

Getting Started 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.

Navigate ShelterPact, review daily priorities, understand connected records, and organize staff work.

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Navigate ShelterPact and Choose the Right Workspace

ShelterPact groups staff work into Operations, Shelter, Records, Compliance, Work Management, and Administration. Start with the workspace matching the action you need to perform, then open the linked record for its full context.

Before you begin: Sign in with the account assigned by your organization. Available modules and actions depend on your role. The shared demo account is intentionally restricted.

Step-by-step instructions

1. Open the left navigation. Select a group heading to expand its links. The active workspace is highlighted so you can see where you are.
2. Use Operations for dispatch and field response. Open Shelter for active custody, housing, restrictions, care, and movement pathways.
3. Use Records to search permanent identities and investigations. An animal or person can remain in Records after a particular operational event has finished.
4. Use Compliance for licenses, rabies certificates, citations, and renewal follow-up. Use Administration for finance, reporting, public services, signatures, and settings.
5. Open New in the top bar to start common work. Search quick actions or expand its grouped sections; select the action matching the event.
6. Use Collapse navigation when you need more space. Follow record names, reference numbers, or View links to open details rather than relying on a summary card alone.
7. When finished, open the staff name/avatar menu and select Sign Out, especially on a shared workstation.

Fields and meanings

Field / control	What to review
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

Screenshots

Figure 1. The main staff interface and navigation groups.

