

People 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.

Maintain contacts, ownership relationships, reusable addresses, and partner destinations without duplicating records.

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Find and Create a Person Record

People stores reusable contacts for owners, adopters, finders, custodians, foster caregivers, and complainants. A person's role in an event is represented by links and workflows, not a separate duplicate identity.

Before you begin: Open Records / People. Search first using name, person ID, phone, or email.

Step-by-step instructions

1. Search the directory and open plausible matches. Compare contact information and linked history before choosing an existing person.
2. If the contact is new, select New Person. Enter First Name, Middle Name, Last Name, and Date of Birth only when known and appropriate.
3. Choose Record Status and enter Primary Phone, optional Secondary Phone, and Email. Review spelling and numbers before saving.
4. Use Internal Notes for staff context. Keep factual notes relevant to agency operations.
5. Identification & Ownership Verification provides optional ID Type, ID Number, and Proof of Ownership fields for later ownership-sensitive workflows.
6. Select Save Person. Review the saved record and its number, then link the relevant animal, address, or event.
7. For a person created inside an intake or movement workflow, confirm that the saved person is selected in that workflow before continuing.

Screenshots

Figure 1. People provides searches and a permanent contact directory. (part 1 of 2)



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Search ShelterPact...

+ New



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Addresses

New Person

Permanent records for owners, complainants, custodians, finders, and other contacts.

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

8 records

Person	Phone	Email	Updated
 Parker Sullivan DEMO-P-0008	970-555-0108	parker.sullivan@example.com	9/27/2026 View
 Cameron Ellis DEMO-P-0007	970-555-0107	cameron.ellis@example.com	9/27/2026 View
 Riley Foster DEMO-P-0006	970-555-0106	riley.foster@example.com	9/27/2026 View
 Casey Monroe DEMO-P-0005	970-555-0105	casey.monroe@example.com	9/27/2026 View
 Jordan Reeves DEMO-P-0004	970-555-0104	jordan.reeves@example.com	9/27/2026 View
 Taylor Hayes DEMO-P-0003	970-555-0103	taylor.hayes@example.com	9/27/2026 View
 Morgan Bennett DEMO-P-0002	970-555-0102	morgan.bennett@example.com	9/27/2026 View
 Avery Carter DEMO-P-0001	970-555-0101	avery.carter@example.com	9/27/2026 View

ShelterPact Demo

Figure 1. People provides searches and a permanent contact directory. (part 2 of 2)



Figure 2. The person form separates identity, contact details, and optional verification information. (part 1 of 2)



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Back to People

New Permanent Record

New Person

Create a reusable person record for future calls, animals, addresses, and enforcement cases.

Person Identity

Reusable identity and contact information for owners, complainants, custodians, and other contacts.

First Name

Middle Name

Last Name

Date of Birth

Record Status

mm/dd/yyyy

Active

Contact Information

Searchable contact methods used across ShelterPact.

Primary Phone

Secondary Phone

Email

Internal Notes

Figure 2. The person form separates identity, contact details, and optional verification information. (part 2 of 2)

Identification & Ownership Verification

Optional information that can be reused during reclaim and other ownership-sensitive workflows.

ID Type

ID Number

Driver License, State ID, Passport...

Optional

Proof of Ownership

Veterinary records, photos, adoption records...

Do not upload identity-document photos unless your organization specifically permits it.

Save Person

ShelterPact Help Center | Detailed Guides

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Practical checks

Follow your organization's policy for identification information. The form cautions against uploading identity-document photos unless specifically permitted.

Troubleshooting

What you see	What to check
A finder already exists as an adopter	Reuse the person and record the new relationship or event role.
A receipt or workflow has the wrong person	Resolve the link through the appropriate authorized workflow before finalizing the event.

Update Contact Information and Review Person History

Updating an existing person keeps its linked animal and financial history together. Verify the identity before changing contact details.

