, Involved Animal, and Incident Address. Confirm each permanent identity before saving.
3. Select Create Case and review the case number and Case Control values.
4. Use Violations to record code/ordinance, violation date, description, responsible person, and compliance deadline, then Add Violation.
5. Use Enforcement Actions for warnings, notices, citations, court filings, reinspections, or case notes. Record action date, reference, amount or dates when appropriate, and description before Record Action.
6. Keep Status, Next Follow-up, Compliance Due, and the investigation summary current. Use Save Case after valid control changes.
7. Review Linked Records and Case History for supporting context. When closing a case, document the appropriate disposition/closing summary and preserve related records.

Screenshots

Figure 1. Case creation links the originating event with subjects, animals, and location. (part 1 of 2)



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Back to Cases

New Enforcement Record

New Case

Open an investigation and optionally link its originating call, subject, animal, and location.

Case Information

Case Title *

Example: Repeated running-at-large violations

Case Type

General Investigation

Priority

Normal

Assigned Officer

Unassigned

Compliance Due

mm/dd/yyyy

Next Follow-up

mm/dd/yyyy

Summary

Initial allegations, observations, or investigation scope...

Initial Linked Records

Originating Call

DEMO-C-0001 · Dog Bite

Subject / Responsible Person

None

Figure 1. Case creation links the originating event with subjects, animals, and location. (part 2 of 2)

Involved Animal

None

Incident Address

None

Create Case

Figure 2. The case workspace includes control fields, violations, enforcement actions, linked records, and history.



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Back to Cases

DEMO-E-0001

Bite / Rabies Investigation - Ranger

Bite Investigation - Opened 9/19/2026

OPEN

Discuss

Save Case

Case Control

Investigation status, assignment, deadlines, and disposition.

Title

Bite / Rabies Investigation - Ranger

Status

Open

Priority

High

Assigned Officer

ACO Jordan Smith

Compliance Due

mm/dd/yyyy

Next Follow-up

mm/dd/yyyy

Case Summary

Investigation involving Ranger, quarantine requirements, and rabies compliance.

Disposition / Closing Summary

Linked Records

People, animals, calls, and addresses connected to this case.

DEMO-A-0003 · Ranger

Involved Animal

DEMO-C-0001 · Dog Bite

Originating Call

DEMO-P-0003 · Taylor Hayes

Responsible Person

Person

Select record...

Related

+ Link Record

Case History

Permanent case audit trail.

Rabies compliance citation DEMO...

9/20/2026, 2:16:53 PM

Practical checks

A narrative enforcement action is not automatically the same as issuing a civil citation with a linked charge. Use Citations for that record and financial linkage.

Troubleshooting

What you see	What to check
A follow-up is missed	Review the case deadline and assign an appropriate task or diary reminder.
The wrong subject is linked	Resolve the identity before recording additional enforcement actions.

Issue an Animal License and Review Renewals

Animal Licensing maintains issuance and expiration history, tag information, responsible people, and optional financial charges.

Before you begin: Open Compliance / Licensing. Confirm the animal identity, owner relationship, applicable license type, dates, jurisdiction, and fee policy.

Step-by-step instructions

1. Search the register for existing license history before issuing another record. Review current, expiring, expired, and voided status filters.
2. Select Issue License and choose Animal. Review Owner / responsible person; correct the relationship when necessary before issuing related paperwork.
3. Choose License type and enter Tag number, Issue date, Expiration date, Jurisdiction, and Notes.
4. Review Create licensing charge and the Fee item. Confirm the charge reflects the actual fee policy rather than assuming the displayed default applies.
5. Select Issue License when the details are correct. Review the number, tag, dates, status, and financial linkage.
6. Open Document to review generated license paperwork and any required completion steps.
7. Use Compliance Operations renewal queues and Renew when available to process an upcoming renewal. Preserve prior issuance history rather than overwriting the old event.