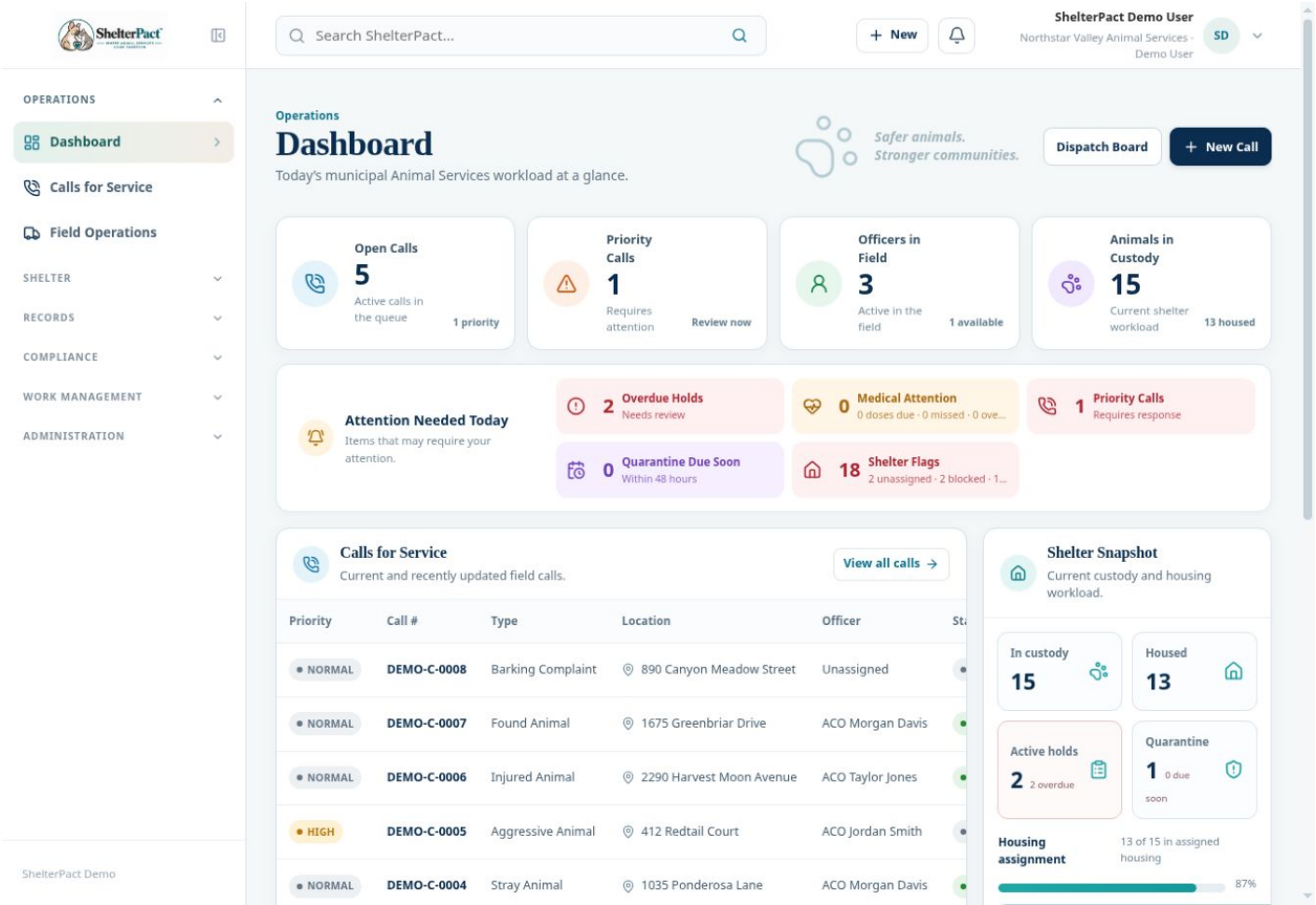
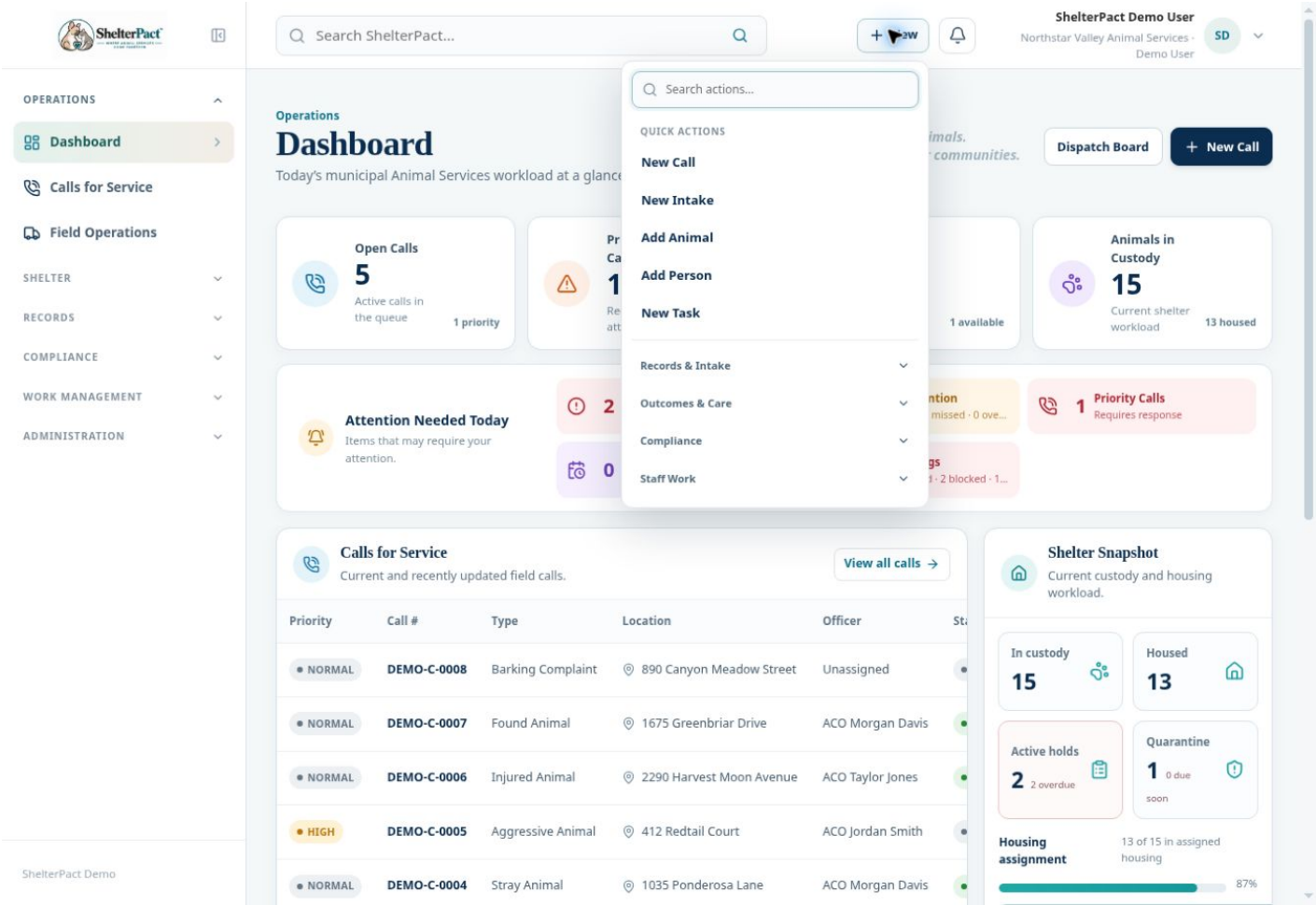


Figure 2. The New menu provides quick actions and searchable workflow entry points.



Practical checks

A visible page may provide view access while editing still requires a separate permission.