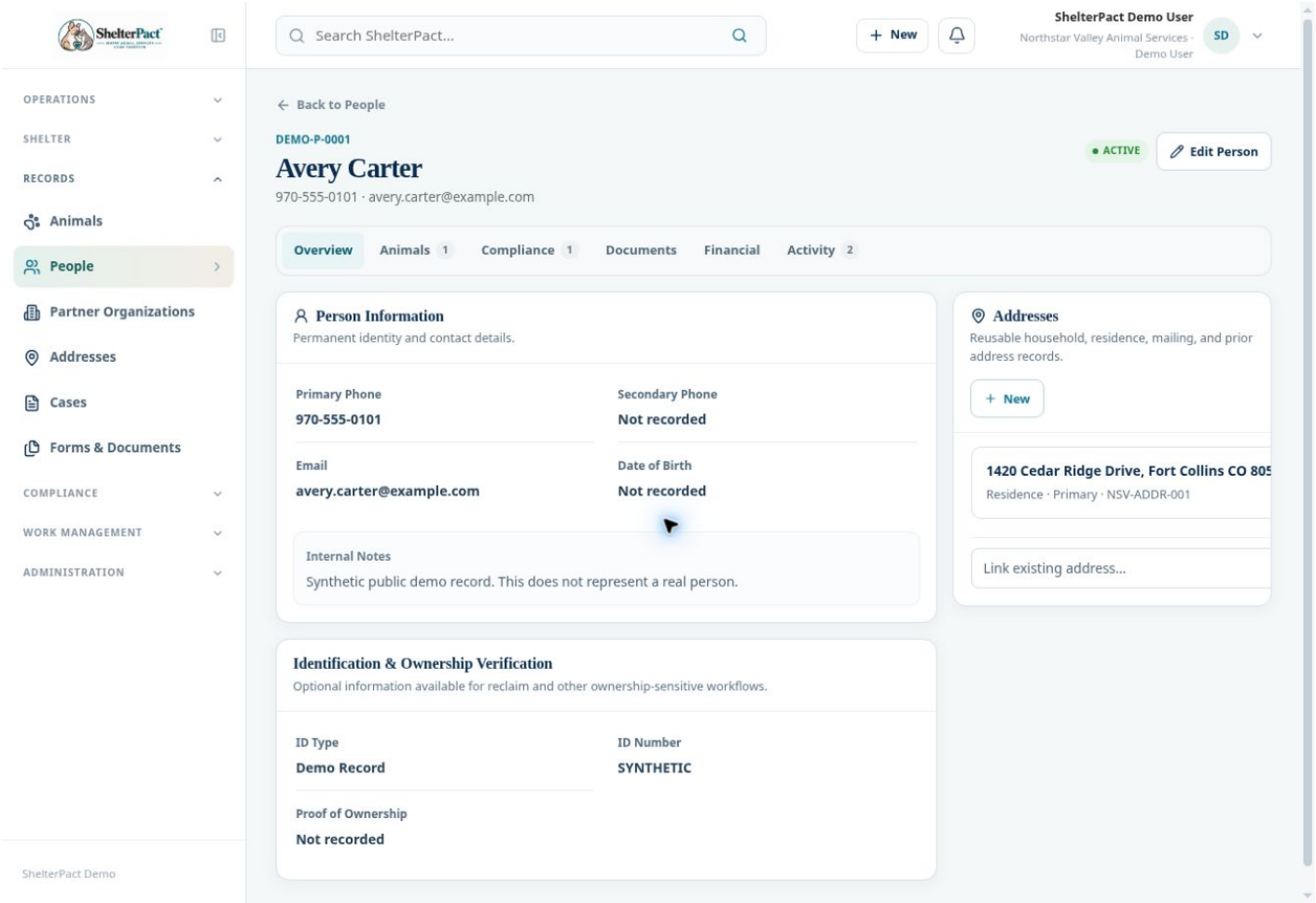
Before you begin: Open the person by name or View and confirm the person number and current contact information.

Step-by-step instructions

1. Read Overview to confirm identity, primary and secondary phone, email, internal notes, and verification information.
2. Select Edit Person and update the relevant fields. Confirm the corrected details with the information provided to your agency.
3. Save using the displayed form action, then review Overview to ensure the change was recorded correctly.
4. Use Animals to review current and historical relationships. Compliance shows related regulatory records; Documents and Financial show connected paperwork and transactions.
5. Use Activity to review recorded history. Review source workflows for context when a relationship or transaction does not match expectations.
6. Check address links separately. Updating contact information does not mean a reusable address or ownership relationship has also changed.

Screenshots

Figure 1. Overview shows contact details, verification information, addresses, and related tabs.



Practical checks

Keep historical records associated with the same identity. Record a new relationship or event rather than rewriting prior facts.

Troubleshooting

What you see	What to check
A relationship is labelled Historical	Review its originating event; historical ownership does not prove current authority to reclaim.
Updated information is not in an old document	Generated documents preserve their snapshots; use the document revision process when a correction is necessary.