Screenshots

Figure 1. The license form records type, tag, dates, jurisdiction, responsible person, and fee selection. (part 1 of 2)

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SD

Demo User

Refresh

+ Issue License

Total history

6

license records

All statuses 6 records

Document Void

Document Void

Document Void

Document Void

Document Void

Document Void

Document Void

Animal Licensing

Issue License

Create a permanent license record and optionally prepare the configured licensing fee.

Animal *

Select animal...

Owner / responsible person

No owner linked

License type

Standard

Tag number

Issue date

10/12/2026

Expiration date

10/12/2027

Jurisdiction

Northstar Valley service area — synthetic public

Notes

Create licensing charge

Uses the selected active fee item and links it to this animal/owner.

Fee item

License Fee - \$15.00

Cancel

Issue License

Figure 1. The license form records type, tag, dates, jurisdiction, responsible person, and fee selection. (part 2 of 2)

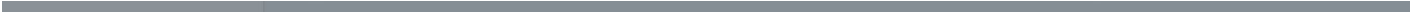


Figure 2. The license register distinguishes current and renewal-attention records. (part 1 of 2)

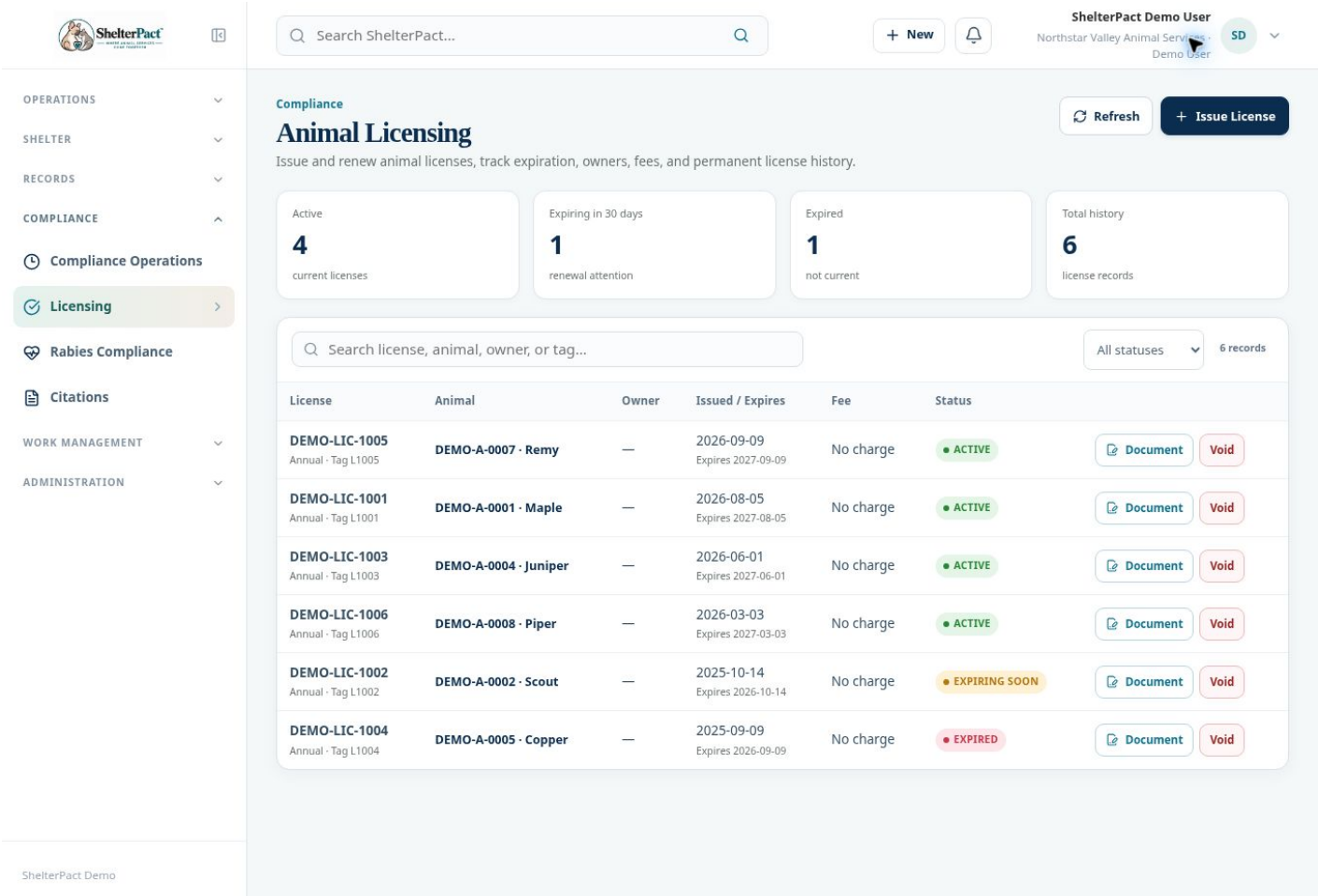


Figure 2. The license register distinguishes current and renewal-attention records. (part 2 of 2)

Practical checks

Issuing a charge is not collecting payment. Review outstanding balances through Financial when applicable.

Troubleshooting

What you see	What to check
No owner appears	Review the animal's current People relationships.
A license is expired	Review renewal information and approved dates; do not alter historical issuance facts just to clear the status.

Issue a Citation and Manage Compliance Follow-Up

Citations links the responsible person, violation, relevant animal/case, due date, and financial balance. Compliance Operations gathers due or delinquent items for follow-up.

Before you begin: Confirm the citation is authorized and have the responsible person, violation details, service method, dates, and fine information available.

Step-by-step instructions