Troubleshooting

What you see	What to check
A menu item is missing	Ask your administrator to check the relevant module and your assigned role.
An action is disabled	Check permissions, the current record state, and any workflow requirements before retrying.

Use the Dashboard to Review Daily Priorities

Dashboard summarizes field workload and current shelter work. Its attention cards are shortcuts into operational queues, not a replacement for reviewing the underlying records.

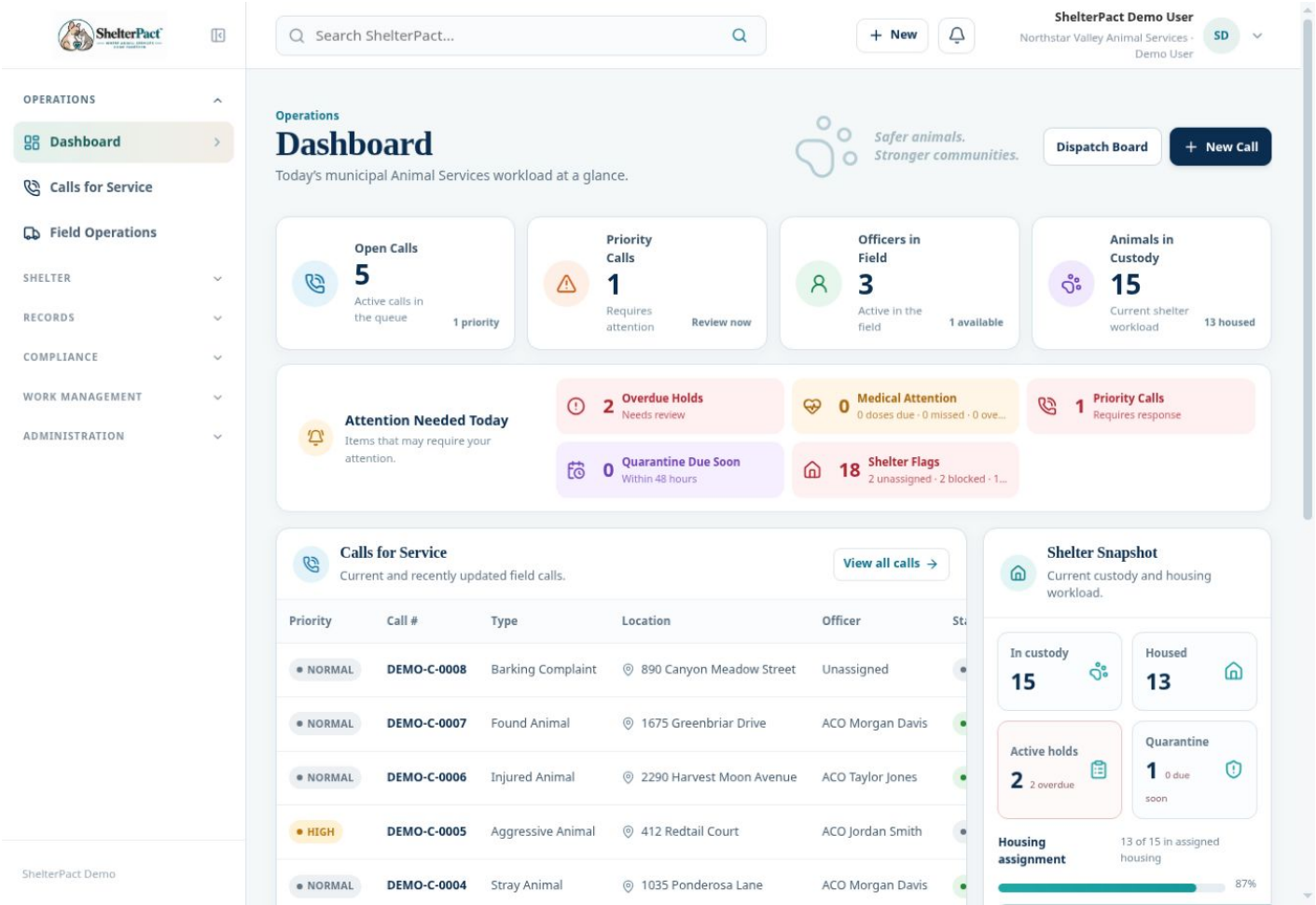
Before you begin: Open Operations / Dashboard. Refresh a destination workspace if you need to confirm its latest state.