Link a Person to an Animal

Animal Relationships distinguishes ownership, custody, foster, finder, previous-owner, and other links. Choose the role that accurately describes the relationship.

Before you begin: Open the correct person record and the Animals tab. Confirm the animal's identity and whether an existing relationship already describes the situation.

Step-by-step instructions

1. Review current and historical relationships. Do not assume a historical Owner relationship authorizes a present-day release.
2. Select the relationship type: Owner, Custodian, Foster, Finder, Previous Owner, or Other, as available in the organization.
3. Select the animal from the animal selector. Compare its animal number and descriptors before linking.
4. Select Link and review the resulting relationship on the person record.
5. Open the animal's People section to confirm the associated information is correct.
6. For a foster placement, reclaim, surrender, or adoption, still complete the appropriate guided workflow. A relationship link alone does not record placement, custody admission, release, fees, or paperwork.

Screenshots

Figure 1. The person Animals tab includes relationship type and animal selection. (part 1 of 2)

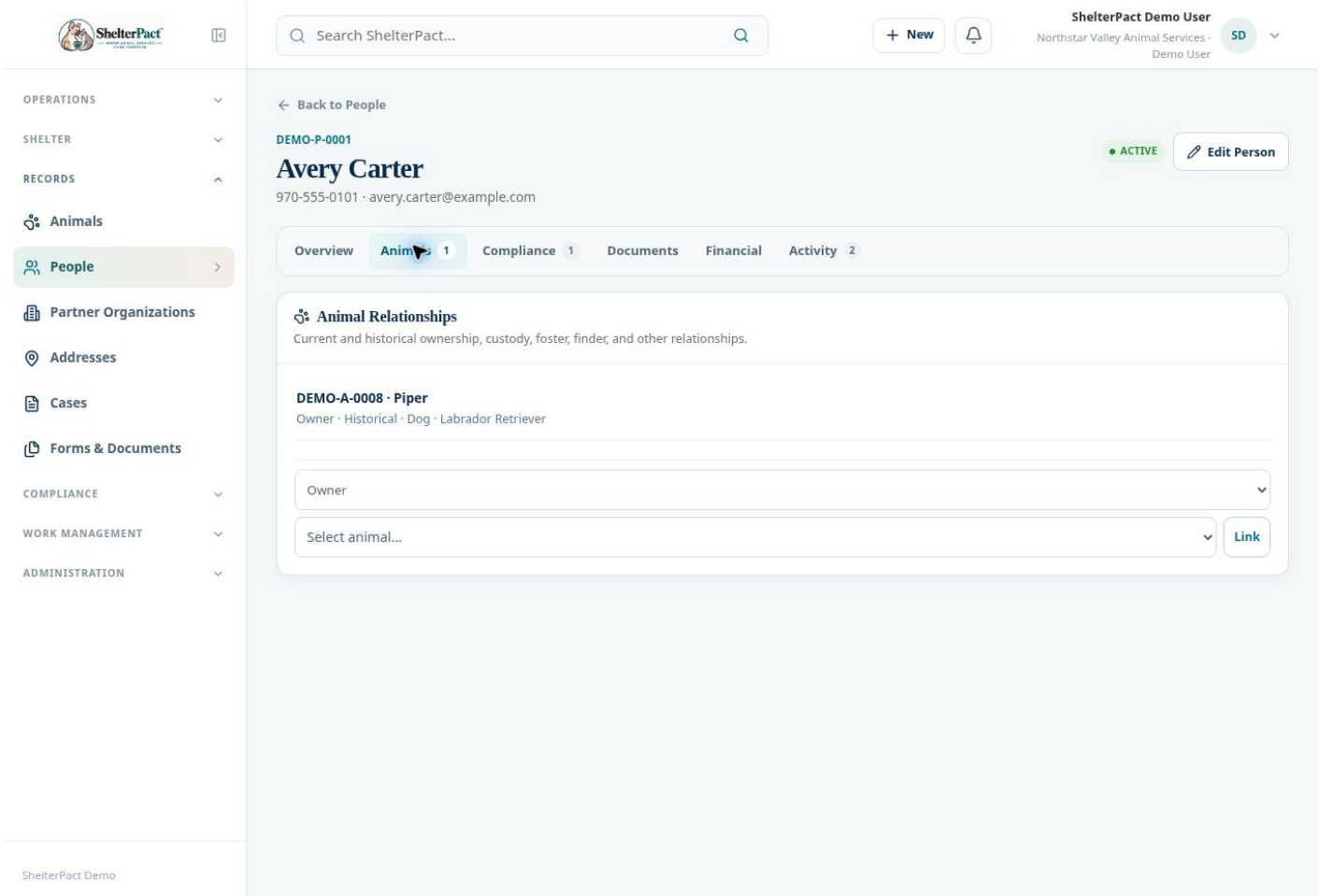


Figure 1. The person Animals tab includes relationship type and animal selection. (part 2 of 2)