1. Open Compliance / Citations / Issue Citation. Select Responsible person and any Related animal and Enforcement case.
2. Choose Violation and enter Violation description. Record the actual Fine amount according to the authorized action.
3. Enter Issue date, Payment / compliance due, Service method, Court date where applicable, and Notes.
4. Review Financial linkage. A fine greater than zero creates a linked Enforcement charge; collection and corrections continue through Financial.
5. Select Issue Citation when required information is correct. Review the citation number, status, balance, and links.
6. Use Document to review the notice and complete required signing or document finalization. Collect Payment is available for eligible unpaid balances.
7. Open Compliance Operations to review license, rabies, citation, and balance queues. Use Open, Renew, or Create Follow-up Tasks where authorized and appropriate.
8. Review the source record after follow-up. Payment resolves a financial balance but may not complete separate compliance, court, or case requirements.

Screenshots

Figure 1. Citation issuance links the subject, violation, cases, dates, service method, and fine. (part 1 of 2)

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ANIMAL CARE SOFTWARE

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Refresh

+ Issue Citation

Outstanding
\$125.00
citation balances

All statuses > 3 records

Document

Collect Payment

Void

Document

Void

Document

Collect Payment

Void

Enforcement

Issue Citation

X

Creates a permanent citation record and, when an amount is entered, a linked financial charge.

Responsible person *

Select person... >

Related animal

No animal linked >

Enforcement case

No case linked >

Violation

Select or describe below... >

Fine amount

0.00

Violation description *

Issue date

10/12/2026 <>

Payment / compliance due

mm/dd/yyyy <>

Service method

In Person >

Court date

mm/dd/yyyy <>

Notes

Financial linkage

A fine greater than \$0 creates a linked Enforcement charge. Payments, refunds, waivers, and receipts continue through ShelterPact Financial so the audit trail stays centralized.