Step-by-step instructions

1. Review Open Calls, Priority Calls, Officers in Field, and Animals in Custody to understand the current workload.
2. Open an Attention Needed Today item such as overdue holds, medical attention, priority calls, quarantine, or shelter flags. Review the affected records and required action.
3. Use Calls for Service to open a recent call. Check its actual status, assignment, and narrative before making a dispatch decision.
4. Review Shelter Snapshot for custody, housing assignment, active holds, and quarantine. Open Shelter Operations to investigate unassigned housing or blocked outcomes.
5. Review Today's Tasks and follow each record link. Identify who is responsible and what evidence or follow-up is needed.
6. Review Recent Dispatch Activity to understand recorded changes. Users Online Now indicates recent activity; it does not guarantee that a staff member is available for a new assignment.

Screenshots

Figure 1. Dashboard connects priority summaries with their operational queues.



Practical checks

Several flags can apply to one animal. Do not interpret an attention-flag total as a count of unique animals.

Troubleshooting

What you see	What to check
A total differs from a register	Check filters, whether a total counts flags or records, and whether the register includes historical items.
A deadline is overdue	Open the record and document the appropriate follow-up; do not simply change the date to remove the flag.

Search Records and Read Status, Custody, and History

Finding the right existing record prevents duplicate identities and fragmented history. Search broadly first, then confirm identity using more than a name.

Before you begin: Gather available identifiers, contact details, or record numbers. Names alone may not uniquely identify an animal or person.

Step-by-step instructions

1. Use Search ShelterPact in the top bar when you do not know the record type. Enter a meaningful search term and submit the search.
2. For a known record type, open Animals, People, Calls for Service, or Cases and use its local search field.
3. Reset restrictive filters if needed. Check all relevant statuses and date ranges before concluding that a record does not exist.
4. Open the candidate record. Compare the record number, identifiers, descriptors, contact information, and related history against the information you have.
5. On an animal record, read Operational Status, Custody, Housing, and Restrictions separately. These describe different aspects of the animal's current state.
6. Use record sections to review details. More sections on an animal record exposes holds, housing, cases and calls, tasks and diary, and media.
7. Use Activity or Timeline to review recorded events. When an operational event repeats, reuse the permanent identity and create the appropriate new event or episode.

Screenshots



OPERATIONS

SHELTER

RECORDS

Animals

People

Partner Organizations

Addresses

Cases

Forms & Documents

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

+ New



ShelterPact Demo User

Northstar Valley Animal Services

Demo User

SD

Animal Records

Animals

Search permanent animal records by identity, descriptors, custody, location, or history.

+ New Animal

Search ID, name, chip, license, rabies tag, breed or color...