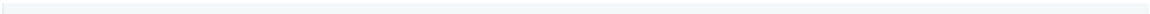


Figure 2. The animal People tab provides the related relationship view. (part 1 of 2)

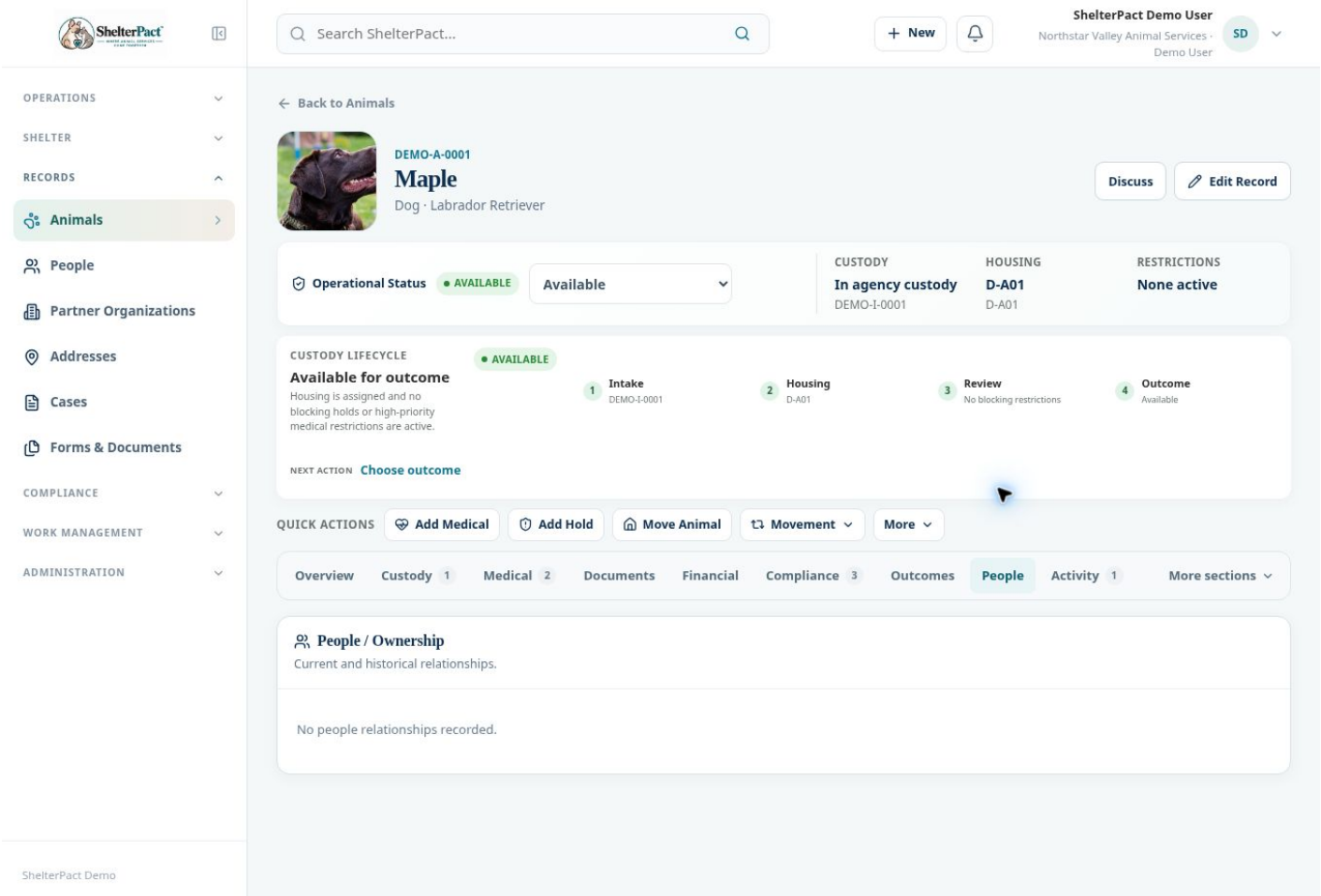


Figure 2. The animal People tab provides the related relationship view. (part 2 of 2)

Practical checks

Use the actual event workflow to maintain custody and outcome history, even when a relationship already exists.