Figure 1. Citation issuance links the subject, violation, cases, dates, service method, and fine. (part 2 of 2)

Figure 2. Compliance Operations organizes renewal, citation, and balance follow-up. (part 1 of 2)

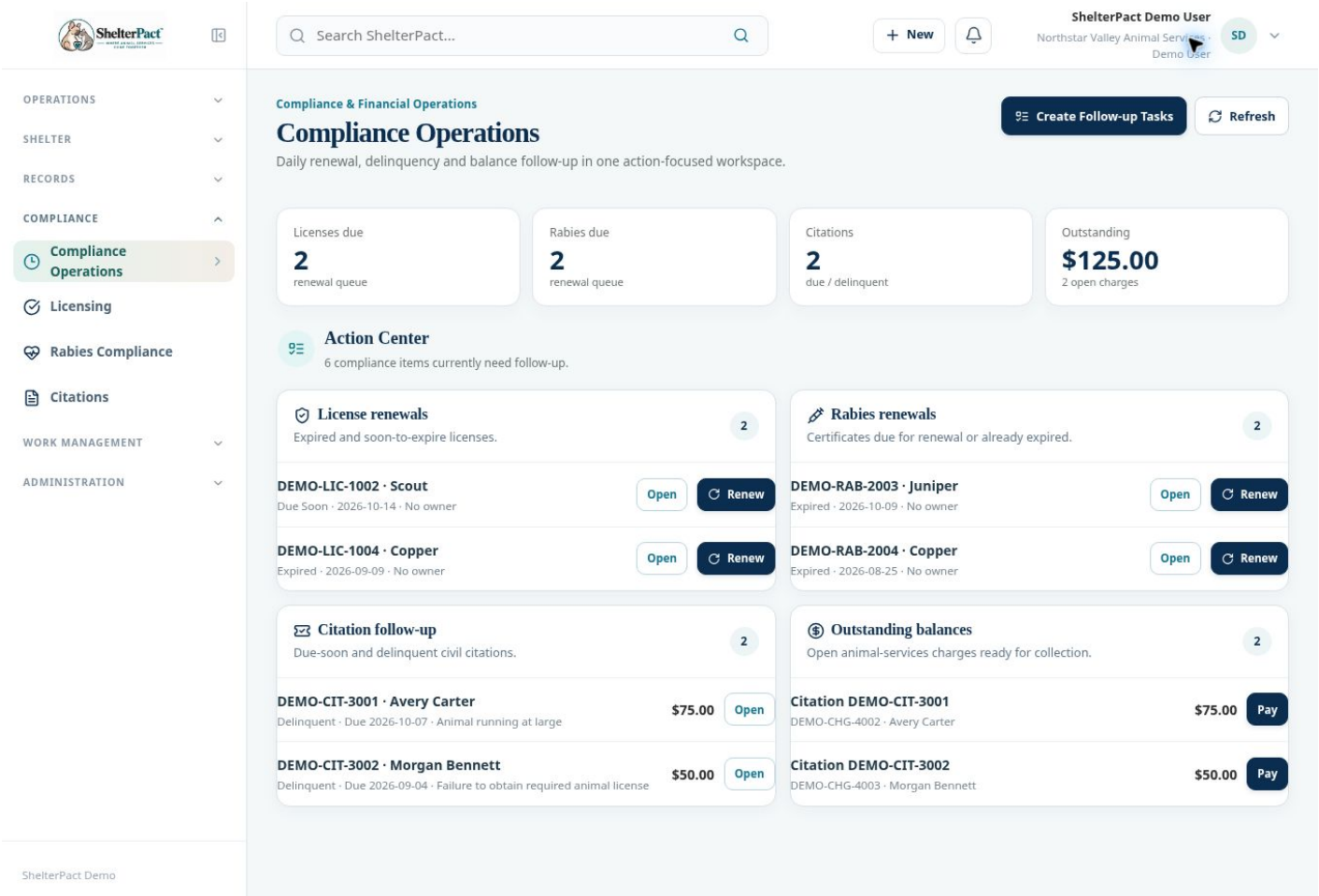


Figure 2. Compliance Operations organizes renewal, citation, and balance follow-up. (part 2 of 2)

Practical checks

Keep actual source records current; completing a follow-up task does not automatically resolve a citation or case.

Troubleshooting

What you see	What to check
Collect Payment is missing	Check whether the citation is paid, voided, has no balance, or your role lacks collection access.
A citation is paid but an investigation remains open	Review the separate case and nonfinancial requirements.