All statuses

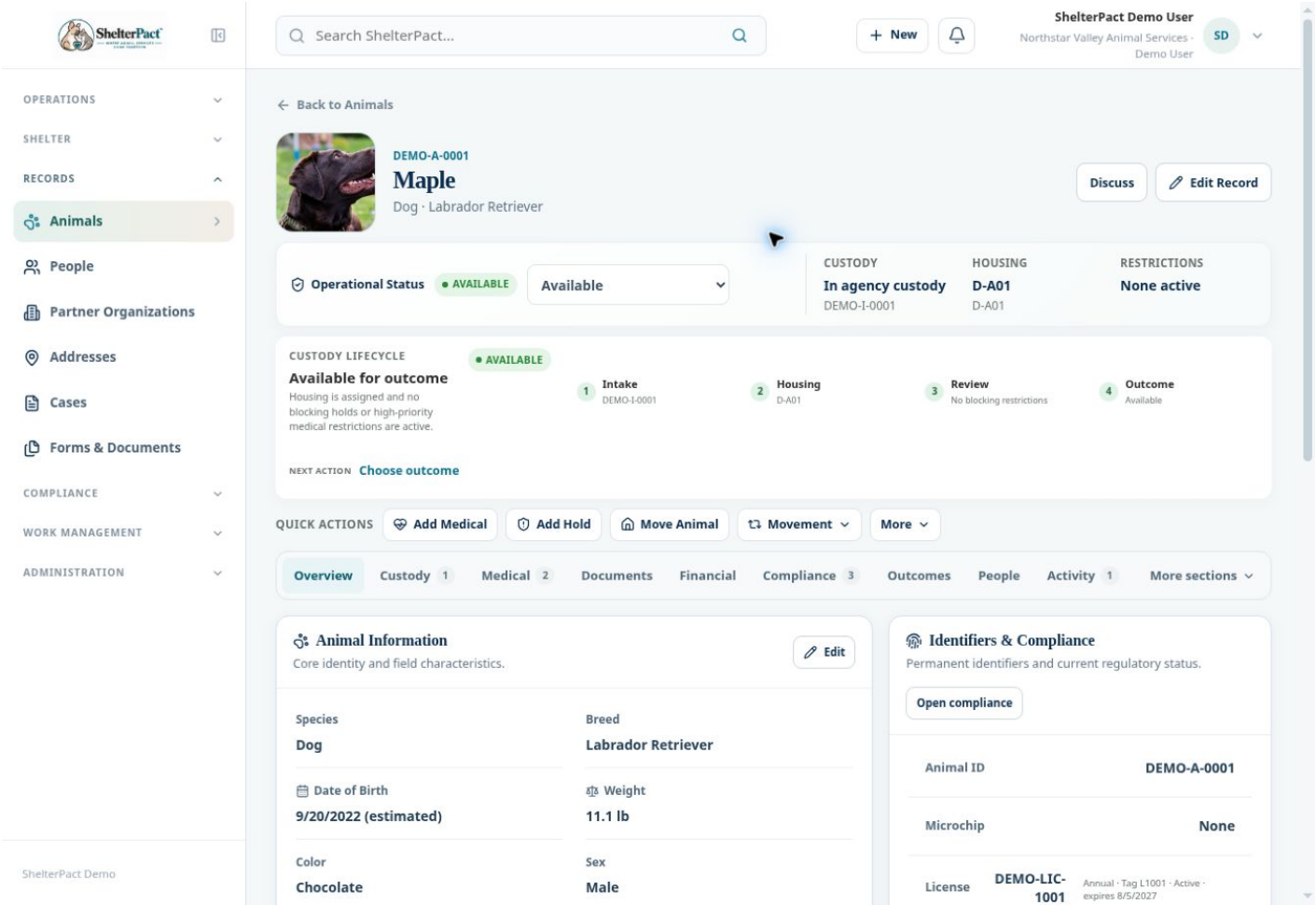
Advanced Filters

19 records

Animal	Species / Breed	Sex / Age	Identifiers	Current State	Updated	
 Harbor A26-000001	Dog Mixed Breed	Male Unknown · Unknown	None recorded	PENDING EVALUATION In agency custody	10/12/2026	View →
 Hazel DEMO-A-0016	Rabbit Mixed Breed	Female ~2 years · Altered	985141000000016 Microchip	AVAILABLE Small Animal / S-A01	9/27/2026	View →
 Mochi DEMO-A-0011	Cat Domestic Shorthair	Female ~1 year · Altered	R26-1011 Rabies tag	AVAILABLE Cat Ward A / C-A02	9/27/2026	View →
 Oliver DEMO-A-0010	Cat Domestic Shorthair	Male ~2 years · Altered	985141000000010 Microchip	AVAILABLE Cat Ward A / C-A01	9/27/2026	View →
 Luna DEMO-A-0006	Dog Chihuahua	Female ~7 years · Intact	985141000000006 Microchip	AVAILABLE Dog Ward A / D-A06	9/27/2026	View →
 Juniper DEMO-A-0004	Dog Golden Retriever	Female ~2 years · Altered	985141000000004 Microchip	AVAILABLE Dog Ward A / D-A04	9/27/2026	View →
 Scout DEMO-A-0002	Dog Beagle	Female ~3 years · Altered	985141000000002 Microchip	AVAILABLE Dog Ward A / D-A02	9/27/2026	View →
 Maple DEMO-A-0003	Dog Border Collie	Male ~1 year · Intact	R26-1001 Rabies tag	AVAILABLE Dog Ward A / D-A01	9/27/2026	View →

ShelterPact Demo

Figure 2. The animal header separates operational status, custody, housing, and restrictions.



Practical checks

Creating an animal record does not by itself create a custody episode. Changing a status does not replace a completed outcome.

Troubleshooting

What you see	What to check
The animal is absent from Current Population	Search Animals and review whether it has an active custody episode.
Two possible records match	Resolve the identity before creating or attaching new information; this guide does not describe a record-merge operation.

Create and Complete an Operational Task

Tasks tracks work that has an assignee, priority, and completion state. Link a task to the record it concerns so staff can find the supporting information.

Before you begin: Open Work Management / Tasks. Confirm who should perform the work and whether an existing task already covers it.

Step-by-step instructions

1. In New Task, enter a short, specific Task Title describing the action. Use Description for the details, expected result, and useful context.
2. Choose Assigned Staff and Priority. Select a due date and time that reflects the operational deadline.
3. Choose a Reminder if staff should be notified before the due time. If work repeats, select Repeat and verify Occurrences before creation.
4. Choose Related Record Type, then select the actual related record. Confirm its number or name before linking it.
5. Select Create Task. Review the task in Task Board and confirm its assignment, deadline, related record, and status.
6. Use My tasks and status filters to review your work. Open the related record and perform the action before marking the task complete.
7. Select Complete when the assigned work is actually finished. If the task came from a hold, medical event, or compliance record, also update that underlying workflow as appropriate.