Troubleshooting

What you see	What to check
The link does not complete a reclaim	Continue through eligibility, ownership verification, financials, documents, and final review.
The selected animal is incorrect	Stop further workflow actions and have the link corrected through available authorized controls.

Create and Link a Reusable Address

Addresses stores locations once and allows people to share the correct address record. Review existing locations before creating another version of the same address.

Before you begin: Open Records / Addresses or the Addresses panel on a person's Overview.

Step-by-step instructions

1. Search or review the address directory for the exact street, unit, city, and postal code. Do not rely only on a street name.
2. Select New Address when the location is new. Enter Street Address, Unit / Apt, City, State, ZIP, County, and any appropriate Notes.
3. Select Save Address and verify the saved location and address number.
4. Return to the person's Overview. Use Link existing address to select the correct reusable record and select Link.
5. Review the relationship shown in the Addresses panel, including residence or primary designation where recorded. Open the address to confirm the location.
6. When a pickup or incident differs from the person's residence, record the actual incident location in the intake or call instead of assuming the residential address applies.

Screenshots

Figure 1. The reusable address form captures street, unit, city, state, ZIP, county, and notes. (part 1 of 2)



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New Location Record

New Address

Create a reusable location that can be linked to people and future records.

Address

Street Address

Unit / Apt

City

State

ZIP

County

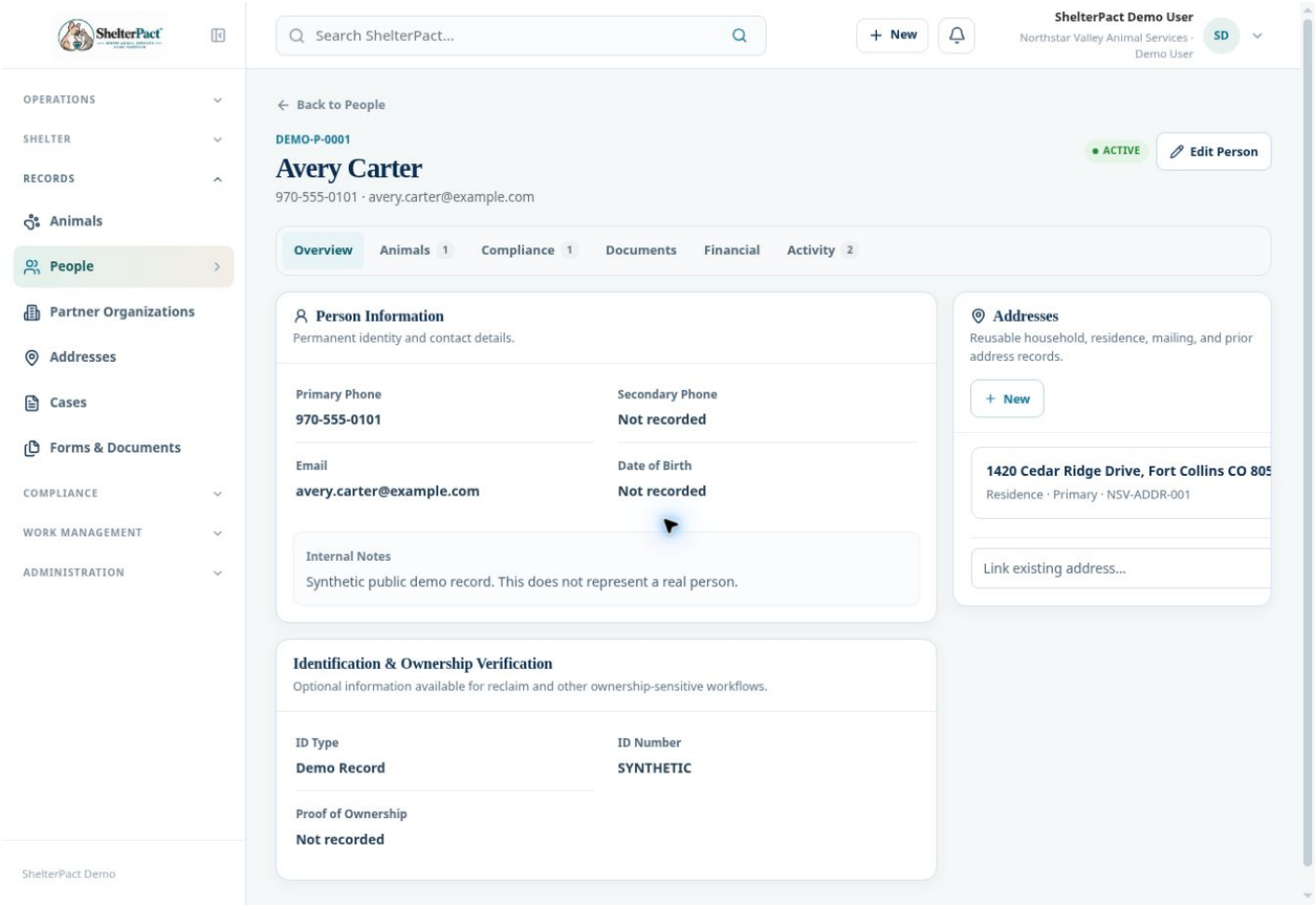
Notes

Save Address

Figure 1. The reusable address form captures street, unit, city, state, ZIP, county, and notes. (part 2 of 2)



Figure 2. Person Overview includes reusable address links.



Practical checks

Apartment or unit information can distinguish locations that would otherwise appear identical.

Troubleshooting

What you see	What to check
The address exists but is absent from a person	Create the relationship using Link existing address; a location record alone is not a person link.
The caller and incident locations differ	Keep both locations accurate in the call or intake.

Create and Maintain Partner Organizations

Partner Organizations represents rescue groups, shelters, veterinary providers, government agencies, nonprofits, and businesses. Transfer destinations should use the organization record when the receiving party is an organization.

Before you begin: Open Records / Partner Organizations. Search organization name, number, phone, email, or website, and check Active and Inactive results.