Screenshots

Figure 1. Tasks includes assignment, reminders, recurrence, and record links.



OPERATIONS

SHELTER

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Tasks

Diary

Operational Calendar

Staff Rota

Messages

Search ShelterPact...

+ New

ShelterPact Demo User

Work Management

Tasks

Assign, track, and complete operational work across your agency.

Tasks

Diary

Calendar

Staff Rota

Visible Tasks

9

Current view

Open / In Progress

5

Active work

Overdue

9

Requires attention

+ New Task

Create an operational task, assign it, and optionally link it to a ShelterPact record.

Task Title

What needs to be done?

Assigned Staff

Unassigned

Priority

Normal

Due Date / Time

mm/dd/yyyy, --:-- --

Reminder

No reminder

Repeat

None

Occurrences

2

Related Record Type

None

Related Record

Choose a related record type first.

Practical checks

Completing a task does not automatically prove that a medical dose was administered, a hold was released, or a case was closed.

Troubleshooting

What you see	What to check
The task is not visible	Check My tasks, the selected status, and whether the task was assigned to another staff member.
The same work appears twice	Check whether one task was generated by a workflow before creating a second manual task.

Schedule Diary Entries and Review the Calendar

Diary records appointments, dated operational notes, and follow-ups. Operational Calendar displays diary items alongside tasks and staff shifts.

Before you begin: Open Work Management / Diary. Confirm the time, assigned staff, and related subject before creating an appointment.

Step-by-step instructions

1. Enter a Title and choose Assigned Staff, or leave it at Agency / Unassigned when the item is agency-wide.
2. Choose Start and End. Use All Day for an item that should occupy a calendar date rather than a specific time.
3. Select a Reminder and, when appropriate, Repeat and Occurrences. Review the schedule so it does not create unintended appointments.
4. Choose the Related Record Type and record, then add Notes explaining the appointment or follow-up. Select Create Entry.
5. Review the entry in Diary Entries. Use Complete when it has occurred or its follow-up is finished.
6. Open Operational Calendar. Select Day, Week, Month, or Agenda, use Today to return to the current date, and choose the staff filter.
7. Enable the Tasks, Diary, and Shifts item types you need to see. Maintain each item in its source workspace rather than relying only on the calendar display.

Screenshots

Figure 1. Diary stores scheduled appointments and dated notes.



OPERATIONS

SHELTER

RECORDS

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Tasks

Diary

Operational Calendar

Staff Rota

Messages

ADMINISTRATION

Search ShelterPact...

New

ShelterPact Demo User
Northstar Valley Animal Services
Demo User

Work Management

Diary

Operational reminders, appointments, follow-ups, and dated notes.

TasksDiaryCalendarStaff Rota

+ New Diary Entry

Create a dated operational note and optionally link it directly to another ShelterPact record.

Title

What should staff remember or follow up on?

Assigned Staff

Agency / Unassigned

All Day

Show this as an all-day calendar item

Start

10/12/2026, 03:03 PM

End

mm/dd/yyyy, --:-- --

Reminder

No reminder

Repeat

None

Occurrences

2

Related Record Type

None

Related Record

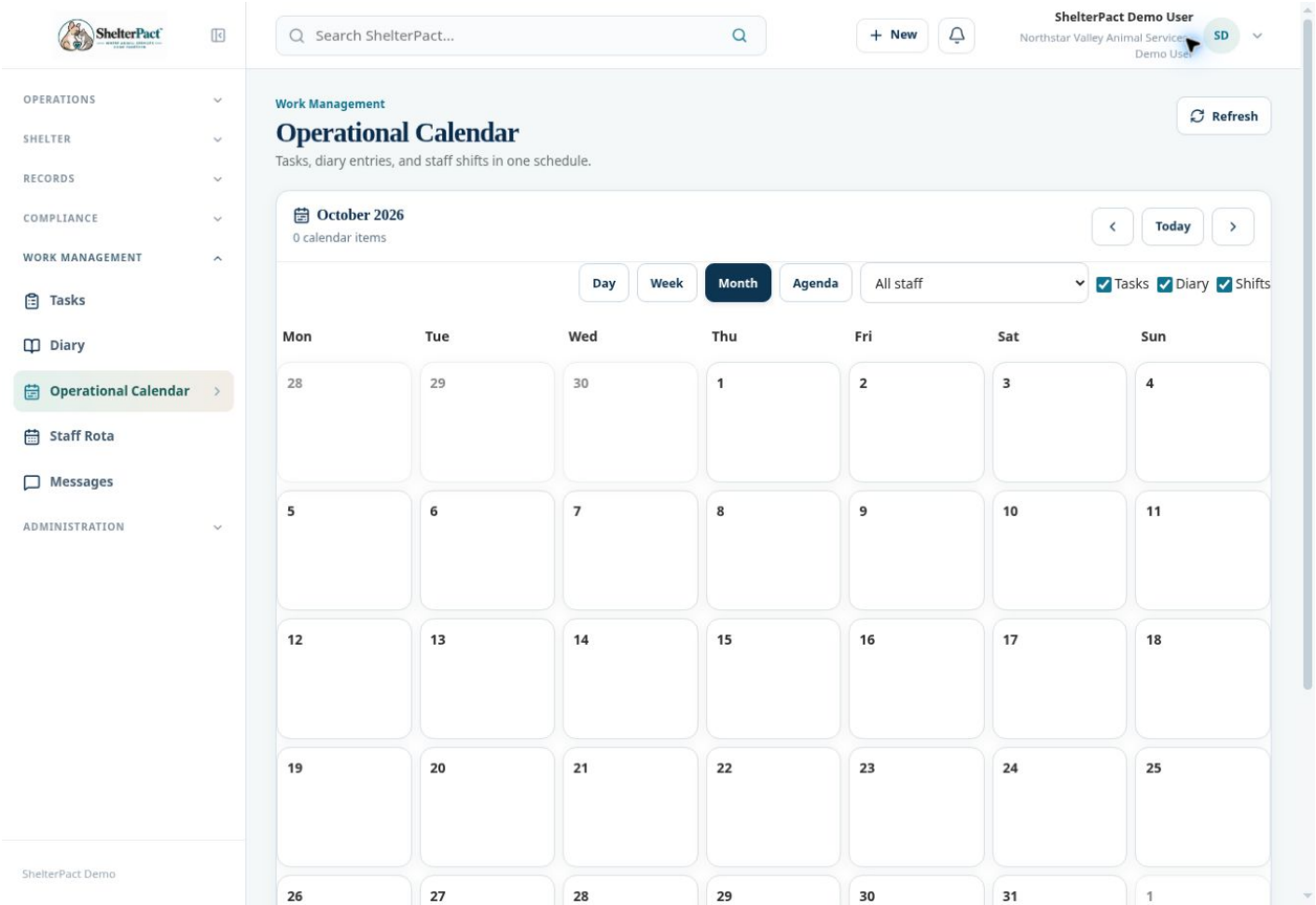
Choose a related record type first.

Notes

Add context, instructions, or follow-up details.

Refresh

Figure 2. Operational Calendar combines tasks, diary entries, and staff shifts.



Practical checks

Confirm your organization's timezone before scheduling time-sensitive work.

Troubleshooting

What you see	What to check
An entry is missing from the calendar	Check the displayed dates, selected staff, and Diary toggle.
The item needs completion tracking	Use Tasks for assigned work; use Diary for the scheduled appointment or note.

Review Staff Coverage and Record-Linked Conversations

Staff Rota organizes shifts and availability. Messages keeps operational conversations attached to staff and records so a discussion can be found later.

Before you begin: Open Work Management / Staff Rota or Messages. Scheduling and conversation actions depend on your assigned permissions.

Step-by-step instructions

1. In Staff Rota, select a date in Week of to load its Monday-through-Sunday schedule.
2. For a shift, select Staff, Date, Start, End, Shift Type, Status, Assignment, and Break Minutes. Add Notes and verify recurrence before Add Shift.
3. Use Leave or Call Out when applicable. Review gaps and conflicts after changes; coverage warnings depend on active coverage rules.
4. An authorized scheduler can define a coverage rule using assignment, time range, minimum staff, and days. Review rules before relying on a no-warning result.
5. For a conversation, open Messages and select New Conversation, or use Discuss on a record to keep the conversation attached to that subject.
6. Review Active, Closed, and Archived conversations. Keep formal decisions and authoritative updates in the actual operational record as well as discussing them.
7. Close or archive finished discussions according to agency practice. Do not remove record history to tidy up a conversation list.

Screenshots

Figure 1. Staff Rota shows schedule controls and coverage rules.



OPERATIONS

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Diary

Operational Calendar

Staff Rota

Messages

ADMINISTRATION

Search ShelterPact...

+ New

ShelterPact Demo User

Work Management

Staff Rota

Schedule staff, manage availability, and monitor required operational coverage.

Tasks | Diary | Calendar | Staff Rota

Schedule Week

Choose any date to load its Monday-through-Sunday rota.

Week of 10/12/2026

COVERAGE ISSUES

0

0 gaps · 0 conflicts

UNAVAILABLE

0

Call Out / Leave this week

COVERAGE RULES

0

Active agency requirements

+ Schedule Shift

Add staff coverage, leave, training, or on-call time.