Step-by-step instructions

1. Open an existing match and verify its type and contact details. Reuse the organization if it is the same partner.
2. For a new partner, select New Organization. Enter Organization Name and choose the appropriate Organization Type.
3. Select Record Status and enter Phone, Email, Website, and appropriate Internal Notes.
4. Select Save Organization. Review the new organization record and its number.
5. Link contact people and reusable addresses after saving, using the controls on the partner record. Confirm primary contacts and the relationship they have to the organization.
6. Before a rescue transfer, confirm the receiving partner is active and that its contact and destination details are correct.
7. Maintain changes on the same partner identity. Inactive partners remain relevant to historical transfers and other records.

Screenshots

Figure 1. The partner directory supports type and status filters. (part 1 of 2)



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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 Network DEMO-ORG-003	shelter	970-555-0203 partners@foothills-humane.example	● ACTIVE	9/27/2026	View →
Front Range Animal Rescue DEMO-ORG-001	rescue	970-555-0201 transfer@frontrange-rescue.example	● ACTIVE	9/27/2026	View →
Northstar Veterinary Center DEMO-ORG-002	veterinary	970-555-0202 care@northstar-vet.example	● ACTIVE	9/27/2026	View →

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Figure 1. The partner directory supports type and status filters. (part 2 of 2)



Figure 2. Create a partner identity before linking contact people and addresses. (part 1 of 2)



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New Partner Record

New Partner Organization

Create a permanent partner record. People and reusable addresses can be linked after the organization is saved.

Organization Information

Permanent tenant-scoped record for rescues, shelters, veterinary providers, agencies, nonprofits, businesses, and other partners.

Organization Name

Organization name

Organization Type

Rescue Group

Record Status

Active

Phone

252-555-0100

Email

contact@example.org

Website

https://example.org

Internal Notes

Internal notes about this partner organization...

Save Organization

Figure 2. Create a partner identity before linking contact people and addresses. (part 2 of 2)

Practical checks

A partner organization and a contact person are separate records with different roles in the transfer workflow.

Troubleshooting

What you see	What to check
A partner is absent from a receiving selector	Check whether it is active and whether the workflow requires an organization destination.
An organization has several contact people	Maintain the appropriate contact relationships instead of duplicating the organization.