Staff

Select staff...

Date

10/12/2026

Start

08:00 AM

End

05:00 PM

Shift Type

Regular

Status

Scheduled

Assignment

Shelter, Field Operations, Front Office...

Break Minutes

30

Repeat

Occurrences

ShelterPact Help Center | Detailed Guides

17

Figure 2. Messages separates active, closed, and archived conversations. (part 1 of 2)

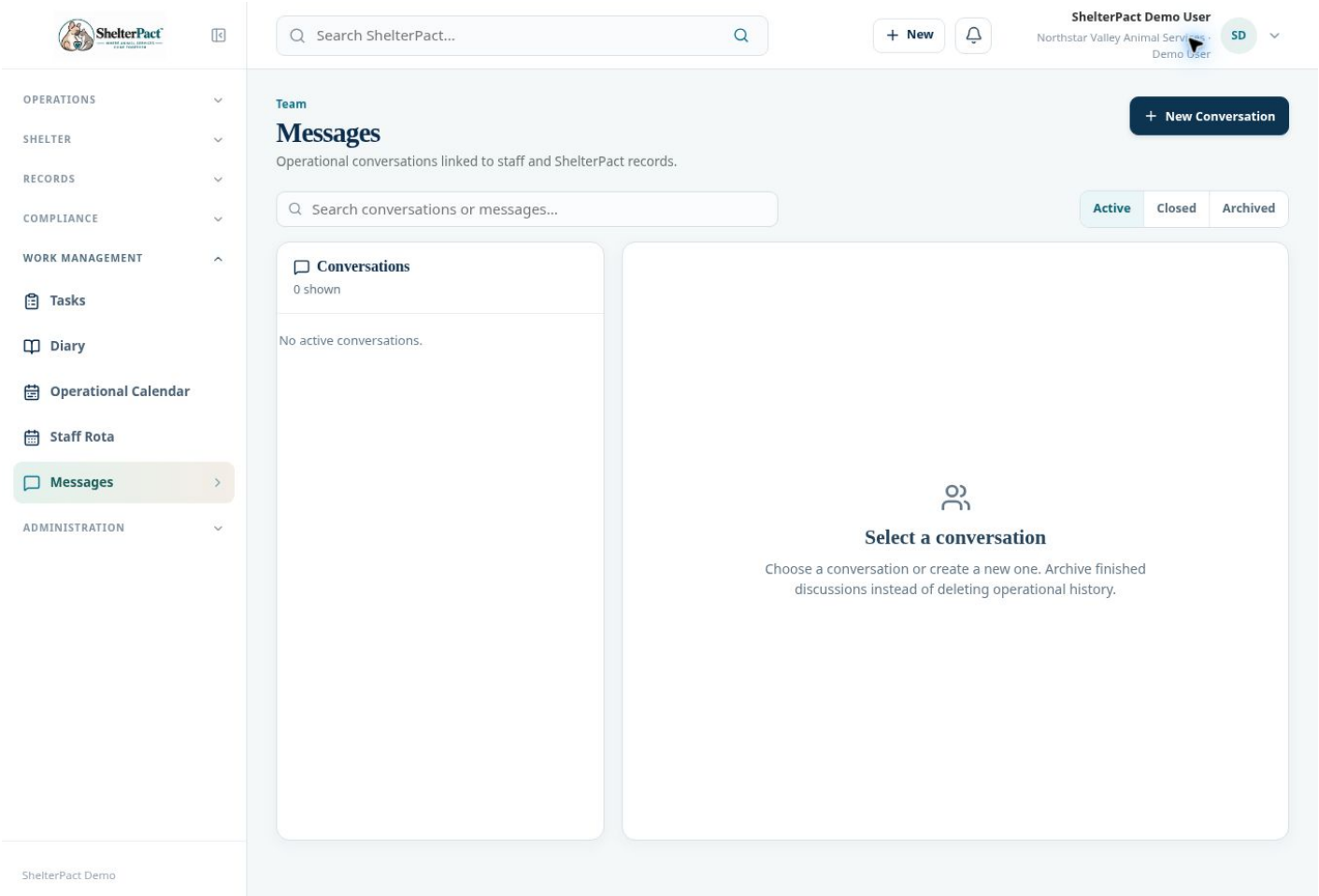


Figure 2. Messages separates active, closed, and archived conversations. (part 2 of 2)

Practical checks

A conversation is context for the work; it does not replace the record's status, deadline, or audit entry.

Troubleshooting

What you see	What to check
No coverage problems appear	Confirm that coverage rules are configured for the relevant assignments and times.
A conversation seems missing	Check Closed and Archived views and the linked record.